

Promotional and Community Event Grant Application

McKinney Community Development Corporation FY 2026

MCDC Mission

Staying true to voter intent, we work proactively, in partnership with others, to promote and fund community, cultural, and economic development projects that maintain and enhance the quality of life in McKinney.

Important Information

- Please read the McKinney Community Development Corporation [Grant Guidelines](#) before completing this application.
- The Grant Guidelines are available at [McKinneyCDC.org](#) or by emailing Info@McKinneyCDC.org.
- If you are interested in a preliminary review of your grant request or event idea, please [complete and submit the online Letter of Inquiry](#).
- **Applications must be submitted via online form and must be submitted no later than 5 p.m. on the deadline date.**

All applicants must submit a complete application with the following attachments and required information as detailed throughout the application to ensure Board consideration for funding.

- Detailed event description
 - Comprehensive narrative that includes event mission, goals, planning and execution timeline;
 - Planned activities pre-event and during event;
 - History of past or similar events;
 - Event budget (fundraising goals, projected revenue, funding sources);
 - Ticket price(s). (At least one category of ticket must be \$35 or under.)
 - Safety/security plan, parking/traffic management plan, weather contingency, event staffing plan.
- Target audience – Please include data from previous events if available.
 - Attendance projections (include how your calculations were made);
 - Target audience including demographics (families, young adults, seniors, all ages, ethnicity) as well as diversity of interests (arts, culture, recreation, sports, shopping, etc.);
 - Geographic reach (goal for attendees from outside of McKinney, estimated travel distance).
- Community and economic impact
 - Describe how your event will showcase McKinney for tourism and economic development for residents and visitors (shopping and dining in McKinney, hotel stays, participation in other McKinney activities).
- Marketing and promotional plan

Detailed and itemized plan and promotional budget - include strategies and channels (print ads, press releases, digital ads, social media, radio, posters, flyers, yard signs, articles, etc.);

- Social media followship and website data if available.
- Financial viability of organization (Please provide the following documentation)
 - Verification of organization's status (IRS letter of determination, W9);
 - Most recent two years of financial statements including organization's budget and profit/loss statements (audited preferred or written explanation if audit not available);

Promotional and Community Event Grant Calendar

To ensure timely and effective use of promotional grant funds, we recommend event(s) are scheduled to occur at least 4-6 months after the award notification date(s).

Cycle I

- Application Deadline: Nov. 28, 2025
- Presentation to MCDC Board: Dec. 18, 2025
- Board Vote and Award Notification: Jan. 22, 2026

Cycle II

- Application Deadline: May 30, 2026
- Presentation to MCDC Board: June 25, 2026
- Board Vote and Award Notification: July 23, 2026

Organization Name	McKinney Repertory Theatre
CEO / Executive Director	Davina Gazo Stampfel
Federal Tax I.D.	33-1042926
Incorporation Date	Tuesday, January 21, 2003
Mailing Address	111 N. Tennessee Street McKinney, Texas, 75069
Phone Number	(646) 236-4496
Email	executivedirector@mckinneyrep.org
Website	mckinneyrep.org
Social Media	https://www.facebook.com/mckinneyrepertorytheatre/ , https://www.instagram.com/mckinneyrepertorytheatre

Please provide a detailed narrative about your organization including year established, mission, goals, scope of services, staff, successes, contribution to community, etc.

Our main mission is to build community through live theatre. We do this by presenting professional-quality productions and complementary programming for the cultural education, entertainment, and inspiration of our community. MRT is open to everyone—regardless of experience—to volunteer and participate in our theatrical productions.

Formed in 2003, MRT was the first group to perform in the McKinney Performing Arts Center (MPAC) when it was renovated in 2006, debuting with *To Kill A Mockingbird* in conjunction with *Read Across McKinney*. Today, we are a proud resident arts group at the MPAC. Starting with our 2022-2023 Season, we have seen record-breaking audience growth each season. This past season's production of *A Christmas Carol* reached 3,101 attendees, breaking our all-time attendance record for the third consecutive year.

Typically, we perform a four (4) show season, but due to renovations this year in the MPAC, we have been collaborating with several cultural partners to bring out of the box ideas to life. We have remained highly active during the renovation period through strategic "off-site" collaborations. These include:

New Works Play Reading Festival: We successfully fostered local talent and playwrights, providing a platform for original stories and deepening our engagement with local creatives. We had over 115 attendees across all three nights.

Vintage Voices Concert: Our recent free garden concert reached over 100,000 residents through marketing and brought a multi-generational audience together for a lovely afternoon at the Heard-Craig Center with over 70 people attending.

Regency Ball Collaboration: In partnership with the Heard-Craig Center, we produced a regency ball that sold out a month before bringing in tourism from Dallas and even as far as Waco. Many who attended have asked when the next ball will be.

The Golden Age Radio Revue: A live radio show featuring comedic classics from Burns & Allen, X Minus One, Abbot & Costello and more... set in the historic setting of Chestnut Square Heritage Village this July 25th.

Piloting a Youth Program: Broadening our programs to serve our community in a new way by producing *Seussical JR*. This educational program is open to students ages 7 to 18 who are interested in theatre and performance. The program is open to 50 students and sold out in 2-weeks.

Once the McKinney Performing Arts Center reopens, we will be going back to our four-show main stage season. Pending the MPAC opening in time for our December 2026 performances, we are planning to perform *A Christmas Carol* (20th Anniversary) and *Steel Magnolias* in Feb/March 2027 (Free Student Ticket Show). Our season selection remains a democratic process; the Play Selection Committee researches and presents options to our Board, and our Members and Season Ticket holders vote on final show selections.

In addition to our artistic work, we volunteer to lead a theatre enrichment program for Serenity High School and we regularly donate tickets to local non-profits for fundraisers and the populations they serve.

