

## **Grant Writing – Susan Kavanaugh**

- Grant-writing training through MARC (MidAmerica Regional Council) in Kansas City Missouri
- Extensive fundraising training through the Institute for Charitable Giving
- Certified Professional Grant Writer
- Additional training through the American Grant Writers Association, Inc.

### ***Organizations I've secured grants from (not inclusive):***

#### **Federal Grants Secured:**

- **U.S. Department of Justice, Office for Victims of Crime (VOCA)**
  - \$65,000
  - \$152,000
- **U.S. Department of Interior for Historic Preservation (Northwest Arkansas near Fayetteville)**
  - \$200,000

#### **State Grants Secured:**

- **Arizona Governor's Office of Highway Safety**
  - \$15,000
  - \$30,000
- **Arizona Department of Transportation**
  - \$131,000
- **Arizona Health Care Cost Containment System (AHCCCS)**
  - \$120,000
  - \$65,000
  - \$30,000
- **Arizona Department of Economic Security (DDD)**
  - \$1,500,000

#### **National Foundation Grants Secured:**

- **The Walmart Family Foundation - \$450,000**
- **Rotary International - \$300,000**
- **The Sharon D. Lund Foundation - \$130,000**
- **The Ibis Foundation - \$100,000**

**Regional Foundation Grants Secured:**

- **Virginia G. Piper Charitable Trust - \$120,000**
- **City of Scottsdale - \$73,000**
- **City of Peoria - \$45,000**
- **BHHS Legacy Foundation - \$30,000**



**ARIZONA SPORTS AND TOURISM AUTHORITY**  
**FY2016 Youth & Amateur Sports Biennial Grant Application**  
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**AZSTA 2016 GRANT FUNDING**

**AZSTA has a projected maximum of \$2 Million dollars of funding available for the 2016 Biennial Grant cycle. The Authority may, at its sole discretion, award the total amount or a portion of the maximum projected available funding based on the grant applications received by the deadline (see below).**

**AZSTA BIENNIAL GRANT OVERVIEW**

AZSTA, per Arizona Revised Statute, operates within Maricopa County, Arizona. AZSTA will hold workshops in various locations to ensure that as many communities and organizations as possible are made aware of our biennial grant program.

- A \$250,000 maximum guideline has been established for grant applications in Authority matching funds. Any grant application requesting more than \$250,000 from AZSTA will not be accepted.
- A maximum of one grant award will be considered for recommendation for any one applicant/organization.

**BIENNIAL GRANT GOALS & OBJECTIVES**

- To identify, solicit, develop and allocate funding for youth and amateur sports proposals in Maricopa County which will service a wide variety of sporting and physical activity experiences throughout the County.
- To provide technical assistance, demographic and facility information and outreach to youth and amateur sports participants and their communities about opportunities and activities of AZSTA.
- To participate in and encourage partnerships which benefit youth and amateur sports and physical activity.
- To ensure that funds provided by AZSTA are allocated in a responsible and effective manner and in compliance with the organization's enabling legislation.

**CORE REQUIREMENTS FOR APPLYING FOR A BIENNIAL GRANT**

1. Applicants must be a Maricopa County agency, municipality, school district or any other incorporated public entity, (including any combination of the forgoing) or a 501(c) (3) or 501 (c) (4) non-profit organization, which has been in operation for no less than one calendar year (documentation evidencing this must be provided). For-profit organizations are not eligible to apply for a biennial grant.
2. Proposed projects must be within Maricopa County.
3. Organizations and/or projects that have previously received funding from the Authority may re-apply for funds, but may not be as highly considered as new organizations and/or projects requesting funding.
4. Funding will only be considered for those projects for youth and amateur sports facility/field construction and/or renovation, sports field lighting and/or equipment.
  - a. Funding for programs will not be considered or awarded
  - b. Funding for indirect costs such as overhead and administrative expenses (e.g. salaries, utilities, rent, etc.), loans or endowments, conferences, individuals, tournaments, travel, capital campaigns, funding to sustain an organization or program or any other category that the Authority, in its sole discretion, considers to not be directly related to a capital improvement project will not be funded.



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**FY 2016 GRANT TIMELINE**

|   |   |
|---|---|
| <p>Grant Assistance Workshops and Information at <a href="http://www.az-sta.com">www.az-sta.com</a></p>   | <p>May 18, 2015 through May 27, 2015<br/>         Workshops will be scheduled during this timeframe – location(s), dates and times will be posted at <a href="http://www.az-sta.com">www.az-sta.com</a></p> |
| <p>Grant Applications – Availability</p>  | <p>Grant applications will be made available the week of June 1, 2015 at <a href="http://www.az-sta.com">www.az-sta.com</a></p>   |
| <p>Deadline for submitting applications</p> <ul style="list-style-type: none"> <li>At the time the application is submitted, a minimum of 50% of Applicant’s Contribution must be documented in Section IV of the application as well as by third party funding commitment letters (if applicable). Applicants must also summarize their plan for raising the remains of funds.</li> <li>In-kind donations should be itemized and calculated accurately in Section III of Grant Application</li> </ul>  | <p>Documents must be received electronically and in the AZSTA office by <u>Friday, June 26, 2015– 5:00 p.m.</u></p>   |
| <p>Evaluation and Review Period including project site visits from AZSTA staff</p>  | <p>July – August 2015</p>   |
| <p>Notification of Grant Awards</p> <ul style="list-style-type: none"> <li>Prior to the notification of the grant awards, applicants will be asked to provide additional documentation evidencing a minimum of 75% of Applicant’s Contribution</li> </ul>   | <p>September – October 2015</p>   |
| <p>Funding Agreement between AZSTA and Recipient</p> <ul style="list-style-type: none"> <li>100% of Applicant’s Contribution must be secured and evidenced prior to the execution of the funding agreement</li> </ul>   | <p>Within 30 days after Notification of Grant Awards (October – December 2015)</p>  |
| <p>Project Completion</p> <ul style="list-style-type: none"> <li>The project, as approved, should be completed within twelve months of the execution of the Funding Agreement between the Applicant and the Authority</li> <li>A “Commitment to Complete” provided by the applicant’s Board of Directors or other appropriate governing body must be submitted with the application.</li> <li>Should the project, as approved be delayed beyond the twelve month period, the Recipient must provide an extension request in writing with the new projected completion date and explanation of delay.</li> </ul> | <p>Within twelve (12) months of the execution of the Funding Agreement.</p> <p>Extension request will be due 30 days prior to the original project completion due date</p>                                  |
| <p><b>Grant Management &amp; Reporting Workshop</b></p> <ol style="list-style-type: none"> <li>A Grant Reporting and Management Workshop will be held in January of 2016 and will be <b>required</b> for all AZSTA Grant Award recipients to attend.</li> </ol>   | <p>January 2016</p>   |



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**FREQUENTLY ASKED QUESTIONS**

|  |  |
|--|--|
| <p><b>1. Who may apply for a grant?</b></p>  | <p>Applicants <u>must</u> be a Maricopa County agency, municipality, school district or any other incorporated public entity, (including any combination of the forgoing) or a 501(c) (3) or 501 (c) (4) non-profit organization, which has been in operation for no less than one calendar year. Proposed projects <u>must</u> be within Maricopa County. Applicants who have previously received funding from AZSTA may apply for funds, but may not be as highly considered as others who have not received prior funding. For-profit organizations are not eligible for biennial grant awards.</p>   |
| <p><b>2. How much in funding can applicants request?</b></p>                           | <p>The Authority, per A. R. S., may fund, at its sole discretion, up to two-thirds of a project's total cost. Projects which request less than the two-thirds match from AZSTA are additionally considered.</p>  |
| <p><b>3. When can a project start to be eligible for funding?</b></p>                  | <p>If an applicant is awarded a grant from AZSTA, that portion of the project for which Authority funds have been awarded <u>cannot</u> have started before the execution of a Project Funding Agreement. The Agreement is to be executed within <b>30 days after the grant is awarded</b>. Funds will be made available on a pro-rata reimbursement basis after the agreement is executed and work has begun.</p>   |
| <p><b>4. When must the project be completed?</b></p>                                   | <p>The project must be completed within 12 months of the funding agreement's execution unless otherwise agreed to by the Authority and documented in the funding agreement. A "Commitment to Complete" provided by the applicants Board of Directors or other appropriate governing body must be submitted with the application. Should the project, as approved be delayed beyond the twelve month period, the Recipient must provide an extension request in writing with the new projected completion date and explanation of delay. The extension request will be due 30 days prior to the original project completion due date</p>  |
| <p><b>5. How are the Authority's funds disbursed?</b></p>                              | <p>Disbursements of grant funds will be available to grant recipients on a pro-rata <b>reimbursement basis</b>. This ensures that the Authority's funds are expended on a pro-rata basis along with the recipient's contribution as the project progresses. For example, the Authority awards \$50,000 toward a project with a total value of \$150,000. The Authority's contribution as a percentage of the total value is 33%. As the project moves forward, the grant recipient submits a reimbursement for \$10,000. Once approved, the Authority makes a payment of \$3,333 (33%) to the recipient. This would continue through the completion of the project at which time all funds would have been disbursed under the Funding Agreement. A reimbursement form is available on the Authority's website along with this application and progress reports.</p> |
| <p><b>6. What kinds of projects are eligible?</b></p>                                  | <p>Grants are based on projects serving youth and amateur sports and physical activity, which demonstrate financial need, leveraged funding, community partnerships, sustainability, and a demonstrated benefit to a local community in Maricopa County. The Authority will accept grant applications for new facility or field construction, facility or field renovation, field lighting and/or equipment. Funding for programs or other administrative/overhead type expenses will not be awarded.</p>  |
| <p><b>7. What are some examples of projects which have previously been funded?</b></p> | <p>Funding has been awarded for equipment, transportation, lighting of fields, renovation of existing sports facilities, construction of playgrounds, construction of fitness trails, and construction of sports fields or complexes. The Authority is only accepting applications for new facility/field construction, field/facility renovation and/or equipment. Funding for programs will not be considered or awarded.</p>  |
| <p><b>8. What types of funding are not awarded?</b></p>                                | <p>Grants will not be awarded for requests for: fixed overhead/administrative expenses (e.g. salaries, rent, utilities, etc.), loans or endowments, conferences, individuals, golf tournaments or benefit tables, travel (all), capital campaigns, funding to maintain the sustainability of an organization or program, or anything else deemed as not serving the youth and amateur sports community within Maricopa County.</p>   |



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**GRANT APPLICATION PROCESS**

1. AZSTA's Youth and Amateur Sports Grant Application ***is required***. No other application format will be accepted. Application must be TYPED and submitted in WORD format
2. Two (2) printed copies of the application and supporting documents must be received by the Authority at its offices no later than 5:00 PM on Friday, June 26, 2015. No applications will be accepted after this time.
  - a. Applications not conforming to the requirements as contained within this Biennial Grant Application will be considered incomplete and will not be considered for funding.
  - b. Handwritten applications will not be accepted.
  - c. No faxes will be accepted
  - d. Applications should be printed on white, 8.5" x 11" paper. One of the two required copies should not be bound, but be held together with a binder clip to allow for additional copies to be made.
  - e. One electronic version of the completed grant application (in its original Word format) must also be provided by the deadline via email to: [robin@az-sta.com](mailto:robin@az-sta.com)  
**Authority Delivery/Mailing Address:**  
Arizona Sports & Tourism Authority at University of Phoenix Stadium  
1 Cardinals Drive, Glendale AZ 85305 , Attn: Robin Lea-Amos
3. Letters of support for your project may be included along with your application at the time it is submitted. Any communication or solicitation of the Authority's board of directors, either directly or indirectly, regarding your application may subject your application to disqualification.
4. Any and all requests for information or clarification must be addressed directly with the Authority's staff to Robin Lea-Amos, [robin@az-sta.com](mailto:robin@az-sta.com).
5. Project site visits from AZSTA staff will be conducted during the evaluation process. No other in-person meetings with the Authority staff will be scheduled to discuss the application process will be granted. All questions must be submitted via email or discussed via telephone.
6. A "Commitment to Complete" provided by the applicants Board of Directors or other appropriate governing body must be submitted with the application.

