

# NATS – Discretionary Fund Guidelines/Instructions/Tips



**Audience: Region Governors/Chapters/Districts/Board Members**

This document explains ***Discretionary Grant Guidelines***. For additional help or assistance contact the NATS national office 904-992-9101 or e-mail [finance@nats.org](mailto:finance@nats.org).

- AVAILABLE TO:** NATS Regions; District and Chapter organizations; NATS Chapters in the process of formation. Grants are not for individual member use.
- GRANT AMOUNTS:** \$600 maximum in any fiscal year (January 1 to December 31). Grants of more than \$150 must be accompanied by matching funds from local dues, admission charges, registration fees, gifts, and/or funding from other agencies.
- PURPOSE:** NATS discretionary funds are intended to assist in sponsoring master classes, lectures, recitals, workshops, and other activities that enrich the professional life of students and teachers. Monies are not intended to be used as prize money for student auditions. Preference will be given to requests from organizations that have not previously received NATS discretionary funds and for whom NATS discretionary funds will permit the offering of quality events not otherwise possible.
- REQUIREMENTS:**
- Step 1 - The On-line Application Form** must include as accurate an estimate as possible of both available /budgeted income and projected expenses and must be submitted at least six weeks before the date of the scheduled event.
- Step 2 - The Application Approval** will be e-mailed to the submitter as soon as the application has been reviewed and approved.
- Step 3 - Acknowledgment** of assistance from NATS discretionary funds must be printed on project programs as follows:
- This event is made possible in part by a grant from the Discretionary Fund of the National Association of Teachers of Singing, Inc.**
- Step 4 - The On-Line Expense Voucher Form** *must be completed within six weeks after the event.* All related receipts may be scanned (PDF format) and e-mailed to [finance@nats.org](mailto:finance@nats.org), at the NATS national office. A copy of the event program with the required acknowledgement of assistance must be submitted with the receipts. After approval, an ACH transfer of funds to the designated Chapter or Region listed on the Expense Voucher form will be processed at the end of the calendar month. Failure to follow these requirements may lead to a loss of monies from NATS Discretionary Funds.
- NOTE:** The NATS Discretionary Fund is not a primary source of funding for special events, but an ancillary one. If a program is financially successful to the extent that discretionary funds are not needed, please notify [finance@nats.org](mailto:finance@nats.org) immediately so that those funds can be released to another applicant. All applications are processed in the order in which they are received.

For additional questions or assistance e-mail:  
[finance@nats.org](mailto:finance@nats.org)  
[vpoutreach@nats.org](mailto:vpoutreach@nats.org)

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## Step 1 - Discretionary Fund Application – Instructions/FAQ/Tips

### How do I know how much to apply for and how much will I receive?

To help explain, this is part of the information provided for applying for a discretionary grant:

**Grants of more than \$150 must be accompanied by matching funds from local dues, admission charges, registration fees, gifts, and/or funding from other agencies.**

### **1 –EXPENSES - On the application, breakdown the projected EXPENSES in each category.**

For example:

**Fees** - This is what you are going to pay the clinician or speaker as a fee for their service.

**Travel** - This is a combination of travel expense (airfare, mileage, hotel, car rental, meals etc.)

All of the other categories or fairly self-explanatory.

**Expense Total** - Make sure that you total all expenses and enter the projected amount in Total.

**TIP:** Keep your expenses simple. If your qualifying event is in addition to a large conference or competition, limited your expenses to only the portion directly related to the workshop/presentation. Remember, do not include awards and prizes as an expense, they do not qualify for a grant.

### **2 – INCOME - On the application, breakdown the projected INCOME in each category.**

#### How do I know what to put in the projected income?

The second portion of the application is for projected income or sources of funds you have available to pay for the Event (workshop, masterclass). It may be the money in your bank account or a contribution from your region or projected admission fees. Just remember that available funds are a projection just like the expenses. When it comes to what you actually have in your bank account, you have to look at those funds as what you have budgeted to use to pay for the fees and expenses directly related to the workshop or masterclass. In most cases you will have expenses for your event that are not and cannot be used for the grant application, such as awards or cost associated with a competition.

