TACOMA CREATES

2022-23 Quarterly Report Instructions

For Tacoma Creates-funded organizations with quarterly contract deliverables, there are quarterly reports in September 2022, December 2022, March 2023, and June 2023, with the June report also being a Final Report for the full contract year.

The purpose of each report is to:
- Demonstrate the completion of your contracted deliverables (your planned programs/services) for the quarter
- Upload your invoice for this time period
- Help Tacoma Creates staff understand your work and its impact

Once this report is completed, we will be able to issue payment for the work completed.

The Quarterly Report can be found in your Submittable account. To find it, you can either refer to the notification email from Submittable informing you that a new form has been added to your account and clicking the link there, *OR* by following these instructions:
1. Sign into your Submittable account
2. Click on your City of Tacoma – Office of Arts & Cultural Vitality - 2022-2023 Tacoma Creates application (you should see a submission date of February or March 2022)
3. Click on the "Forms" tab
4. There, you should see the quarterly report form listed – click on the "Continue" button to access the form

DEMONSTRATING COMPLETION OF DELIVERABLES

There are three ways for you to demonstrate completion of your quarterly deliverables:
- **The Program Summary Chart** – to track public programs you produced
- **A brief narrative** – to share details about your work
- **Support material** – to share documentation/examples of your work

The deliverables that you need to report on are listed in the "Exhibit A" section of your contract. For assistance with understanding this section of your contract please refer to this document or contact staff for support.

In the first part of the report, you will complete a **Program Summary Chart** (which you can download here), where you will list the Tacoma Creates-supported General Public Programs and/or Youth Education Programs that your organization produced each quarter. This is how you will share information about the locations and participants of your programs, so that we can tell the collective story of how Tacoma Creates funds are being used to engage community.

This chart is designed for you to track and report on programs one quarter at time, adding each quarter to *the same document* throughout the program year. You will submit your Summer Quarter data with the Summer Quarter report, and then add in your Fall Quarter data for the Fall Quarter report, and so on. Be sure to save your completed Program Summary Chart as an **Excel file (.xls or .xlsx)** to your computer in a place where you will be able to refer back to it and add to it throughout the year, and to add your organization's name to the file name ("OrgName 2022-23 TC Program Summary Chart") when you save your chart. After you've completed and saved this chart for each quarter, you'll upload it to your Quarterly Report in Submittable.

We have restructured our Program Summary Chart for 2022-23 so that a single row can be used to report on ongoing events that occur over multiple quarters throughout the program year. Please use a separate row for each program and/or event support by Tacoma Creates, with one location per row. There are detailed instructions on how to complete the Program Summary Chart on the second tab of the document.

You can use this chart as a way to organize how you collect data about your programs. We encourage you to update this document over the course of the 2022-23 funding year, as you complete events / programs, so that you have all the information ready to go for your Quarterly reports and the Final Report.

There is one required **narrative question** in this report, which asks you to share briefly about your work over the past quarter. In addition to the location and participation information shared in the Program Summary Chart for public programs, tell us a little about when and how your deliverables were completed, and/or the successes or challenges in implementing the work. To demonstrate your work, provide links to online materials and/or upload **support materials** such as photos or videos, or examples of communications or curriculum materials, etc. *If you share photos or videos with Tacoma Creates, we assume that you have permission from both the photographer and the subjects of the photo. By sharing photos, videos, and other documents, you are giving permission to Tacoma Creates staff to use these materials in their communications, including social media posts, and reports to City Council and the community.*

There are two optional prompts for you to share any specific examples or stories about how Tacoma Creates funds are helping your organization make a positive impact in the community, and/or within your organization. If you do any program evaluation work or surveys to participants, we'd like to see examples of data or quotes that show the positive impact of your work. If you don't have anything notable to share this quarter, that is fine, you may leave these sections blank.

UPLOADING YOUR INVOICE

The last part of the Quarterly Report is to upload your invoice. If you were unable to fully complete all of the planned work (deliverables) outlined in your contract, it may be inappropriate to invoice for the full funding amount. If this is the case, only invoice for work that has been completed. If you have questions about this, or you anticipate a need to make adjustments to your contracted deliverables, please contact staff for assistance.

Your invoice should include:
- Your organization's (or your fiscal sponsor's) name and contact information
- Invoice date
- Summary of services rendered (this can be your list of completed contract deliverables)
- For Impact Funding organizations, include any ELO or TPL amounts as appropriate
- Amount requested (You can find the amount you may invoice for each quarter listed in the Exhibit A section of your contract.)

Invoice should be made out to:
    City of Tacoma
    Tacoma Creates
    747 Market Street, Room 900
    Tacoma, WA 98402

SPECIAL EXCEPTION for Asia Pacific Cultural Center, Hilltop Artists, Rainbow Center, and Spaceworks Tacoma. These organizations are fully transacting in Ariba and invoices from these organizations must be submitted through Ariba vs. being attached in the Quarterly Report. Please ensure that the invoice number you submit in Ariba is no more than 16 characters long, otherwise, it may not process/pay correctly. For these organizations, you will need to upload a blank Word document, in order to move forward with submitting your Quarterly Report.

BEFORE YOU CLICK THE SUBMIT BUTTON…

Make sure you've done the following:
- ☐ Completed, saved, and uploaded your Program Summary Chart
- ☐ Responded to the required narrative question
- ☐ Shared examples of your work through links and/or uploaded materials
- ☐ Uploaded your invoice for work completed

If you need additional assistance in understanding or completing the Quarterly Report, please reach out to Clarissa Gines at cgines@cityoftacoma.org, or Lisa Jaret at ljaret@cityoftacoma.org.