



SCREEN ACTORS GUILD

PATRICIA A. HEISSER METOYER, Ph.D.
Executive Administrator
Affirmative Action

*Brown will send
draft 6/10/99
8 pages
Sent to Brown
Thursday 6/3 noon*

May 18, 1999

Dr. George Gerbner
234 Golf View Road
Ardmore, Pennsylvania 19003

Dear Dr. Gerbner,

As per our conversation, please find a copy of the IACF proposal guidelines. Please submit a proposal to the Affirmative Action Department for the proposed research for 1999-2000. It is important to place emphasis on seniors, performers with disabilities and women in this proposal as there is ongoing ethnic research already being conducted by the Tomas Rivera Policy Institute.

Enclosed, please find a copy of the preliminary research conducted by the Tomas Rivera Policy Institute as promised. Please feel free to call, if you have any questions.

Sincerely,

Patricia Heisser Metoyer

Patricia Heisser Metoyer
Executive Administrator
Affirmative Action

**SCREEN ACTORS GUILD-PRODUCERS
INDUSTRY ADVANCEMENT AND COOPERATIVE FUND**

Dear Applicant:

This letter is in response to your request for a grant from The Screen Actors Guild - Producers Industry Advancement and Cooperative Fund.

The Trustees are empowered to make grants to qualified organizations for the purposes and objectives as set forth in the guidelines of the Industry Advancement and Cooperative Fund (IACF) Trust document.

The IACF is funded by employer contributions and is exempt from coverage under the Employee Retirement Income Security Act ("ERISA"). In order to maintain the ERISA exemption, the IACF must not provide "welfare" benefits, which include training and apprenticeship programs and scholarships. Accordingly, your organization may not use any part of the IACF funding to provide seminars regarding various career opportunities, information, on job search strategies or discussions and activities involved in a particular career or vocation. We appreciate your cooperation in assisting the IACF by reporting within the bounds of its restrictions.

Please provide to the best of your ability all information requested on the attached forms. If an item does not apply to your organization please indicate "not applicable" however, do not leave any questions unanswered. Your grant cannot be considered until all requested documentation is complete.

If you should have any questions please contact Ms. Alice Ortega, Director of Finance at (818) 973-4405.

Sincerely,



Bruce L. Dow
Administrative Director

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Revision 9/15/95



SCREEN ACTORS GUILD-PRODUCERS
INDUSTRY ADVANCEMENT & COOPERATIVE FUND

GUIDELINES FOR REQUESTING FUNDS

To approach the SAG Industry Advancement & Cooperative Fund (IACF) to sponsor projects and programs, the following guidelines have been adopted for the EEO, Performers with Disabilities, Senior Performers and Women's Committees. These guidelines do not apply to other SAG committees.

PROCEDURES

1. Chairs of any one of the above-referenced committees should first submit a written proposal which describes the project or program in as much detail as possible, along with an attached budget, to the national chair or national co-chair of the respective committee for approval. The chairs should also send copies to and coordinate with their Executive Director or, if in NY or LA, the respective Executive Administrator of Affirmative Action.
2. The proposal is then forwarded to the LA and /or NY Affirmative Action Administrator(s) for review and approval by the National President's Committee on Affirmative Action. If the President's Committee does not approve a committee's project proposal, the committee retains the right to submit the proposal to the SAG Board. Understandably, a committee's proposal probably would be viewed more favorably by the SAG Board if it had the approval of the President's Committee.

The President's Committee is comprised of the President, First Vice-President in Los Angeles, Second Vice President (who is also the New York Branch President), National Chairs and National Co-Chairs of the EEO, Seniors, Women's and Performers with Disabilities Committees.

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3. For committees that are joint with any other performers' union(s), firm financial commitments from the other union(s) must be obtained prior to approaching the IACF. If no contribution is forthcoming from the other union(s), then the project(s) becomes a SAG project with no identification with or input from the non-participant(s). Equal contributions from the other union(s) is the standard rule, with exceptions taken under advisement.

FINANCIAL

1. The Executive Administrators of Affirmative Action are authorized to oversee and maintain a running account of all expenditures and approve requests to adjust budget line items as long as such adjustments do not exceed the total budget.
2. Funds allocated to specific stages of a project should be utilized for that purpose. Funds may not be used to implement one stage at the expense of another. For any stage not implemented the funds must be returned to the IACF.
3. All requests for reimbursement must be accompanied by a Check Request Form, which staff will complete, and original receipts addressed to *SAG-IACF Special Projects Trust Account*.
4. Counsel advises that SAG may not bill the Fund for any reimbursement; therefore, the Guild cannot advance any payment. When immediate monies are required, such as deposits to providers prior to services being rendered, the bill is to be submitted to the Executive Director or, in LA and NY, the respective Executive Administrator of Affirmative Action. Staff will fax it to the Accounting Department in LA, and the check will be sent overnight to the provider. The original bill will then be mailed by staff to Accounting.
5. Any funds not utilized must be returned to the IACF.