MRT is a 98% volunteer-driven organization, overseen by a Board of Directors and managed by our part-time Executive Director, Davina Gazo Stampfel. We are supported by 200–250 dedicated volunteers who handle everything from directing and acting to technical crew and concessions. To offset the personal costs incurred by these demanding roles, we provide modest stipends to our core creative leads.

Select One

Nonprofit 501(c)3 (Attach copy of IRS Determination Letter)

IRS Determination Letter for 501(c)3



MRT 501c3 Confirmation.pdf

Is the representative information same as above?

Yes

Is the contact for communications between MCDC and the organization same as above?

Yes

Total Amount Requested

13,190.00

Are matching funds available?

Yes

Matching Funds Available

We are putting \$1,524 towards promotions/marketing

Have you received or will funding be requested from any other City of McKinney entity (e.g. Visit McKinney, Arts Commission, City of McKinney Community Support Grant)?

Yes

Provide name of City of McKinney entity funding source and amount.

We will be requesting \$20,000 from the McKinney Arts Commission, the maximum amount of funding based on our annual budget for next season of \$100k+

If applicable, please indicate the name of the events, year(s) and amount(s) of MCDC funding received in the past five years.

Yes, we requested promotional grant funding for advertising our season three times in the past. We were granted funds for the 2022-2023 Season, 2023-24 Season, 2024-25 Season, 2025 Season & 2026 Collaborations.

Information about the promotional / community event for which you are seeking funding.

Date(s) of Event

Pending the McKinney Performing Arts Center re-opening in time for our production, we are planning on producing: A Christmas Carol: Dec. 11-12 & 18-19, 2026 (2 weekends only - we typically do 3) Steel Magnolias: February 26-28, March 5-7 & 12-14, 2027

Location(s)

McKinney Performing Arts Center

Ticket Prices

A Christmas Carol: \$14.50 for adults, \$11.50 for seniors, \$9.50 for children/students
Steel Magnolias: \$26.50 for adults, \$23.50 for seniors, free for children/students (Pending grant from HEB. If grant is not awarded, student tickets will be \$24.50)

Is this the first time for this event?

No

If not, what is the history for the event (beginning in what year and how often is it held)?

We produce a new season every year and have been producing our annual holiday show, "A Christmas Carol" for 20 years. Each season we produce different shows aside from our annual holiday production. This past year, our production of "A Christmas Carol" had 3,101 people attend - our most ever! Since our first production of A Christmas Carol in 2006, our one-hour version of the show has become an annual

holiday tradition for many in McKinney and draws attendees from the greater DFW metroplex.

How does event showcase McKinney for tourism and/or business development?

With the support of this grant, McKinney Repertory Theatre (MRT) has evolved into a regional destination; this past season, over 56% of our audience traveled from outside of McKinney. This statistic underscores how our marquee productions serve as "cultural magnets," attracting thousands of visitors who contribute directly to the local economy.

Our two upcoming productions are uniquely positioned to bring tourism and visitors to McKinney:

A Christmas Carol: Now a beloved regional tradition, this production draws nearly 3,000 patrons annually over three (3) weekends. For many families across North Texas, "Christmas in McKinney" begins with our show at the MPAC. This seasonal staple transforms downtown into a holiday destination, driving massive foot traffic to nearby shops, restaurants, and wine bars as guests arrive early to dine and experience the charm of our historic district during the peak holiday shopping season.

Steel Magnolias: This iconic Southern classic offers a heartfelt celebration of friendship, resilience, and community that strongly resonates with audiences across generations. Its recognizable title and universal themes make it an ideal draw for regional visitors seeking high-quality live entertainment in an intimate historic setting. By producing Steel Magnolias as part of our post-renovation season, MRT will continue positioning downtown McKinney as a vibrant cultural destination where visitors can enjoy both exceptional theatre and the unique hospitality, shopping, and dining experiences of our historic square.

Community theater like MRT is a powerful engine for economic development. According to the U.S. Bureau of Economic Analysis, arts and culture contribute 3.2% of the U.S. GDP—surpassing the contribution of the entire travel and tourism industry. Furthermore, a National Endowment for the Arts study through the University of Texas at Arlington found that thriving arts communities correlate directly with rising local wages and increased property values.

Supporting MRT has a ripple effect: as our 5,500+ annual patrons and over 200 volunteers visit downtown, creativity flourishes, and local businesses thrive. Through these iconic productions, MRT is stimulating the downtown economy and shaping McKinney into a vibrant, "must-visit" destination where people want to live, invest, and return year after year.

Does the event support a non-profit (other than applicant)?

No

What percentage of revenue will be donated (indicate gross or net)?

None. We are a nonprofit community theatre

Expected total attendance and how calculations were made.

3,600 in attendance is anticipated in total for both productions. We anticipate 2,400 in attendance for A Christmas Carol (2 weekends only this year due to MPAC renovations as opposed to the normal 3 weekends) & 1,200 in attendance for Steel Magnolias. We made these calculations based on past show attendance numbers.

Expected percentage of attendees coming from outside of McKinney.

56%

Total attendance from previous event(s) (if applicable)

44 _____ of attendees from McKinney at the previous event.
percentage

56 _____ of attendees from outside of McKinney at the previous event.

percentage

Geographic Reach (estimated travel distance)

We have patrons that come as far as Louisiana (180 miles) & Oklahoma (60 miles). Typically, we see the greater percentage of McKinney audience coming from the greater DFW area. 33% coming from Plano, Princeton, Wylie, Melissa, Allen, Anna, Frisco, & Farmersville, 15% coming from 20 miles away including Dallas, Richardson, Aubrey, Little Elm, & Van Alstyne, and 6% coming from 30-40 Miles away including Sherman, Denton, Arlington, Denison, Ft. Worth. the remaining 2% come from more than 50 miles away.

Describe the TARGET AUDIENCE to include:

- Demographics (i.e. families, young adults, seniors, all ages, ethnic diversity)
- Diversity of interests (i.e. arts, culture, recreation, sports, shopping, etc.)

