

GEORGE S. AND DOLORES DORÉ ECCLES F O U N D A T I O N

2018 FORM

GRANT APPLICATION INSTRUCTIONS

Read these instructions thoroughly prior to completing the grant application.

This form is updated annually; please make sure you are using the 2018 form.

Incomplete applications or those that do not meet current guidelines may not receive consideration.

Required elements of the application (include in this order):

- G 1. Completed Grant Application Form (Sections A through E that follow)
- G 2. Full project/program budget, one page
- G 3. Cover letter from President, Executive Director or CEO
- G 4. List of your organization's board of directors and officers
- G 5. Two current letters of support for your organization and project/program
(These must accompany the application when submitted. They should be representative of individuals/organizations unrelated to your board of directors.)
- G 6. Photographs and/or architectural renderings, with sq.ft. indicated
(As applicable for construction, restoration, and conservation projects; please submit in 8 ½ x 11" page format if possible.)
- G 7. ~~Your organization's current 501(c)(3) IRS determination letter
(Not required for cities, counties, public schools or state-owned colleges or universities.)~~
- G 8. Your most recent balance sheet *(a separate sheet from your audit)*
- G 9. Your most recent audited financial statement *(If you do not have an audited statement, include a profit & loss statement instead. The profit & loss statement should balance with the Annual Operating Budget, Section D.)*
- G 10. Optional: relevant pamphlets/brochures or other information *(keep to a minimum)*

Required format of the application when submitted:

- Use Times New Roman 12pt type; if space is insufficient, **you may include 1-2 extra pages.**
- There is no need to add table of contents, page numbers, or section dividers to the application.
- **Please do not** bind, staple, punch holes in, or add labels to the application or attachments.
- Submit two hard copies of the completed application and all attachments.
- ~~Submit one additional copy of application, Board of Directors list, and project budget in Word (NOT~~
~~Macintosh or PDF formats, please) on a new and labeled CD, DVD or USB Flash Drive.~~
- Send the completed application and all attachments to the Development Office. We will deliver to the Foundation. Please address any cover letters to Lisa Eccles – Address below.
Lisa Eccles, President & COO
George S. and Dolores Doré Eccles Foundation
79 South Main Street, 14th Floor

Salt Lake City, Utah 84111

Required follow-up to the application:

If significant changes occur in the status of your project/program after submission of an application, it is your responsibility to contact the Foundation and provide the updated information. Please do so via e-mail if possible. In particular, **notify the Foundation of changes in the goals, budget, time-line, and fund-raising progress**, including any major grants received.

GEORGE S. AND DOLORES DORÉ ECCLES
F O U N D A T I O N

GRANT APPLICATION FORM

All application information will be kept confidential.

Date: February 6, 2018

APPLICANT ORGANIZATION:

Organization Name: Pioneer Theatre Company

Organization Name listed on 501-(c)(3): University of Utah

Address: 300 South 1400 East Rm. 325

City/State/Zip: Salt Lake City, Utah 84112

County: Salt Lake County

Website Address (if applicable): www.pioneertheatre.org

Contact Person: Sarah Young

Title: Director of Annual Giving

Phone: 801-585-3196 E-mail: sarah.young@ptc.utah.edu

FAX: 801-581-5472

Organization President/Director/CEO: Chris Lino

Title: Managing Director

Phone: 801-581-6357 E-mail: chris.lino@ptc.utah.edu

Signature: 

Chair of the Board: Dan Lofgren

Address: 6440 South Wasatch Blvd. Salt Lake City, Utah 84121

Phone: 801-454-4600

E-mail:

dlofgren@cowboypartners.com

Signature: _____

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SECTION A. ORGANIZATION BACKGROUND

This section should provide an overview of your organization – why it exists and how it operates.

Do not elaborate here on your need for support of the specific project/program, which is in Section B.

1. Year established: 1962

2. Total annual operating budget: \$ 4,912,536

(This should match total budget in Section D.)

3. Organization type: *(Choose one that most adequately describes your area of focus.)*

X Arts and Culture
 Community
 Education

Health Care
Preservation and Conservation

4. Mission statement of your organization:

As a professional theatre within a university community, Pioneer Theatre Company's primary concern is artistic excellence: to provide the Wasatch Front and university communities with a theatrical experience of the highest professional standards.

