

reading musical foundation
APPLICATION FOR 2019-2020 APPROPRIATIONS
Application Information for Applicants

The Reading Musical Foundation (“RMF”) is now receiving Applications for Grants to be paid during the fiscal year beginning July 1, 2019 and ending June 30, 2020.

Program Type Definitions

As an organization, RMF is looking to better define our collective impact in the community. By breaking programs into these mission quadrants, we will be able to attribute our dollars and outcomes to specific goals. Please continue specifying which quadrant of RMF’s mission matches your project(s) the best. The definitions and focuses are as follows:

ADVANCING MUSIC EDUCATION: Defined as moving forward, in a purposeful way, the field of study associated with the teaching and learning of music.

The primary focus of this goal is hands-on music education experiences. All projects in this goal area should:

- Nurture musicians to the fullest extent of their ability/talent
- Engage members of the community as active participants and contributors to music teaching and learning

ADVOCATING MUSIC EDUCATION: Defined as publicly supporting the field of study associated with the teaching and learning of music.

The primary focus of this goal is on the music education network in our community. All projects in this goal area should:

- Increase and strengthen the capacity of school music programs and community music education organizations
- Be collaborative in nature

ADVANCING MUSIC APPRECIATION: Defined as moving forward, in a purposeful way, the understanding of the value music experiences have for individuals and the community.

The primary focus of this goal is positive audience experiences. All projects in this goal area should:

- Develop and engage new and existing audiences
- Foster increased access to the musical arts in Berks County

ADVOCATING MUSIC APPRECIATION: Defined as publicly supporting the understanding of the value music experiences have for individuals and the community.

The primary focus of this goal is on the providers of music education programs and presenters of music performances in our community. All projects in this goal area should:

- Increase and strengthen the infrastructure capacity of community-based music providers and organizations
- Be collaborative in nature

As seen in the above mission definitions, RMF continues to seek programs that collaborate with other organizations, creates increased accessibility to the musical arts, as well as addresses the sustainability of your organizations.

2018-2019 Evaluation Reports

Your application from 2018-2019 listed specific outcomes you expected to achieve as a result of your program. Please refer back to those outcomes when completing your evaluation report for 2018-2019.

Reminder Information:

This application allows you to apply for funding for specific programs. RMF will provide program-based awards. Examples of such include music director/educator stipends, musician fees, rehearsal costs, etc. To condense the process, organizations may include multiple programs on the same program application if they are similar. For example, organizations may list all concerts in a series as a "Concert Series," instead of creating an application for each concert. Other groupings may include education initiatives, masterclass series, etc. Please just fully explain each offering under the grouping. RMF will meet with any organization that has specific questions about how to best organize or complete your application.

You need *not* submit copies of your bylaws (unless they have been modified) or Form 990, if you have recently filed one. If we need that material to consider your application, we will contact you.

We will consider an application complete when all questions that follow are answered and the application and all required documents have been *physically received* in RMF's office (electronic copies are fine – assume if the email was not confirmed the application was not received). We suggest that you email or hand carry these items to RMF's office. Postmarks are irrelevant. The deadline is **Friday, February 22, 2019 at 5 PM.**

We offer the following guidance to address frequently-asked questions:

1. Only organizations that perform music primarily in Berks County are eligible for funding.
2. Every fiscal year is a new year. The fact that RMF previously awarded funds for the same or a similar purpose is not relevant to the determination of a subsequent request.
3. RMF may restrict or impose conditions on grants. As included in last year's grant acceptance letters, RMF will not consider increases in awards to organizations that do not have 100% board giving participation.
4. The success of RMF's public campaign directly impacts the availability of funds. ***Your organization's support of RMF's campaign this season is directly relevant to the total amount RMF will have available to appropriate.***
5. RMF considers the community's immediate needs in the arts so compelling that it cannot make grants for research at this time.