Our target audience for A Christmas Carol includes families, seniors, students, young professionals, and adults of all ages who enjoy the arts, holiday traditions, cultural experiences, and live entertainment. As one of MRT's most beloved annual productions, the show appeals to a broad and ethnically diverse audience from McKinney and surrounding North Texas communities. This production attracts individuals and families with a wide range of interests, including theatre, music, storytelling, education, history, and community events, making it an accessible and welcoming cultural experience for both longtime patrons and first-time attendees.

The target audience for Steel Magnolias includes adults, seniors, couples, women's groups, community organizations, theatre patrons, and older students (high school & college) who enjoy live entertainment, Southern culture, classic storytelling, and emotionally driven productions. The show's universal themes of friendship, resilience, humor, and family connection resonate across generations and cultural backgrounds, attracting both longtime theatre supporters and new audiences seeking meaningful cultural experiences. MRT anticipates attendance from a diverse mix of arts enthusiasts, community members, and regional visitors interested in theatre, literature, cultural programming, and social experiences centered around Historic Downtown McKinney.

FINANCIAL GOALS FOR EVENT OF PROMOTIONAL / COMMUNITY EVENT

Gross Revenue \$65,933

Projected Expenses \$43,944

Net Revenue \$21,989

Please provide funding sources and dollar amounts associated with each of the following.

Sponsorship Revenue \$9,500 (for full season)

Registration Fees \$1,200 (MRT Membership Fees for full season))

Donations \$3,500 (for full season)

Other (raffle, auction, etc.) \$200

Net Revenue \$361 (for full season)

Metrics to evaluate success of event. Outline the metrics that will be used to evaluate success of the proposed event (attendance, reach from across targeted audiences, funds raised, tickets sold, etc). If funding is awarded, a final report will be required summarizing success in achieving objectives outlined for the event.

We will measure the success of our 2026/2027 season and marketing campaign through a combination of attendance metrics, geographic reach, and digital engagement. Our primary goals for our first two shows of this "Grand Reopening" period include:

Ticket Sales & Attendance: Our goal is to capitalize on the excitement of the renovated McKinney Performing Arts Center to reach new attendance milestones:

A Christmas Carol: Achieve an average of 267 attendees per performance (a continued growth trend) for our two-weekend run (typically we do 3, but due to renovations, we are not able to get into MPAC sooner), totaling at least 2,400 attendees for the season.

Steel Magnolias: For this beloved Southern production, we aim to attract a total of 1,200 attendees, averaging 100 tickets per performance.

Domestic Tourism: We aim to maintain and expand our status as a regional draw for communities such as Allen, Anna, Melissa, Princeton, Frisco, Sherman, and Plano. Currently, 56% of our audience originates from outside of the McKinney/Fairview area, highlighting MRT as a primary driver for North Texas tourism.

Digital Engagement: Following a year of continued growth, we aim to continue to increase our social media presence by an additional 10% during the 2026–2027 campaign. Our current platforms have shown significant momentum:

Facebook: Now at 2,530 followers (an over 10% increase over the previous year).

Instagram: Now at 700 followers (an over 27% increase over the previous year).

Continued growth on these platforms serves as a key indicator of community awareness and the effectiveness of our digital outreach.

Tracking & Evaluation: We will monitor these goals using real-time box office data, ZIP code analysis of ticket buyers to track tourism trends, and detailed social media analytics. These data points provide measurable proof of the marketing campaign's effectiveness and its direct impact on McKinney's regional visibility and downtown economic vitality.

Provide a comprehensive narrative that includes:

- Mission, goals, planning and execution timeline
- Planned activities (pre-event and during event)
- History of past or similar events
- Safety/security plan, parking/traffic management plan, weather contingency, event staffing plan

Our annual production of A Christmas Carol is one of the community's most beloved holiday traditions and serves as a cornerstone of arts and cultural tourism in Historic Downtown McKinney. Pending the reopening of the McKinney Performing Arts Center (MPAC) following renovations, MRT plans to present the production over two weekends: December 11–12 and December 18–19, 2026.

Now in our 20th year of producing theatrical performances at MPAC, MRT continues its mission to build community through live theatre by presenting family-friendly productions that educate, entertain, and inspire. A Christmas Carol attracts audiences of all ages, including families, seniors, students, and visitors from across North Texas who make the performance part of their holiday traditions in Downtown McKinney.

Production planning will begin in late summer 2026. Auditions are scheduled for early September, followed immediately by rehearsals throughout September and the fall season. Technical rehearsals and final production preparations will take place during the week prior to opening. Marketing and advertising efforts will launch in mid-October, while season ticket sales and early ticket promotions will begin in September to

maximize advance sales and community awareness.

As one of MRT's highest attended productions, A Christmas Carol contributes significantly to downtown economic activity by encouraging audiences to dine, shop, and explore Historic Downtown McKinney before and after performances. The production not only supports MRT's mission, but also reinforces McKinney's identity as a vibrant arts and cultural destination during the holiday season.

Following A Christmas Carol, MRT plans to present Steel Magnolias at the McKinney Performing Arts Center from February 26–28, March 5–7, and March 12–14, 2027. This beloved Southern classic continues MRT's long-standing tradition of producing high-quality theatrical experiences that foster connection, storytelling, and community engagement. Steel Magnolias is widely recognized for its heartfelt storytelling, humor, and themes of friendship, resilience, and family, making it especially appealing to adults, seniors, women's groups, and patrons who enjoy classic American theatre and cultural programming.

Auditions for the production will take place during the first week of January 2027, with rehearsals beginning the following week. The rehearsal process will include regular evening and weekend rehearsals leading into technical rehearsals the week prior to opening. Marketing and promotional efforts for the production will begin in mid-January through a combination of digital advertising, social media campaigns, print materials, and community outreach.