Secondarily, PTC serves an educational purpose: to be a resource for students and appreciators of the arts; to provide a model of standards and practices in the professional theatre to university students; and, for those contemplating a career in the profession, to provide a practical, professional experience.

5. Brief background/description of your organization: *(Please include information helpful to under-*

standing your organization, including size, area of impact, and changes in structure or name. For cities and towns, please include population.)

Pioneer Theatre Company is a nonprofit professional theatre in residence at the University of Utah. PTC is one of only a small group of professional theatres in the country associated with a major university, and recognized nationally as an important regional theatre. PTC's programming is intended to reflect both its position as Utah's premier producing theatre and the large and diverse audience it serves. In consequence, the theatre is committed to the

production of major musicals, classics from the canon of theatrical dramaturgy, adaptations of literary classics, contemporary works of significance, and new plays.

Under the leadership of Artistic Director Karen Azenberg, PTC produces seven productions from September to May with a minimum of 119 performances. The theatre serves between 80,000 and 90,000 patrons annually.

PTC offers audiences the opportunity to see rarely produced plays and musicals not found at other local theatres or presented by national touring companies. Each season encompasses a wide variety of theatre experiences, including family-friendly musicals and comedies, straight plays, the Musical in Concert program and Play-by-Play new play reading series, ensuring that there is something for everyone to enjoy.

PTC creates every production locally for Utah audiences. The actors performing on our stage our full-time professionals, many with Broadway credits. Our sets, lighting, sound, and costumes are designed and created by a resident team of professional theatre artists, working in concert with guest artists from New York and around the country.

In addition to programming serving the general community, PTC is committed to offering special opportunities for young people to engage in theatre both as audience members and artists.

University and K-12 students are offered deeply discounted tickets, and special Wednesday afternoon Student Matinees are offered to area schools at little or no cost.

PTC's internship program, in partnership with the University of Utah Department of Theatre, gives musical theatre, actor training, and stage management students the opportunity to work alongside professionals and gain hands-on experience in their chosen field.

PTC has also partnered with the Boys and Girls Club of Greater Salt Lake to develop an educational outreach program for underserved youth. Through this program, club members are invited to attend productions at PTC and participate in accompanying workshops led by professional artists, designers, and theatre educators. Attending a production at PTC gives club members the opportunity to see a professional play or musical, often for the first time ever.

6. Number of paid staff employed by your organization: 175 full and part-time staff

7. Key staff positions and annual salaries: (*This information will be kept confidential.*)

Title:	Annual Salary:
<u>Artistic Director</u>	<u>\$ 120,000</u>
<u>Managing Director</u>	<u>\$ 116,382</u>
<u>Director of Development</u>	<u>\$ 70,869</u>

SECTION B. PROJECT/PROGRAM INFORMATION

This section should provide the details of the grant you are requesting, including the purpose of the specific project(s) or program(s), how goals will be achieved, why funds are needed, and how grant would be used.

1. Name/Title of the project(s) or program(s) for which you are seeking a grant:

Presenting Sponsorship of the Major Musical Closing the 2018-2019 Season- **Grease**

2. Total cost of project/program(s): \$878,325

3. Grant amount requested: \$100,000

4. Project timetable: Begins (month/year): 04/2019 Ends (month/year): 05/19

5. Requested funds needed by (month/year): 04/2019

6. Summary/description of the project(s) or program(s), including purpose, goals, and the specific use of the funds requested. Please do not duplicate information included in Section A.

A grant from the George S. and Dolores Doré Eccles Foundation will provide the presenting sponsorship of the major musical of the 2018-2019 season. The musical is scheduled for production in May 2019 and will close the season. The title for this production will be finalized by mid-to-late March, 2018. **UPDATE (3/1/2018): The musical selection for the 2018-19 season is *Grease*.**

Funds provided by the George S. and Dolores Doré Eccles Foundation will be directed towards production expenses including sets, lighting, costumes, artistic and technical salaries, and materials. The increased production expenses associated with sizeable productions of major musicals make sponsorship even more important to the show's success.

When selecting any show, considerations must be made regarding how each production will fit together as a whole season. Factors such as cast size, casting requirements, overall budget, potential box office sales and the availability of rights must be taken into account in the selection process. Because of the nature of this process, titles under consideration are subject to change. George S. and Dolores Doré Eccles Foundation will be notified when production titles have been finalized.

