**reading musical foundation**

**APPLICATION FOR 2023-2024 APPROPRIATIONS – FULL APPLICATION – SECOND CYCLE**

**Application Information for Applicants**

The Reading Musical Foundation (“RMF”) is now accepting Applications for Grants to be paid during January 2024 through December 2024.

**Eligible Applicants for Current Round of Appropriations**

* Organizations with a January-December Fiscal Year (or similar)
* Organizations with a July-June Fiscal Year with new initiatives/programming that will occur January-June 2024.

**Mission-Based Project Funding**

Organizations will be asked to select one of the following mission-related target areas for each of the programs they are requesting funding. To help organizations understand where their projects/programs will best fit, below are descriptions for each area:

***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 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 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 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 should:

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

**Other Anticipated Outcomes of RMF Appropriations:**

* Creates increased accessibility to the musical arts (education, performance, and/or appreciation)
* Fund programs that collaborate with other organizations
* Addresses the sustainability of area music organizations

**Evaluation Reporting**

RMF defines “outcome,” which is what we achieved as a result of our work. On the application, organizations are asked to define their anticipated outcomes, their evaluation methods, and whether their evaluation metrics will be subjective or objective. Organizations will be asked to address these outcomes, and if goals were achieved, as part of the evaluation process.

**Program-Based Funding**

RMF will award program-specific grants. 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.

**Application Process/Timeline**

* **Application Deadline: Sunday, October 15, 2023**
* **Grant Decisions Announced: After November 21, 2023**
* Application is considered complete when all required documents have been received by RMF (Electronic Submissions: please assume that if the email was not confirmed, the application was not received).

**Frequently Asked Questions:**

* Only organizations that perform music primarily in Berks County are eligible for funding.
* 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.
* RMF may restrict or impose conditions on grants.
* 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***.
* RMF considers the community’s immediate needs in the arts so compelling that it cannot make grants for research at this time.
* All requests should be project/program-based; RMF will not consider capital campaign requests.
* As a reminder, RMF will not consider increases for organizations that do not have 100% participation with board giving.

**Required Documents to Include with Application:**

* 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.
* Proof of current registration with the PA Department of State, Bureau of Charitable Organizations.
* The following financial statements:
	+ Most recent balance sheet and income statement (ended June 30, 2023, or later)
	+ Budgets or proposed budgets for previous, current, and next fiscal years
	+ If you have any outside reviewed financial statements (audit, reviewed, etc.) from the previous year, please include a complete copy of the report, including notes to financial statements, and the management letter, if any.
* **No more than two** 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.
* List members of your governing board, the name of the board chair, and all officers of your organization.
* If you received a grant from the Foundation for the current grant cycle, a Grant Evaluation Report must be completed, signed, and submitted to the Foundation at the date noted on your grant agreement.

*Please note***:** 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. Please feel free to contact Keri Shultz, RMF President, with any questions or concerns regarding your application.

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**APPLICATION FOR 2023-2024 APPROPRIATIONS – SECOND CYCLE**

**Part 1: General Questionnaire & Support Materials**

1. RMF makes restricted, program-based grants. Please complete a “Program Application” (found at the end of these materials) for *each* program you would like RMF to fund. Please summarize all of your funding requests for the 2023-2024 fiscal year below (continue responses on separate sheets if necessary):

**Program #1**

Name: Requested Amount: $

Mission Target Area:

🞏 Advancing Music Education 🞏 Advocating Music Education

🞏 Advancing Music Appreciation 🞏 Advocating for Music Appreciation

**Program #2**

Name: Requested Amount: $

Mission Target Area:

🞏 Advancing Music Education 🞏 Advocating Music Education

🞏 Advancing Music Appreciation 🞏 Advocating for Music Appreciation

**Program #3**

Name: Requested Amount: $

Mission Target Area:

🞏 Advancing Music Education 🞏 Advocating Music Education

🞏 Advancing Music Appreciation 🞏 Advocating for Music Appreciation

**Program #4**

Name: Requested Amount: $

Mission Target Area:

🞏 Advancing Music Education 🞏 Advocating Music Education

🞏 Advancing Music Appreciation 🞏 Advocating for Music Appreciation

**Total Request $**

1. In what respects does your organization promote music education, music appreciation and music performance *generally* (that is, apart from efforts to promote your own organization)?
2. In what respects does your organization promote other organizations that perform music in Berks County? What was your organization’s most fulfilling collaboration with another local charitable organization last year?
3. Identify by name, title, physical address, email address and business telephone number the person whom RMF shall contact with requests for additional information.

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**Part 2: Strategic Plan & Vision**

1. What is your mission statement?
2. If you have a vision statement, please share the statement and your activities to see it fulfilled.
3. How does Berks County benefit if your mission and vision are achieved?
4. Is your organization currently operating under a strategic plan? If not, please move on to question five.
5. How frequently do you review your strategic plan?
6. What are the major action items in your strategic plan?
7. What methods are you using to evaluate your organization’s success with your strategic plan?
8. What is the timeline for your plan (starting date, target completion date, etc.)?
9. Tell us about your audience and participants. Include details on who you target, target size, the role of audience/participant feedback in your planning, and changes you have seen, or expect to see in the makeup of your audiences/participants.
10. Do you know what motivates donors to give to your organization? If yes, what are the top three reasons?

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**Part 3: Governance**

|  |
| --- |
| Please answer the following questions as YES (true) or NO (false): |
| **Y** | **N** |  |
|  |  | ***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. What are your primary goals around board recruitment? Describe the process you follow to recruit new members to your governing board.
3. 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? How often are those statements given to the governing board?
2. Please note your total spent or will spend 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 |  |  |

1. Did 100% of your board make a financial gift to you organization last fiscal year? What percentage will make a financial gift to your organization this year?
2. What expectations around board giving and board fundraising are shared as part of your board recruitment process?
3. What annual dues, if any, do your organization’s musicians pay to the organization?
4. If you charge your audience for any concerts, how do you determine what to charge?
5. 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 8.
6. What was the total market value of the endowment as of the end of your most recent fiscal year?
7. What restrictions govern the use of funds in your endowment?
8. Who serves as the investment manager for your endowment?
9. What is your organization doing to increase its revenues and manage expenses?
10. What, if any, extraordinary increase or decrease in revenues or expenses did your organization experience last fiscal year?

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**Part 5: Program Application**

***Organizations requesting funding for multiple programs: Please complete one application for each program***

Name of Program

List any Collaborating Organizations (Musical and/or Non-Musical), if applicable:

Amount Requested from RMF Total Program Budget

**Tell us about your program/project:**

How does this program fulfill your organization’s mission statement?

**What community need/ problem/issue does this program address?**

Who is your target audience for this program?

RMF defines “outcome” as what you hope to achieve as a result of this program. Using that definition, what are the measurable outcomes your organization hopes to achieve?

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.