In addition to the performances themselves, MRT engages the community through volunteer involvement, cast participation, and partnerships with local businesses and organizations. All performances are supported by volunteers who serve as ushers and front-of-house support staff, helping create a welcoming and safe environment for patrons. MRT also hires a security officer to be present during each performance to ensure audience safety and assist with crowd management.

Describe how your event will showcase McKinney for tourism and economic development for residents and visitors (shopping and dining in McKinney, hotel stays, participation in other McKinney activities, etc.)

With the support of this grant, McKinney Repertory Theatre (MRT) has evolved into a regional destination; this past season, over 56% of our audience traveled from outside of McKinney. This statistic underscores how our marquee productions serve as "cultural magnets," attracting thousands of visitors who contribute directly to the local economy.

Our two upcoming productions are uniquely positioned to bring tourism and visitors to McKinney:

A Christmas Carol: Now a beloved regional tradition, this production draws nearly 3,000 patrons annually over three (3) weekends. For many families across North Texas, "Christmas in McKinney" begins with our show at the MPAC. This seasonal staple transforms downtown into a holiday destination, driving massive foot traffic to nearby shops, restaurants, and wine bars as guests arrive early to dine and experience the charm of our historic district during the peak holiday shopping season.

Steel Magnolias: This iconic Southern classic offers a heartfelt celebration of friendship, resilience, and community that strongly resonates with audiences across generations. Its recognizable title and universal themes make it an ideal draw for regional visitors seeking high-quality live entertainment in an intimate historic setting. By producing Steel Magnolias as part of our post-renovation season, MRT will continue positioning downtown McKinney as a vibrant cultural destination where visitors can enjoy both exceptional theatre and the unique hospitality, shopping, and dining experiences of our historic square.

Community theater like MRT is a powerful engine for economic development. According to the U.S. Bureau of Economic Analysis, arts and culture contribute 3.2% of the U.S. GDP—surpassing the contribution of the entire travel and tourism industry. Furthermore, a National Endowment for the Arts study through the University of Texas at Arlington found that thriving arts communities correlate directly with rising local wages and increased property values.

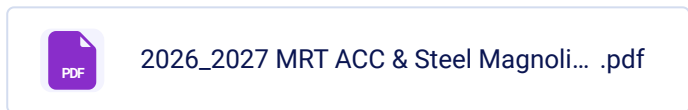
Supporting MRT has a ripple effect: as our 5,500+ annual patrons visit downtown, creativity flourishes and local businesses thrive. Through these iconic productions, MRT is stimulating downtown revitalization and shaping McKinney into a vibrant, "must-visit" destination where people want to live, invest, and return year

after year.

Provide a detailed and itemized promotional plan and budget for the event(s). Plan should include promotional channels (print ads including publication names, social media, radio, posters, flyers, yard signs, etc.)

Promotional Channel	Budget
Community Impact Print Ads (Season, ACC, & Steel Magnolias)	4,200
Vinyl Signage (ACC & Steel Magnolias)	\$270
Posters & Postcards (ACC & Steel Magnolias)	\$420
Facebook Ads/Boosted Posts (Both Shows)	\$500
Geofencing via Groundtruth (Both Shows)	\$300
Community Impact Digital (Both Shows)	\$2,800
Community Impact Newsletter (Both Shows)	\$1800
Local Profile Digital (Both Shows)	\$1,200
Radio Ad KLAKE (Both shows)	\$1,200
Housewarmers Newsletter (Both Shows)	\$300

Event Marketing Plan and Budget Attachment



Total Promotional Budget

\$14,714

Does your marketing plan include components specifically designed to promote your event(s) within the ethnically diverse communities that call McKinney home? Please share details.

Yes. While MRT’s marketing plan is designed to reach the broader North Texas community, several components are intentionally structured to engage the ethnically and culturally diverse populations that call McKinney home. Our digital-first strategy—including Facebook/Instagram advertising, geofencing campaigns, Community Impact digital placements, and radio advertising—allows us to target audiences across a wide range of demographics, age groups, and neighborhoods throughout McKinney and surrounding communities. In addition, our use of broadly accessible community platforms such as Community Impact, Housewarmers newsletters, local event calendars, and MPAC promotional channels helps ensure that information about our

productions reaches both longtime residents and newer families relocating to the area. MRT's productions themselves are also intentionally selected to appeal to diverse audiences and interests—from the family-friendly holiday tradition of A Christmas Carol to the multigenerational themes of friendship, resilience, and community found in Steel Magnolias. As a volunteer-driven community theatre, MRT welcomes participation from individuals of all backgrounds and experience levels, both onstage and offstage. Our goal is to create accessible cultural experiences that reflect McKinney's growing and diverse community while continuing to position Historic Downtown McKinney as an inclusive destination for arts, culture, and entertainment.

What percentage of the total marketing budget does the grant represent?

Coming off of a year without being able to do performances at MPAC due to renovations, we are covering \$1,524 of a \$14,714 budget. Our contribution represents approximately 10.36% of the total promotional funding budget. We are requesting \$13,190 from MCDC.

Marketing lessons learned from past events (if applicable).

Our 2025 season reinforced the importance of maintaining a balanced, multi-channel marketing strategy while also showing us which tactics generate the strongest engagement and return on investment. Meta advertising (Facebook and Instagram) remained our most effective ticket-driving platform, generating more than 130,000 views and over 1,500 link clicks across campaigns. A Christmas Carol alone generated more than 1,300 clicks, confirming that digital advertising remains our strongest tool for audience conversion. We also saw strong success with event-based boosts and learned that recognizable titles significantly amplify engagement across all channels.

Our 2025 season also marked MRT's first partnership with a TikTok influencer, @ChaptersofAlyssa, to promote Barefoot in the Park and Downtown McKinney. The campaign successfully expanded our reach to younger audiences and generated strong engagement through likes, shares, saves, and comments, demonstrating the value of influencer partnerships and short-form video content. Geofencing campaigns performed best during high-traffic festivals and tourism weekends, reinforcing the importance of strategic timing and placement.

