

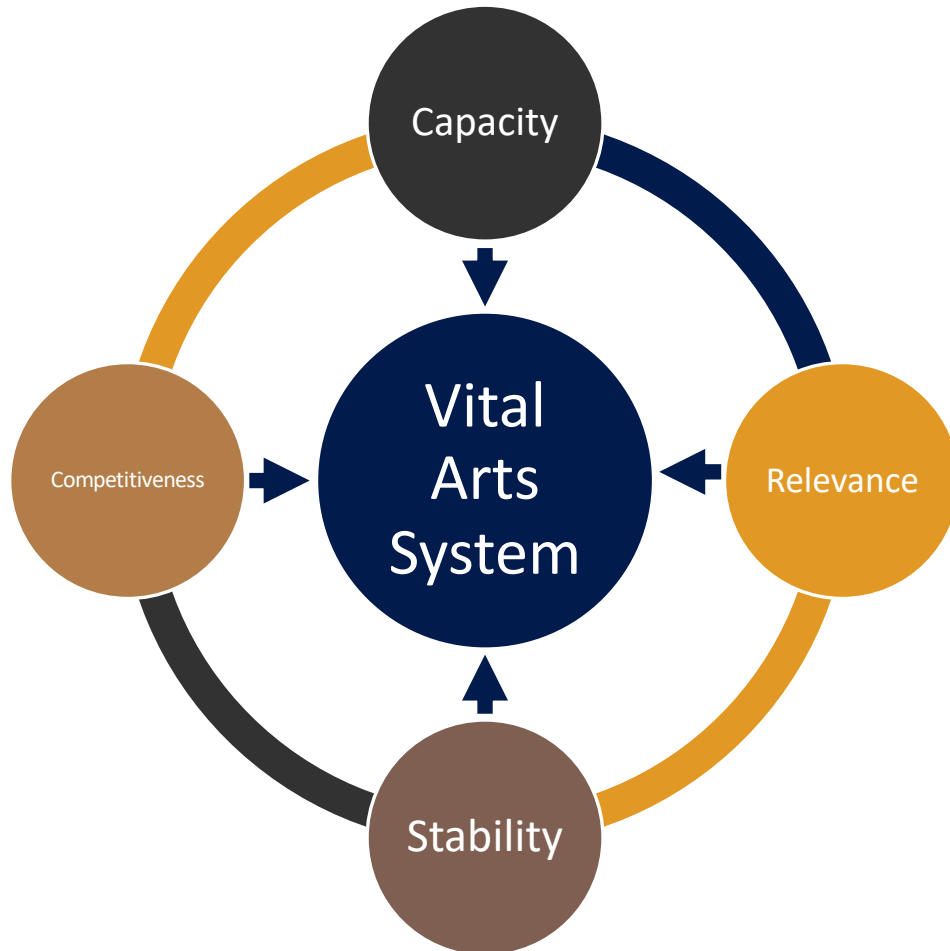
Performing Arts Strategic Investment Plan

PRESENTATION TO
GRANTEES
MAY 7, 2019

Plan Approved
February 22, 2019



Our Investment Model



Cullen seeks to partner with WNY performing arts organizations that advance the growth of WNY's vital arts system by demonstrating:

- Capacity
- Relevance
- Stability
- Competitiveness

Retaining Current Grant Programs while Expanding Opportunities for Collaboration

- Through sector-wide and peer-city research, local focus groups, and consideration of our past investments, our process revealed that our current programs serve many of the needs of WNY's performing arts sector
- We are introducing a few new programs to close gaps identified by the sector
- The enhanced group of offerings/grant support will contribute to the pursuit and growth of a vital arts system for WNY

Many aspects of our process will remain the same

Overview:

- Our target investment for WNY's Performing Arts sector remains \$1.2 million/year
- **Audited or reviewed financials from the most recently completed fiscal year are required of all applicants for all programs**
- Organizations can apply for multiple years of funding: one, two and three years with a few exceptions (i.e. Cullen Fellows)
- Grant sizes offered will remain \$5,000 to \$100,000 per year
- **An organization cannot have more than one open grant through the *Responsive Grant Cycle* process; however, it may receive additional sources of grant funding through our newly formulated "Strategic Grant" category (Cullen Fellows, Collaborative Opportunities, Sector Initiatives)**

Many aspects of our process will remain the same: Process

Process:

- Applications will be accepted in the same two (2) cycles: the LOI process continues to open in January 1 and July 1 of each year.
- We will have a “two stage” process as we do currently, with an LOI to start and an Application offered to those with approved LOIs. (The one exception to this is the short-form application for the “Action Grants”)
- The application process will continue to have a *Application Review Session* with the possible exception of some applications in the “Action Grants” category **which is for past Cullen grantees only.**

Cullen Grant Categories for Performing Arts

Responsive Grant Programs

Responsive Grant Cycle offerings:

- Program Support
- Organizational Enhancement
- General Operating
- Capital Grants
- Action Grants *

Strategic Grants

Strategic Grants/Initiatives:

- Sector Initiatives*
- Collaborative Opportunities*
- Leadership Development:
Cullen Fellows Program*

** New Program*

Responsive Grant Programs

There are no changes to the following current Cullen Responsive Grant programs:

- Program Support
- Capital Grants
- Organizational Enhancement (capacity building)
- General Operating Support

The following eligibility requirements remain applicable for all Responsive Grant programs:

- Applications accepted through bi-annual responsive grant process (opens January, July)
- Only **ONE** grant per organization per 18-month cycle
- May apply for one (1) to three (3) years of funding
- May not have an open grant with Cullen to apply
- Two-step process continues (LOI and Application); *Application Review Session* required

Additionally, we are introducing a new “Action Grant” program for eligible, past grantees seeking amounts under \$7,500 (additional information follows).

Program Support

Overview:

- ✓ Program creation or expansion that focuses on building and diversifying audiences; and/or supports artistic risk-taking
- ✓ Addresses audience engagement and reach which is a top issue/priority as stated by WNY's PA organizations
- ✓ Support for new programs that can promote and sustain organizational relevance

Organizational Enhancement (Capacity Building)

Overview:

- ✓ Flexible funds for a variety of capacity-building initiatives
- ✓ Grants will provide capacity-building opportunities for:
 - Succession planning assistance
 - New staff members
 - Professional advisement in strategic planning, financial planning, and other professional services
 - New technology and related training (websites, marketing, ticketing systems)
 - Board training and development (for individual orgs)

General Operating

Overview:

- ✓ On a selective basis, we will fund general operating requests

Capital Grants

Overview:

- ✓ Capital funding for building and equipment needs
- ✓ We will consider making a lead grant
- ✓ Capital projects may include:
 - Bricks & mortar
 - Equipment related to performances (sound, lighting, seating, instruments, etc.)

Action Grants (New Program)

Overview:

- ✓ One-step, expedited process **for eligible past grantees (see below)**
- ✓ Increases flexibility and responsiveness for smaller requests
- ✓ Grants of up to **\$5,000** for organizations with budgets **under** \$75K; and up to **\$7,500** for organizations with budgets **over** \$75K

Eligibility/Features:

- ✓ Simpler Application Process
- ✓ **MUST** be past Cullen grantee with no open grants with Cullen
- ✓ Applications accepted and approvals made on a rolling basis
- ✓ Turn-around time (decision) will be four (4) to six (6) weeks
- ✓ **ONE** grant per org. per 12-month cycle; can seek one to three-years funding
- ✓ Application Review Session (i.e. site visit) determined by proposal

Strategic Grants (New Programs)

Overview of Strategic Grant programs:

1. Sector Initiatives
2. Collaborative Opportunities
3. Leadership Development (*Fellows Program*)

Sector Initiatives (New Program)

Overview:

- ✓ Addresses shared priorities in the sector through speakers, workshops, professional development, and research. For example:
 - Grant writing; writing/evaluating outcomes and impacts
 - Board training and development/governance (sector-wide)
 - Diversity, Equity and Inclusion (DEI) Topics
 - Financial-related topics
 - Audience development/engagement/outreach
 - Other topics for professional development

Features:

- ✓ Cullen will work with sector members on identifying the most relevant, timely and priority topics, and the optimal means to advance them
- ✓ Participants **CAN** have an additional active grant with Cullen to participate

Collaborative Opportunities (New Program)

Enables WNY's performing arts sector members the flexibility to create unique partnerships and collaborations and submit proposals once a year for consideration of funding. Collaborations will have:

- ✓ Minimum of two (2) partners **from WNY's PA sector** *
- ✓ Lead organization must be a past or present Cullen grantee, however the second and other additional partners need not be past grantees so long as they qualify under Cullen's definition of "performing arts organization" *
- ✓ Non-performing arts organization may be partners but not the lead, and must be in addition to 2+ WNY performing arts partners *
- ✓ Lead partner must be current or past Cullen grantee*; however other partners need not be current or past Cullen grantees but should be from/based in WNY
- ✓ Lead applicant should have an operating budget over \$250,000
- ✓ Lead partner signs contract and completes follow ups for the project

Eligibility/Features:

- ✓ Applications accepted in Summer cycle only (opens July 1)
- ✓ Participants **CAN** have an additional active grant with Cullen (Program, Capacity, Capital, Gen Op, Fellow)
- ✓ Application Review Session required (i.e. team interview)
- ✓ May require an outcome and impact evaluation component

* While Cullen Foundation believes in cultivating and strengthening a variety of performing arts groups, we prioritize support to those organizations where the primary focus and mission is community performances