**Authorized Signatory**

By our signature below, we attest that we have read and understand all components of the Arizona Sports and Tourism Authority's funding process related to this Grant Application, and that, if funded, we will comply with all requirements and guidelines listed therein. We further attest that our organization has the capacity to deliver all aspects, both financial and operational, that we have presented in this Grant Application. **(Electronic signatures are acceptable on the copy submitted via e-mail)**

Date: June 24, 2015

\_\_\_\_\_  
Grant Applicant Signature  
Susan Kavanaugh, Director of Development and Communications  
Name (printed) and Title



## **GRANT APPLICATION EVALUATION PROCESS**

**STEP ONE:** Applications are initially reviewed and evaluated by AZSTA's staff for compliance with the core requirements of the grant program as well as other established application criteria. This initial review may result in additional requests for information and/or clarification. Project site visits from AZSTA staff will be conducted during the evaluation process

**STEP TWO:** All applications will be forwarded to the members of the Authority's Youth and Amateur Sports Committee for their individual review and consideration. They will be grouped as either conforming or non-conforming with the program's core requirements and other established criteria with explanations as to any non-conformance issues.

**STEP THREE:** Once step two has been completed, the Authority will schedule a public meeting of the Youth and Amateur Sports Committee at which time the staff will provide its recommendations as to which applications should be considered for funding. It would be anticipated that at this meeting the committee, based on the staff's recommendations and the committee's input, would formally recommend a final list of applications to be forwarded to the Authority's board of directors for consideration in making grant awards.

**STEP FOUR:** The Authority's board of directors meets to consider the award recommendations from the Youth and Amateur Sports Committee and approve the awards.

**STEP FIVE:** Final award recipients are notified and are provided an electronic version of the Funding Agreement which must be completed and fully executed within thirty (30) days of the award notification. 100% of the applicant's contribution must be documented prior to the execution of the Funding Agreement in order to move forward.

**STEP SIX:** A Grant Reporting and Management Workshop will be held in January of 2016 and will be required for all AZSTA Grant Award recipients to attend.

**STEP SEVEN:** Implementation phase – the project is to be completed within twelve months of the execution of the Funding Agreement. During this phase, the Applicant is to prepare and submit to the Authority at [robin@az-sta.com](mailto:robin@az-sta.com) a monthly Project Progress Report Form which can be found at: [www.az-sta.com/yas\\_grantcycle.htm](http://www.az-sta.com/yas_grantcycle.htm)  
At the completion of the project there will be one final project progress report form to be completed which summarizes the success of the project meeting its stated goals and objectives.





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**FY2016 Youth & Amateur Sports Biennial Grant Application**

| <b>I. APPLICANT INFORMATION</b>           |   |
|---|---|
| (Fill in the requested information below) |   |
| Organization Name                         | [REDACTED]  |
| Mailing Address                           | 9299 W. Olive Ave., Suite 311   |
| City, State and Zip Code                  | Peoria, AZ 85345  |
| Primary Contact Person and Title          | Susan Kavanaugh<br>Director of Development and Communications   |
| Phone #                                   | 623-760-8025 <b>Fax# 623-266-7491</b>   |
| Email Address                             | skavanaugh@[REDACTED]   |
| Secondary Contact Person and Title        | Bri Donthan<br>Recreation Program Director  |
| Phone #                                   | 623-266-7490 <b>Fax # 623-266-7491</b>  |
| Email Address                             | bridonthan@[REDACTED]   |
| Website URL                               | [REDACTED]  |
| Qualifying Organization Structure         | 501c-3  |
| Arizona Corporation Commission File No#   | 0997475-4   |
| Number Of Years as a Non-Profit           | 13  |
| Prior Award Recipient?                    | Place an 'X' here <u>  X  </u> if your organization has ever received a funding award from the Authority.<br>If previously awarded, when was the grant awarded? 2008 and 2012<br>How much was the award? 2008/\$6,000 and 2012/\$26,335 |

**II. PROJECT INFORMATION**

|  |  |                          |                                    |                          |                            |                                     |                  |
|--|--|--------------------------|------------------------------------|--------------------------|----------------------------|-------------------------------------|------------------|
| <b>Project Title</b>   | Title goes here:<br>[REDACTED] Health and Fitness Program  |                          |                                    |                          |                            |                                     |                  |
| Project Type (mark 'X' for all that apply)   | <table border="1"> <tr> <td><input type="checkbox"/></td> <td><b>Facility Construction (new)</b></td> </tr> <tr> <td><input type="checkbox"/></td> <td><b>Facility Renovation</b></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><b>Equipment</b></td> </tr> </table>  | <input type="checkbox"/> | <b>Facility Construction (new)</b> | <input type="checkbox"/> | <b>Facility Renovation</b> | <input checked="" type="checkbox"/> | <b>Equipment</b> |
| <input type="checkbox"/>   | <b>Facility Construction (new)</b>   |                          |                                    |                          |                            |                                     |                  |
| <input type="checkbox"/>   | <b>Facility Renovation</b>   |                          |                                    |                          |                            |                                     |                  |
| <input checked="" type="checkbox"/>  | <b>Equipment</b>   |                          |                                    |                          |                            |                                     |                  |
| Project Address  | 15227 N. Reems Rd.      7200 W. Bell Rd.   |                          |                                    |                          |                            |                                     |                  |
| City, State and Zip Code   | Surprise, AZ 85374      Glendale, AZ 85308   |                          |                                    |                          |                            |                                     |                  |
| Describe Ownership Structure of Land and/or Facility   | Both locations are leased  |                          |                                    |                          |                            |                                     |                  |
| If property where project is leased, include copy of lease   | Attached Letter of Intent for Surprise<br>Attached Lease for Glendale  |                          |                                    |                          |                            |                                     |                  |
| Tax Assessor Parcel No.  | Unit B2 501-18-525; Unit B3 501-18-497; Unit B4 501-18-498   |                          |                                    |                          |                            |                                     |                  |
| Project Description (Describe the project and its importance to your community in 150 words or less) | For the past 13 years, [REDACTED] has been providing responsive, progressive, and dynamic programs for individuals with Developmental Disability to empower them to realize their dreams of optimal independence, meaningful employment, significant social relationships, and full inclusion within their community. One way we accomplish this mission is through our Health and Fitness Program which |                          |                                    |                          |                            |                                     |                  |





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includes daily fitness classes for all of our participants as well as training in numerous Special Olympics sports for our athletes. Because of the upcoming expansion of space at our Surprise location and the relocation of our Peoria location to a larger space in Glendale, we have an opportunity to expand our health and fitness facilities. We are requesting funding to purchase adaptive and traditional fitness equipment for both locations. We are also requesting uniforms and equipment for our Special Olympics athletes who use these facilities as part of their training.

**III. PROJECT FUNDING**

Total Project Value \$41,205.00 \_\_\_\_\_

Requested Authority Contribution \$27,607.35 \_\_\_\_\_ ( 67 % of Total Project Value (max. is 67%))

**Applicant's Contribution**

- Applicant's Contribution includes all sources of cash and in-kind that the Applicant is securing for their matching portion

**In-Kind contributions** are limited in scope and will be reviewed by the Grant Administrator as part of the grant approval process.

Additionally, there are specific percentage limitations which determine the maximum amount of "in-kind contributions" allowed for the grant to be considered for approval:

**Limit #1** – must be less than 10% of the Total Project Value (example: total project cost = \$100,000. Limit #1 = "in-kind" contributions must be less than \$10,000)

**Limit #2** – must be less than 25% of the Applicant's Total Contribution (example: total project cost = \$100,000. Applicant's contribution = 1/3 = \$33,000. Limit #2 = "in-kind" contributions must be less than \$8,250).

**Enter values on the Excel worksheet below by DOUBLE CLICKING on it to open it up. When you are finished press 'Esc' to exit and save the worksheet.**

|                                    |           |  |
|------------------------------------|-----------|--|
| <b>Total Project Value</b>         | \$ 41,205 | Enter values in 'Green' shaded boxes only!                                 |
| <b>Applicant Contribution</b>      | 13,598.00 |  |
| <b>Cash</b>                        |           |  |
| <b>In-Kind</b>                     |           | Okay   |
| <b>Total Contribution</b>          | \$ 13,598 |  |
| <b>as % of Total Project Value</b> | 33%       | Okay (Min. 33% required)   |
| <b>Amount Secured</b>              | \$ 13,598 | Okay (Min. 50% required)   |
| <b>Maximum In-Kind Amount</b>      | \$ 3,399  | Okay (Max. of lesser of 10% of Total Project or 25% of Total Contribution) |

In-Kind contributions Describe any in-kind contributions sources for the project N/A

**Project Start and Completion Dates** (If this is a phased project, please provide the start and completion dates for each phase and which phase(s) are parts of this funding application. If not, please just complete the Phase #I line. Projects cannot begin prior to the execution of the Funding Agreement. Project completion date must be no later than 12

Start date  
 Completion date

| Phase | Description                | Start Date   | Completion Date | Part of this Funding App? |
|-------|----------------------------|--------------|-----------------|---------------------------|
| I     | Build out Glendale         | 6/22/15      | 10/1/15         | No                        |
| II    | Build out Surprise         | 9/1/15       | 11/1/15         | No                        |
| III   | Purchase fitness equipment | Upon funding | Within 60 days  | Yes                       |



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months after the execution date of the Funding Agreement.)

|    |                            |              |                |     |
|----|----------------------------|--------------|----------------|-----|
| IV | Purchase uniforms          | Upon funding | Within 60 days | Yes |
| V  | Purchase laundry equipment | Upon funding | Within 60 days | Yes |

**IV. PROJECT DESCRIPTION and STATEMENT OF NEED**

(Describe the project in detail including how this project will meet your organization's goals, will benefit the community at-large, how many people will benefit from this project, what criteria will be used by you to measure the project's success, major partners in the project and why this project is in need of funding.)

Since 2007, the [REDACTED] Health and Fitness Program has helped to address the fitness, strength, stamina, weight control and overall health of the adults with disability that attend our program. Obesity and poor physical conditioning are steadily increasing in the adult population of the United States but their incidence in people with Developmental Disability (DD) is significantly higher. Approximately 30% of our current [REDACTED] participants are classified as overweight while 8% are obese. Obesity leads to other physical and emotional problems. It is the mission of [REDACTED] to empower our individuals to achieve optimal independence and being physically and mentally fit enables them to succeed while being part of the larger community.