Community newsletters such as Community Impact and Housewarmers continued to deliver exceptional open rates and broad visibility, proving highly valuable for maintaining awareness and community trust. Meanwhile, printed posters and postcards remained effective grassroots tools, particularly for legacy productions like A Christmas Carol, which generated more than 300 direct QR scans. In contrast, traditional print advertising generated strong overall reach and branding visibility but lower direct engagement, reinforcing that print functions best as an awareness and credibility tool rather than a primary ticket conversion strategy.

Moving forward, MRT plans to continue prioritizing digital advertising, event-based geofencing, influencer collaborations, and community newsletter partnerships while strategically investing in print to gain awareness and credibility upon our return to the stage.

If applicable, please include examples of past marketing efforts (screen shots of ads, posters, social posts, radio text, etc.)

I've included the copy for our last radio ad for A Christmas Carol. I am unable to upload the screenshots requested in this segment and can forward via email if you would like.

A Christmas Carol - December 2025 KLAKE Ad

[Sound bed: Lightly eerie Christmas music – faint chains, soft wind, then fading into warm holiday bells]
SCROOGE (gruff but intrigued):

Humbug, you say? That's what I thought too—until those blasted ghosts showed me the light of Christmas! Now, even I, Ebenezer Scrooge, invite you to see my story come alive at the McKinney Repertory Theatre in

historic downtown McKinney!

Each year, more fine folks fill the seats to watch A Christmas Carol—a tradition, I daresay, almost as beloved as Christmas pudding!

So don't be a miser—get your tickets now! Shows in November and December - Visit McKinneyRep.org or call (214) 544-4630.

(Soft chuckle) You'll leave with your heart three sizes larger... and that's no humbug!

[Music swells, bells fade out]

[Tag (speed up)] Thanks to the McKinney Community Development Corporation and McKinney Arts Commission for their promotional grant support.

Metrics to evaluate success of marketing/promotional plan: Outline the metrics that will be used to evaluate overall success of the executed promotional plan. If funding is awarded, this should be included in the final report. (success in reaching new audiences, social media data, website analytics, etc).

To measure the impact of our marketing efforts for A Christmas Carol and Steel Magnolias, MRT will utilize a comprehensive evaluation framework. We will synthesize performance data from our advertising partners with internal metrics to track growth, regional reach, and community engagement.

Our success will be measured through the following key performance indicators:

1. Ticket Sales & Attendance Milestones

We are leveraging the excitement of the renovated McKinney Performing Arts Center (MPAC) to drive record attendance for our landmark productions:

A Christmas Carol: We aim to achieve an average of 267 attendees per performance. Despite a condensed two-weekend run necessitated by renovation schedules, we are targeting a total of 2,400 attendees for the season.

Steel Magnolias: We have set a goal of 1,200 total attendees for this iconic Southern classic, averaging 100 tickets per performance.

Methodology: We will track these figures using real-time box office data, allowing us to pivot marketing efforts if specific performances require additional promotion.

2. Regional Impact & Domestic Tourism

MRT serves as a cultural magnet for North Texas, and we are committed to maintaining and expanding our status as a regional destination.

Benchmark: Currently, 56% of our audience originates from outside the McKinney/Fairview area, drawing visitors from communities including Allen, Anna, Melissa, Princeton, Frisco, Sherman, and Plano.

Methodology: We will conduct ZIP code analysis of all ticket buyers to quantify our geographic reach and ensure our marketing investments are effectively converting regional residents into McKinney visitors.

3. Digital Engagement & Awareness

Continued growth on our social media platforms serves as a primary indicator of increased community awareness and the efficacy of our digital outreach. Following a year of exceptional growth, we aim to increase our social media following by an additional 10% during this campaign.

Current Baseline:

Facebook: 2,530 followers (a 10%+ year-over-year increase).

Instagram: 700 followers (a 27%+ year-over-year increase).

Methodology: We will monitor platform-specific analytics to evaluate engagement rates, reach, and follower acquisition, using these metrics to optimize our social media strategy in real-time.

By combining the reported performance metrics from our media partners (such as click-through rates and impression data) with these internal milestones, MRT will maintain a data-driven approach to marketing. This dual-layer tracking ensures that every dollar of grant support is directly linked to measurable growth

in theater attendance and increased tourism traffic for the city of McKinney.

Please provide:

- Verification of organization’s status (IRS letter of determination, W9, etc.)
- Most recent two years of financial statement including organization’s budget and profit/loss statement (Audited is preferred or written explanation if audit not available.)

Budget


 MRT Budget 2026-2027 051126.pdf

Financial Statements

 MCDC Financials 05.21.26.xlsx

 MCDC YTD Finance Summary 04.30.26.xlsx

IRS Determination Letter (if applicable)

 MRT 501c3 Confirmation_7322.pdf

W9

 W9 -MRT - May2026.pdf

All Applicants must submit a complete application with the following attachments and required information as detailed throughout the application to ensure the Board consideration for funding

Procedure

Application completed and submitted prior to deadline (5:00 PM on deadline date)

Application Submitted via online form

Organization and Financial Information

Completed all organizational information

Provided documentation of organization status (IRS letter, W9)

Two most recent years of financial statements (budget + profit & loss) (audited if available)

Event Description

Missions, goals, execution timeline, programming/activities, budget

Event dates, times, and location(s)

Cultural or community relevance

Target audience (numbers, demographics, geographic reach, diversity, past data)

Community & Economic Impact

Description of how the event promotes tourism and economic development

Economic impact projections

Benefits to McKinney residents and the community's quality of life

Marketing & Promotional Plan

Itemized marketing plan and budget

List of marketing channels (print, digital, radio, social, etc.)

