

GRANT PROPOSAL GUIDELINES

The Chester County Community Foundation connects people who care with causes that matter, so their philanthropy makes a difference now and forever.

- The Community Foundation is a collection of Funds: Field of Interest Funds + Donor Advised Funds.
- 99% of the grants issued by the Community Foundation are made possible through the generosity of the Fund Advisors who created donor advised funds. \$2.2+ million is granted annually to nonprofits in Chester County and beyond.
- All Community Foundation Funds accept this grant application form.

Proposals submitted by nonprofits will be considered for 2 types of grants:

1) FIELD OF INTEREST & DONOR ADVISED FUNDS

- ◇ Proposals received **any time throughout the year** are eligible for funding consideration from the Foundation's Field of Interest Funds & Donor Advised Funds.
- ◇ Grant **awards** typically range from **\$500 - \$7,500**.
- ◇ Grant decisions are made **intermittently** throughout the year, as Fund Advisors desire.
- ◇ Proposals are **electronically shared** with Fund Advisors to assist them in making grant decisions.
- ◇ **General operating** grants are encouraged. Nonprofits should be specific about their mission, goals, and measurable outcomes.
- ◇ Grants **focus on Chester County** causes and issues, but **are not limited** to Chester County.
- ◇ Grants may be made to charitable nonprofits working in **all fields of interest** including arts, culture and humanities; education; community improvement; environment; religion; health; and human services.

2) FUND FOR CHESTER COUNTY CAPACITY BUILDING INITIATIVE

- ◇ The goal of the Community Foundation's capacity building grantmaking is to **strengthen the effectiveness of nonprofit organizations serving the Chester County region**.
- ◇ Capacity building proposals received by **September 15** annually will be eligible for this special grant initiative.
- ◇ Capacity building projects should strengthen a nonprofit, in areas including:
 - Mission, Vision & Strategy
 - Governance & Leadership
 - Strategic Relationships
 - Operations and Technology
 - Fundraising & Development
- ◇ Grant **awards** range from **\$500-\$5,000**.
- ◇ NPO's with budgets \$ 750,000 or less preferred
- ◇ Grant monies are distributed by **February**.
- ◇ Nonprofits must be **located in and serve Chester County** to receive a grant from this special initiative.

- A proposal is considered "complete" when the Chester County Community Foundation has confirmed receipt of the **Grant Proposal Summary Sheet, Narrative and Attachments**.
- Proposals are shared electronically online with Fund Advisors and the Grants Committee.
- The electronic form is available at **www.chescocf.org**.

Per IRS regulations, applicants: must be charitable, tax exempt organizations with 501(c)(3) certification and cannot be individuals

- **E-mail proposals to grants@chescocf.org**. Receipt will be confirmed by e-mail.
- Please contact Kevin Baffa or Beth Harper Briglia at (610) 696-8211 or **grants@chescocf.org** if you have any questions. Thank you.

I. CHESTER COUNTY COMMUNITY FOUNDATION GRANT PROPOSAL SUMMARY SHEET

One page only. This page will be shared electronically with Grant Committee Members & Fund Advisors.

Note: If Philanthropy Network of Greater Philadelphia's Common Grant Application is used, the Community Foundation's

Summary Sheet MUST accompany application.

To obtain an electronic version of this application, visit www.chescocf.org

Date Sept 15, 2018

Contact Information

Organization Name: Association for the Colonial Theatre

Executive Director Name: Ken Metzner

Address: PO Box 712 (Mail) Phoenixville, PA 19460

Executive Director E-mail:

ken@thecolonialtheatre.com

Phone: (610) 917-1228

Board of Directors Chair Name: Marian Moskowitz

Website: www.thecolonialtheatre.com

Primary Contact Name: Emily Simmons

Year Incorporated: 1999

Primary Contact E-mail: emily@thecolonialtheatre.com

Has your nonprofit ever applied to the Community Foundation? Yes No Not Sure

Has your nonprofit ever received funding from the Community Foundation? Yes No Not Sure

X Donor Advised Fund(s) Fund for Chester County Don't know/Not sure

Field/s of Interest:

X Arts, Culture & Humanities

Environment/Animal Welfare

Education

Health

Human Services

Religion

Organization Information:

Geographic Area Served (If not all of Chester County, specify primary Chester County regions served): About 90% of all known Colonial Theatre customers originate from Chester (including southerly areas like Kennett Square) and surrounding counties (Montgomery, Delaware, Philadelphia, Bucks and beyond). The remaining 10% are out-of-state or unknown (no address on record). Historically, most patrons hail from a 30 mile radius around the theatre and concertgoers travel from beyond that radius, including from out-of-state.

