

**METCALF
FOUNDATION**

Stories from the Inc.

Preparing Your 2015 Application

February 2015

#CreativeStrategiesInc

Strategic Initiatives

- ▶ 2001-2012
- ▶ over \$11.1 million invested
- ▶ 115 grants awarded to 84 different companies

#CreativeStrategiesInc 2

Strategic Initiatives

- ▶ multi-year investment in professional performing arts companies
- ▶ companies propose their own solutions to their most pressing challenges

Creative Strategies Incubator

- ▶ multi-year investment in professional performing arts companies
- ▶ companies propose their own solutions
- ▶ additional components:
 - learning network
 - additional leadership resources
 - participating companies expected to share learning with sector

Focus Issue

- ▶ strongest applications come from real knowledge and interest in Focus Issue
 - What are the important writings on new and alternative revenues?
 - What are other companies trying, in or outside of Canada, that is particularly exciting or innovative?

Focus Issue

- ▶ strongest applications come from real knowledge and interest in Focus Issue
- ▶ most successful applications start from this place of inquiry and then determine what their proposed Supported Initiative will be
 - appropriate for your company – best course forward for your company
 - builds on mandate or current activity of company

Focus Issue

Important Considerations

- ▶ the more creative, the better the likelihood of funding...
- ▶ the more grounded in learning around this Focus Issue, the better the likelihood of funding...
- ▶ really not looking for “We just want to hire a fundraiser...”

Application Process

- ▶ two-part application process:
- ▶ letter of interest – due March 23
 - invitation to submit application – by March 30
 - Program Director speaks with all organizations submitting full applications
- ▶ full application – due May 4
 - results – by June 26

Letters of Interest

- ▶ brief background to company
 - least important section – brief
 - if collaborative application, should introduce all partners

Letters of Interest

- ▶ brief background to company
- ▶ outline your proposed initiative
 - most important section
 - Is your proposed initiative focused, clearly articulated, well thought out, achievable?

Letters of Interest

- ▶ brief background to company
- ▶ outline your proposed initiative
- ▶ names/titles of people who will participate in Learning Network
 - in full application stage, each of these people will need to provide a statement regarding what they hope to gain from the Learning Network (ascertain their willingness before you put their names down...)
 - not so many people that it will become unwieldy for Learning Network (or application process)

Letters of Interest

- ▶ brief background to company
- ▶ outline your proposed initiative
- ▶ names/titles of people who will participate in Learning Network
- ▶ experience working in collaborative learning environments
 - could be company or individual experience

Letters of Interest

Important Considerations

- ▶ submitted only in pdf form
- ▶ need Metcalf cover sheet
- ▶ three page maximum (honest three pages...)
- ▶ description of proposed initiative most important section for letter of interest
- ▶ application deadline firm – all materials must be received by 5:00 pm on Monday, March 23

What is Metcalf looking for?

- ▶ Is the applicant eligible?
 - registered charity
 - professional performing arts organization
 - based in Toronto
 - three years' production history
 - addresses Focus Issue
 - not an operating request
 - applicant is not currently receiving Strategic Initiatives or Creative Strategies Incubator funding

What is Metcalf looking for?

- ▶ Is the proposed initiative compelling?
 - Is it new for this company? Is it innovative for the sector?
 - Is it focused? Was the company thoughtful and rigorous in the development of this plan?
 - Is it achievable? Is it achievable on the proposed budget?
 - Is the proposal clearly written?

What is Metcalf looking for?

- ▶ Does the amount of funding requested feel appropriate for the proposed initiative?
 - Is it within the program parameters?
 - Is it too much money? Does it feel “padded”? Does it feel like a “disguised” request for operating support?
 - Is it too little money? Is the proposed activity really possible for this amount of money?
 - Do you really need the same amount of money for every year of the proposed activity?

What is Metcalf looking for?

- ▶ How would this company and this proposal contribute to the Learning Network?
 - Is this a new, creative way to approach the Focus Issue?
 - Would this company/these people bring diversity to the Learning Network? (discipline, company size, art form)
 - Is this a company with a strong history of leadership in the sector, particularly at the local level?

Common Challenges

- ▶ organization not eligible

Common Challenges

- ▶ organization not eligible
- ▶ doesn't really address the Focus Issue
 - “catch-all” application
 - something that we really want to do, with the focus issue addressed “on the side”

Common Challenges

- ▶ organization not eligible
- ▶ doesn't really address the Focus Issue
- ▶ not fully thought through
 - Is the thinking clear and clearly articulated?
 - Is the plan fully developed?
 - Is it sustainable? Does the requested amount make sense?
 - “If we build it...”

Common Challenges

- ▶ organization not eligible
- ▶ doesn't really address the Focus Issue
- ▶ not fully thought through
- ▶ “disguised” application for operating funds
 - Is this simply an application to hire more staff?
 - Does this support a program that is already in operation?

Common Challenges

- ▶ organization not eligible
- ▶ doesn't really address the Focus Issue
- ▶ not fully thought through
- ▶ “disguised” application for operating funds
- ▶ “this is what you gave money to [company x] for...” “this is what Metcalf funds...”

Common Challenges

▶ sorry...