Promotional time

Social media engagement data and website analytics (if available)

Completed applications that are eligible for consideration by MCDC will be presented to the board according to the schedule outlined on this application. Presentations will be limited to five (5) minutes, followed by time for questions from the Board. **Please be prepared to provide the information outlined below in your presentation:**

- Summary of organization and goals.
- Summary of event(s) to include dates, location, ticket prices, target audience, estimated attendance from within and outside of McKinney (and past attendance if applicable), event and pre-event activities, how event supports your organization's mission, non-profit beneficiary if applicable,
- Event logistics including timeline, safety/security, parking/traffic management
- How your event showcase McKinney for tourism and economic development
- Specific marketing plans for event(s) including promotional channels and budget for each.
- Past promotional success and lessons learned (if applicable).
- Percentage of total marketing budget that this grant application represents.

- The Promotional/Community Event for which financial assistance is sought will be administered by or under the supervision of the applying organization.
- All funds awarded will be used exclusively for advertising, marketing and promotion of the Promotional/Community event described in this application.

- Recognition to MCDC:
 - MCDC will be recognized in all marketing, advertising, outreach and public relations as a funder of the Promotional/Community Event. A logo will be provided by MCDC for inclusion on all advertising, marketing and promotional materials. Specifics for audio messaging will be agreed upon by applicant and MCDC and included in an executed performance agreement.
 - Grant recipients are encouraged to use graphics and text from the MCDC Grantee Toolkit (to be provided to all grant recipients) for posts/ads to help share how MCDC partners with your organization.
- The Organization officials who have signed the application are authorized by the organization to submit the application;
- Applicant will comply with the MCDC Grant Guidelines in executing the Promotional/Community Event for which funds were received.
- Applicant gives permission for the use of Board presentation images and other published event images on MCDC and City of McKinney website and social media content and print/digital publications.
- Applicant will provide a final report of the Promotional/Community Event(s) no later than 30 days following the completion of the Promotional/Community Event(s). Applicant may choose to use the [online form for Final Report](#) or email Final Report to info@mckinneycdc.org. If emailed, Final Report may be in any format. All Final Reports should include:
 - narrative report on the event(s),
 - goals and objectives achieved based on performance metrics outlined in the application,
 - financial data (budget vs. actual expenses and revenues along with explanation for variances,
 - amount donated to charity (if applicable),
 - samples of marketing efforts (images of printed materials and ads, screenshots of website and online promotions),
 - statement/examples demonstrating how grant recipient promoted MCDC as a partner, and
 - photos and/or video of the event(s).
- Grant funding is provided on a reimbursement basis subsequent to submission of a reimbursement request, with copies of invoices and paid receipts for qualified expenses. Up to 20% of the grant awarded may be withheld until the **final report on the Promotional/Community Event is provided to MCDC**.
- Funds granted must be used within one year of the date the grant is approved by the MCDC board.

Applicant Electronic Signature

We certify that all figures, facts, and representations made in this application, including attachments, are true and correct to the best of our knowledge.

Selecting this option indicates your agreement with the above statement.

Chief Executive Officer



Date

Saturday, May 23, 2026

Representative Completing Application



Date

Saturday, May 23, 2026

Notes

- Incomplete applications or those received after the deadline will not be considered.
- A final report must be provided to MCDC within 30 days of the event / completion of the Promotional / Community Event.
- Final payment of funding awarded will be made upon receipt of final report.
- Please use the Final Report to report your results. A PDF version is also available.



2026/2027 Marketing Plan and Budget for MRT's Reopening with *A Christmas Carol & Steel Magnolias*

For the 2026–2027 Reopening, McKinney Repertory Theatre will implement a focused marketing strategy to promote our marquee productions of *A Christmas Carol* and *Steel Magnolias*. This coordinated approach utilizes a mix of high-impact digital tools, traditional print, and local broadcast to ensure strong attendance and regional engagement.

1. Digital & Social Media Marketing

- **Facebook Ads/Posts:** Targeted paid campaigns and organic posts to share production details, cast highlights, and direct ticket links.
- **GeoFencing Digital Ads:** Location-based mobile advertising targeting users near different high profile events such as Beneath the Wreath, Home for the Holidays, the McKinney Farmer's Market, etc.
- **Community Impact Digital:** High-visibility digital placements on the *Community Impact* website to reach local residents.
- **Community Impact Newsletter:** Featured placements in the *Community Impact* email briefing.
- **Local Profile Digital:** Digital advertisements and event listings on the *Local Profile* platform to reach regional arts enthusiasts.
- **Housewarmers Newsletter:** Inclusion in the *Housewarmers* newsletter to introduce new residents to MRT's seasonal offerings.

2. Print & Physical Visibility

- **Community Impact Print:** Targeted print advertisements in the McKinney edition of *Community Impact* newspaper.
- **Vinyl Signage (MPAC Yard Signs):** High-visibility yard signs and vinyl banners prominently displayed outside the McKinney Performing Arts Center.
- **Posters:** Professionally designed posters distributed across downtown McKinney, local businesses, and at partner venues.

3. Broadcast & Regional Community Outreach

- **Radio:** Local radio spots to reach commuters and residents across northern Collin County, emphasizing the "must-see" nature of our return to the MPAC stage.
- **Local Media Listings:** Submit press releases and event details to local newspapers, online publications, and regional arts calendars.
- **MPAC Promotions:** Leverage our partnership with the McKinney Performing Arts Center to include our productions in their official newsletters, website listings, and on-site signage.



Goals & Measurement

- **Attendance Targets:**
 - *A Christmas Carol*: Achieve an average of 267 attendees per performance (Goal: 2,400 total attendees).
 - *Steel Magnolias*: Achieve an average of 100 attendees per performance (Goal: 1,200 total attendees).
- **Regional Visibility:** Continue to draw 56%+ of our audience from outside the McKinney/Fairview area, reinforcing our position as a regional tourism driver.
- **Digital Growth:** Increase MRT’s Facebook and Instagram followings by **10%** across all channels during the 2026–2027 season.

