



The
Pew Center
for Arts
& Heritage

2024

APPLICATION GUIDELINES EVOLVING FUTURES

Grants for adaptability and sustainability

Accessibility and Support

The Center is committed to providing accessibility to all applicants.

Staff members are prepared to assist applicants who require special accommodation to review our guidelines or to use our online application system.

Some translation services may be available.

Please contact us at help@pewcenterarts.org or call **267-350-4902** for assistance.

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Program Modifications

As of their release date in January 2024, these guidelines represent the complete Evolving Futures Application instructions for grant applicants. The Pew Center for Arts & Heritage and The Pew Charitable Trusts reserve the right to change and/or modify these Guidelines at any future time in response to experience gained from operations, input from applicants and recipients, external evaluations, and the community. Potential applicants will be alerted to updates to the Guidelines in a timely manner.

LETTER FROM THE EXECUTIVE DIRECTOR

Dear colleagues and Center constituents,

I am pleased to share with you the 2024 Application Guidelines for Evolving Futures grants. Recognizing the many critical operational issues now facing the cultural sector, these grants have been designed to resource organizational adaptations that are part of an informed strategic vision leading to long-term sustainability.

In our 2023 grant cycle, the Center [awarded more than \\$9 million](#) to Philadelphia area organizations through 28 Project grants and to individual artists through 12 fellowships. We are gratified to support a remarkably broad range of hybrid and discipline-specific public programs and creative works that reflect the breadth, diversity, and vitality of our region's cultural ecology.

Through our grantmaking, the Center carries out The Pew Charitable Trusts' strategic goal of fostering a vibrant civic life by bringing high-quality, meaningful experiences to a wide range of audiences in the Philadelphia region.

We look forward to hearing from you as we begin a new grant-making cycle and deeply appreciate your participation in the Center's grants process.

With best wishes for your continued success,

A handwritten signature in black ink that reads "Paula Marincola". The signature is fluid and cursive, with a large initial "P" and "M".

Paula Marincola
Executive Director

NEW GRANT CATEGORY: EVOLVING FUTURES

In an effort to support thriving communities and to acknowledge the challenges and opportunities that this critical post-pandemic moment in the cultural sector presents, the Center will offer Evolving Futures development grants for organizations.

The COVID-19 pandemic has left a paradigm shift in its wake. The cultural sector is experiencing long-term structural changes and persistent serious challenges. These include audience attrition and the waning effectiveness of the subscription model; demographic change in audiences; limited and constrained financial resources and donor fatigue; faltering equity efforts; and widespread staff-related issues, including layoffs, turnover, burnout, and labor costs. These factors point to the critical need for the nonprofit sector to consider new operational efforts and models—both to evolve and to sustain itself going forward.

To this end, the Center will fund Evolving Futures grants to offer resources to organizations that are willing and ready to adapt or evolve their structures and systems for greater viability.

Evolving Futures projects should be part of a strategic vision designed to result in demonstrably greater viability and sustainability.

Examples of possible Evolving Futures projects include but are not limited to—

- Business model evolution
- Strategic alliances
- Efforts to adapt administrative structures and processes for greater efficiency and effectiveness
- Creation of shared or outsourced infrastructure or administration
- Workforce adaptation/restructure, including continuing efforts around diversity, equity, accessibility, and inclusion
- Mergers, including with for-profit entities

Goals must be clear. Plans must be actionable and completed within 24 months.

Organizations applying for Evolving Futures grants will be asked to describe the “what/why/how and with whom;” their projected outcomes; and their thoughtful, well-informed, and realistic plans.

Applicants may choose between Evolving Futures and cultural Project grants but can only apply for one grant in the 2024 cycle.

EVOLVING FUTURES (continued)

Multi-Organization Evolving Futures grants

Some applicants may decide that their evolutions would be best served by Multi-Organization grants. Multiple organizations may submit a single application to propose a significant strategic alliance. To apply in this category, consult first with Center staff.

Grant Periods

The implementation period for Evolving Futures grants begins **October 1, 2024** and ends by **October 1, 2026**.

ELIGIBILITY for Evolving Futures grants

Applicant organizations must have as their primary mission and defining purpose the presentation of art or public history programs for public audiences.