Through daily fitness classes, special programs such as dance, yoga, zumba and karate, and Special Olympics training, we provide a supportive environment where these individuals can achieve their personal fitness goals, build self-esteem, and participate in sports activities otherwise not available to people with DD. The program provides individualized training schedules, nutrition plans, and monthly meetings with a fitness and nutritional coach. The individuals are able to create personal goals, work towards the goals, and assess the success of their efforts. Our Special Olympics athletes participate in swimming, softball, bocce ball, bowling and basketball in the fall and flag football, volleyball, and track and field in the spring. We are adding a cheer team which will be ready for performance and competition in spring 2016.

Grants from the Molly Lawson Foundation and John C. Lincoln Gives support the fitness and nutrition coaching. Partnerships with the Rio Vista Recreation Center in Peoria, the Fitness Institute of Arrowhead, and the Northwest Family YMCA in El Mirage provide our participants with a place to train and participate in one on one nutritional coaching. Our success is measured by the number of participants in our various fitness programs, the number of participants who reach, or exceed their personal goals (i.e. stamina, strength, weight loss), and the number of Special Olympics athletes who train and compete in the various sports. Programs are regularly reviewed and modified to insure success.

Our Health and Fitness Program has grown as has our overall enrollment. Because of the tremendous need for services for adults with DD in northwest Maricopa County and interest in the unique opportunities we provide our participants, we will be expanding our Surprise location and relocating our Peoria location to a larger space in Glendale. On a daily basis, we currently have 170 participants attending our Peoria campus and 75 on our Surprise campus. With our expansion plans that are underway, our enrollment goals by the end of 2015 are 186 participants on our Peoria (Glendale) campus and 140 on our Surprise campus.

Funding is needed to purchase adaptive and traditional fitness equipment (i.e. recumbent and upright bicycles, treadmills, free weights, balance balls, kettle balls, and wheelchair accessible weight machines) and provide uniforms and sports equipment for our expanded number of participants. Most of our participants are low income and do not have the resources needed to purchase sports equipment and uniforms. We would purchase the following:



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| Sport                                  | Cost                  | Quantity | Total    |
|--|-----------------------|----------|----------|
| Adaptive/traditional fitness equipment | \$15,000 per location | 2        | \$30,000 |
| Cheer uniforms                         | \$130 each            | 24       | \$ 3,120 |
| Mats for cheerleading                  | \$125 each            | 6        | \$ 750   |
| Basketball/Softball uniforms           | \$37 each             | 80       | \$ 2,960 |
| Football/Soccer uniforms               | \$30 each             | 60       | \$ 1,800 |
| Softball helmets                       | \$50 each             | 8        | \$ 400   |
| Karate clothing                        | \$15 each             | 20       | \$ 300   |
| Daily fitness uniforms                 | \$5 each              | 75       | \$ 375   |
| Washer/dryer to maintain uniforms      | \$1,500 per set       | 1        | \$1,500  |
|  |                       |          | \$41,205 |

**V. FUNDING PARTNERSHIPS & LEVERAGED FUNDING**

(Describe any agencies or organizations with whom you will collaborate to enhance the project's effectiveness and leverage funding for the project. Additional consideration will be given to projects that are able to leverage other funding sources which will help the applicant exceed the applicant's required contribution minimum of 33% of the total project value adjusted for costs which the Authority may/may not elect to participate in funding.)

Limit – One page

receives funding based on enrollment from the State of Arizona Department of Economic Security/Division of Developmental Disability DES/DDD for program expenses which will be used to meet the required 33% match. While state funding from DES/DDD covers staffing, operations, overhead, and maintenance of our facilities, the funds needed to enrich our programs and provide opportunities for our participants comes primarily from grants and donations.

Through a grant from the Molly Lawson Foundation, we have been able to develop our Personally Fit Pilot Program which provides individual training and counseling to our participants. Grants from John C. Lincoln Gives and TJX Foundation also support our fitness initiatives.

Through lease negotiations for the expanded space in Surprise and the new campus in Glendale, we have secured the funding to allow us to build-out these new facilities. We have signed a letter of intent to lease an additional 3,500 square feet adjacent to our current location in Surprise to create a performing arts and fitness center which will include a dance floor and multipurpose room. Our Glendale location will be 3,000 square feet larger than our current Peoria location allowing us to offer more programming to more participants. The dance floor in our Peoria location which was purchased with 2012 AZ-STA Biennial grant funds will be maintained and moved to the Glendale campus to extend its life and usefulness.

Enter values on the Excel worksheet below by double-clicking on it to open it up. When you are finished press 'Esc' to exit and save the worksheet



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**VI. PROJECT SUSTAINABILITY**

(Describe the useful life (in years) of the project and how and who the project, once it is completed and operating, will be funded for on-going operations, capital repair and replacement and routine maintenance.)

Limit – One page

The life expectancy, with proper care and maintenance, of the proposed fitness equipment is 7 to 12 years. Participants will be taught how to use the equipment to prevent damage to the equipment or injury to the participant. They will also learn how to care for the equipment after each use. Routine maintenance and repairs, as needed, will be covered through the general operations and maintenance budget of [REDACTED].

Uniforms and individual equipment (i.e. softball helmets) will remain at [REDACTED] after each use. Staff will be responsible for oversight and care. However, participants will also learn to care for the sports equipment they use. Equipment, when not in use, is stored in a climate controlled storage area. Uniforms are laundered by [REDACTED] staff after each use and we are requesting funding for large capacity laundry equipment for this purpose. Because our participant turnover rate is very low (about 2% annually), the participants use the same uniforms for many years.

**VII. PUBLIC INVOLVEMENT AND SUPPORT**

(Describe the public's/community's role in this project, how they've been involved in shaping the project and what demonstrated support or non-support there is for this project. Include your organization's efforts to include the community in the process and/or obtain their support for the project.)

Limit – One page

[REDACTED] and its fitness program has the support of our participants and their families and numerous community partners.

[REDACTED] involves participants and their families in program planning so that we can best meet their individual needs. All participants have access to our fitness programs and Special Olympics teams/individual sports and 100% choose to participate in either one or both of the programs.

Special Olympics supports our efforts to field participants and welcomes our athletes.

Asian American Karate, LLC teaches classes for our participants and uses our Peoria location for its public classes. Theater Works partners with our performing groups (i.e. dance) to provide a venue for performances.

Rio Vista Recreation Center in Peoria and the Northwest Valley Family YMCA in Surprise make their fitness facilities available to our participants.

The Fitness Institute at Arrowhead provides one on one nutritional coaching to 50 individuals in our Personally Fit Program, at no cost to them.

Grants from the Molly Lawson Foundation, John C. Lincoln Gives and TJX Foundation support our fitness programs.

We continually explore other opportunities for our participants as well as ways to partner



**ARIZONA SPORTS AND TOURISM AUTHORITY**  
**FY2016 Youth & Amateur Sports Biennial Grant Application**  
[www.az-sta.com](http://www.az-sta.com)

with, and include, other organizations in our programming.

**VIII. BENEFIT TO A LOCAL SCHOOL OR BY A LOCAL SCHOOL**

(Describe, if applicable, how your project is accessible to and for the benefit of local school(s). If there is a benefit, describe which school(s) (by name and location and distance from the project site) will benefit from this project. If your organization is a local school, will the project be made available to the public and/or amateur sports organizations during non-school hours? Please describe in detail. )

Once the build-out in Surprise is complete, we plan to explore an opportunity with the Dysart School District to make our facilities available to their special needs students.

Limit – One page

**IX. SUPPLEMENTAL INFORMATION**

The following attachments **must** be submitted with your application

1. IRS Letter determining 501c3/c4 status
2. Verification of funds letter verifying required amount of secured funding
3. Location Map/Site Map/Plan (8 ½ x 11 or folded to 8 ½ x 11 only)
4. Photos of Existing Facility, Field, Site
5. Letters of Support (optional)
6. List of Board of Directors and Key Staff or Staff Organization Chart with Names, Titles and contact information
7. Most recent fiscal year-end financial statements
8. Commitment to complete project within 12 months of award. Commitment letter provided by applicants Board of Directors or other appropriate governing body.

## **City of Peoria General Fund FY16-July 1, 2015-June 30, 2016**

Sample sections of grant proposal. Award received.

Grant Manager: Susan Kavanaugh

### Short overview questions

#### **1. Program Name/Title**

██████████ Performing Arts Program

#### **2. Program Description**

The ██████████ Performing Arts Program strives to provide equal access and opportunity to performing arts opportunities for adults with Developmental Disability in Peoria and surrounding communities of Northwest Maricopa County. Our program is two-fold as we provide year-round educational activities and community outings to view professional performances from local cultural institutions like Ballet Arizona, in addition to a 12-week integrated performance program aimed at producing and performing an artistic work through partnership with Peoria-based arts organization, Theater Works.

#### **3a. Program Location City**

Peoria

#### **3b. Program Location State**

AZ

#### **3c. Program Location Mailing Address Zip + 4 Code**

85345

#### **4. Provide targeting boundaries of the proposed activity; provide a map if necessary.**

██████████ serves Northwest Maricopa County, including the cities of Peoria, Glendale, Anthem, Phoenix, Sun City, Surprise, El Mirage, Whitman, Morristown, and Wickenburg. In the past year, we have also begun to offer our services to the cities of Goodyear and Scottsdale. Our geographical service area boundaries are North of Interstate

10, South of Anthem, West of 32nd street, and East of Wickenburg. A map of our service area is provided in the attachment section of this grant application.

**5. Describe the goal of the program.**

The activities provided by the [REDACTED] Performing Arts Program have been proven to improve the quality of life for adults with disability in areas of physical, emotional and social development. Through integrated participation with professionals in the arts field, everyone, including the audience, can experience an inclusive recreation; promoting acceptance, respect, and appreciation for the and contributions that adults with disability can provide to their community.

**6. Amount Requested**

6,200.00

**7. Amount of match provided by agency, if any.**

0.00

**8. If your agency is providing match, please define the "type" of match if it is not cash.**

No matching funds will be provided; Yet, One Step Beyond intends to more than match funds we are able to receive from the City of Peoria with Foundation, Government, and private contributions to insure the sustainability of this vital program.

**9. Explain exactly what Peoria funds would be used for (salaries, utilities, equipment, facilities, etc.)**

Over the past 8 years, our Performing Arts Program has grown in its program offerings, as well as in its participation. In 2014, our annual program offered activities to 225 adults with Developmental Disability, while our 12-week integrated program served 65 adults with and without disabilities. Over the next year and through 2016, we hope to continue to grow our community impact by providing an additional week integrated program in the fall, and by increasing our participation by 100%. The funds provided by the City of Peoria will be used supplement program fees, to cover operational costs related to supplies and educational materials to enhance the learning process and production value of the performance. By underwriting these costs, participants are able to continue to take part in the program,



while the organization works to enhance current offerings and ensure that the necessary materials are available to meet the growing needs of our expanding organization.