Describe Population Served and Annual Number of People Served: In the last year, ACT sold over 66,000 tickets to programming; over 20,000 were purchased by supporting members, whose 'dues' entitle them to special benefits. Programming at ACT is all-ages (3 years and up) and tickets and concessions are priced affordably at rates lower than chain theatres. This helps enable access and offsets the cost of parking in the Borough for visitors. Box office sales account for an estimated 50% of total film sales. These lack identifiable patron information; ACT is working to discover ways to capture personal data describing these patrons, including with text-to-sign up.

Each of the Colonial Theatre's three theatres, lobby areas, Garden Suite and adjacent rooftop deck are available for rental and accessible for patrons and visitor with physical disabilities or mobility issues. ACT's programming, which includes a Sensory Friendly film series, free Young Audiences live summer concert series, and film series' like Cult, Fright Night, New World Cinema, and Classic films are intended to attract patrons of all ages and interests.

Mission: Inspire audiences by presenting exceptional and eclectic film and performance for all in Phoenixville's historic Colonial Theatre.

Proposal Summary: ACT is respectfully requesting funding to undertake a strategic analysis of social services and nonprofit organizations in our community. Through structured, direct engagement with the leaders of these organizations, ACT can formalize a plan for new Community Outreach program. The goals and workplan will contribute to a new vision statement and strategic plan. Through discoveries made via the Foundation’s capacity building grant, the Colonial Theatre hopes to make its assets (physical, technical, marketing and knowledge-based) more widely available in ways that advance the missions of these organizations, benefit the lives of their constituents, and expand our own arts audience. To do this effectively, a formal process is required, along with support from stakeholders.

Annual Budget: In lieu of the board-approved budget for the newly begun fiscal year (September 1, 2018 – August 31, 2019), numbers for the recently completed fiscal year are presented here.

| | |
|---|--|
| <u>\$1,457,347</u> | 8 # of Full-Time Equivalent Paid Staff |
| 83 % of budget for program expenses | 15 # of Board Volunteers |
| 7.8 % of budget for administrative expenses | 200 # of Active Non-Board Volunteers |
| 9.1 % of budget for fundraising expenses | 2,000 # of Volunteer Hours |
| <i>100 % total</i> | |

Top 3-5 funding sources: Box Office Income – Film & Live; Concessions; Community Coalition; Membership

Grant Amount Requested from the Community Foundation: \$5,000

II. CHESTER COUNTY COMMUNITY FOUNDATION GRANT PROPOSAL NARRATIVE

Provide clear, concise information. 3 pages maximum.

1. Organization’s history, goals, key achievements and distinctiveness: The 115-year old theatre, originally known as the ‘Colonial Opera House’, is the last surviving of four theatres in the Chester County borough. Harry Houdini, a lion, and Mary Pickford, a friend of builder and owner Harry Brownback, graced the Colonial’s stage in its early years. The iconic Colonial is well known internationally by movie lovers as a setting for the 1958 science fiction classic, *The Blob*, starring a young Steven McQueen. However, to residents who knew Phoenixville after the closure of Phoenix Steel Company in the 1980s, its most memorable role has been as a catalyst for economic revitalization and development. From the turn of the century until 1991, the Colonial was privately owned and operated by a succession of dedicated individuals. In 1997 it faced an uncertain future and a group of community members that included founding Executive Director Mary Foote and Board Members Ken Mumma and Trish Hartline activated to form the nonprofit Association for the Colonial Theatre (ACT) which purchased the venue. The Colonial reopened in 1999 with a screening of the German film, *Run Lola Run*. Over the last 15 years, over \$2 million in building upgrades have been undertaken, a strategic plan was completed, and technological capacity was built. In 2006, the Commonwealth of Pennsylvania Department of Community and Economic Development declared the Colonial Theatre an “Anchor Building”. In 2008, ACT noticed that membership had begun to plateau and sought advice from theatre consultants. The Board and staff learned that without a physical expansion to add program space and patron amenities, future growth was unlikely. It was then that the Colonial began to evaluate a future capital expansion. At that time, the pace of revitalization and business development in the Borough of Phoenixville was not as robust as it is today. ACT’s board knew it could cement progress by attracting more visitors and spending (at least \$24.60 per person, according to sources like Americans for the Arts) to the Borough with more film variety and live concerts. In 2010, the building immediately next door to the Colonial was vacated by its owner, *The Phoenix* newspaper. Its size, configuration, and shared internal wall made it a perfect candidate for an adaptive reuse. The Board of Directors raised and contributed enough money to purchase the site in 2011, for approximately \$750,000, then undertook the planning studies necessary to launch an \$8M fundraising campaign (the core construction costs for the project were ~\$5.6M). In March 2017 after 13 months of construction and via financing from Malvern Federal Bank and Trust, the Colonial Theatre’s ‘new wing’ opened and immediately began