Collaborative Opportunities (New Program)

Three main areas to explore in multi-organizational collaborations:

1. Advance artistic and/or organizational excellence, such as:
 - Joint productions/programs
 - Creation of new artistic works through collaborative models
 - Piloting shared “back-office” positions and functions
 - Solutions to shared operational needs (ex: shared storage for sets, costumes, etc.)
 - Systems-building projects
2. Development of anchoring and mentoring programs to strengthen and advance small and mid-sized orgs by leveraging regional talent to assist them; may include:
 - Opportunities for “anchor institutions” to mentor and support the artistic development and audience engagement efforts of mid-sized and smaller performing arts organizations
 - Considers shared/loaned venue use; may include support of “in-residence” opportunities
3. Exploration of community/audience engagement among multiple sector members:
 - New options for shared marketing and audience engagement
 - Research and/or shared marketing initiatives that benefit multiple WNY performing arts organizations

Leadership Development: Cullen Fellows (New Program)

The Cullen Fellows program reflects the foundation's belief that development of talent is essential to strengthening individual professionals, organizations, and elevate WNY's performing arts sector as a whole.

The yearlong, self-designed program provides substantive new learning opportunities for promising performing arts leaders to move from “success to significance” by providing them with the financial resources to enhance their skills through intentionally selected activities and a customized professional advancement plan.

Fellows will be selected on the basis of exceptional ability and potential, and future promise for significant contributions to the WNY's performing arts sector, and the strength of his/her application.

Leadership Development: Cullen Fellows (New Program)

NOW ACCEPTING
APPLICATIONS!

Overview:

- ✓ Adds a talent/human capital piece for performing arts investments
- ✓ Targets sector's need to develop talent and enhance administrative and artistic capacity; bolsters support for emerging leaders' growth
- ✓ Increases our ability to “grow-our-own” and “deepen-the-bench” of the local sector

Eligibility/Features:

- ✓ Applications accepted May 1st through June 15th; decisions made by July 31st
- ✓ Eligible Fellow activities will occur between September 1st and August 31st
- ✓ Participants **CAN** have an additional active grant with Cullen
- ✓ Up to five (5) Fellow awards made per year
- ✓ Awards will be **up to \$15K per individual**
- ✓ Cohort model to encourage sharing learnings and experiences
- ✓ A code is needed in Foundant; use **Fellows19** when you start online application

Leadership Development: Cullen Fellows (New Program)

Eligible Activities and Fund Uses:

Eligible uses of funds cover a variety of areas addressing advancement in artistic, operational, technical and administrative areas and include:

- Tuition/fees related to relevant coursework; professional development and certification
- Costs related to participating in structured mentoring activities; and/or for structured visits to recognized leaders/peer organizations
- Skill/credential/certification programs run by recognized leaders in specific area nominee intends to address
- Conference participation in relevant content area(s) (artistic or managerial)
- Participation in leadership and PD programs run by recognized performing arts organizations, relevant membership organizations, or funders
- Transportation, meals and lodging for destinations related to eligible activities

Applicant Organization:

The applicant organization will serve as the grantee and will hold grant funds in restricted account to be utilized for the sole purpose of approved/eligible fellowship related-expenses.

Responsive Grant Cycle Requests (Suggested Levels)

To simplify grant requests, eliminate bias, promote transparency and manage expectations, Cullen offers the following **suggested levels** of requests for **Responsive Grant Cycle** requests:

Organization Revenues	<u>Suggested Request</u> Range Low	<u>Suggested Request</u> Range High
Less than \$75,000	\$2,500	\$10,000
Over \$75,000 but under \$150,000	\$5,000	\$20,000
Over \$150,000 but under \$500,000	\$10,000	\$50,000
Over \$500,000 but less than \$1,500,000	\$10,000	\$75,000
\$1,500,000+	\$10,000	\$100,000

**Capital grants may be considered an exception to using this guide; however, the maximum request amount remains up to \$100k/year for one to three years*

*** Action Grant requests levels are up to \$7,500 as outlined in program details*

Grant Cycle Schedule

Winter Cycle		Summer Cycle	
Opens January 1		Opens July 1	
Program Support		Program Support	
Organizational Enhancement		Organizational Enhancement	
Capital Grants		Capital Grants	
General Operating		General Operating	
		Collaborative Opportunities	
Leadership Development (Fellows Program) opens May 1 st			
Action Grants accepted anytime			
Sector Initiatives occur year-round (<i>application not required</i>)			

Questions?

Staff will provide guidance along-the-way regarding:

- ✓ Eligibility
- ✓ Outcomes
- ✓ Project fit
- ✓ Foundant
- ✓ Financial requirements
- ✓ Other relevant questions

PLEASE CALL FLORINE LUHR BEFORE YOU START AN LOI OR APPLICATION

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