**10. Total Program Budget**

38,956.00

**11. Indicate what percent of funding you are requesting for this program as it relates to the entire organizational budget.**

16%

**12. Disclose the minimum amount of funds needed for service to be delivered in Peoria.**

All the requested funds are necessary for implementation of our program. Not only do these programs provide enrichment to a deprived sector of the population of Peoria (individuals with Developmental Disabilities), but we also utilize Peoria resources such as the Peoria Performing Arts Center, and collaborate with Peoria-based Nonprofit Organizations such as Theater Works, to increase our potential impact in this community.

**13. How is this program unique compared to programs currently being offered within the City of Peoria, in adjacent communities, or through private programs?**

The [REDACTED] Performing Arts Program is the only nonprofit organization in the City of Peoria that provides this unique model integrated performing arts activities and opportunities to individuals with and without disabilities. This model has been successfully utilized by the Detour Theater Company in Scottsdale, Arizona for the last 15 years; however, Detour does not provide transportation services individuals in the West Valley can benefit from these programs. This unfortunately creates accessibility difficulties for a substantial percentage of our population. The City of Peoria Adaptive Recreation Program also offers these kinds of performance opportunities; however, their programs are exclusive to individuals with Developmental Disabilities. Through this program, [REDACTED] strives to create inclusive opportunities for adults with and without disabilities to share in recreation experiences together.

**14. What other cities/towns currently provide funding to this program?**

At this point we currently do not receive, nor are we pursuing, funding from other cities for this program. We feel that we provide a unique program that operates within the City of Peoria, primarily utilizes Peoria community resources, and serves individuals and patrons within the Peoria City limits. Therefore, funding from the City of Peoria has been our focus.

**15. State the number of volunteers used to serve Peoria residents.**

30

**16. State number of volunteers hours donated to serve Peoria residents.**

2,500

###

Additional content from the grant proposal

**1. Define the need in Peoria for the proposed program, supported by statistics or other valid proof.**

The Department of Economic Security/Division and Developmental Disabilities reports that there are 5,000 individuals with Developmental Disabilities of all ages residing in Northwest Maricopa County. [REDACTED] is one of eleven organizations dedicated to providing performing arts experiences to individuals with disability in the state of Arizona. However (as stated previously), [REDACTED] is the only nonprofit organization in the City of Peoria providing integrated performing arts opportunities to individuals with and without disability, making the demand in our city substantial. With consistent increases in the number and life span of adults living with Developmental Disability, and a clear preference towards inclusive community-based versus institutional service options, it is necessary for [REDACTED] [REDACTED] to not only continue to provide these services, but to grow and develop them to ensure that current and future individuals have equal access to the opportunities, like the arts, to ensure a meaningful life.

For people with Developmental Disability, participation in arts programs can provide so much more than a mere visual and/or physical experience. Integrated arts programs provide benefits in areas of physical functioning (coordination and endurance), emotional functioning (self-confidence and decrease in anxiety), social functioning (self-initiated peer interaction), and day/community program functioning (ability to retain information), more so than models that exclusively offer programs to individuals with disability. These new-

found skills are then transferable to other areas of life, including employment readiness, as the individual is more able to communicate with confidence during job interviews and job placement. In fact, 70% of the individuals that participate in our Performing Arts Programs are also employed through the [REDACTED] Employment Development Program.

Benefits are seen in not only the participants with disabilities, but for the participants without disability as well. Studies have shown that through artistic collaborative programs, like ours, participants without disability begin to strengthen their ideas of diversity and tolerance. The fact is, these individuals will interact and work with each other outside of recreational experiences, and these programs enhance and strengthen the social relationship skills in the adults with disabilities and the inclusive ideals for those without disability.

**2. Describe all public outreach and citizen participation efforts undertaken during the development of this program or activity.**

With growth and development playing a significant role in the strategic goals set for our organization in the past and oncoming years, expansion of our employment program is paramount to the success of the individuals we serve to provide them the services they need. Historical data has shown us that with each past planned expansion we were able to answer the needs of all individuals on our waiting list. However, after each expansion we found that our waiting list would grow again immediately, necessitating further strategic planning for growth to answer this community need. Clearly, the effectiveness of our uniquely responsive program model for individuals with DD has made us the program of choice in Peoria and the West Valley. Because of our success, families of participants are our best marketing resource; their word-of-mouth referrals are the primary source for recruitment of individuals in need of our programs and services.

Other trends we have recognized in terms of program expansion involve the largest influx of new enrollees happening in June after High School Commencement. It is our goal over the next months to form stronger collaborations with special education programs in the Unified School Districts in Maricopa County, especially in Peoria due to our program location. In addition to collaborating with school districts to provide information on basic services available, we work exclusively with the Peoria Unified school district to provide community-based work experience. Other Peoria organizations that we currently collaborate with to provide work experiences include the Peoria Unified School District, Performing Arts Center, Peoria Preschool, and SouthWest Indian Ministries.

**3. Describe methods used for assuring that program funds will be used for the original purpose of the program or activity.**

Constant managerial overview of program funds is common practice at [REDACTED] as we hold regular meetings with our Board of Directors (5 per year), during which a Treasurer's Report is presented and approved. Our CFO prepares monthly profit and loss and balance statements for approval by our Board Financial Oversight Committee. An independent CPA prepares an audit of our financial records and our Federal 990 and AZ 99T Tax Returns annually. All of these documents are available for public inspection upon request. Additionally, as a qualified vendor with the Arizona Department of Economic Security, Division of Developmental Disability, [REDACTED] program operations are semi-annually monitored by AZ DES/DDD, OLCR, and Dept of Health.

**4. Specify the eligibility criteria, if any, necessary for Peoria residents to receive services.**

[REDACTED] Performing Arts Program serves adults with Developmental Disability (DD) living in Peoria and other West Valley communities. The majority of our clientele consists of individuals who are Title XIX (Medicaid) eligible and receive federal matching funds to pay for their participation in our programs. However, some individuals with disability are not eligible for Title XIX funding. We offer our program to such individuals at a reasonable cost of \$20 per day. Other programs in our area of service either do not accept private-pay participants or charge daily fees that exceed \$60 per day. Thus, we can serve participants who would not otherwise access the services they need.

**5. Specify the timeline from when a Peoria resident applies for service to when they receive proposed services.**

Recruitment and placement of an individual in [REDACTED] programs takes on average 1-2 months. Placement is dependent on openings in the program of interest to the prospective participant as well as on an enrollment process involving an assessment of individual needs, tours of program facilities, and observation days during which the prospective participant attends programs for a day to determine responsiveness of the program(s) to individual needs. Once an appropriate match between [REDACTED] programs and the individual's needs is identified, an individual service plan and schedule of activities is developed, and services for transportation and program are authorized by DES/DDD. This final step takes approximately 1 month.

**6. If your organization currently has a waiting list for the proposed service, describe the approximate wait time and the number of citizens on the list.**

Our 12-week performance sessions have never incurred a waiting list but have routinely declined participants due to space constraints. With the addition of a second session, we hope to offer this unique program to 65 more participants during the fall of 2015, increasing our participation by 100%. For participation in our year-round programs, occurring at our life-skills campuses, planned strategic expansion of [REDACTED] program facilities in

2015 and 2016, has enabled us to actively enroll new participants at an average rate of 5 individuals per month through Dec. 2015. Majority of the enrollment will, and routinely has, taken place in June after teen individuals transition from high school and into a day program model.

**7. Name partnering agencies or collaborative efforts with other non-profit, profit and/or governmental agencies that are a part of this program. Describe their roles and quantify the value of partner contributions.**

Since 2007, [REDACTED] has partnered with Theater Works to provide our 12-week Performance Programs. What started as an exclusive program for 28 adults with Developmental Disabilities exploring the concepts of theater and performance art, the Performing Arts Program is now inclusive, offering educational arts enrichment to all [REDACTED] Participants (currently 221) and performance opportunities for both adults with and without disabilities (currently 65). Through Theater Works, our organization and participants gain access to resources that we would otherwise not have. Our participants get the opportunity to work with professional writers, directors, and actors to develop a new show every year. They work in a professional rehearsal space and perform on professional stages, with professional sets, props, and costumes.

In turn Theater Works can impact a population of individuals that deserve to participate in the arts, and further their own mission of providing opportunities for children, patrons and artists to experience theater that inspires, enriches and enlightens their lives through the celebration of the performing arts. Other organizations that we partner with throughout the year to provide exposure to additional performing arts outlets include Ballet Arizona, Arizona State University, Detour Theater Company, and Valley Youth Theater.

**8. Identify the program's target population(s) and service delivery area in Peoria, include specific geographic boundaries.**

Our target population is adults and teens with developmental disability. We serve all communities in the city boundaries of Peoria, in addition to other communities in West Maricopa County, including Anthem, Avondale, Glendale, Phoenix, the Sun Cities, Surprise, Whitman, Morristown, and Wickenburg. Our geographical service area boundaries are north of Interstate 10, south of Anthem, west of 15th Street, and east of Wickenburg. A map of our service area is provided in the Attachment section of this grant application.

**9. Identify community problems, conditions and/or challenges this target population must overcome.**

In 2009, the Journal of Applied Theater and Performance published a case study discussing the Improbable Theater Company, a performing arts organization for individuals with disability in Phoenix, AZ. This study reported that integrated community programs,

especially for adults, are either not available or adequately used by residents of Maricopa County. Whether due to affordability, physical barriers, or societal stigmas, access to inclusive cultural arts programming continues to be an unserved need in our communities.

**10. Share a recent success story of a Peoria client from this program.**

Not only is theater an outlet for creativity and fun, but education in the theatrical arts is also an integral part of the development of each human being. Studies show that there is a correlation between the arts and achievements. A report by Americans for the Arts states that young people who participate regularly in the arts are four times more likely to be recognized for achievements in other areas of life, including work or school.

██████████ is no exception to these findings. By encouraging our participants with full support and inclusion of arts education programs we have watched many of our members blossom from their shells. For example, we have watched one of our very shy and withdrawn participants with autism respond extraordinarily well in this program. When Sarah first started attending classes at Theater Works she wouldn't even go up onto the stage. Slowly with help from her non-disabled peers and a lot of hard work she began to open up and take part in the rehearsals and theater games. She now is able to stay and dance onstage in full view of a crowd of 200 people, when before she would have hidden offstage. "It is nothing short of magic!" Concluded one of our parents after watching this young lady on stage, and hers is just one of the many other success stories. Through this opportunity Sarah and her peers were able to overcome hardships and experience their accomplishments together as a team, which has created a social bond that continues to this day.

We fully believe that all our members should have that experience as we continue our work to foster the combined fields of arts education with adults with disabilities by working with Theater Works.

**11. The City of Peoria City Council has set high-level goals in several areas. Please select the goal your program most closely addresses.**

a. Arts/Culture (expanding or preserving quality of life)

**12. Explain how the proposed program supports the City Council goal selected above.**

██████████ Performing Arts Program creates a unique opportunity for adults with Developmental Disability (DD) to learn and participate in the arts. The City of Peoria has a vested interest in services that support arts and culture exposure for its citizens. Our programs offer this year-round to not just the individuals with disabilities but for the community.