UPDATE (3/1/2018): The major musical selected for the 2018-19 is *Grease*. *Grease* is a nostalgic and affectionate look back at America at the dawn of the sixties, as the senior class of '59 at Rydall High enjoys their senior year. As Danny and Sandy become a couple, the Pink Ladies and Burger Palace Boys hang out at the local burger joint, talking about cars, each other, and the upcoming dance. Written in 1971 by Jim Jacobs and Warren Casey, *Grease* debuted on Broadway in 1972 and was nominated for seven Tony Awards. It went on to become a West End hit and a major feature film,

has enjoyed two popular Broadway revivals in 1994 and 2007, and remains Broadway's 15th longest running show.

SECTION B. PROJECT/PROGRAM INFORMATION (*continued*)

7. Brief description of the project's target population (including the number of people served).

PTC serves theatre audiences of diverse preferences. A 2016 survey of current subscribers, past subscribers, and single ticket buyers shows that PTC's audience is split between patrons who value traditional, family-friendly productions, and patrons who like to see more innovation, edginess, and programming that appeals to adults. PTC seeks to balance these two "camps" by offering a wide selection of theatre. The closing musical of 2018-2019 will target families and more traditional theatregoers.

The major musical is estimated to serve 15,000 patrons. The target audience will consist of PTC's general audience, university students, and secondary school students. The majority of the theatre's general audience is mature (average age 56 for subscribers and 45 for single ticket buyers), well-educated, married or partnered, and actively religious. Patrons attend from Salt Lake, Davis, Weber, Summit, Utah, and Tooele Counties.

The secondary school Student Matinee audience tends to be more diverse than our adult audience, and includes low-income students and English-language-learners. The university audience includes students from the University of Utah, Westminster College, Brigham Young University, Salt Lake Community College, and Weber State University. Additionally, constituents from the Boys and Girls Club of Greater Salt Lake are invited to attend in conjunction with our educational outreach program.

8. Number of volunteers the project will utilize and in what ways they will be involved (*if applicable*):

PTC will engage approximately 295 volunteers during the production. Volunteers are responsible for maintaining a high-quality patron experience at PTC, which encompasses convenience, comfort, and safety. As the frontline of PTC's patron service team, volunteers provide assistance as ushers, ticket checkers, and concessions attendants.

9. Brief description of plans for evaluating the effectiveness of the project or program:

Please explain how your organization will determine if the project or program meets its goals. If a Foundation grant is awarded, you will be required to report on the use of the grant monies and their impact.

As with most performing arts organizations, PTC measures success at the box office. This objective quantitative measure is how many people saw the production. The theatre evaluates each production qualitatively as well, according to the following questions:

1. Did the musical or play in question receive a fully realized production?
2. Were the acting and production values of the highest possible standards?
3. What was the general audience reaction to the performance?

4. In the event that a patron did not appreciate the play, did they feel the production was of the highest quality to be found along the Wasatch Front?

Talk-backs following Saturday matinee performances of every production give audiences the opportunity to provide immediate feedback on the production and their experience.

PTC periodically conducts surveys of our subscribers, single ticket patrons, and the general public to determine the impact our work has in the community. Surveys include the annual audience survey, which allows patrons to suggest work they would like to see in the coming year and give feedback on suggestions presented by the artistic director. In addition, we look at the critical response from media outlets and professionals to gauge artistic quality.

SECTION C. PROJECT FUNDING PLANS AND PROGRESS

This section should give an overview of your goal, plans and funds raised so far to complete the project for which you are seeking a Foundation grant.

1. Total cost of project/program(s) for which you are seeking a grant: \$ 878,325

2. Grant amount requested from the George S. and Dolores Doré Eccles Foundation via this application: \$ 100,000

3. Potential Donors

*List all individuals and organizations, both public and private (**other than the George S. and Dolores Doré Eccles Foundation**), from whom you are or will be seeking contributions (cash or in-kind) for this project/program.*

Name of Potential Donor: Expected (required) Response:	Amount:	Request made?	Date of Request: (Indicate Yes or No)	
<u>Salt Lake City Arts Council</u> <u>(pro-rata amount)</u>	\$ <u>700</u>	No	<u>06/2018</u>	<u>10/2018</u>
<u>Utah Division of Arts and</u> <u>Museums (pro-rata amount)</u> <u>06/2018</u>	\$ <u>5,600</u>	No	<u>02/2018</u>	
<u>Wells Fargo</u>	\$ <u>20,000</u>	Yes	<u>7/2018</u>	<u>declined</u>
<u>Emma Eccles Jones</u> <u>Foundation</u> required <i>(Please use as much space as needed.)</i>	\$ <u>50,000</u>	No	No formal request	

Total amount we are seeking from these sources: \$ 76,300

4. Committed Donors

List all individuals and organizations, both public and private, who have made a contribution (cash or in-kind) or firm pledge toward this project. Also list the amount contributed or pledged.

