

**Letter of Interest
Creative Communities
Core Support for Arts and Cultural Organizations**

Description of Funding

This Letter of Interest (LOI) must be submitted by nonprofit arts and cultural organizations that wish to apply for core support funding through the William Penn Foundation. When awarded, core support will be for three full fiscal years and will be unrestricted.

Before submitting an LOI, please review the [Program Guidelines](#) to ensure your organization's eligibility for this funding strategy and your understanding of the types of funding available. Organizations that do not meet the eligibility requirements will be automatically declined.

All applicant organizations must have:

- At least five consecutive years of up-to-date DataArts (Cultural Data Project) profiles.
- At least one paid, full-time staff person.
- An audit or financial review.
- 501(c)(3) nonprofit designation and be a professional arts and cultural organization.
- No less than five consecutive years of ongoing operations, including the most recently completed year.

Certain additional eligibility requirements apply for the following disciplines:

- Choruses must have a professional core, paying some of its singers all of the time, a minimum of 12 singers or 25 percent of the singers in the chorus, whichever is less-or be fully professional, paying all of its singers all of the time. Minimum payment to singers must be twice the federal hourly wage for each hour singers are contracted to rehearse and/or perform (based upon an average of combined rehearsal and performance hours per production). Please describe in the LOI how your chorus meets this eligibility requirement.
- Theatres should demonstrate rigorous pursuit of theatrical form, as demonstrated by at least 30 hours of rehearsal time for primary production activities and at least 20 percent of the theatre's annual budget dedicated to total artist compensation (including but not limited to actors). Please describe in the LOI how your theatre meets this eligibility requirement.
- Museums must be accredited by the American Alliance of Museums.

When applicable, please address how your organization meets these criteria as part of the organizational overview section of the LOI.

Annual Benchmark Instructions

There are three separate sections (see tabs across the top) for entering Annual Benchmark data. Listed below are instructions for completing this information.

BENCHMARKS - Finance, Program, Online Strategy Tab - All applicant organizations are required to complete the benchmark information on this tab.

BENCHMARKS - Audience Tab - Complete this benchmark information if you are a cultural organization that produces, presents, exhibits, etc., programs in the performing or visual arts, literature, history, humanities, film, etc.

BENCHMARKS - Constituencies Tab - Complete this benchmark information if you are an arts service organization that provides services to individual artists or conservation/preservation and other services, etc.

You are only required to complete one of the Audience or Constituency benchmark tabs, not both of them.

If you have further questions regarding how to fill out the annual benchmarks, please contact [Olive Mosier](#) or [Jessica Richards](#) at the Foundation.

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Application Process/Submission Deadlines

All LOIs will be assessed by a review team, which will determine those LOIs that merit an invitation to submit a full proposal.

All LOIs must be accompanied by the following documents, which can be uploaded with the LOI:

- Most recently completed audit
- An operating budget for the current fiscal year and most recently completed fiscal year
- An annual organizational operating budget for each year of requested funding (three years)
- Strategic or business plan, when available

Please recognize that an invitation to submit a proposal does not guarantee funding or funding at the requested level.

The deadline for submitting completed LOIs to the Foundation is 5:00 p.m. on July 8, 2016. Organizations that have submitted an LOI can expect to hear back from the Foundation on or around **October 3** regarding whether or not they have been invited to submit a full proposal. **Full proposals will be due December 2.** We will make every effort to review full proposals at the next board of directors meeting in April 2017.

LETTER OF INTEREST
Creative Communities
Core Support for Arts and Cultural Organizations

Receipt Date:

ORGANIZATION INFORMATION

Tax ID #:

Name:

Address

City/State/Zip:

Telephone:

Fax:

Web Address:

Current Fiscal Year:

Total Operating Budget:

Fiscal Year End Date of Most Recently Completed Audit:

BRIEFLY SUMMARIZE YOUR ORGANIZATION'S MISSION AND WORK.

BRIEFLY DESCRIBE YOUR ORGANIZATION'S HISTORY, INCLUDING THE YEAR FOUNDED.

NAME AND TITLE OF PERSON CERTIFYING THIS APPLICATION:

CONTACT INFORMATION

Organization Leader:

Name:

Title

Telephone:

Email Address:

Proposal Contact:

Name:

Title

Telephone:

Email Address:

GRANT REQUEST

DESCRIBE YOUR ORGANIZATION'S KEY PROGRAMS (EMPHASIZE PROGRAMS FOR ADULTS/GENERAL AUDIENCES AS OPPOSED TO CHILDREN/TEEN/YOUTH PROGRAMS).

