

Frequently Asked Questions

1. General SDF Info

What is the contact info for SDF?

All mail should be sent to:
Southern Documentary Fund
762 Ninth St #574
Durham, NC 27705

The SDF office is located at 110 Morris St, Durham, NC 27705. Please be aware that we do not accept incoming mail at our physical address.

You can contact SDF at: 919-308-3714 (office) 919-683-1403 (fax)
info@southerndocumentaryfund.org

I want to support a project. How can I make a donation?

Please see our Donate page <http://southerndocumentaryfund.org/donate/> for details about supporting SDF through a charitable donation.

What does fiscal sponsorship mean?

Fiscal sponsorship allows individuals to solicit charitable donations under the umbrella of the Southern Documentary Fund's (SDF) 501(c)(3) non-profit status. Many foundations require that you have a fiscal sponsor to be eligible for most grants. As your fiscal sponsor, SDF becomes the non-profit tax-exempt organization that allows you to receive contributions from individuals, foundations, corporations, and government agencies that may not otherwise be available to you. Cash donations received on behalf of your project are tax-deductible for the donor.

SDF does not award grants or do research for individual project funding. Fiscal sponsorship with SDF does not mean that we are your producers, fundraisers, or in any way connected to the content or actual production of your project.

2. The Application Process

I am currently working on a documentary. Does SDF grant money to documentary projects?

No. SDF is not a granting organization. We do not accept grant proposals. SDF is a non-profit tax-exempt organization that serves as a fiscal sponsor to over 65 projects <http://southerndocumentaryfund.org/works-in-progress/>. Fiscal sponsorship allows you to solicit contributions from individuals, foundations, corporations, and government agencies that might not otherwise be available to you as an individual.

At what stage of production can I apply for fiscal sponsorship?

You can apply for fiscal sponsorship with SDF at any phase: pre-production, production, or post-production. Project Directors have also used SDF as a sponsor for distribution grants or to accept donations to do outreach and related community engagement projects.

I don't live in the South. Can I still apply with SDF?

SDF sponsors projects by directors who are living in the South and/or directors, living anywhere in the country or around the world, who are telling stories about or related to the South. You do not need to live in the "South" to apply for Fiscal Sponsorship with SDF, but your project must be related to our mission to tell stories about the American South
<http://southerndocumentaryfund.org/about/>.

Do you sponsor experimental projects, shorts or feature films?

Yes. Many of our projects are feature length, but we encourage artists from all genres and with projects of varying lengths to apply for sponsorship.

When does SDF accept applications for fiscal sponsorship?

SDF accepts applications on a quarterly basis. The deadlines are: January 15, April 15, July 15, and October 15.

Can you review my application between deadlines?

SDF will not accept applications between deadlines. Our New Projects Committee meets quarterly (January, April, July, and October). If you have an immediate need and require advice about what to do, please call 919-308-3714.

Where do I send my application materials?

We accept applications four times per year January 15, April 15, July 15, and October 15. Please see <http://southerndocumentaryfund.org/apply-for-sponsorship/> for more info about the application process and requirements.

Applications must be in hand by 5 pm on the deadline date. All application packages should be addressed as follows:

*The Southern Documentary Fund
762 Ninth St #574
Durham, NC 27705*

SDF will not accept incomplete or late submissions. SDF does not return submission materials. If you would like your materials returned once a fiscal sponsorship decision has been made you must send a SASE with your application packet.

I've submitted my application for fiscal sponsorship. When will I hear something?

The New Projects Committee meets shortly after the deadline passes and makes recommendations to the Board of Directors. The Board votes on all recommendations within one month of the application deadline. All applicants will be notified either via letter or email within one month of the deadline.

My proposal was rejected. Do you offer feedback or advice on my proposal?

Yes. Your letter of denial has comments from the Committee that will advise you on the revision points to address in the proposal. If you need additional feedback you can contact us (919-308-3714) to request a phone consultation with a New Projects Committee member.

If my proposal is denied, can I resubmit it at a later date?

Project directors who are denied can resubmit if the Committee offers you the opportunity. In this case, you may resubmit your application, without an additional fee, for the next deadline. Resubmissions are only required to include the revised proposal, budget, and application. You do not see to resend work samples or optional materials unless these materials have been updated. Proposals that are not resubmitted within one deadline cycle will be considered a new application and will need to send the full application packet, including the application fee.

3. FAQs for Fiscally Sponsored Project Directors

How long am I part of the fiscal sponsorship program?

You can be a part of the SDF program as long as you are in pre-production, production, or post-production. Many participants have also used SDF as a sponsor for distribution grants. In order to be part of the program, you must file regular narrative and financial semi-annual reports, which are due on January 15 & July 15.

What are my responsibilities to SDF as a fiscally sponsored project director?

You must keep track of all your expenses connected with the project. SDF is not your bookkeeper and is not responsible for your personal records. As a fiscally sponsored project director, you are obligated to spend funds in accordance with your approved budget. You must remain accountable for the donations you spend. You must submit a progress report every January 15th and July 15th whether you are actively fundraising or not.

How do I request funds? How do I pay my project expenses?

In order to receive funds, you must first complete the W-9 form and return it to SDF. It is recommended that you request your balance from SDF before you turn in your disbursement request. This ensures that you are requesting currently available funds for your project.

