

Spark Event – “Paths for Development”

Society Hill Playhouse

507 S. 8th Street

Monday, May 12, 2008

Notes taken and typed by Michelle Jacob,

Administrative Assistant for the Theatre Alliance of Greater Philadelphia

I. Introduction

A. Announcements from Karen

1. Thank you to Society Hill Playhouse for hosting tonight’s event and to Whole Foods for providing refreshments.
 - Please speak to Greg DeCandia to book Society Hill Playhouse as a Live Arts venue.
2. Karen introduces our panelists.
 - John Frisbee – Director of Development at Pig Iron, Spark Committee member
 - Lane Savadove – Artistic Director at Ego Po, Spark Committee member
 - Olive Mosier – Director of Arts & Culture, William Penn Foundation
 - Fran Kumin – Director of Philadelphia Theatre Initiative, a program of the Philadelphia Center for Arts and Heritage funded by The Pew Charitable Trusts, administered by UArts.

II. Presentation on Funding Institutions

A. William Penn Foundation (Olive Mosier)

1. Background
 - A regional foundation based in Philadelphia. It funds the five counties of Southeast PA and Camden, NJ
 - The board consists of half Haas family and half public members.
 - Annual budget is \$62-67 million.
 - There are three branches, with Arts and Cultures the smallest at \$11-14 million.
2. Funding
 - Their approach to funding came out of 2001 foundation-wide planning process. Arts and Culture Program focus on each organization’s mission-driven work.
 - The foundation funds a wide range of arts and culture organizations. Funding decisions are made first based on the quality of the organization’s work and then we try to award funding that strengthens operations. While William Penn does fund administrative areas such as salaries and insurance, we also fund costs related to productions such as actor or designer salaries or facility rental.
 - The goal is the fiscal stability of individual organizations.
3. Qualifications
 - Come to William Penn with funding that is difficult to raise but crucial for your organization.
 - At least 3 years of programming to see the quality of the organization’s work.

- Paid staff.
 - Professional infrastructure that encompasses the organization.
4. Follow-up material
- William Penn Foundation Annual Report (Copy available at the Theatre Alliance Office.)
 - Organizational attributes that were identified by the Arts Endowment as critical to success as a “high-performance” arts organization:
 - a. **Identity and Purpose** – Does the organization have a clear sense of who it is, why it exists, and what it hopes to accomplish?
 - b. **Leadership** – Is there a leadership vision for the organization? How does the organization manifest leadership qualities?
 - c. **Programming** – Does the organization’s work consistently achieve high standards of excellence?
 - d. **Management of Resources** – Is the organization’s operation well-run, and does it have the resources necessary to realize its mission?
 - e. **Audiences and Community** – Does the organization have a clear sense of who it serves and the strength of its relationship to the community?
5. The Foundation’s annual report on grants can also be found on its website (www.william penn foundation.org).
- B. Philadelphia Theatre Initiative (Fran Kumin)
1. Background
 - Philadelphia Theatre Initiative is only one of the artistic initiatives of The Pew Charitable trusts all housed at Philadelphia Center for Arts and Heritage is located at 1608 Walnut Street, 18th Floor.
 - Other initiatives include: Dance Advance, Heritage Philadelphia Program, The Pew Fellowships in the Arts, Philadelphia Cultural Management Initiative, Philadelphia Exhibitions Initiative, and Philadelphia Music Project.
 2. Funding
 - Target funding for project support, not long-term strategic planning.
 - Since 1995, Pew has awarded about \$8 million to this region’s theatre community for project grants, professional development research, artistic consultants, etc.
 - The goal is to enhance the creative work done on stages, and advance Greater Philadelphia as leader of theatre in this country.
 - Support work that is adventurous, risky, complex, or on a larger scale from which you normally produce.
 - Provide resources that stimulate artistic development, strengthen and expand the capacity of producing and presenting organizations and independent theatre artists as well.
 - Expand the range of programming in this community.
 - Develop sense of community through exchange of resources and networking through roundtables, workshops, and trips.
 3. Qualifications (*The Eligibility Requirements listed are for theatres with budgets under \$500,000 only. There are different requirements for larger theatres. Subject to change as they are under re-examination.*)
 - To be eligible, the organization must employ professional artists.