WHO IS SERVED BY YOUR ORGANIZATION? FOR EXAMPLE, AUDIENCES COMING TO A PERFORMANCE/EXHIBIT; CONSTITUENCIES, SUCH AS OTHER ARTS ORGANIZATIONS OR ARTISTS, AS IN THE CASE OF A SERVICE ORGANIZATION; OTHERS; ETC. PLEASE DESCRIBE WITH AS MUCH DEMOGRAPHIC DETAIL AS POSSIBLE. ALSO, INCLUDE A DESCRIPTION OF HOW YOU GATHER THE DATA PROVIDED AND HOW FREQUENTLY YOU DO SO.

DESCRIBE YOUR ORGANIZATION'S CURRENT FINANCIAL CONDITION, WITH PARTICULAR EMPHASIS ON YOUR ORGANIZATION'S BALANCE SHEET AND PROFIT AND LOSS STATEMENT (THAT IS, TRENDS IN EXPENSE OR INCOME, ONE-TIME CAPITAL COSTS OR CAPITAL GIFTS, ETC.). EXPLAIN ANY ANOMALOUS RESULTS AND WHETHER THESE RESULTS WILL CHANGE GOING FORWARD.

BRIEFLY DESCRIBE YOUR ORGANIZATION'S PLANNING PROCESS AND THE RESULTING PROGRAMMATIC AND OPERATIONAL PRIORITIES FOR THE CURRENT AND NEXT THREE FISCAL YEARS.

WHAT ROLE DOES YOUR ORGANIZATION PLAY IN CONTRIBUTING TO CIVIC LIFE IN YOUR COMMUNITY (AS YOUR ORGANIZATION DEFINES COMMUNITY)? HOW IS THAT REFLECTED IN YOUR CURRENT STRATEGIC PLAN OR PRIORITIES?

BRIEFLY DESCRIBE YOUR SENIOR STAFF MANAGEMENT TEAM (AND SENIOR ARTISTIC TEAM WHERE APPLICABLE), INCLUDING JOB RESPONSIBILITIES AND INDIVIDUAL EXPERTISE. INCLUDE A DESCRIPTION OF YOUR ORGANIZATION'S OVERALL GOVERNANCE STRUCTURE, THE SIZE OF YOUR BOARD (NOTING ANY VACANT SEATS), AND THE BOARD'S ROLE IN FUNDRAISING. ALSO INCLUDE BRIEF BIOS OF EACH BOARD MEMBER. (THIS INFORMATION CAN BE SUBMITTED AS DOCUMENTS THROUGH THE ATTACHMENTS TAB AT THE TOP OF THIS PAGE).

BENCHMARKS – FINANCE, PROGRAM, ONLINE STRATEGY

All applicant organizations are required to complete the annual benchmark data below.

For all metrics requested, please provide data for the following fiscal year-end dates to align with this Core Support cycle:

- *Previous Fiscal Year: WPF considers the "previous fiscal year" to mean those ending between 11/1/2015 and 10/31/2016.*
- *Current Fiscal Year: WPF considers the "current fiscal year" to mean those ending between 11/1/2016 and 10/31/2017.*
- *Next Three Fiscal Years (period of requested funding)*
- *Year 1: fiscal years ending between 11/1/2017 and 10/31/2018*
- *Year 2: fiscal years ending between 11/1/2018 and 10/31/2019*
- *Year 3: fiscal years ending between 11/1/2019 and 10/31/2020*

If you have further questions regarding how to fill out the annual benchmarks, please contact [Olive Mosier](#) or [Jessica Richards](#) at the Foundation.

FINANCE: HOW MANY MONTHS OF LIQUID UNRESTRICTED NET ASSETS WILL BE AVAILABLE

	DATE	# of MONTHS
Previous Fiscal Year:		
Current Fiscal Year:		
Next Three Fiscal Years:		
Year 1:		
Year 2:		
Year 3:		

PROGRAM: WHAT ARE YOUR PROGRAM GOALS, AND WHAT EVIDENCE WILL YOU USE TO DETERMINE IF THESE GOALS WERE MET?

Previous Fiscal Year:
Goal:

Current Fiscal Year:
Goals:

Next Three Fiscal Years:

Year 1:
Goals:

Year 2:
Goals

Year 3:
Goals:

ONLINE ENGAGEMENT

Does your organization have an online strategy that is key to meeting your mission that is beyond memberships and general information? (Yes or No)

If Yes, please describe your strategy.