Complete your disbursement request by the 15th of the month. SDF will not transfer or disburse any portion of the grant funds without a properly completed disbursement request from the Project Director. You must list anticipated expenses for the funds you are requesting. Also, if you have requested funds previously, please include a report, which itemizes expenses incurred and paid for with the last disbursement. This includes check numbers, payees, and purpose of the check/ payment. See <http://southerndocumentaryfund.org/info-for-project-directors/> for the disbursement request form.

Checks are made out to the project, not to the individual director or producer; thus, your project must have a business checking account (the social security number or Federal ID number must be on file for that entity). The project director is then responsible for paying expenses incurred by your project.

How often can I request disbursements? How long does it take to get a disbursement on a contribution once it has been sent to SDF?

Disbursements are available from SDF once per month. Funds for disbursement request received by the 15th of any month will be mailed by the 10th of the following month, subject to availability of funds and compliance of the request with the Project description and grant purposes. If the request is not accompanied by a detailed description of how the previous disbursement was spent, SDF reserves the right to withhold payment until receipt of such a document. Consult your tax advisor concerning your liability for unexpended income—SDF does not give tax advice.

How are donations processed and how long before I can request funds?

When SDF receives a donation on behalf of your project: SDF sends a letter of thanks to your donor. This serves as the letter of tax-deductibility. SDF notifies the Project Director each time we receive a donation on your behalf. SDF will provide the donor name, address and amount donated. Funds are deposited once per week. The processing period for donations is 3-4 weeks.

For example, when SDF receives a donation for your project we will send the donor a thank you letter and notify you, the project director, within 1 business day of the receipt of the donation. SDF will then deposit all funds received by the end of the business week. Your funds are available for request 3-4 weeks after the deposit date. This processing period allows time for funds to clear the bank and for SDF to complete fiscal sponsorship management associated with the funds.

How do I get more contribution notification or disbursement forms? And can they be faxed in?

Feel free to make copies of the forms sent to you in your welcome packet. These forms are also available on our website on the Info for Project Directors page as well as in the Fiscal Sponsorship Handbook. An original signature is required so forms should be mailed directly to 762 Ninth Street #574, Durham, NC 27705. See <http://southerndocumentaryfund.org/info-for-project-directors/> for important Project Director forms.

What if I need a grant application or proposal to be signed by someone at SDF?

You may e-mail, fax, or mail your application to us. E-mail your grant application to: info@southerndocumentaryfund.org or fax your grant application to the attention of the Director of Operations, Jennifer Cromling, at 919.308.3714.

or

Mail it your grant application to the Director of Operations, Jennifer Cromling, at 762 Ninth Street #574, Durham, NC 27705. Please send us an email prior to mailing any documents that need a signature. Please note: we will need to read your proposal and application form prior to signing so leave adequate time for our review in the application process.

Even if the proposal or application does not require a signature from SDF, does SDF still need to approve and/or see the proposal?

Yes! SDF requires you to send a copy of each proposal you submit. This communication is useful to us as we are sometimes contacted by funders.

What if a funding application requires SDF's annual report?

Like many other small non-profits, SDF does not produce an annual report. If foundations or other granting organizations require one, please use the current SDF Information Sheet found in your fiscal sponsorship package and on the SDF website.

Can I use SDF's letterhead for proposals? Can I use SDF's name and address on invitations to fundraising events?

Your proposals cannot be sent on SDF letterhead. SDF must always be identified as your project's fiscal sponsor and not as a producer or other principal of your project. However, you can create letterhead for your project that identifies it as a fiscally sponsored project of the Southern Documentary Fund. You must contact SDF prior to making any arrangements for events utilizing SDF's name in promotional materials.

What if a funder wants to speak to someone at SDF?

SDF has one part-time staff person who is in the office four to five days a week. Please provide our phone number – 919.308.3714 – messages are checked daily. Phone calls will be returned within 2 business days. Or you may contact SDF via e-mail or phone with your funder's information and we will contact them directly.

What is the difference between the SDF Verification of Tax-Exempt Status Form and the Project Confirmation Letter and when do I use them?

The Verification of Tax-Exempt Status Form is used whenever you need to show proof that SDF is a tax-exempt organization, and that contributions to your project are tax-exempt under the IRS tax law 501(c) (3). Foundations and government agencies usually require it when you apply for grants. Your confirmation letter from SDF serves as proof that your project is being sponsored

by SDF, making it tax-exempt as well. Please use this for your applications to funders that require a fiscal sponsor and for individuals who want to make tax-deductible contributions to your project. PLEASE DO NOT USE YOUR ORIGINAL. MAKE COPIES!

What are some of the best practices that successful Project Directors engage in?

- Put reminders on your calendar two weeks before SDF progress reports are due: January 15 and July 15
- Submit progress reports to SDF on time
- Send SDF a copy of each grant application you make
- For each grant you received, note any grant reporting deadlines on your calendar and submit complete, timely reports to your grantors and to SDF
- Plan your need for disbursements! SDF cuts checks once a month and requires lead time for processing them.
- Inform SDF of any changes in the name of your project and/or your contact info: e-mail, address or telephone changes
- Inform SDF of any significant changes to your project status: is it now Completed? Actively In-Progress? Inactive? Tabled?
- If your project and/or production company has its own website, provide the URL to SDF so that we can provide the link on your SDF website project page
- Let SDF know if you are interested in a work-in-progress screening so that you can get constructive audience feedback
- Share news of any screenings, festivals, awards related to your project once it is complete so that we may include it on the SDF website or newsletter
- Bookmark the SDF website

For more best practices see: <http://southerndocumentaryfund.org/info-for-project-directors/>