- Organizations must be located in the five-county Philadelphia area (Bucks, Chester, Delaware, Montgomery, and Philadelphia counties).
- Organizations must have 501(c)(3) designation at the time of applying. The Center will not accept applications from fiscally sponsored organizations or nonprofits intending to serve as pass-throughs for grant funds.
- Universities and schools are not eligible for Evolving Futures grants, although independent cost centers within universities may be.
- Organizations must have operating budgets of \$150K or above and have paid, professional artistic/curatorial and managerial staff.
- Organizations' finances must be sound and must evidence tenable organizational stability. (See page 5, "[Financial Review](#).")
- Grantees with open Project grants are eligible to apply.
- Grantees with open Recovery grants are ineligible to apply.
- Organizations are ineligible if they are managed by current employees of The Pew Center for Arts & Heritage or The Pew Charitable Trusts; members of such employees' households; or people closely related to such employees through blood, marriage, or domestic partnership.

INELIGIBLE COSTS: *Evolving Futures grants will not support—*

- capital or facilities improvements or technology upgrades as a primary focus;
- real estate expenditures;
- renovations;
- debt service or retirement funding; or
- endowment funds.

DEADLINE: Organizations interested in applying must contact apply@pewcenterarts.org by **Thursday, February 15, 2024** to request a meeting with Center staff.

GRANT REQUEST AMOUNTS

Grant requests are subject to review and approval by Center staff.

Maximum allowable grant requests for all single-organization Evolving Futures grants will be tiered to organizational budget size and range from \$40,000 to \$400,000, as follows:

Applicant Annual Operating Budget	Maximum Grant Request
\$150,000 – 300,000	\$80,000
\$300,000 – 1 million	\$200,000
\$1 – 5 million	\$300,000
Over \$5 million	\$400,000

Multi-Organization grant requests

Organizations may choose to pool their efforts through a collaborative alliance. Multi-Organization grant requests will also be tiered to the budget sizes of the collaborating institutions. Multi-Organization grants may not exceed \$800,000 in total.

Financial review to determine eligibility and maximum request amounts

The Center conducts financial reviews of all applicant organizations. Applicants must submit the last three years of financial statements. Audits are preferred whenever available and are required for organizations with annual budgets above \$500,000. Outside financial reviews are accepted for organizations with annual budgets under \$500,000.

The Center requires that applicant organizations' finances are sound and evidence tenable organizational stability. Ongoing operating deficits greater than 10% will be reviewed by the Center's financial consultants and will require additional discussion with program staff before determining whether an application can proceed further through the Center's adjudicatory process.

APPLICATION PROCESS AND DEADLINES

Application begins with a scheduled conversation with the Center’s Executive Director and Senior Program staff.

STEP 1 | Contact Us to Schedule a Meeting

Schedule a meeting to discuss your project idea. Your Executive/Managing Director or a Board member must attend. Write to apply@pewcenterarts.org to make this appointment.

Please include a few sentences about your idea with your appointment request.

Following the initial meeting, Center staff will advise potential applicants of their eligibility to move forward with a proposal.

Complete this step by *Thursday, February 15, 2024.*

(Meetings must occur by March 1, 2024.)

STEP 2 | Submit Summary Documents: *Description, Budget, Financial Audits*

Following the meeting with Center staff, applicants should use January–early March to focus their ideas and then to submit a 1–2 page written description of their project, as well as an estimated budget.

Applicants should send the most recent 3 years of audits (or financial reviews, for organizations with budgets under \$500,000) to the Center. *(See the next page, “[Summary Documents Detailed](#)”.)*

Send your written description, estimated budget, and audits to apply@pewcenterarts.org.

Complete this step by *Thursday, March 14, 2024.*

Following review of summary documents, the Center will advise organizations of their eligibility to move forward to the full Application.

STEP 3 | Complete the Application

The Center will provide eligible Evolving Futures grant applicants with access to the application form in April 2024. This application will require a more fully explicated budget and additional materials detailed on *pages 8–11, “[How to Apply](#)”.*

Complete and submit the Application by *Thursday, June 6, 2024 at 4 p.m.*

Center staff will notify you by late August 2024 about the panel’s funding decision. The Center’s public announcement of all grants will be made in September 2024.

SUMMARY DOCUMENTS DETAILED

Following a required conversation with the Center’s Executive Director, Program staff will advise potential applicants of their eligibility to move forward with a proposal. At that time, advancing applicants should create and submit the following to the Center:

A WRITTEN DESCRIPTION OF THE PROJECT

Applicants’ 1–2 page written description of their project should address these questions:

- *With respect to future sustainability, what structural or operational challenges or opportunities exist for your organization in this moment?*
- *What evolution do you propose?*
- *Why is this evolution important for your organization? How would this strategic work position you for greater sustainability?*

AN ESTIMATED BUDGET FOR THE PROJECT

Below your written description, estimate four budget totals—one for each of the following budget categories:

- Consulting/Training/Other Personnel Fees
- Related Staff Salaries and Costs (See page 9, [“A note on Related Staff Salaries and Costs.”](#))
- Travel and Subsistence/Housing
- Other Direct Costs

THREE YEARS OF AUDITED FINANCIAL STATEMENTS

With the materials above, applicants at this stage must submit their last three years of audited financial statements. Organizations with budgets under \$500,000 may provide outside financial reviews. Please share these documents as PDFs either via a download link or as email attachments. Indicate in your message to us if any financial statements are drafts. (See page 5, [“Financial Review”](#) for full information.)