programming film, live concerts, and special events for *three* theatres in two historic buildings joined at the lobby and backstage: the original 1903 Colonial Theatre and the c. 1925 Bank of Phoenixville Building.

Current programs are referenced in the 'Description of Key Initiatives' section of this grant request; these mainly consist of seven days of arthouse and independent film and live concerts and comedy. As a single screen theatre, the Colonial was capable of programming only ~400 feature film screenings annually. Three screens have enabled the presentation of ~3,200 feature screenings a year and a greater number of live concerts than before. A minimum of nine screening times are offered daily, and film, live concerts, and private events can happen concurrently. (Prior to the expansion there was a single 6:30 PM screening on Monday nights, for example.) From September 1, 2018 to date, total attendance has been 66,751. The Colonial is a member of the Philadelphia Cultural Alliance; the Phoenixville Community Coalition; the Phoenixville Regional Chamber of Commerce; the League of Historic American Theatres (LHAT); Art House Convergence; and the National Association of Theatre Owners (NATO).

Funding request: ACT is respectfully requesting funding to identify close partnership opportunities with local and county-wide social services, religious, arts and cultural, and nonprofit organizations. Through a series of focused and professionally facilitated meetings with arts and non-arts related leaders of community organizations, ACT will identify how to develop programming that helps advance their missions and engage with their constituents while advancing the Colonial Theatre's own mission. This exploration is intended to create a framework for a formalized Community Outreach program and staff position (part time). We hope to discover how to activate the Colonial Theatre's significant facilities, develop existing programs (film and live concerts), and whether adding new art forms such as movement and storytelling could deepen our connection to community. The work undertaken through this capacity building grant from the Chester County Community Foundation will inform a future strategic plan and the case statement for other grants and funding to enact the plan. Therefore, it addresses two of the capacity-building areas established in the guidelines for grants of this nature: 'strategic relationships' and 'mission, vision and strategy.'

• Description of key initiatives:

Film: Arthouse and independent film presented daily in 35mm and digital formats. Film series include Classic, Cult, New World, Fright Night, Sensory Friendly, and new releases. Film programming includes grant-funded film series like Science on Screen®, now in its third year and featuring inventive pairings of film with scientists from fields related to film content or themes. SoS is made possible through a generous grant from the Coolidge Corner Theatre Foundation, with support from the Alfred P. Sloan Foundation.

Young Audiences (YA) Programs: Film for kids and teens (ages 8 to 17) throughout the year and live concerts featuring award-winning children's musicians, bands, and performers for children ages 3+. Includes bilingual live concerts and film. YA Live concerts are attended by groups by daycare and summer camps like Brightside Academy, Phoenixville Area Children's Early Learning Center, and Magic Moments. In the recently completed fiscal year, 4,402 attended all YA programs: 3,125 film and 1,277 live.

Live Concerts & Performance: Concerts and comedy are presented in partnership with Point Entertainment and range from classic rock to folk. To date, live concerts and comedy have mainly been presented in partnership with Point Entertainment with several exceptions booked by Colonial Theatre staff. In the recently completed fiscal year, 10,823 attended live programs at the Colonial Theatre (non-YA); the majority (9,510) were Point concert attendees

Theatre organ concerts and other event rentals: The Colonial Theatre's rare Wurlitzer Opus 585 theatre organ is owned and restored by the Theatre Organ Society of the Delaware Valley (TOSDV). It consists of a console hidden beneath the stage in the original 1903 auditorium and 1,692 pipes. The organ is featured in concerts and accompanies silent film. Like TOSDV, corporations, individuals, and nonprofits can rent various areas of the Colonial for private and public events, with or without film or live performance components. Attendance at Theatre organ concerts (live and film) was 382. Rental attendance for rentals involving ticketing was 1,756. Total guest count for non-ticketed events is not tracked or reported by ACT.