Required documents that must accompany your application:

1. Exempt organization determination letter issued by the Department of the Treasury, Internal Revenue Service, and all notifications of any changes, or proposed changes, in your federal income tax status.
2. Proof of current registration with the PA Department of State, Bureau of Charitable Organizations.
3. The following financial statements:
 - Most recent balance sheet and income statement (ended December 31, 2018 or later)
 - Budgets or proposed budgets for fiscal years ending 2018, 2019 and 2020

- If financial statements for your most recently ended fiscal year were audited, a complete copy of the audit report, including notes to financial statements, and the management letter, if any.
4. **No more than three** of your organization's campaign brochures, concert programs, news releases or other documents that describe what your governing board believes to be the finest activities or programs your organization offered during the last year.
 5. If you received a grant from the Foundation for the current fiscal year, a Grant Evaluation Report must be completed, signed and submitted to the Foundation, at the Foundation's office, no later than **Monday, April 15, 2019 at 5 p.m. *This is the only document that may be submitted after February 22, 2019.*** The Grant Evaluation Report for 2018-2019 appropriations is included in this packet.

Please feel free to contact me with any questions or concerns regarding your application.

Sincerely,

Keri M. Shultz
President

1. What is your mission?
2. How will your programs for the upcoming year fulfill your mission?
3. When did you last ask your audience what programs they want from you?
4. To what extent does your programming reflect a change in the cultural demographics of Berks County?
5. Is your organization currently operating under a strategic plan? If not, please move on to question six.
 - A. How frequently do you review your strategic plan?
 - B. What are the major action items in your strategic plan?
 - C. What methods are you using to evaluate success with your strategic plan?
 - D. When you last reviewed your strategic plan, to what extent did you take changes in Berks County's cultural demographics into account?
6. What steps are you taking to increase your audience, both in numbers and in cultural breadth?
7. Why would a donor contribute to your organization?
8. In what respects has your audience changed during the last 10 years?
9. In what respects do you think your audience will change in the next 10 years?
10. What steps are you taking to serve that audience 10 years from now?
11. What was your organization's most fulfilling collaboration with another local charitable organization last year?

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Part 3: Governance

Please indicate if the following statements are <i>true or false</i> :		
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		All seats on the governing board are subject to term limits.
		Incoming board members know precisely what is expected of them when they join the board.
		Directors complete and sign a written conflict of interest policy each year that is on file with the organization.

Please answer the following questions:

1. How many members of your board are employed by your organization?
2. If your governing board has an Executive Committee, under what circumstances may the Executive Committee act for the board?
3. Who reviews the performance of your chief executive officer, however titled?
4. Describe the process you follow to recruit new members to your governing board.
5. What skills, expertise, experience and/or attitudes do you look for in a candidate for your governing board?
6. When did your organization last revise its bylaws?
7. Please explain how your organization complies with the Child Protective Services Law and Pennsylvania 2014 Act 153 (i.e., necessary background checks, clearances and mandatory reporting)?

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Part 4: Finance

1. How often are financial statements, consisting of at least an income statement and balance sheet, produced for your organization?
2. How often are those statements given to the governing board?
3. Please note your total spent in the below categories for the prior and current year:

	Prior Year	Current Year
Musician Payroll		
Administrative Staff Payroll		
Music Director or Conductor Payroll		
Advertising and Marketing Expenses		

4. What percentage of your board made *unrestricted and/or restricted* financial contributions to your organization for the prior and current fiscal years? Please note that this refers to donations of cash, not donations of goods or services. Additionally, you may include pledged gifts not yet received, but please note them as such.
5. What is the total amount of *unrestricted and/or restricted* financial contributions your board made for the prior and current fiscal years?
6. Financial contributions by your governing board represented ____% (of the prior fiscal year) and ____% (of the current fiscal year) of the total contributions your organization received for the same years (donations of cash, not donations of goods or services).
7. Are members of your board expected to solicit *unrestricted* financial contributions from others?
8. What annual dues, if any, do your organization’s musicians pay to the organization?
9. If you charge your audience for any concerts, how do you determine what to charge?
10. When you recruit members to your governing board, do you discuss what the organization expects board members to contribute financially to the organization?
11. For the purpose of this question and the next three, an “endowment” is a fund restricted by the donor **or** by the governing board that may be accessed in limited amounts **or** for limited purposes. Does your organization have an endowment? If not, please continue on to question 12.
 - A. What was the total market value of the endowment as of the end of the fiscal year most recently ended?
 - B. What restrictions govern the endowment?