DEADLINE: Send your written description of the project, estimated budget, and required financial documents to apply@pewcenterarts.org by **Thursday, March 14, 2024.**

HOW TO APPLY: APPLICATION QUESTIONS

**The following questions will appear in the full Application.
Additional required materials are outlined on [pages 9–11](#).**

QUESTIONS

(Word limits for each answer are in parentheses.)

1. Please provide a description of your organization. (100 words)
2. What is the critical structural or operational challenge that exists for your organization with respect to your future sustainability? How did you identify this challenge? (200 words)
3. What evolution to your business model do you propose? How will this evolution help your organization? What preparatory research and rationale have helped you to define this proposed initiative? (300 words)
4. What are the specific goals and expected outcomes of this adaptation? How will this strategic work position your organization for greater sustainability? Please be specific. (200 words)
5. Describe the scope of work that you will undertake to affect this change. What are the phases of this work? What have you already set in motion? What is the end-point? (300 words)
6. With whom will you work on this process of change? What roles and responsibilities will each collaborating partner/consultant/participant take on? (300 words)
7. In what ways are you considering a diversity of voices and viewpoints as you select your collaborators? (150 words)
8. Please describe the nature of your organizational commitment to this evolution, including the degree of commitment from your board. (100 words)
9. How will you evaluate the success of this evolution? Please be specific. (150 words)

HOW TO APPLY: APPLICATION BUDGET

Grant request amounts are determined after Center staff review and approval.

At the full Application stage, the Center will provide a Budget Form to allow you to detail anticipated project income and expenses.

INCOME

The Center does not require matching funds, though additional income to fund your project is welcome. If your total Evolving Futures budget exceeds your grant request, please provide detail about additional income that your organization plans to put toward costs. Include grants and contributions, cash allocations, and earned income.

EXPENSES

Budget expense categories include the following:

- Consulting/Training/Other Personnel Fees
- Related Staff Salaries and Costs *
- Travel and Subsistence/Housing
- Other Direct Costs

At the Application stage, please use the Budget Form to break down expenditures on individual lines beneath these category headers.

BUDGET NOTES

Panelists study budgets. For each line-item in your budget, please use the “Budget Notes” field to detail context and to demonstrate how you calculated budget amounts. This information will help panelists to follow the logic of your budgeting.

*** Important note on Related Staff Salaries and Costs**

Existing staff salaries may be included proportionate to the essential project work performed. The percentage of time spent on the project should be included in the Budget Notes. New staff salary lines must be accompanied by a plan, described in the narrative, for how your organization will sustain these salaries, as needed, beyond the term of the grant. Combined existing- and new-salary lines may not exceed 25% of the full grant request.

HOW TO APPLY: SITE SAMPLES AND PLANNING DOCUMENTS

Strong samples will complement your proposal and assist the panel in understanding and contextualizing your goals. We encourage applicants to discuss these samples with Center staff before submitting an Application. Staff may be able to offer guidance.

Provide up to 5 relevant images (or one video and 4 images) of your organization/venue(s). Include views of the exterior as well as interiors where the public encounters your work.

You may also provide up to 3 relevant documents as PDFs. Executive summaries are preferred in all cases over lengthy documents. Total combined page-count should not exceed 15 pages. Examples of relevant PDFs include summaries of strategic plans, past evaluations, and feasibility studies.

Space will be provided for you to explain the relevance of each sample. Use this space to connect-the-dots between your work samples and your answers to the narrative questions.

Please do not submit—

- Promotional videos or trailers
- Filmed interviews
- Samplers or montages of moving image or audio material
- Reviews, press, or marketing collateral

HOW TO APPLY: CHECKLIST OF ADDITIONAL REQUIRED MATERIALS

The Application will also require the following:

Project Timeline

A concise description of key activities, time frame, and staff associated with each stage of the planning and implementation of the project.