# STEM Grant

SCIENCE • TECHNOLOGY • ENGINEERING • MATHEMATICS

## STEM INNOVATION GRANT APPLICATION

|  |  |
|--|--|
| <b>Contact Person Information:</b>   |  |
| Contact Name:  | Susan Kavanaugh  |
| Contact Email:   | susan@kavcomcc.com   |
| Contact Number:  | 602-316-1742   |
| <b>Organization Information:</b>   |  |
| Organization Name:   | Better Autism Schools for Arizona  |
| Organization Website:  | <a href="http://www.scienceprepacademy.com">www.scienceprepacademy.com</a> |
| Nonprofit Tax ID:  |  |
| <b>HISTORY OF ORGANIZATION:</b>  |  |
| <p>Science Prep Academy was established in August 2017 and seeks to serve students with Asperger's Syndrome and high functioning autism throughout Phoenix who want to attend college but face a frustrating search for a school to help them realize their dreams. Science Prep Academy offers Arizona's only college and career prep STEM school curriculum. The teacher to student ratio is 4 to 1. Autistic students have statistically shown their best performance when they are learned in small class settings. At Science Prep Academy, a student's academic success is optimized through smart use of data and technology by expert, passionate teachers – both face-to-face and online – while his or her emotional success is supported by specially trained academic coaches and trained therapists in an innovative team environment. Each and every student has a Personalized Learning Plan tailored to his or her particular learning requirements.</p> <p>There is a huge disconnect between what students with autism at Arizona schools are getting out of their therapy, academic, and social curriculum and what they need to be successful to obtain and retain a career. At Science Prep Academy, we hope to connect and engage with students to achieve their goals. We also seek to integrate these educated students into the technology workforce.</p> <p>Science Prep Academy has added the Amazon Future Engineer program to the curriculum is one of many ways that the academy opens new doors of possibility to their students. The Amazon Future Engineer program is aiding in the academy's mission by offering a progressive curriculum for grades K-8 and high school students in the fields of computer science and coding. This is another way that the Science Prep Academy has encouraged STEM programs to the student.</p> |  |
| <b>Program Information:</b>  |  |
| <b>PROGRAM EXECUTIVE SUMMARY:</b>  |  |
| <p>One in 59 children born today are affected by autism. Eighty percent of individuals with autism are under the age of 22 and will eventually face the challenge of entering the workforce. Many of these children have been identified as having STEM-focused gifts, opening the door for inclusion in society and technology careers. The FIRST Lego League project fosters the development of critical thinking skills, team communication, and self-esteem for young students affected by Autism. Thirty middle-school-aged students, both girls and boys from underserved communities in Phoenix, are introduced to greater opportunities in life.</p>   |  |



The FIRST Lego League program is a year-long project that the school began in 2018. The mission has been achieved through a coalition including Arizona State University's School of Engineering and the Mary Lou Fulton Teachers College, the Intel Foundation, and Team Paradise, a local FIRST robotics team from Paradise Valley High School and the Autism Society of Arizona.

The FIRST Lego League has measurably high results from the overall program. For instance, 87% of participants have had an increased interest in attending college. Eighty-eight percentage of participants have had an increased interest in simply doing well in school. The results of the First Lego League's impact on its participants show how such a program can benefit the students of **Science Prep Academy**.

As for how the **Science Prep Academy** will measure results, indicators for effective results include increased number of new teams, new team members, team members who transition into college and team members who transition into a STEM career. Management of data, reporting, and evaluation is closely aligned with our organizational goals. All data is kept in real time on a visible balanced scorecard which is reviewed on a daily, monthly, or quarterly basis.

|  |   |
|--|---|
| <b>Program Time Frame:</b>   | Aug 2020-May 2021   |
| <b>Requested Amount:</b>   | 7,500   |
| <b>Overall Program Budget:</b>   | 22,500  |
| <b>Other Funding Sources:</b>  |   |
| \$500 from Arizona State University Ira A. Fulton School of Engineering  |   |
| <b>Random Question:</b>  |   |
| <b>How did you hear about the grant?</b>   | Discovered this grant while researching available STEM grants for our programs. |
| <b>How to Submit:</b>  |   |
| E-MAIL:<br><a href="mailto:CSR@ColocationAmerica.com">CSR@ColocationAmerica.com</a><br>Subject Line: STEM Grant Application for [Organizations Name].<br>Please remember to include this attachment! |   |

**Thank you for applying!**

Look out for an email from us confirming your application has been received!

## **Molly Lawson Foundation Grant Application 2016**

### **Summary**

- The organization's mission, goals, and history
- The purpose of the proposed project and/or the services you currently provide to the community
- How does the purpose relate to the mission of the Molly Lawson Foundation
- The results you aim to achieve

### **Mission, Goals, and History**

██████████ provides comprehensive and person-centered programs to adults with Intellectual Disability in northwest Maricopa County. The mission of ██████ is to provide responsive, progressive, and dynamic programs to empower individuals with intellectual disability to realize their dreams of optimal independence, meaningful employment, significant social relationships, and full participation in our community. Programs focus on training in employment and life-skills preparation, access to recreational and cultural opportunities, and advocacy for people with disabilities and their families. All of these programs accomplish the clear goal of enhancing the quality of life for the individuals we serve. Our participants include individuals with Down syndrome, cerebral palsy, autism and other disabilities living mainly in Peoria, Glendale, Phoenix, Surprise, and surrounding communities.

█████ began in 2001 by assessing community need and researching programs providing services to adults with intellectual disabilities (ID) in Maricopa County. In response to this initial research and identified need for such services in our community, ██████ formulated its mission. In 2003, ██████ opened its first life skills training and recreational programs for persons with ID focusing on household management, community resource utilization, practical academics, recreation activities, and community service.

The ██████ Employment Development Program, an employment training, placement, and support program was established in 2004, followed by the ██████ Training Program and Catering in 2007. These programs offer an inclusive workplace immersion experience by creating partnerships with businesses and community organizations that provide actual workplace experience. Ongoing job coaching ensures success. In 2009, ██████ developed partners and funding to design a physical fitness program that incorporates physical training, nutrition education, and diet planning to further increase participants' workplace success as well as their personal esteem.

Organizational growth has been substantial; we have increased the scope of our service from 2 programs serving 16 individuals to 11 programs serving 267 individuals on a daily basis in 4 locations in Glendale, Peoria, and Surprise. We serve 121 females and 146 males between the ages of 18 and 64; all of them are low income and ethnically diverse.

Because of this growth, we have expanded our campuses to accommodate the need. In August 2014, we opened a campus in Surprise to serve individuals in far northwest Maricopa County. In November 2015,

the Peoria based life skills, performing and fine arts, and sports and fitness programs moved to Arrowhead Creekside in Glendale. The new Glendale space, located at 72nd Avenue and Bell Road, provides our participants with an additional 3,000 sq. ft. of program space, and a more centralized location for both our Peoria and Glendale residents. We are exploring the relocation of our pre-vocational and vocational programs, which are still located in Peoria, and the home-style culinary program, which teaches basic cooking skills needed for daily living, to an additional building at the Glendale location in summer 2016. The [REDACTED] catering business and the vocational culinary training program will remain in their current location in Peoria.

### **Services Currently Provided**

[REDACTED] offers programs to meet the needs of participants and their families: employment development, culinary training, life skills training, performing and fine arts opportunities, sports and fitness programs, and resources for families. Each participant, in collaboration with their parent/guardian and the [REDACTED] staff, develops a schedule to meet their specific needs and interests. Transportation is provided daily to and from participants' homes as well as to daily activities.

Employment development teaches basic employment skills and provides opportunities for both group supported employment and independent supported employment in the community. Culinary training teaches basic cooking skills necessary for independent living, then advances to skills necessary for employment. Our culinary catering component provides daily opportunities to prepare and serve food at our campuses as well as in the community. [REDACTED] provides ongoing job coaching, both in the classroom and on the job-site, to help our participants be successful and gain independence.

Recreational programs include art, music, dance, and sports activities. We offer classes in: art, such as drawing, painting, and ceramics exhibited at an annual art showcase; music, dance and theater including performance opportunities; and daily fitness training as well as Special Olympics training. Our Personally Fit Program, which was started with support of the Molly Lawson Foundation, continues to help our participants address health issues related to obesity.

Life skills training teaches practical academics and household management skills to assist each of our individuals achieve optimal independence. Weekly social activities, community service, and special events enhance participants' quality of life.

With consistent increases in the number, and life span, of adults living with intellectual disability, and a clear preference towards inclusive community-based versus institutional service options, it is necessary for [REDACTED] not only to continue to provide these services, but to grow and develop them to ensure that current and future individuals with intellectual disability have equal access to the opportunities to ensure a meaningful life. We envision a world in which people with disability are fully included in all areas of our community and are recognized for their potential, their talent, and their contributions to our society.

## **Our Proposal and the Molly Lawson Foundation**

██████████ is requesting support for its biennial camping trip which is a three-day, two-night recreational opportunity offered to all of our participants. This aligns with the interest of the Molly Lawson Foundation in optimizing opportunities for social interaction among adults with intellectual disabilities by providing social events and trips of unique interest to them. The camping trip addresses the general well-being of our participants; it promotes personal growth and fosters independence for adults with disabilities.

## **Project Purpose**

- The problem or opportunity being addressed
- The work to be done – how, where, when, how it will be carried out
- Who will benefit from the work, including the number of people served
- Timetable
- Partners and their roles if applicable

## **Problem/Opportunity**

Everyone, whether disabled or not, enjoys regular recreation that develops skills, promotes good health, relieves stress, facilitates social interactions, and provides a general joy for living. Because of their intellectual disabilities, our participants face numerous obstacles every day of their lives. Access to opportunities that the general population enjoys such as transportation and travel, outdoor recreation, health and fitness, and social interaction is limited. ██████████ addresses these issues through its daily programming, weekend social opportunities, and unique travel experiences, specifically, the biennial camping trip.

The camp setting is restorative in that natural environments help to promote restorative feelings in individuals who take part in them. Current research indicates many positive health outcomes resulting from participation in recreational therapy programs including physical health status, cognitive status, and an improved ability to deal with life. The social interaction is invaluable for those with intellectual disabilities who may not normally have these opportunities because of their disabilities.

## **Who, What, Where, When and How**

Every year, ██████████ offers all of its participants an opportunity for an overnight vacation with their peers. Every other year, this vacation is a fall “camping trip” which is the equivalent of a short summer camp experience. The most recent camping experience was attended by 93 participants and 33 staff members and as ██████████ continues to grow, the number of attendees on future trips will increase.

████████████████████ with Pinerock Camp and Retreat Center in Prescott, Arizona, to provide lodging and meals for the ██████ staff and participants for the three-day, two-night experience. Participants and staff arrive by chartered bus in time for lunch on Day One and depart on Day Three after breakfast. Everyone is housed in dormitory style lodging with shared bathroom facilities, and meals are served in the camp dining hall. Staff members provide 24-hour supervision for the participants at a ratio of 1 staff member to 2.5 participants. Campers are divided into teams of three to facilitate supervision and rotation through planned activities.