- Have a *salaried* employee, not just paid.
 - Based in Philadelphia (five counties of Southeast PA) for 3 years.
 - 501 c3 non profit organization.
 - Have mounted at least 1 production 3 out of last 5 years. Must produce 1 production during grant season.
 - Work must be evaluated in current season by site reporters. PTI employs approximately 50 leading theatre professionals from outside the Philadelphia community to do site visits and prepare reports for the selection panel. The panel uses this information to determine the historic quality of an organization's work, which counts for 30 percent of an application's score at the panel meeting.
4. Follow-up material
- Philadelphia Center for Arts and Heritage Brochure. (Copies available at the Theatre Alliance Office.)
 - Visit www.philadelphiatheatreinitiative.org to read more about the organization.
 - If you are interested in becoming involved with PTI, call the office at 267-350-4940 and arrange a meeting with Fran. Next step will be to set up site visits.

III. Questions from the panel

A. What can developing company one-year into producing process do to prepare organization?

1. Funder point of view
 - An emerging organization needs to demonstrate broad community support through individual contributions, and begin figuring out a strategy to approaching and building history with public funders (State Arts Council, GPCA).
 - Get on the foundation's radar. Olive Mosier and Courtenay Wilson are site visitors. Board members and other staff are out in the field looking at work.
 - Clearly articulate your mission. Make a case for yourself and your theatre. Why you are different from other theatres in area? Why you are different and important to this community?
 - Send postcards to PTI. This helps them to see level of activity, names of collaborating artists, and venues. All of this adds to information about organization.
 - Funders talk to each other. Give the same information to all funders. The more you have infiltrated the funding community, the more you are on their radar screen.
 - Give at least 3 weeks notice for site visitors.
2. Development Director point of view
 - Artistry should spring from a clear mission statement. Focus on mission-driven work, Theatre should present something as unique as possible.
 - Stay on your message. Keep reinforcing in people's minds what kind of theatre company you are.
 - Be strategic about how many grants you apply for. Be sure that you feel confident with the amount of money, accounting needs and time that goes into grant proposal. Decide if it is the right time to apply.

- Start with Philadelphia Cultural Fund and Fels Fund. Site visitors will help you find out what you can do better.
- B. Strategic Planning – Consultant-based or internal, staff-based planning.
1. Funder point of view
 - Encourage that organizations work with outside consultants.
 - Suggested resources: Martin Cohen at PCMI, Nonprofit Finance Fund, LaSalle Nonprofit Center, or peer organizations for recommendations.
 - Interview consultants to see who is a good match with organizations.
 - Submit a proposal with defined scope of work, including the creation of the plan and implementation for at least 2 years after plan is established.
 - Strategic plan becomes a living document that the board and staff use to make good decisions about the organization as a whole and gives context of priorities for which changes can be made.
 - Discourage internally-based strategic plans.
 - Challenge organization that the plan they are creating is realistic. Address the reality the organization is working in.
 2. Director of Development point of view
 - It is difficult for smaller companies to do strategic plan with an outside consultant.
- C. What is the role of a program director as opposed to a judging panel?
1. William Penn Foundation
 - The first step is a letter of inquiry, which should be submitted through the Foundation's website. New organizations need to give the foundation time to see work. Add the foundation to your mailing lists.
 - Invite letter of inquiry for organization whose work is seen as right for William Penn to be funding.
 - Interview the organization to make sure this is the right direction for this company to go.
 - Program Director - consultation, talk to others about organization.
 1. Philadelphia Theatre Initiative
 - Program Director puts together diverse and knowledgeable review panel and makes sure the panel considers the applications using only the criteria published in the guidelines.
 - Organize professional development activities.
 - Advocate for community.