If Yes, what principal metrics do you use to quantify success (cite no more than three) (e.g., number of retweets, numbers of music downloads, web visitation, etc.)

Complete the following information describing your experience to date and anticipated trends with the metrics identified above. (Example: if one of your metrics is YouTube views, you will enter "YouTube views" in the first row for each of the years requested and provide corresponding numbers.)

	DATE	METRIC (fill in type of metric in space below)	METRIC (fill in type of metric in space below)	METRIC (fill in type of metric in space below)
		Ex. #s Facebook Friends		
Previous Fiscal Year		Ex. 5		
Current Fiscal Year		Ex. 8		
Next Three Fiscal Years:				
Year 1		Ex. 9		
Year 2		Ex. 9		
Year 3		Ex. 10		

BENCHMARKS – AUDIENCE

COMPLETE THIS SECTION IF YOU ARE A CULTURAL ORGANIZATION THAT PRODUCES, PRESENTS, AND/OR EXHIBITS PROGRAMS IN THE PERFORMING OR VISUAL ARTS, LITERATURE, HISTORY, HUMANITIES, FILM, ETC.

(IF NOT, GO TO THE BENCHMARKS - CONSTITUENCY TAB)

For all metrics requested, please provide data for the following fiscal year-end dates to align with this Core Support cycle:

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- *Current Fiscal Year: WPF considers the "current fiscal year" to mean those ending between 11/1/2016 and 10/31/2017.*
- *Next Three Fiscal Years (period of requested funding)*
- *Year 1: fiscal years ending between 11/1/2017 and 10/31/2018*
- *Year 2: fiscal years ending between 11/1/2018 and 10/31/2019*
- *Year 3: fiscal years ending between 11/1/2019 and 10/31/2020*

If you have further questions regarding how to fill out the annual benchmarks, please contact [Olive Mosier](#) or [Jessica Richards](#) at the Foundation.

IN-PERSON PARTICIPATION: WHAT WILL BE THE TRENDS OF YOUR AUDIENCE SERVED, THAT IS, STEADY STATE, WITH LESS THAN 1% DEVIATION, OR GROWTH, AND IF SO, BY HOW MUCH, FOR EACH OF THE FOLLOWING

Local programming that comprises your regular season or visitation, however you define your season or visitation (e.g., a theatrical or concert season, general museum or gallery attendance, etc.).

	DATE	#ATTENDED	#PAID	#UNPAID	% CHANGE FROM PREVIOUS YEAR
Previous Fiscal Year					
Current Fiscal Year					
Next Three Fiscal Years					
Year 1					
Year 2					
Year 3					

Local special event programming (if applicable, other than fundraising events) (for instance, pop-ups, performances in an art gallery that is not your usual venue, temporary art installations in alternative venues, etc.)

	DATE	#ATTENDED	#PAID	#UNPAID	% CHANGE FROM PREVIOUS YEAR
Previous Fiscal Year					
Current Fiscal Year					
Next Three Fiscal Years					
Year 1					
Year 2					
Year 3					

Local public programs (if applicable), such as artist talks, back stage tours or guided gallery tours, readings, etc.

	DATE	#ATTENDED	#PAID	#UNPAID	% CHANGE FROM PREVIOUS YEAR
Previous Fiscal Year					
Current Fiscal Year					
Next Three Fiscal Years					
Year 1					
Year 2					
Year 3					

AT THE END OF THE THREE-YEAR GRANT PERIOD, IS THERE AN OVERARCHING GOAL YOU EXPECT YOUR ORGANIZATION TO HAVE MET? IF SO, HOW WILL YOU KNOW IF YOU HAVE MET THAT GOAL?

BENCHMARKS – CONSTITUENCY

COMPLETE THIS SECTION IF YOU ARE AN ARTS SERVICE ORGANIZATION, INCLUDING THOSE THAT PROVIDE SERVICES TO INDIVIDUAL ARTISTS OR CONSERVATION/PRESERVATION AND OTHER SERVICES, ETC. (IF NOT, GO TO THE BENCHMARKS - AUDIENCES TAB.)

SKIP ANY SECTION THAT DOES NOT APPLY TO YOUR ORGANIZATION

For all metrics requested, please provide data for the following fiscal year-end dates to align with this Core Support cycle:

- *Previous Fiscal Year: WPF considers the "previous fiscal year" to mean those ending between 11/1/2015 and 10/31/2016.*
 - *Current Fiscal Year: WPF considers the "current fiscal year" to mean those ending between 11/1/2016 and 10/31/2017.*
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 - *Year 2: fiscal years ending between 11/1/2018 and 10/31/2019*
 - *Year 3: fiscal years ending between 11/1/2019 and 10/31/2020*

If you have further questions regarding how to fill out the annual benchmarks, please contact [Olive Mosier](#) or [Jessica Richards](#) at the Foundation.