The stay at camp is planned and implemented by ██████ staff who have access to general camp amenities including recreational fields, hiking trails, and campfire sites. Activities include: sports, hiking, arts and crafts, games, a nature-themed scavenger hunt, a dance, and an evening campfire. Meals are eaten as a group in the dining hall allowing time for socialization with those not in their assigned team or dormitory setting. Campers are encouraged to try new experiences in order to build self-confidence and, because they are away from parents/guardians, gain independence.

All ██████ program participants are eligible to attend the camping trip; in December 2015 there were 267 program participants and the December 2016 enrollment goal is 325 program participants. We are requesting funds for our 2017 camping trip in anticipation of significantly increased participation and costs. As the organization has grown, ██████ has had to re-evaluate the annual travel opportunities as they are all covered by fundraising. The camping trip continues to be an excellent value.

████████████████████ partners with Pinerock Camp for lodging, meals and camp amenities; Cox Communications has provided scholarship dollars for those participants who do not have the financial means to pay the nominal fee; and parents/guardians, staff, donors, local businesses, and the participants themselves work together to raise the money needed to finance the trip. It is truly a team effort to bring this experience to a group of individuals who may not otherwise have this opportunity.

## **Assessment**

- The goal(s) of your project and/or services
- How success will be defined, measured, and documented
- What role, if any, the population to benefit from the project/program will play in measuring its success
- How the results of your assessment will be used

The all-encompassing goal of the camping trip is to enhance the quality of life for our participants. Additional psychological benefits could include a perceived sense of freedom, independence, and autonomy; enhanced sense of self-worth, self-reliance, and self-confidence; improved ability to socialize with others; enriched capabilities for team membership; greater adaptability and resiliency; and a more positive outlook on life.

All of our programs are ongoing, addressing the consistent need for services for this population. Each participant has a plan specific to their own goals and needs; these personalized plans are developed with input from the staff and the participant's parent/guardian while taking into consideration the participant's interests. The plans are evaluated and updated on a regular basis. Monthly progress reports are prepared for each participant and these reports are used to evaluate their goals and program participation.

Staff members are assigned a team during the trip and track their participation in the various activities during the day. Staff members can also observe each participant's ability to perform daily living skills when away from home. Accomplishments, successes, and/or issues noted by staff during the trip will become part of this progress report.

Participants are part of the camping trip evaluation process. They are encouraged to express themselves, sharing success stories and reflections about the trip, during the closing campfire.

Marchell is an example of a participant who benefited from the trip. She lives with a friend and doesn't receive respite services. Prior to the most recent camping trip, she was new to [REDACTED] and had just begun creating new friendships. She was very interested in attending the trip; however, she was not able to afford it. Through donations and the generosity of others, Marchell was able to experience her first-ever independent trip as an adult. Her smile of joy and excitement said it all. The three-day trip was a break from her normal living arrangements as well as an opportunity to be independent. She returned full of stories about all the good times she had experienced and the new friendships she had made.

Our evaluation process is integral to the assessment and continuous improvement of staff implementation of the program, and the enhancement of the value of our participants' experiences. Our evaluation is used regularly to identify what we are doing right for our participants and where there may be need for improvement. [REDACTED] is required to submit regular reports to DES/DDD for each participant: monthly for those in the life skills program and quarterly for those in group supported employment. Turnover in our program is less than 2%; thus, we are essentially providing lifelong support to the individuals we serve.

**Organization Status** (for operating support grants) N/A

**Budget** (for program support grants)

- The amounts committed and requested for the project/program for all sources, including the Molly Lawson Foundation
- Expenses for the project/program including line items or a budget narrative
- Which expenses are priorities for funding in the event the Foundation can provide some but not all of the support requested

█████ is requesting \$15,000 in support of its camping trip which would enable 150 adults with intellectual disabilities to experience a three day outdoor adventure at an established camp. The total trip has an anticipated budget of \$34,605; fundraisers, donations, sponsorships, and an affordable fee paid by the participants will cover the balance.

Grant funds would be used to pay for staff lodging and meals, charter buses for the entire group, and purchase miscellaneous supplies. In past years, the participants have paid a \$100 fee to attend; with grant funds supporting transportation and staff expenses, █████ would be able to reduce the participant fee to \$75 making it more affordable for our individuals on limited incomes.

█████ relies on grants and other fundraising efforts to provide the extras that make our programs unique and successful and enable us to go one step beyond what other programs provide to enrich the lives of our participants. The majority of our clientele consists of low income individuals who are Title XIX (Medicaid) eligible and receive federal matching funds through the Arizona Department of Economic Security/Division of Developmental Disabilities to pay for their participation in our programs. These funds, which are based on the hours each participant attends daily and reimbursed accordingly, covers salaries, operating expenses, and daily transportation for our participants.

Expenses for the camping trip are paid entirely through fundraising, donations, and an affordable fee paid by each participant. Participants and their families sell merchandise twice a year, hold car washes, support restaurant nights (█████ receives a percentage of sales), and coordinate other fundraising opportunities. Staff time is covered by DTA hours and respite reimbursements through DES/DDD but staff lodging, meals, and transportation are covered by fundraising. With staff to participant ratios at 1 to 2.5, the number of staff and associated costs increase significantly as the number of participants grows.

If the Molly Lawson Foundation can only provide a portion of the amount requested, the priorities would be staff expenses and charter buses. These are the two largest expenses after camp fees for the participants and are required for the trip to occur.



### Biennial Camping Trip Projected Budget

| Expenses           |   | Proposed Budget | Actual Expenses |
|--------------------|---|-----------------|-----------------|
| Camp Fees          | 2 nights lodging and 7 meals:<br>150 Participants @ \$105                       | \$15,750        |                 |
|                    | 2 nights lodging and 7 meals:<br>60 Staff @ \$105                               | \$6,300         |                 |
| Bus Charter        | 4 (56 passenger buses) @ \$1,800  | \$7,200         |                 |
| Supplies           |   |                 |                 |
| Snacks             | 210 @ \$2.50 per person   | \$525           |                 |
| Bottled Water      | 30 cases @ \$6 per case   | \$180           |                 |
| T-Shirts/Backpacks | 210 @ \$15 per person   | \$3,150         |                 |
| Miscellaneous      | Art project, first aid kits, prizes/awards, dance decorations, camping supplies | \$1,500         |                 |
| <b>Total</b>       |   | <b>\$34,605</b> |                 |

| Income                  |   | Proposed Budget | Actual Income |
|-------------------------|---|-----------------|---------------|
| Molly Lawson Foundation |   | \$15,000        |               |
| Fundraisers             | Sales, car washes, restaurant nights, coin drop | \$6,500         |               |
| Donations               | Cash, gift cards, in-kind                       | \$855           |               |
| Sponsorships            |   | \$1,000         |               |
| Participant Fee         | 150 @ \$75                                      | \$11,250        |               |
| <b>Total</b>            |   | <b>\$34,605</b> |               |

### Attachments

- IRS Determination Letter (not required, previous applicant)
- IRS Form 990 (not required, previous applicant)
- Current organizational operating budget, including revenues and expenses (Attached)
- List of Current Board of Directors (Attached)

## **Bid to Host the 2019 Conscious Capitalism Annual Conference**

**First Name**

Scott

**Last Name**

McIntosh

**Phone**

602.999.2070

**Email**

scott@consciouscapitalismaz.com

**City**

Phoenix

**Country**

United States

**State**

Arizona

**Postal Code**

85282

## **CCAZ Bid for Annual 2019 CC Conference**

Submitted 1-31-2018, Scott McIntosh

*Application Questions:*

**Hosting the 2019 Conscious Capitalism Annual Conference is an opportunity to show off your area's local Conscious Capitalism community. Why do you think your community should be featured in 2019 amongst the global CC community?**

Conscious Capitalism AZ (CCAZ) was and is continuing to be one of the defining leaders in the conscious capitalism movement. After Australia and Chicago, we were the third formal chapter established in our movement.

We have been building significant interest and engagement in conscious capitalism with our business community since 2012 and have the support of city and state leadership, civic groups, entrepreneurial hubs, the media, and thousands of individuals involved in *work for good* operational models.

We are the first chapter to offer CC consultant certification, a beta program rising in interest. We will be one of the first chapters to create a sustainable business model with no more than 20% of our revenue coming from grants and philanthropy. The income will be directed toward not only chapter meetings, but more specifically our laser focus on bringing conscious capitalism into education. Other generated revenue will be directed towards special events and outreach, national broadcast programs, and publishing.

Most importantly, CCAZ is also one of the first to focus on sharing our principles through public and private education, creating a true grass roots base for “raising” and training some of the finest young minds in innovative conscious business practices. **Conscious Capitalism in Education** would an excellent theme for the 2019 conference.

Due to our chapter’s influence, conscious capitalism tenets have already been incorporated into business curriculum for seven different undergraduate and graduate courses at Grand Canyon University (GCU). This April we are co-hosting a collegiate challenge with GCU during which students from multiple universities and colleges will be able to pitch innovative “work as a force for good” business ideas. The expected number of attendees will be nearly 2,000.

Phoenix is also home to Arizona State University, which was ranked in 2017 by U.S. News and World Report as the nation’s most innovative university. Stanford was ranked #2, and MIT, #3. Our reach is extending into ASU, Northern Arizona University, University of Arizona, and K-12 schools.

Just two weeks ago, Arizona Governor Doug Ducey spoke about his 2018 proposed \$371 million budget for education in Arizona. We will invite Governor Ducey to play a role in the 2019 Annual Conference. Based on a relationship we have with his office and his bid for re-election (November 2018 to prove what we know to be positive support), we expect this to be a relatively secure opportunity. Ducey is also widely known for his background in business and lifelong interest in capitalism.

Should we receive the honor of hosting the Conscious Capitalism Conference in 2019, our potential for impact on the city of Phoenix, the state of Arizona, and the global CC community is clearly developed and poised for measurable success.

**Who from the chapter would be most involved in helping to organize the event? Please provide their name, position, skills, and LinkedIn profiles.**

Lead:

**Susan Kavanaugh**, CCAZ Executive Director, certified CC consultant, event specialist

<https://www.linkedin.com/in/susan-kavanaugh-4011474/>

Supporting Roles:

**Adam Goodman**, CEO *Goodmans Interior Structures*, Corporate and Board of Directors' member, connector, prominent civic figure

<https://www.linkedin.com/in/adamkgoodman/>

**Heidi Jannenga**, President and Co-Founder *WebPT*, Corporate and Board of Directors' member, CCAZ public speaking representative, physical therapist with high-level business acumen

<https://www.linkedin.com/in/heidijannenga/>

**Scott McIntosh**, CCAZ Founder and Chairman, Co-Founder *MAC6*, Angel Entrepreneur, connector, consultant

<https://www.linkedin.com/in/scottlmcintosh/>

**Brian Mohr**, CEO *Y Scouts*, Corporate and Board of Directors' member, human resource and management strategist

<https://www.linkedin.com/in/bmohr/>

**Randy Gibb**, Grand Canyon University dean of Coangelo College of Business, Corporate and Board of Directors' member, education leader

<https://www.linkedin.com/in/randy-gibb-156a0b6/>

**Ray Delmuro**, Owner Refresh Glass, Corporate and Board of Directors' member, 2017 CC Inc. CEO Summit featured speaker, entrepreneur, hospitality industry connector

<https://www.linkedin.com/in/ray-delmuro-89b04110/>

**The success of the Annual Conference will depend largely on the involvement of local Conscious Capitalism businesses being involved. Please list every Conscious Capitalism business in your area that you believe could be involved with the conference, and what kind of involvement you'd seek from them (e.g. joining the host committee, sponsor, in-kind donations, hosting activities at their location, etc.)**

Our chapter has powerful in-growing corporate commitment and engagement through: our CCAZ Board of Directors, group of 121 Arizona CEOs who attended the recent conscious capitalism CEO Summit, and through recent corporate engagement in our highly successful Sum and Substance event. Key support is available from all of our corporate members including Local First Arizona, an organization with 3,000 business members.