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IACF PROCEDURES

IMPORTANT CHANGE

Important change from original memo to committee members regarding procedures, to wit: All original copies of proposals should be sent to Catherine York, SAG/LA as follows:

Winter and Spring Plenaries: Prior to President's Committee meeting because limited time before Board meeting.

All other times can be sent after President's Committee conference as long as Board meeting is not imminent. If Board meeting is close, then CY receives as above.

CY's mandate is to review all proposals in case there is a need for more information and then to refer the proposals to Ken Orsatti and John McGuire to sign off. She will send the proposals to Alice Ortega at the IACF after Board approval.

**The Screen Actors Guild - Producers
Industry Advancement and Cooperative Fund**
Purpose and Objectives

The Industry Advancement and Cooperative Fund (IACF) awards grants to qualifying organizations in the broad areas set forth in the IACF Trust Agreement. Specifically, the purpose and goals of the IACF are as follows:

- a. To assist performers and Producers in solving problems of mutual concern not susceptible to resolution within the collective bargaining process.
- b. To enhance the involvement of performers in making decisions that affect their working lives, including educational and informational assistance to provide for alternative career opportunities.
- c. To study and explore ways of eliminating potential problems which reduce the competitiveness and inhibit the economic development in the entertainment industry in order to maintain and expand employment opportunities for performers.
- d. To provide performers and Producers with opportunities to study and explore new and innovative joint approaches to achieving organizational effectiveness.
- e. To provide a forum for open and honest discussion of problems confronting performers and Producers in the entertainment industry.
- f. To improve communication between representatives of labor and management.
- g. To provide seminars and showcases to improve and enhance casting procedures, and to maintain and review continued nondiscrimination practices as to employment of performers.
- h. To study and inform Producers and performers as to required safety standards under state and federal laws, and to work toward accident-free work environments.
- i. To study health standards, such as in the use of smoke, as they may affect the well-being and health of performers working on sets and on location.
- j. To study, monitor standards and oversight as to the use and welfare of animals and performers working with animals in motion picture production.
- k. To review policies and procedures as to employment opportunities of American performers and the U.S. immigration laws.
- l. To receive and accumulate data and statistics and all relevant information that will aid performers and the industry in achieving the above objectives of the IAC

**The Screen Actors Guild - Producers
Industry Advancement and Cooperative Fund
Grant Application**

Please complete application as thoroughly as possible. If additional space is needed please attach a separate sheet along with application. If you have any questions, contact Ms. Alice Ortega, Director of Finance at (818) 973-4405.

SECTION I - Organization Data

1. Name of Organization or Committee: _____
2. Contact Person: _____ Phone #: _____ Fax #: _____
3. Address: _____ _____

4. Statement of purpose and brief history of organization:

5. Names of present Officers, and Board Members; or Chair person and Vice-chair person:

6. Submit financial statements (audited, if possible) for year in which funds are sought or last fiscal year where audited report is available. If report is not available, explain below.

7. Enclose a copy of the IRS Determination Letter, documenting tax exempt status, or state on organizational letterhead that there has been no change in IRS status since issuance of the ruling letter. If no IRS Determination, please explain the nature of the non profit status of your organization.

SECTION II - Project Information

1. Submit a cover letter, stating the need for the project, the amount being requested and have it signed by the Organization's Chief Executive Officer or Chief Elected Officer, Chair Person and Vice-chair Person or when appropriate the Applicant.

2. Description or Name of Project for which grant will be designated:

3. Objective and potential benefits of project:

4. List Previous IACF grants:

<i>Brief Description or name of project</i>	<i>Grant Amount \$</i>	<i>Date</i>
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5. Amount of Current Grant Request: \$ _____

6. Proposed time table:

Identify fiscal year grant will be utilized: _____

Project or Grant estimated completion date: _____

7. Under separate cover, please submit a "project" budget (revenue and expenses).

8. Will any of the funds from this grant be used for scholarship or apprenticeship programs?
no _____ yes _____ (If yes, provide a detailed explanation on separate sheet.)

9. How does your project relate to the Purpose and Objectives of the IACF? See attached list.