Name of Committed Donor:	Amount pledged or received:
<u>Salt Lake County ZAP (estimate pro-rated amount)</u>	\$ <u>70,000</u>
_____	\$ _____
_____	\$ _____
_____	\$ _____

(Please use as much space as needed.)

Total donor contributions/pledges to this project to date: \$ 70,000

Total committed to this project by your own organization: \$ 572,200

Grand total of funds committed to date: \$ 642,200

All funding information will be kept confidential.

Additional Potential Sponsors of PTC's 2018-19 Season				
Potential Donor	Amount	Requested made?	Date Requested	Expected Response
Zions Bank/ <i>One presenting sponsorship and one principal sponsorship</i>	\$50,000/\$40,000	No	03/2018	03/2018
Simmons Family Foundation/ <i>Student matinee program</i>	\$40,000	No	08/2018	11/2018
Dominion Questar/ <i>One principal sponsorship</i>	\$25,000	No	08/2018	12/2018
Steiner Foundation/ <i>Pro-rated over all 7 productions</i>	\$25,000	No	No formal request required	06/2018
Meldrum Endowment/ <i>Student matinee program</i>	\$17,000 (estimate)	No	Endowment	N/A
The Lawrence T. and Janet T. Dee Foundation/ <i>One production sponsorship</i>	\$15,000	No	07/2018	10/2018
Marriner S. Eccles Foundation/ <i>One production sponsorship</i>	\$10,000	No	10/2018	Spring 2018
Pioneer Theatre Guild/ <i>General operating support</i>	\$10,000	No	No formal request required	06/2018
The Richard K. and Shirley S. Hemingway Foundation/ <i>Sponsorship of two student matinees</i>	\$7,500	No	Spring/2018	08/2018
Myriad Genetics/ <i>One performance sponsorship</i>	\$5,000	No	10/2018	10/2018
S.J. & Jessie E. Quinney Foundation <i>One performance sponsorship</i>	\$5,000	No	No formal request required	11/2018

George Q. Morris Foundation/ <i>Student Matinee study guides</i>	\$4,415	No	04/2018	04/2018
Andrea Golding Legacy Foundation/ <i>General operating support</i>	\$5,000	No	No formal request required	12/2018
Wanda and Carvel Mattsson Memorial Fund	\$6,000	No	No formal request required: Endowment	N/A

SECTION D. ORGANIZATION'S ANNUAL OPERATING BUDGET SUMMARY

Name of Organization: Pioneer Theatre Company Annual Operating Budget: \$4,912,536

We operate on a (check one): Calendar Year Fiscal Year (beginning month: July)
 2015 or FY 15-16 2016 or FY 16-17 2017 or FY 17-18 2018 or FY

	18-19 (Actual)	(Actual)	(Projected)	(Projected)
REVENUES				
Earned income				
Ticket revenue, tuition, fees	2,423,782	1,987,495	2,666,093	2,418,000
Interest, dividends	169,343	177,751	180,000	225,000
Fund-raising events	87,143	138,558	140,000	110,000
Other (specify):				
Concessions/Gallery		81,702	72,105	70,000
70,000				
Misc. Box Office	87,528	98,884	130,000	108,000
Rental income	23,807	24,453	35,000	35,000
University (includes pass-thru funds for Dept. of Theatre)	208,230	208,230	208,230	208,230
Total earned income:	\$ 3,081,535	\$ 2,707,476	\$ 3,407,323	\$ 3,174,230
Public support				
Federal		0 0		0 0
State	50,000	37,500	45,000	45,000
City	8,000	8,000	6,650	8,000
County	0	0	100,000	100,000
ZAP, RAP taxes etc.	698,597	651,969	604,115	580,000
United Way	0	0	0	0
Other (specify):				
Total public support:	\$ 756,597	\$ 697,469	\$ 755,765	\$ 733,000
Private support				
Foundations (cash)	304,297	353,790	325,000	350,000
Corporations (cash)	244,840	250,409	275,000	265,000
Individuals (cash)	240,289	227,082	260,000	260,000
In-kind	0	0	0	0
Other (specify):				
Guild	14,500	19,000	10,000	12,000
Total private support:	\$ 803,926	\$ 850,281	\$ 870,000	\$ 887,000
Grand Total Revenues :	\$ 4,642,058	\$ 4,255,226	\$ 5,055,088	\$ 4,794,230