This comprehensive plan allows McKinney Repertory Theatre to maximize the impact of our reopening, engage the community, and drive meaningful foot traffic to Downtown McKinney through strategic, data-driven investments. By investing **\$13,190.00** across these channels, we ensure that MRT continues to serve as a premier cultural destination, driving record attendance and sustained economic growth for downtown McKinney.

Marketing/Advertising Item	Budget
Season Tickets - Grand Reopening (Both Shows)	
Community Votes	\$39.00
Posters	\$40.00
Facebook Ads/Posts	\$100.00
GeoFencing Digital Ads	\$75.00
Housewarmers Newsletter	\$200.00
Brochures	\$70.00
Community Impact Storytelling	\$1,000.00
Community Impact Print 1/4 Page Ad	\$1,400.00
Total Requested for Reopening	\$2,924.00
A Christmas Carol	
Vinyl Signage (MPAC Yard Signs)	\$140.00
Posters	\$100.00
Postcards	\$250.00
Facebook Ads/Posts	\$250.00



GeoFencing Digital Ads	\$200.00
Community Impact Print	\$1,400.00
Community Impact Digital	\$1,400.00
Community Impact Newsletter	\$900.00
Local Profile Digital	\$600.00
Radio	\$600.00
Housewarmers Newsletter	\$200.00
Total Requested for A Christmas Carol	\$6,040.00
Steel Magnolias	
Vinyl Signage (MPAC Yard Signs)	\$130.00
Posters	\$70.00
Facebook Event Ad/Posts	\$250.00
Geofencing	\$100.00
Community Impact Print	\$1,400.00
Community Impact Digital	\$1,400.00
Community Impact Newsletter	\$900.00
Local Profile Digital	\$600.00
Radio Ad	\$600.00
Housewarmers Newsletter	\$300.00
Total Requested for Steel Magnolias	\$5,750.00
SUBTOTAL	\$14,714.00
MRT COVERING	-\$1,524.00
Total Requested from MCDC Grant	\$13,190.00

Show Budget 2026-2027

Expenses	Nov/Dec '26 MAIN Stage		Jan 27 NON main		Mar '27 MAIN stage		Apr '27 NON main		Jul '27 MAIN stage		2026-27 Budget	2026-27 Actuals
	ACC Budget	ACC Actuals	Winter Chestnut Square Budget	Winter Chestnut Square Actuals	Steel Magnolias Budget	Steel Magnolias Actuals	Schulte Young Playwrite Rdng	Schulte Young Playwrite Rdng	Mamma Mia or 9 to 5 Budget	Mamma Mia or 9 to 5 Actuals		
MPAC/Other Space rental	5,598				6,069				6,069		17,735	-
Royalties	15		-		2,295				5,000		7,310	-
Scripts	100				355		100				555	-
Show Programs/Print Material	2,200		100		1,250		50		1,250		4,850	-
Show Signs	490				200		50		490		1,230	-
Adult Cast Members	1,500		-		600				2,300		4,400	-
Adult Understudy max of 2	100				200				200		500	-
Director	400		100		400				400		1,300	-
Director Gas Stipend	50				50				50		150	-
Director-Special Add On	-										-	-
Stage Manager (Incl Youth SM)	300				200				200		700	-
Producer	150				150				150		450	-
Set Designer	200				200				200		600	-
Master Carpenter	250				500				500		1,250	-
Scenic Designer	150				150				150		450	-
Light Designer	300				300				300		900	-
Sound Designer	200				200				200		600	-
Costume Designer	200				200				200		600	-
Seamstress	100				100				100		300	-
Prop Master	100				100				100		300	-
Light Board Operator	220				180				180		580	-
Sound Board Operator	220				180				180		580	-
Stage Crew (Non-Stipended)	1,320				540				540		2,400	-
Projector Operator	220				-				-		220	-
Special Effects Operator	220				-				-		220	-
Videographer	50				50				50		150	-
ASL Interpretation	160				160				160		480	-
Show Security (Secured Dallas)	665				1,418				1,418		3,500	-
Construction materials	250				1,000				2,000		3,250	-
Set Dressing	250				800				800		1,850	-
Lighting materials (incl rental)	50				-				-		50	-
Costumes	1,500		300		1,200				2,700		5,700	-
Hair/Makeup Artist	220				-				-		220	-
Hair/Makeup Materials	300				200				-		500	-
Props	100				1,000				500		1,600	-
Musicians	1,950				-				3,000		4,950	-
Choreographer	50				-				100		150	-
Fight/Intimacy Choreographer	-				-				-		-	-
Music Director	100				-				100		200	-
Special Effects (Materials/Rental)	300				-				-		300	-
Paid Movers (Load In/Out)	200				200				200		600	-
Rental Vehicle (Load In/Out)	150				150				150		450	-
Cast/Crew Appreciation	500				500				500		1,500	-
Concession Expenses	450				600				600		1,650	-
Schulte Young Playwrite Prize	-				-		500		-		500	-
Miscellaneous	200		150		200		100		200		850	-
Total show expenses	22,048	-	650	-	21,896	-	800	-	31,236	-	76,631	-
Ticket Sales	31,410		1,800		31,473		1,100		29,267		95,049	-
Concession Sales	1,403		-		1,648		-		1,648		4,698	-
Total show revenue	32,813	-	1,800	-	33,120	-	1,100	-	30,914	-	99,747	-
Total Show Net Income	10,765	-	1,150	-	11,224	-	300	1	(322)	-	23,116	-