IV. Questions from the audience

- A. Is it possible to get site visitors to come out before actually applying?
1. Set up a meeting with Fran. She must be convinced that you will be eligible very soon because it is expensive and time-consuming to bring in site visitor.
- B. Define the word 'quality' – organizational quality or quality of production?
1. Historic quality of the productions. Site visitors will talk to the director and/or company beforehand to put the production in context – vision, financial means, challenges or unusual situations.
 2. Write about choice of work and how it is related to your mission – acting, direction, design elements, audience (# attracted in terms of space capacity, response).

3. Send 3 different site visitors. They try to send site visitors who are open to the type of work they will be seeing.
4. To avoid conflict of interest, we hire major theatre practitioners from outside of the area to serve as site visitors. This also helps to get the word out about the Philadelphia theatre community.
5. William Penn deals with artistic quality and infrastructure of the theatre, whereas PTI considers organizational strength when applications are considered and looks at artistic quality in site visits.

C. Producing organization with strong educational component. Do you look at what the community is willing to see?

1. The selection panel evaluates organizations on their own terms.
2. What is risky for a suburb may be different from what's challenging in Center City.

D. Nonprofit company in Delaware is starting to look at funding. Do you provide grant money to out of state?

1. PTI can only give money to five counties area. William Penn gives to five counties and Camden County.
2. Recommendation to speak with Peggy Amsterdam with GPCA, formerly ran the Delaware Department of Arts previous to coming to GPCA.

E. Any predictions of how funding will be on next couple of years? Size of endowments?

1. William Penn is already more competitive. Funds available have not increased, but numbers of organizations applying have increased. Attempt to maintain organizations already receiving funding while opening up grants for new organizations.
2. All PTI grants are more competitive now, both because of the larger grant sizes and because more individuals and organizations are eligible to apply for funding

F. How long have you been in Philadelphia? What do you find interesting about the Philly theatre scene?

1. Olive Mosier has been in Philadelphia 8 years. Surprise of Philadelphia is that it has extraordinarily rich and deep cultural sector, which make her job so rewarding.
 - The leadership of the cultural organizations take their work seriously. The quality of artistic leadership has elevated cultural sector in Philadelphia.
 - It is a supportive community, and competitive in a healthy way.
2. Fran Kumin has been here 2½ years, coming from Theatre Communications Group in NY. She had no idea of the depth of this theatre community.
 - She has been impressed by generosity of theatre community. Artists helping friends/peers on productions.
 - People tend to work across disciplines more often in Philadelphia.

G. "Does the organization have a clear sense of who it serves and the strength of its relationship to the community?" Share hallmarks of companies that have this quality.

1. We want to see the organization's own articulation of this and see how it translates to the audience. See connection between the intent/goal and what is really happening.
2. Look at your goal and ask yourself what steps are you actively taking to make that happen.

H. Is there a salary cap? What about proof of the salaried employee?

1. PTI does not currently have a salary minimum, but the qualifications are currently under re-examination.

- To prove that there is a salaried employee we sometimes need to see proof, such as a tax form with the amount blocked out.
- Recognize that not all companies can or should produce every year.
- 2. William Penn needs to see the numbers in budget for each fiscal year and want the assurance that the salaries are being paid are sustainable in organization.
 - Evaluate organization differently. Look at where an organization is and make decision based on circumstance of organization at that time.
 - They are not always looking for growth because that is not appropriate for all organizations at all times. Often, organizations are in sustaining mode. Due to economy, some organizations have had to pull back in number of staff or productions. Look at if these decisions are fiscally sound and responsible.

V. Heather Evans, Freelance Grant Writer

A. Heather has submitted grants to PTI and William Penn from a variety of organizations.

1. She uses the Delaware Valley Grant Format
2. Heather hosts the Philly arts deadlines calendar on MySpace.

B. Heather offers organizations:

1. Development Tool Kit.
2. Personalized grant calendar
3. Individual giving planning for your constituency

C. Flyer for Heather's service is available at the Theatre Alliance Office, or you can download it at <http://www.theatrealliance.org/spark/resources.html>.