All of our corporate members and their employees will support us. This is a moderate base of 19+ highly-committed, highly-involved prominent companies. Our growing individual member base (just now under 200, but doubled or more by the date of the conference) has shown consistent support and would, without doubt, engage in our development and execution of the 2019 Annual Conference. From our membership base we have 53 trained ambassadors of Conscious Capitalism who were instrumental in our promotion of the recent Sum and Substance event, attended by more than 220 people, and through impactful outreach in the state of Arizona in 2017

Additional local businesses and organizations that will engage in creating and promoting the event include:

**Supporting Corporations:**

Bar Napkin Design

CES Study Abroad

CurrIQnet

DMB Community Life

Fairy Tale Brownies

Goodmans Interior Structures

Grand Canyon University  
Hool Coury Law, PLC  
Jaburg Wilk  
Kadima Ventures  
Keyser  
Local First Arizona  
Lucid  
MAC6  
MJ Insurance  
Moses Inc.  
Nextiva  
Refresh Glass  
Resound Creative  
U & Improved  
Upwards Projects (Postino's)  
WebPT  
YScouts  
zeNPO

**Civic and Business Leadership Organizations:**

Arizona Commerce Authority  
Arizona Community Foundation  
Entrepreneurs Organization  
Junior Achievement  
Governor's Office  
Greater Phoenix Economic Council  
Greater Phoenix Leadership  
Phoenix Chamber of Commerce  
Phoenix Rotary 100  
Social Venture Partners  
Tucson Rotary  
Tempe Chamber of Commerce  
Vistage  
West Valley Women  
Women of Central Phoenix  
Young Presidents Organization

**Media:**

The Phoenix Business Journal  
AZ Republic  
Channel 12  
Green Living Magazine

**Universities:**

Arizona State University

Grand Canyon University  
Northern Arizona University  
University of Arizona

**Investment Groups:**

Arizona Tech Investors  
AZ Founders Fund  
Desert Angels  
Canyon Angels

Our business relationships extend into Tucson, with the advent of a Tucson Chapter developing. Less than 2 hours from our metro area, Tucson has multiple business and hundreds of individuals backing business as a way to elevate humanity. We will also tap into this group.

**The conference will require a venue that fits 1,000-1,500 attendees. Do you have any locations already in mind that would fit this need? If so, where and why?**

Phoenix is the *conference capital* of the US based on its climate, sunshine, and outdoor activities.

There are at least four major hotels downtown capable of hosting the conference and providing block room rates for the majority of attendees. Any of these are great venues for the 2019 event. They include Hyatt Regency, Sheraton Grand, Kimpton Hotel Palomar, and Hotel San Carlos and Convention Center. Any and every type of cuisine can be enjoyed at many notable restaurants.

The entire downtown has been renovated, refreshed, and refurbished. We now have a light rail system through out the city. The local downtown also features Roosevelt Row (art district), vibrant university campuses, many parks and pedestrian-friendly areas to roam.

Just south of downtown the Wild Horse Pass Resort| Casino| Spa and the Arizona Grand and Spa at South Mountain offer 4-Star accommodations, meeting spaces, and activities.

We invite your committee to join us in site visits to all of these locations.

Please note that spring training for Major League Baseball attracts many out of town visitors, so bringing the conference to Phoenix will require early securement of meeting space and accommodations.



**Please provide any additional information on why your city would be the best venue to host the 2018 Conscious Capitalism Annual Conference.**

Phoenix continues to be one of the fastest growing cities in America. Our population is nearly 5 million people. An especially large number of Fortune 500 companies are headquartered here or hold a significant presence in Phoenix. Technology and service industries account for more than 75% of the city's economy. We have enormous branding opportunities for Conscious Capitalism, Inc.

We will add that there are hundreds of reasons to visit our city, but the top ten for April include:

1. Perfect weather. Leave your parka and umbrella at home. The average high temperature is 85° in April.
2. Spring Training for Major League Baseball
3. It's prime season for food and drink fests. Visitors can explore the local culinary scene at events such as the Street Eats Food Truck Festival, Devour Culinary Classic, and Flavors of the West.
4. Golf courses
5. Swimsuit season
6. World-class spas
7. Casinos
8. Family-Friendly activities such as water parks, an all-new aquarium, the Arizona Science Center, the Phoenix Children's Museum, and even the Legoland Discovery Center.
9. Mountain trails for hiking and outdoor meditation
10. Natural Sonoran Desert Preserves

08/05/2022

Fred Darragh Foundation  
Attn: Ernie Dumas  
P.O. Box 250746  
Little Rock, AR 72225

Dear Director Dumas and Esteemed Trustees:

Thank you for taking a moment to consider this letter of inquiry to the Fred Darragh Foundation. [REDACTED], is a 501(c)(3) nonprofit that shares the Foundation's goals of advancing financial equity in Arkansas. We seek an opportunity to submit a proposal for a grant of \$15,000.

Good financial health means more than logistical stability: it is the freedom to make the life choices that bring us happiness. But, while everyone knows that saving and budgeting are important, these practices are never as simple and efficient as they seem. All too often, the most necessary expenses can become too burdensome to pay.

Northwest Arkansas is home to many people struggling to keep their heads above water and cannot afford unexpected crises. As one of the nation's biggest regions for income inequality, 48% of children in the region are classified as living in low-income households. When so many families are not making enough to support themselves and their children, it is unavoidable that most people have to borrow money.

The conclusion of the federal foreclosure moratorium and Pandemic Emergency Unemployment Compensation in 2021 created financial stress in low-income households. In 2022, this anxiety is being exacerbated by the worst inflation rate in 40 years. This inflation is making necessary living expenses intolerably high: food prices increased over 9% in the past year and Arkansas gas prices are at an all-time high. These populations are expected to experience greater hardship in the coming years.

But beyond these society-wide issues, there is a far more universal reason that many do not reach out for help when they begin to notice the signs of unmanageable debt. A pervasive stigma around owing money makes most people too embarrassed to ask for help. Traditional wisdom tells people who are doing everything they can do to somehow do more. This painful

and debilitating narrative is not only destructive: it is also wrong. People with financial hardships are not reckless or lazy: often, they are struggling with devastating circumstances beyond their control: 67% of bankruptcies result from medical crises.

Since 1995, [REDACTED] has provided leadership and services that improve the quality of life of individuals and families through financial education, credit and housing counseling, and debt management services. The organization delivers outstanding, life-changing services that help clients plan and budget their finances, manage debt, and keep them in their homes. [REDACTED] normalizes self-advocacy and encourages all people to get in touch for advice and education. The organization is a vital resource that stands in contrast to those telling people to simply work harder and think smaller. Life should not be a silent struggle to survive - it should be full of options, security, and support.

[REDACTED] has three locations and is the only credit counseling agency in Northwest Arkansas providing both in-person and phone sessions. The organization is often a staple in local financial news. Media outlets in Northwest Arkansas reach out for explanations on complex topics and for inspirational stories of clients succeeding in their financial goals in dire situations. The organization reaches out to strengthen the financial health of the communities it serves.

[REDACTED] offers eight counseling services under the umbrellas of Housing, Money Management, and Student Loans. The organization is a member of the National Foundation for Credit Counseling (NFCC). The organization has offices in Fayetteville, Bentonville, and Fort Smith, often serving clients from Missouri and Oklahoma as well. Beyond this region, [REDACTED] is eligible to provide credit counseling in 19 states. [REDACTED] also has three Department of Housing and Urban Development (HUD) certified housing counselors, allowing the organization to provide housing counseling to people in all 50 states.

[REDACTED] has been an effective source of advice and advocacy for its clients since 1995. In that time, the organization has helped more than 111,000 families feel more in control of their finances and able to achieve their goals. The impact of individual counseling has been demonstrated to lower adverse financial outcomes significantly. Pre-purchase counseling, for example, has been shown to help reduce severe mortgage delinquency by 34%.

[REDACTED] is often the last resort for households just barely hanging on. We ask for your help to continue being an invaluable resource to the region in a time when financial and housing services are so deeply needed. [REDACTED] respectfully requests a donation of \$15,000 from the Fred Darragh Foundation to meet the needs of Arkansans to keep our communities financially and mentally well under adverse circumstances.

Regards,



Mary Catherine Harcourt  
Executive Director

June 29, 2022

The Carl & Allen McKinney Charitable Trust  
ATTN: Arvest Bank – Trust Division, Bentonville, Arkansas  
P.O. Box 2389  
Bentonville, AR 72712

Dear Distinguished Trustees:

Acknowledging the Carl & Allen McKinney Charitable Trust's support of nonprofits that serve children in Arkansas, we would like to introduce [REDACTED], a 501(c)(3) nonprofit established in 2008 with a mission to transform the lives of young people through exceptional theatre experiences.

When Artistic Director [REDACTED] founded [REDACTED], she envisioned the three pillars of Production, Outreach, and Education like a tricycle: moving together to keep the rider stable and propelled forward under their own power. This vision continues to inform the organization today. Initially founded to promote family theatre, the design of [REDACTED] operations evolved to promote Social and Emotional Learning principles. Serving youth aged 4 through 18, programs aim to provide a space to activate their voices, foster a sense of belonging, and amplify empathy. Trike's opportunities also extend to adults, theatre professionals, and educators.

### **Meeting Community Need**

The current generation faces enormous obstacles to their mental and emotional well-being. The roar of visual and audio input, the pressure to excel, to fit in yet stand out, leads to youth to strive to be acceptable to others rather than true to themselves. In this din, young people sometimes need help seeing past the noise and getting in touch with what helps them thrive. One of the best tools they can have is a robust set of Social and Emotional Learning skills. Collaborative for Academic, Social, and Emotional Learning (CASEL) outlines five broad and interrelated areas of competence: self-awareness, self-management, social awareness, relationship skills, and responsible decision-making.

In order to develop social-emotional skills, young people need to be engaged in a social environment where they feel safe and are actively encouraged to explore self-awareness, concerns, ideas, and feelings. Theatre provides a community and context where children and teenagers can imagine, create, and experience success. By fostering self-expression and interpersonal relationships, it's no wonder many youths find a home within the theatre, a place where their perceived "differentness" is not only accepted but encouraged. [REDACTED] is dedicated to delivering this transformative space and cultivating a supportive community where young people can authentically be themselves.