**Local Funds:** This is the amount that you have projected/budgeted from your bank account.

**Regional Funds:** This is the amount that your region has offered to pay on your behalf.

**Admissions/Fees:** Admissions charged for the event.

**Income Total** - Make sure that you total all Income.

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## 3– Amount Requested from Discretionary Fund

What amount do I request from the Discretionary Fund?

**Grants of more than \$150 must be accompanied by matching funds from local dues, admission charges, registration fees, gifts, and/or funding from other agencies.**

Example would be:

(a) If your expenses are \$1,500.00, you will have to show that you have available income of \$900.00 to pay for the expenses and that you need \$600.00 to pay the rest. Remember that \$600.00 is the maximum grant.

(b) If your expenses are \$1,000.00, you will have to show that you have budgeted \$500.00 to pay for expenses and that you need \$500.00 to pay the rest. Remember, that the grant must be accompanied by matching funds.

**Tip: Make sure your application is in balance.**

Example: Expenses – Income – Discretionary Grant = zero.

## Step 2 - Discretionary Fund Application Approval

Once the application is approved you will receive the following e-mail., noting the year and the amount of the grant. Note the included instructions:

Congratulations. Your 2019 NATS Discretionary Fund grant has been approved in the amount of \$600.00 based on your estimated budget. Please remember that once the event is completed you will need to complete the online Expense Voucher at: <http://www.nats.org/nats-discretionary-fund.html> and forward all receipts documenting expenses to [finance@nats.org](mailto:finance@nats.org) prior to the check being issued. **Please also remember that your printed programs or material for this event need to contain the following statement. "This event is partially funded by a NATS Discretionary Fund Grant."** Good luck with your event.

## Step 3 – Include the following statement in your event brochure.

Now that you have been approved for you grant, make sure that you add the following statement to your program.

**"This event is partially funded by a NATS Discretionary Fund Grant."**

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## Step 4 – Submit the Discretionary Grant Expense Voucher

**1 – Complete online Expense Voucher.** Once the event over you will need to complete the online Expense Voucher at: <http://www.nats.org/nats-discretionary-fund.html> and forward all receipts documenting expenses to [finance@nats.org](mailto:finance@nats.org) prior to the check being issued. This voucher is automatically received by the NATS bookkeeper. You must submit within six weeks after the event. ***TIP: Put this date on your calendar. If you do not submit timely grants may be lost.***

In order to receive the maximum of \$600.00 you must have at minimum \$1200.00 in expenses. The \$600.00 grant approval is paid out based on your actual expenses at the time you submit your expense reimbursement request and receipts.

Example: You may have been approved for a \$600.00 grant:

(a) If your actual expenses turn out to be \$1200.00 or more, then you will receive the full \$600.00 grant and you will be responsible for the balance.

(b) If your actual expenses turn out to the \$1,000.00, then you will receive \$500.00 from the grant and you will be responsible for the balance.

**2 – Forward Receipts** - Gather all receipts and supporting documents for your expense voucher. The total of all receipts must match the expense total.

**3 – Scan all receipts** in one pdf and e-mail to [finance@nats.org](mailto:finance@nats.org). – In the subject line of the e-mail include your chapter or region name – “Discretionary Grant Receipts” and the Event Date.

Once the national office receives the Expense Voucher and Receipts you will receive an e-mail acknowledgement that the required documents have been received. If there are missing or incomplete documents you will be notified what is needed.

Once the expenses are reconciled and approved, you will receive the grant via ACH transfer to your bank account that NATS national office has on file. ACH transfers are scheduled at the end of each calendar month.

**Exception:** If the admission fees are so much more than you projected and you are able to cover all of your cost, then please note that ***The NATS Discretionary Fund is not a primary source of funding for special events, but an ancillary one. If a program is financially successful to the extent that discretionary funds are not needed, please notify by e-mail [finance@nats.org](mailto:finance@nats.org) immediately so that those funds can be released to another applicant.***