IF YOUR ORGANIZATION HAS MEMBERSHIPS, WHAT HAVE BEEN THE MEMBERSHIP TRENDS, THAT IS, STEADY STATE, WITH LESS THAN 1% DEVIATION, GROWTH, OR DECLINE, AND BY HOW MUCH?

	DATE	#MEMBERS	#PAID	#UNPAID	% CHANGE FROM PREVIOUS YEAR
Previous Fiscal Year					
Current Fiscal Year					
Next Three Fiscal Years:					
Year 1					
Year 2					
Year 3					

IF YOUR ORGANIZATION OFFERS WORKSHOPS OR TRAINING TO MEMBERS OR NONMEMBERS, WHAT HAVE BEEN THE ATTENDANCE TRENDS, THAT IS, STEADY STATE, WITH LESS THAN 1% DEVIATION, GROWTH, OR DECLINE, AND BY HOW MUCH?

	DATE	#ATTENDED		#PAID	#UNPAID	% CHANGE FROM PREVIOUS YEAR
		MEMBERS	NONMEMBERS			
Previous Fiscal Year						
Current Fiscal Year						
Next Three Fiscal Years:						
Year 1						
Year 2						
Year 3						

IF YOUR ORGANIZATION OFFERS ARTS PROGRAMMING, SUCH AS PERFORMANCES OR ART EXHIBITS, WHAT HAVE BEEN THE ATTENDANCE TRENDS, THAT IS, STEADY STATE, WITH LESS THAN 1% DEVIATION, GROWTH, OR DECLINE, AND BY HOW MUCH?

	DATE	#ATTENDED	#PAID	#UNPAID	% CHANGE FROM PREVIOUS YEAR
Previous Fiscal Year					
Current Fiscal Year					
Next Three Fiscal Years					
Year 1					
Year 2					
Year 3					

IF YOUR ORGANIZATION OFFERS ANNUAL MEETINGS OR CONFERENCES TO MEMBERS OR NONMEMBERS, WHAT HAVE BEEN THE ATTENDANCE TRENDS, THAT IS, STEADY STATE, WITH LESS THAN 1% DEVIATION, GROWTH, OR DECLINE, AND BY HOW MUCH?

	DATE	#ATTENDED		#PAID	#UNPAID	% CHANGE FROM PREVIOUS YEAR
		MEMBERS	NONMEMBERS			
Previous Fiscal Year						
Current Fiscal Year						
Next Three Fiscal Years:						
Year 1						
Year 2						
Year 3						

AT THE END OF THE THREE-YEAR GRANT PERIOD, IS THERE AN OVERARCHING GOAL YOU EXPECT YOUR ORGANIZATION TO HAVE MET? IF SO, HOW WILL YOU KNOW IF YOU HAVE MET THAT GOAL?

AUTHORIZATION/ACCURACY CERTIFICATION

By entering your name below, the individual submitting this Letter of Interest certifies that:

- (1) He/she is an authorized representative of the organization;
- (2) This document has been reviewed and approved for submission by an officer or leader of the organization;
- (3) The information contained herein is accurate;
- (4) The organization does not practice discrimination based on race, gender, religion, age, sexual orientation, or national origin.

Name and title of person certifying this application:

Enter the name and title of the person who is certifying accuracy of information and submission of this form.

ATTACHMENTS

The following attachments are necessary to complete the Letter of Inquiry.

(1) Operating Budgets (Required)

- Annual operating budgets are required for the most recently completed fiscal year, the current fiscal year, and the three fiscal years to be covered by the requested grant. There are five options in the drop-down list below to select for uploading each version of the budget.

(2) Proposal Budget (Required) ([Proposal Budget Template](#))

- Please use the link to download a copy of the worksheet to complete the projected funding sources for each year of the request.

(3) Audited Financial Statements (Required)

Include the audit for the most recently completed fiscal year. If the most recent fiscal year-end audit is unavailable, please submit the following:

- Audited financial statements for the prior fiscal year
- Draft of the current audit (if available)
- Internal statement of activities for current fiscal year-end

(4) Strategic, Business, or Financial Plan (if available)

(5) Board of Directors/Senior Staff Management Team

Do not submit work samples unless requested by the Foundation.