MRT Budget 2026-2027: Operating Expenses and Income

Operating Expenses	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Budget	Actuals	
M Community Impact (Print/Digital/Newsletter)													13,500	-	
M Connoisseur Media-Radio Ads													1,800	-	
M Facebook Promotion & Ads													850	-	
M General Season Posters/Postcards													149	-	
M Geofencing													575	-	
M Housewarmers Newsletter													1,000	-	
M Local Profile Digital													1,800	-	
M Nextdoor Advertising													-	-	
A-Weber Server													405	-	
Executive Director (Part Time)													20,000	-	
General Costume/Set/Performance Materials													300	-	
Gift Certificate Tickets													120	-	
Go Daddy Website													200	-	
Go Store It Storage (Warehouse)													24,661	-	Included a 15% increase for entire year
Insurance													1,300	-	7/2025 bill with new agent was \$1,150
Intern Stipend													500	-	For spring semester 2027
Intuit Quickbooks													3,600	-	
MaRTy awards Expenses													2,000	-	
McKinney Chamber of Commerce													325	-	
Member meeting EVENTS													200	-	
MISC													1,500	-	
MPAC Office (half the space)													2,250	-	Continued rate of \$250 for 9 months
Music Licensing (Ascap/BMI)													575	-	
Perusal scripts													100	-	
Show Poster Artwork (custom)													300	-	\$100 for each show
Tx Giving Day Participation													50	-	
Warehouse clean out													-	-	
Zoom Account													200	-	
													-	-	
Total operating exp	-	-	-	-	-	-	-	-	-	-	-	-	78,259	-	
Show Expenses from previous page													76,631	-	
TOTAL EXPENSES													154,890	-	
Income:															
															-
MaRTy Awards (Tickets/Raffle/Donations)													200	-	
Donations/NTx Giving Day													3,500	-	
Program Ads/Sponsorship													4,500	-	
Re-Opening Fundraising Drive													1,000	-	
Student Ticket Program Donations													5,000	-	Hope for HEB donation for Steel Magnolias
Show Income from Previous Page													95,049	-	
Member Dues													1,200	-	
Grants													39,354	-	\$20K for MAC grant + \$19.3 for MCDC grant (Nov & May rqsts)
Concession Sales from Previous Page													4,698	-	
Misc.													750	-	
TOTAL INCOME	-	-	-	-	-	-	-	-	-	-	-	-	155,251	-	

TOTAL NET 361 -

McKinney Repertory Theatre Financials

for Fiscal Years, September 1 - August 31

	23/24 Season	24/25 Season	25/26 Season	
	FY Actuals	FY Actuals	FY Budget	YTD.Apr Actuals
INCOME				
Grants	24,602	28,008	28,640	30,417
Ticket Sales	105,835	103,411	71,890	52,858
Member Dues	1,990	1,532	1,647	850
Donations	13,507	21,482	8,850	7,555
Sponsorships/Program Ads	9,093	3,675	4,500	2,722
Concessions	7,120	7,467	2,768	3,361
Misc	823	159	2,400	676
Total Income	162,970	165,734	120,695	98,439
EXPENSES				
Administrative Salaries & Contracts	16,121	28,434	25,948	17,086
Artistic Salaries & Contracts	17,410	20,005	24,721	18,269
Facility Costs	16,768	22,360	24,444	15,296
Marketing & Promotions	9,218	10,665	8,350	6,272
Program Production Costs	75,024	69,563	40,761	27,222
Total Expenses	134,541	151,027	124,224	84,144
NET INCOME	28,429	14,708	(3,529)	14,295

McKinney Repertory Theatre

YTD Financial Summary

September 01, 2025 - April 30, 2026

	<u>Income</u>	<u>Expenses</u>	Net Income/(Loss)
Grant Funds	\$ 30,417		
Main Stage Ticket Sales	\$ 47,678		
Chestnut Square Events	\$ 1,799		
Donations	\$ 2,555		
Member Dues	\$ 850		
Concession Sales	\$ 3,361		
Program Ads/Sponsorships	\$ 2,722		
Student Ticket Program Donations	\$ 5,000		
Youth Pilot Program Income	\$ 3,381		
Gala/MaRTy Events	\$ 244		
Interest Income	\$ 433		
	<u>\$ 98,439</u>		
MPAC Mthly Office Rent		\$ (1,000)	
MPAC Rental for Performances		\$ (12,220)	
Part-time Executive Director		\$ (13,333)	
Marketing		\$ (7,086)	
Royalties		\$ (3,004)	
Show Security		\$ (2,083)	
Artist Fees		\$ (11,301)	
Lights and Set		\$ (619)	
Costumes		\$ (2,882)	
Props		\$ (208)	
Musicians		\$ (4,755)	
Storage Rental		\$ (14,296)	
Accounting		\$ (2,345)	
Insurance		\$ -	
Memberships		\$ (506)	
Concessions Inventory		\$ (891)	
Print Materials		\$ (4,378)	
Gala/MaRTy Events		\$ (1,155)	
Equipment			
Miscellaneous		<u>\$ (2,073)</u>	
		\$ (84,144)	
			<u>\$ 14,295</u>

P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248219434
Feb. 29, 2012 LTR 4168C E0
33-1042926 000000 00

00022831
BODC: TE

MCKINNEY REPERTORY THEATRE
% JAKE CORRELL
111 N TENNESSE ST STE 305
MCKINNEY TX 75069-4319

1528

Employer Identification Number: 33-1042926
Person to Contact: Ms. Benson
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Feb. 17, 2012, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in February 2004.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section 509(a)(2).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

Request for Taxpayer Identification Number and Certification

Go to www.irs.gov/FormW9 for instructions and the latest information.

**Give form to the
requester. Do not
send to the IRS.**

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	1	Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)		
	2	Business name/disregarded entity name, if different from above.		
	3a	Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____ Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ <i>(Applies to accounts maintained outside the United States.)</i>	
	3b	If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/>		
	5	Address (number, street, and apt. or suite no.). See instructions.	Requester's name and address (optional)	
	6	City, state, and ZIP code		
	7	List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number									
				-					
or									
Employer identification number									

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person		Date May 23, 2026
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they