Blobfest and other special events: Blobfest commemorates our theatre's history and helps define Phoenixville's sense of place. This year, over 2,267 attended Blobfest. It consists of a live stage show (written, produced, and acted by Blobfest committee members); a short film contest called 'The Shortys'; a re-enactment of the 'run out' scene in the Blob; several double features each including The Blob; guest appearances and special screenings; and a

street fair. Additional special events include a celebration of Member-supported cinema held on Oscar awards night, Robert Burns Memorial Whisky Tasting event, Independence Day Fireworks fundraiser, and new December donor appreciation event.

• **Specific needs and issues to be addressed**

The Colonial Theatre has catalyzed significant change in the surrounding community over the last two decades. Internally, it has experienced equally transformative change via its major building expansion and subsequent programming growth, and most recently, the departure of a founder. ACT's founding Executive Director stepped down on July 31 after more than 22 years of dedicated service. Under the leadership of Executive Director, Ken Metzner, who joined the staff on August 1, 2018, ACT plans to curate a wider variety of live performance including performance forms like dance; is piloting a new education program this fall called 'Illuminating Cinema'; and is beginning to strategically assess its overall audience and community engagement strategies. At this critical juncture in the organization's life, we are also mindful of major economic and demographic changes in the Borough of Phoenixville, as well as of the increasing competition for resources by area nonprofits and need. These require thoughtful consideration for ACT to remain relevant to the lives of its constituents and to facilitate inclusivity. Accordingly, part of this leadership transition requires re-assessing how the Colonial can best serve the needs of its diverse and evolving community, be it via offering different kinds of arts programming, opportunities for creative self-expression, a welcoming space for community-building, the hosting and/or nurturing of arts and other civic and nonprofit groups that need places in which to convene and program, etc. The support of community leaders like the Chester County Community Foundation is needed if ACT is to navigate organizational change with 'community' as our 'north'.

With this grant proposal, ACT is requesting funding to assess the needs of various community groups and their constituents. This will be accomplished through a series of at least 6 professionally facilitated meetings with organizations like Open Hearth, Petra, Alianzas de Phoenixville, PAPA (Phoenixville Area Positive Alternatives), Orion Communities and others working to solve systemic community issues. During the exploration of their needs and ways that the arts could help advance their mission, participants will be able to engage with each other and the Colonial via either a blog or chat group. The Colonial Theatre has unique and specific resources that small nonprofits do not, including facilities, considerable marketing reach, ticketing and events infrastructure, and knowledge of film, for example. We plan to explore if, how and to what extent ACT can leverage these built-in assets in a dedicated manner to deepen our engagement with community. For example, many nonprofits already pay the Colonial Theatre to rent space for documentary films with panel discussions that illuminate social issues. Perhaps we can 'hold space' for these organizations by creating a fund to enable that work – or support their work in another, relevant manner articulated by each organization. Some of the ways that ACT already connects to community include:

- Our film tickets are priced less expensively than area theatre chains because earned revenues are offset by donations, membership and grants.
- Offering admission-free, high quality live children's concerts via the annual Young Audiences series.
- Assisting 112 area social services, community organizations, and churches in their fundraising and outreach efforts through the donation of 228 tickets and complimentary memberships valued at \$3,906 dollars this year.
- Meeting community needs by addressing social justice issues via film. ACT offers discounted rental and screening space, as well as film booking services, ticketing infrastructure, and a considerable marketing distribution for nonprofits who lack the staffing, space and resources. Examples of films presented by nonprofits with panel discussions in the last year and a half include: *The Hunting Ground* screening and panel discussion hosted by the Chester County Crime Victims Center and Fund for Women and Girls; *Brother Outsider*, presented by Diversity in Action, Phoenixville and the LGBT Equality Alliance of Chester County (without panel); *Tomorrow*, presented by the Phoenixville Green Team and Southeastern PA Group of the Sierra Club, including a meet and greet and panel discussion with Judy Wicks, Founder of White Dog Café, and Jim Wylie; and *Sustainable*, presented by Lundale Farm with panel discussion that included Dean Carlson of Wyebrook Farms.

• Why it is important to fund this now

Support from the Chester County Community Fund will provide a much-needed capacity building grant required to undertake critical re-assessment of our programs, audience, and strategic direction during a major leadership transition. This project will help catalyze and inform ACT's strategic planning process (we do not currently have a strategic plan). Additionally, it can directly benefit many of CCCF's other grantees, possibly eliminate duplication of funding or services, and deepen county-wide engagement with the arts via exciting new partnerships.