C. Who manages the investments of the endowment?

12. What is your organization doing to increase its revenues?
13. What are you doing to manage expenses?
14. How much in unrestricted funds did your organization have at the end of its fiscal year most recently ended?
15. What, if any, extraordinary increase or decrease in revenues or expenses did your organization experience last fiscal year?
16. Performing organizations often exist in part to provide a musical experience for their musicians apart from an outside audience. One example is the opportunity to perform works the musicians have not performed before or in an ensemble of the quality your organization supports. For the fiscal year most recently ended, estimate the extent to which your organization served this purpose and the extent to which it served an audience apart from its musicians. *Please give an explanation of how you derived this answer.*

Served its own members _____%

Served outside audiences _____%

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Part 5: Program Application

Name of Program _____

Name of Organization _____

List any Collaborating Organizations, if applicable: _____

Amount Requested from RMF _____ Total Program Budget _____

Project Description:

In relation to RMF's mission, does this project advance music education, advance music appreciation, advocate for music education, or advocate for music appreciation? *(Definitions of these mission components are included in the cover letter. Note: while many projects may encompass multiple areas, please choose the one that best fits this project).*

How does this program fulfill your mission?

Is this a new program? If so, please explain your planning process.

If this is an existing program, please explain how support from the Reading Musical Foundation will enhance your program.

Who is your audience for this program?

RMF defines "outcome" as what you hope to achieve as a result of this program. Using that definition, what outcomes do you anticipate from this program?

How will you evaluate your program? Please note if you expect your methods to garner subjective or objective metrics.

Please include a detailed budget which lists all of the income and expenses for your program. Please note which funds have already been received, committed, pending or in-kind.

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EVALUATION FOR 2018-2019 APPROPRIATIONS
Part 6: Program Evaluation for Prior Year Appropriations

The Reading Musical Foundation requires a written evaluation of the results of every appropriation, restricted or unrestricted, as a condition of future funding. This evaluation is due at RMF's office no later than **Monday, April 15, 2019**, whether or not your season has ended. If the season has not ended by that time, do your best to project the probable outcome. If the program has yet to occur, please contact RMF to request an extension.

Name of Recipient _____

Address of Recipient _____

Contact Person/Title _____

Phone _____

Restricted Appropriation Program Name _____ Amount: _____

I certify that the entire appropriation was utilized by the organization for the purpose(s) set forth in the grant agreement.

_____ Date _____
Signature/Title

Please provide the following information on no more than a total of 3 pages.

1. What were your proposed outcomes for this project/these projects (available in your application submitted to RMF)?
2. Share if you accomplished those outcomes, and how you determined that success. Please note if you are determining your answers based on *monitoring* (routine data collection/analysis by your organization), *evaluating* (data collection/analysis provided by an outside party), or *feedback* (surveys, audience/program participant feedback).
3. For ongoing programs: Will you make any changes to the program(s)?
4. By what percentage did your organization increase participation/audience attendance for this particular program this year over last fiscal year? If this is a new program, please disregard this question.
5. Please give a numerical (and demographical, if available) breakdown of those served by the programs for which you received funding from RMF during the current fiscal year. (Please separate your musicians, other program participants and audience members.)

Return to: Reading Musical Foundation, PO Box 14835, Reading, PA 19612

(610) 376-3395

kshultz@readingmusicalfoundation.org