EXPENSES

Salaries and benefits	3,186,173	3,285,443	3,183,362	3,405,956
Building rent/mortgage		0	0	0 0
Building maintenance/repairs	0	0	0	0
Utilities	23,000	24,815	25,000	25,000
Office supplies	7,000	7,997	8,000	8,100
Depreciation	0	0	0	0
Advertising/Public Relations	377,581	372,714	382,615	382,615
Fund-raising activities	18,384	47,500	20,115	21,115

Consultant fees/services		0	0	0	0
Legal/Accounting services	12,000	10,250	10,250	10,500	
Travel/Lodging		133,321	135,507	141,500	
145,000					
In-kind	0	0	0	0	
Other (specify):					
Materials	253,127	248,832	250,250	270,250	
Royalties	206,070	158,260	227,000	258,230	
Box Office and House		114,783	118,730	137,468	
137,368					
Concessions/Gallery	53,839	48,470	34,000	31,070	
Miscellaneous		64,292	56,936	76,211	
70,900					
Theatre Department Expenses	186,600	186,597	186,600	186,600	
Reconciliation		458	0	0	0
Bright Star Tour Payment	0	0	330,000	0	0
Grand Total Expenses:	\$4,636,628	\$ 4,702,051	\$ 5,012,371	\$ 4,952,704	
Net Income/Deficit:	\$	5,430	\$ (446,825)	\$	42,717
(158,474)					\$
Amount of your reserves, if any:	\$	674,584	\$ 227,760	\$	270,477
281,033					\$
Amount of your endowment, if any:	\$ 4,395,135	\$ 4,565,281	\$ 4,956,000	\$	5,204,000

IMPORTANT: Explain net income or deficit, and provide other information as needed, on an attached page.

Net income has risen over the last two years and is projected to increase in FY18-19 dependent on healthy returns in the market. The reserve in FY16-17 decreased by \$446,825 due weak ticket sales. We are projecting a nearly balanced budget for FY17-18.

PTC's strategy to recover from the deficit year in FY16-17 rested on the inclusion of several blockbuster titles in the FY17-18 season, including *Newsies* and *Mamma Mia*. The popularity of *Bright Star* at the box office was a welcomed surprise. Data from past years shows that blockbuster titles have the potential to increase both subscriptions and single ticket sales. In order to achieve a break-even budget, the theatre must make its goals in season and single ticket sales. Due to the lack of available blockbuster titles with high box office appeal and ticket revenue potential for FY18-19, we anticipate a shortfall of \$158,474.

SECTION E: CONSTRUCTION PROJECT DETAILS

Complete this page *ONLY* if you are seeking a grant to purchase a building/land, for new construction, or for a renovation/restoration project.

Name of organization:

This project is: (check all that apply)

Construction (new)

Renovation

Renovation and addition

Purchase a building

Historic restoration

1. Address of new building or site:

2. \$ _____ is current land value. \$ _____ is current building value.

3. Current legal owner of property/building:

Our organization has owned the land since _____.

Our organization has owned the building since _____.

We are in the process of purchasing the land.

Cost: \$ _____

We are in the process of purchasing the land and building.

Cost: \$ _____

4. Project/Building details:

_____ floors

_____ sq. ft.

\$ _____ per sq. ft. cost to build/renovate/restore

Name(s) of architect and contractor, if selected:

5. Timeline for construction:

Anticipated date to complete fundraising: ____ / ____

Anticipated date construction begins: ____ / ____

Anticipated date construction completed: ____ / ____

6. Are you procuring a loan to help fund this project? Yes No

Loan Amount: \$ _____

of years: _____

Interest rate: _____

Entity holding loan: _____

How will the loan be repaid?

7. Are you procuring a bond for the project? Yes No

Bond amount: \$ _____

Entity holding bond: _____

How will the bond be repaid?

8. Will any portion of the building be rented to others? Yes No

If yes, please explain:

9. Who will provide the operation and maintenance for the building?

10. Other (If there is pertinent information not included above, please include here.)