3. How impact and results will be demonstrated

A culminating report with notes from each of six (6) professionally facilitated group meetings with area nonprofit/religious/community groups will be shared in print form with the Chester County Community Foundation. There will be a formal culminating meeting where findings and next steps are presented publicly; Chester County Community Foundation staff, program participants and their stakeholders, and community leaders will be invited to attend and offer feedback. During the grant period, ACT will also launch a blog or chat where participants and other community members can engage with each other to explore 'partnerships' and how best to use arts and cultural programming to enhance their work. The blog or chat will be shared with the Foundation if participants consent.

III. ATTACHMENTS

E-mail or mail this support information

- X 1. Copy of 501 (c) (3) federal tax-exempt letter
- X 2. List of Board of Directors, with their affiliations
- X 3. Most recent annual report and financial statement, audited if available
- X 4. Itemized organizational operating budget with actual results for prior fiscal year and current fiscal year to date

The Board of Directors will vote to approve the current fiscal year budget in its October 2018 meeting. Therefore, ACT has enclosed the budget for its prior fiscal year, which ended on August 31, 2018, and can provide the new budget, once approved.

- X 5. If capacity building initiative, itemized budget (including external consultant's proposal, if applicable).
- X 6. Current strategic plan. If your nonprofit does not have a current strategic plan, explain why. *ACT's last strategic plan was conducted in 2005; a market demand analysis and campaign feasibility study were undertaken in 2011/2012 to lay the groundwork for our recent building expansion campaign. The activities facilitated by this grant from the Chester County Community Foundation will contribute some of the discoveries for a new strategic plan with 'community' at its core.*

E-mail completed proposals to grants@chescofc.org

Please contact Kevin Baffa or Beth Harper Briglia at (610) 696-8211 or grants@chescofc.org if you have any questions. Thank you.

Chester County
COMMUNITY FOUNDATION
*Connecting people who care with causes that matter,
so their legacies make a difference.*

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CAPACITY BUILDING GRANT PROPOSALS

“Capacity building is whatever is needed to bring a nonprofit to the next level of operational, programmatic, financial, or organizational maturity, in order to more effectively and efficiently fulfill its mission.” *National Council of Nonprofits*

Capacity building initiatives may include (but are not limited to) projects which address:

- **MISSION, VISION & STRATEGY:** Organizational Assessment; Strategic & Business Planning
- **GOVERNANCE & LEADERSHIP:** Board Development; Executive Transition/Succession Planning; Leadership Development; Staff Training & Professional Development
- **STRATEGIC RELATIONSHIPS:** Coalition Building; Collaboration; Mergers & Acquisitions; Strategic Restructuring
- **DEVELOPMENT:** Donor Identification, Cultivation, Development & Stewardship; Development Campaigns (Annual, Capital, Planned Giving, Major Gifts); Earned Income Development; Social Enterprise Feasibility & Development; Marketing, Branding & Communications
- **OPERATIONS:** Business Continuity Planning; Financial Management; Human Resources; Volunteer Management; Industry Certification; Risk Management; Technology Improvements

Capacity Building Grants have been used to fund the following initiatives:

- **Strategic Analysis, Plan development and implementation**
- **Technology enhancements, including website design and development; donor tracking and development software**
- **Marketing Materials**
- **Development of Financial management and control systems**

Please note the following regarding the grant process at the Chester County Community Foundation:

Donor Advised Funds: Approximately 99% of the grants issued by the Community Foundation are through the generosity of the Fund Advisors who created donor advised funds. Approximately \$2.2 + million is granted annually to nonprofits in Chester County and beyond.

Capacity Building Grants: The Community Foundation has a pool of unrestricted funding to support capacity building initiatives. A separate grant proposal (using the same application format) must be submitted to be considered for a capacity building grant.

To inform donors of grant proposals that have been received by the Foundation, the grant proposal cover sheet and narrative are posted on the Community Foundation’s website with a link to the nonprofit’s website. Periodically, our donors are mailed a written list of all grant applications received, and directed to the grant proposal webpage so they can review active grant proposals. Community Foundation staff also discuss active grant proposals during donor meetings, when donors are interested in the causes served by the nonprofit.

E-mail completed proposals to grants@chescofc.org
Please contact Kevin Baffa or Beth Harper Briglia at (610) 696-8211 or grants@chescofc.org
if you have any questions. Thank you.