Project Collaborator Letters of Commitment and Background Narratives (PDFs)

- Each letter of commitment from a collaborator should be formatted as a one-page PDF. The letter should describe the following: knowledge about and interest in the project, scope of work, fees for project involvement, and time frame for work. These letters are most effective when submitted on the participant's letterhead and signed by hand. Alternately, the letters should be clearly sourced from the participant's email address.
- Background narratives to describe each collaborator (no more than 75 words each) should accompany each letter of commitment. Include aspects of the collaborator's history of practice that relate directly to your Evolving Futures project content. Include major achievements as relevant, but avoid testimonials and lists of awards, etc.

Staff and Board List (PDF)

A list of your organization's professional staff and board members. Indicate any who are expected to leave the organization before the project is complete.

Letter of Commitment from Board Chair/Governing Official (PDF)

A succinct letter stating your governing Board's commitment for the full term of the project, authored by the Board Chair. For cost-centers within academic institutions, these letters should be signed by the Board Chair of the cost-center or the university Provost.

HOW APPLICATIONS ARE EVALUATED

Peer Panel Review

All Applications are reviewed—and all grants are determined—by a diverse panel of arts and culture practitioners from outside of the Center’s funding region. **These panelists are chosen for their expertise in the areas of practice reflected in the applicant pool.** The work they do in their regions is analogous to work happening in Philadelphia.

A panel chair leads the discussion in relationship to the Center’s evaluative criteria. Center Program staff members facilitate the meetings for the panelists but do not take part in their conversations.

Applications are reviewed one-by-one and on their own merits. The panel does not compare one application to any other.

Panelist selection changes from year to year, though some individuals may serve more than once. Panelists’ names appear on the Center’s website once grant awards are announced.

Staff of The Pew Center for Arts & Heritage and of The Pew Charitable Trusts are not members of the panel and do not determine grant recipients. Conversations between applicants and Center staff do not privilege any organization or proposal.

Application Scoring

Panelists provide three scores, one each for Excellence, Readiness to Implement Process, and Impact and Ability to Meet Stated Goals. The total average of these three scores represents the final score of the Application.

The following ranking scale is used to score each Application.

5.0	Outstanding in relation to all the criteria
4.0 – 4.9	Very good to excellent in relation to the majority of the criteria
3.0 – 3.9	Fair to competent: meets some criteria
2.0 – 2.9	Insufficient competence: does not meet a sufficient number of criteria
1.0 – 1.9	Does not meet professional standards

HOW APPLICATIONS ARE EVALUATED (continued)

Panel discussion and scoring center around Excellence, Readiness to Implement Process, and Impact and Ability to Meet Stated Goals. These criteria are defined using the following indicators.

EXCELLENCE

Panelists arrive at their scores after reviewing these indicators of Excellence:

- Critical challenge has been clearly identified.
- Proposed business model evolution and the underlying research and rationale are laid out.
- Goals and outcomes are clearly stated, measurable, and will positively impact organizational sustainability.
- Scope of work is well-defined and scaled to nature of the evolution.
- Timeline supports realization of proposed goals.
- Organization-wide commitment to evolution is demonstrated across staff, leadership, and board.

READINESS TO IMPLEMENT PROCESS

Panelists arrive at their scores after reviewing these indicators of Readiness:

- Collaborators are well chosen for their roles and possess expertise that aligns with their roles.
- Budget is sufficiently detailed, realistic, and supports the activities described in the Application.
- Proposal provides specific evidence of readiness to organize, manage, and steward the evolution.

HOW APPLICATIONS ARE EVALUATED (continued)

IMPACT AND ABILITY TO MEET STATED GOALS

Panelists arrive at their scores after reviewing these indicators of Impact:

- Project personnel represent a diversity of viewpoints and contribute the cultural competencies necessary to reach project goals.
- Proposal makes a convincing, well-grounded case that proposed evolution to the business model can lead to future sustainability.
- Evaluation methods/criteria are appropriately calibrated in their assessment of project success. Evaluation is actionable and informs future activities.

ADVICE & ASSISTANCE: CONTACT US

Center Program staff members meet with all applicants and are available to offer guidance throughout the process.

The Pew Center for Arts & Heritage staff is available to answer your questions by phone or to meet with you Monday–Friday from 9 a.m.–5 p.m. Contact us at apply@pewcenterarts.org.

Center Program Staff

Executive Director

Paula Marincola

Program Director

Kelly Shindler, *Exhibitions & Public Interpretation*

Program Officers

Zach Blackwood, *Community Connection and Audience Participation*

Murph Henderson, *Performance and Program Administration*

Alec Unkovic, *Visual Art and Creative Practices*

Program Assistants

Ana Gabriela Jiménez, *Exhibitions & Public Interpretation*

Alfiatul (Alfi) Nurdin, *Performance*