### **Track Record of Success**

[REDACTED] challenges this generation to see past fears and anxieties to connect with an authentic expression of their humanity. When gaining a theatre education, children deepen their Social and Emotional Learning (SEL) competencies, strengthen their behavioral health, and develop a wide range of skills from problem-solving to collaboration. [REDACTED] creates unique learning experiences that yields a positive result, year after year. Academic enrichment through the arts and SEL are a combined force that empowers youth to become confident learners.

██████████ measures outcomes by points of engagement, which calculates the number of times a person interacts with ██████ programming, such as each class or performance they attend. In FY22, ██████████ impacted over 46,000 participants through Productions, Academy, and Outreach programs.

### **Programs**

██████████ strives for its programming to be as immersive as possible and takes every opportunity through its Production, Outreach, and Academy to bring participants and young people into the creative process to express themselves.

Production: ██████ produces four family-oriented stage productions each year, choosing topical plays with relevant themes for young people and aims to spark conversations with families and friend groups about the subjects that affect them today. As in everything ██████ does, this program encourages youth to form their own opinions through discussion and reflection.

Outreach: ██████████ Outreach pillar includes in-school residencies for students and educators to deepen their learning experience through Arts Integration. ██████ also incorporates professional development into its programs to transform the classroom with Social and Emotional Learning.

Academy: ██████ maintains a year-round Academy that has enjoyed popularity despite the past two years of obstacles imposed by the COVID-19 crisis. This pillar consists of classes and camp programs. As in all programs, youth participants are encouraged to take creative initiative in all aspects of production.

### **Beyond Northwestern Arkansas**

Since 2018, ██████████ has been taking its model beyond Northwestern Arkansas (NWA). ██████████ programming is easily portable, scalable, and replicable. The 360 Trike-sperience and Playwriting programs tour to California and Indiana, collaborating with Notre Dame University. This partnership remained strong but safe during the coronavirus pandemic through virtual performances.

### **How You Can Help**

In years before 2020, ██████████ has historically sustained half of its budget through its many earned income streams, such as teaching residencies. While the COVID-19 pandemic slowed down this income, ██████████ continues making a significant amount of its budget.

██████████ firmly believes in fairly compensating all professionals that make its productions possible. The majority of ██████ funding supports professional actors, directors, choreographers, designers, and technicians, resulting in significant production budgets that must rely on more than just ticket sales.

A grant of \$10,000 from the Carl & Allen McKinney Charitable Trust will provide direct program support to continue serving our community. Thank you so much for your consideration of this request. If you have any questions, please do not hesitate to contact me at (479) 326-4009 or ██████████.

With gratitude,

A handwritten signature in black ink that reads "P I S" followed by a long horizontal line extending to the right.

Paul Savas, Executive Director

**Texas Commission on the Arts  
Arts Respond Project**

**Application ID:**

**Online portal:** <https://arts.fluxx.io/dashboard/index>

**ID:** [REDACTED]

**PW:** Musicals69#

**Notes:** Commission staff are available to consult with applicants by telephone at 512/463-5535 or 800/252-9415

**Amount:** \$10,000

**Organization**

[REDACTED]

**Location**

[REDACTED] - headquarters

**Primary Contact**

Susan Kavanaugh

**Authorizing Official**

Ron Watson

**Board Chair - was left blank on previous application**

**Executive Director**

Ron Watson

**Our organization is a member of Texans for the Arts.**

Yes

**No**

**Mission Statement**

Characters limit: 259/1000

[REDACTED], Inc. is a non-profit organization dedicated to enhancing the quality of life in Georgetown and Williamson County by providing a venue for quality and affordable entertainment and educational opportunities in the performing arts.

**Number of Staff by Ethnicity**

Asian: 1

Black: 1

Hispanic:

Native American/Alaskan:

Pacific Islander/Hawaiian:

White: 7

Multi-Racial:

**Number of Board of Directors by Ethnicity**

Asian:

Black: 1

Hispanic: 2

Native American/Alaskan:

Pacific Islander/Hawaiian:

White: 10

Multi-Racial:

*Percentage of board members who made a cash contribution to this organization this year?*

**Board members who contributed last year**

100%

*Priority Area***Which one of the following priority areas does this project address**

Economic Development

Education

Health & Human Services

Natural Resources & Agriculture

**Public Safety & Criminal Justice**

*Period of Support (Funding can only be supported for projects taking place between the dates of Sept 1, 2022 & Aug 31, 2023.)*

**Starting Dates** - Sept 1, 2022

**Ending Dates** - Aug 31, 2023

**Payment Date** - Sept 1, 2022

*Audience Information*

**How many adults (over age 18) will be engaged in "in person" arts experiences?**

Adults

**How many children/youth (0-18 years) will be engaged in "in person" arts experiences?**

Children/Youth:14

**Total Audience:** (no place to enter text)

**How many artists will be directly involved?**

Artists

**Indicate if this proposal serves**

Arts Education (Pre-K)

**Arts Education (K-12)**

Arts Education (teachers or adults)

Cultural tourism (check)

International exchange (artist or art; import or export)

None of these groups

*Choose one that describes the project activities for which support is requested. Arts learning is an organized and systematic educational effort with the primary goal of increasing a learner's knowledge of and/or skills in the arts with measurable outcomes.*

**Arts Education**

None of this project involves art education

**50% or more are arts education directed to: K-12 students**

50% or more are arts education directed to: higher education students

50% or more are arts education directed to: pre-kindergarten children

50% or more are arts education directed to: adult learners (including teachers and artists)

Less than 50% of this projects activities are arts education directed to: K-12 students

Less than 50% of this projects activities are arts education directed to: higher education students

Less than 50% of this projects activities are arts education directed to: pre-kindergarten children

Less than 50% of this projects activities are arts education directed to: adult learners (including teachers and artists)

*For the next set of questions, select all categories that, by your best estimate, make up 25% or more of the population served directly by this performance.*

**Available Options**

**Population Served by Race/Ethnicity**

(N) American Indian/Alaskan Native

(A) Asian

(B) Black/African American



(H) Hispanic/Latino

(P) Native Hawaiian/Pacific Islander

(W) White

(G) No single racial/ethnic group made up 25%

### **Population Served by Age**

(02) Young Adults (19-24 years)

(03) Adults (25-64 years)

(04) Older Adults (65+ years)

(09) No single age group made up 25%

(01) Children/Youth (0-18 years)

### **Distinct Groups Served**

(D) Individuals with Disabilities

(I) Individuals in Institutions (hospitals, correctional facilities, shelters, etc.)

(P) Individuals below the Poverty Line

(E) Individuals with Limited English Proficiency

(M) Military Veterans/Active Duty Personnel

(Y) Youth at Risk

(G) No single group made up 25%

### **One sentence summary of project**

*Character limit is 250 (245/250)*

The [REDACTED] Scholarship 22-23 Program offers financial aid to 14 youth from socioeconomically marginalized communities. Participants will get the chance to attend classes and camps that instill empathy, good behavioral skills, and confidence.

### **One page organizational history**

*Character limit is 4000 (2947/4000)*

The [REDACTED] serves Williamson County, Texas, and the surrounding area by producing professional-level performances that showcase the full theatre spectrum: classic plays, Broadway musicals, newer and edgier titles, thrillers, slapstick comedies, and everything in between.

The [REDACTED] building has served as an entertainment center for Central Texas, Georgetown, and Williamson County since 1926. Originally operated as a "Moving Picture" theater featuring silent films, the building was renovated as an art deco movie theater in 1936 and continued operating as a movie theater through the late 1980s.

In 1991, a group of citizens purchased the historic theater building to become [REDACTED], a nonprofit 501(c)(3) corporation. Following significant restoration and renovation, the theatre began operating as a community theatre in 2002. It has produced high-quality, affordable productions and educational opportunities for theatre lovers of all ages for two decades. [REDACTED] is committed to enhancing the historic preservation of Georgetown by properly maintaining the historic Palace Theatre building.

The [REDACTED] was the first theatre in Texas to offer inclusive shows free of charge and continues to be the only theatre in the area offering the shows for free. Inclusive shows are shortened, sensory-friendly versions of full-length productions that adjust special effects and loud noises to accommodate those with autism or audio impairment. Shortened productions consider the audience's aptitude to stay attuned to the show, and performances include sign language interpreters, audio description, and other adaptive methods.

Since its inception, [REDACTED] has produced 350 shows, provided 1,600 education scholarships, and engaged more than 4,000 youth in theatre programming. The [REDACTED] is producing 16 live performances on its Springer and Playhouse stages during the current season, bringing stories to life for thousands of Central Texas theatre lovers. Based on experience, [REDACTED] projects the following for the 2021/22 season:

- Over 36,000 patrons attend live performances
- Over 460 volunteer actors and crew
- Over 7000 youth participate in camps, classes & Theatre for Young Audiences

A theatre is the heart of the community. [REDACTED] opens its arms and hearts to the community, values each person's unique contributions, and considers all who come to [REDACTED] to be a member of the family. Through the power of live theatre, [REDACTED] entertains Central Texans of all ages while ensuring the arts are available to everyone. [REDACTED] programs enrich lives, inspire the next generation of theatre lovers, and nurture an inclusive community that brings the intrinsic value of live theatre to people of all abilities.

**One page project description (include specific information on the project including the key personnel, targeted audience, and goals)**

*Character limit is 4000 (3957/4000)*

The [REDACTED] Scholarship 22-23 Program offers 14 young people financial aid to attend the organization's theatre classes and camps. This will give students from Title-1 schools the chance to be exposed to many opportunities to attend transformative after-school and camp programs. These students are provided many kinds of theatre opportunities by trained professionals. These programs are:





and noncognitive skills, strengthens behavioral health, and provides young people with a wide range of skills, from problem-solving to collaboration.

### **How will you gauge the success/impact of this project?**

*Character limit is 2000 (1615/2000)*

Each Academy camp and class is measured for the goals of individual audiences. Theatre for Young Audiences focuses on expanding students' literary analysis and criticism abilities. The success of this program is measured by a teacher survey of students one month after programming. These surveys determine if the concepts discussed on stage have been retained with the quality of Texas Essential Knowledge and Skills standards.

The Palace Academy employs teacher evaluations at the beginning and end of the year to measure if general learning skills have been promoted. Education Productions use parent and student surveys to determine a participant's comfort and happiness with their performance. Camps are measured by return enrollments as well as parent and student surveys focusing on fun, community, and interest in the subjects learned throughout camp. Special Needs programming is measured by teacher and parent surveys to determine if students' behavioral, technical, and social skills improved, as well as their comfort with self-advocacy.

Palace Performance Company has more advanced metrics for success, such as readiness for admission to Fine Arts colleges. [REDACTED] assists these students in preparing for auditions for Bachelor's of Fine Arts programs. Students complete a readiness rubric for college admissions and are assessed for proficiency in dance, singing, or/and acting, depending on their area of concentration. Success is also determined by interview and audition skills and a more general expression of an increased sense of purpose and belonging in the theatre community.

### **How will you ensure the artistic quality of this project will be high?**

*Character limit is 2000 (1255/2000)*

[REDACTED] seasoned professionals approach theatre training from all angles. Academy programs expose students to the many resources that produce a generation of theatre-literate adults. Young people with differing levels of experience receive appropriate training from a highly educated and well-trained staff. Those with little or no experience will receive their first professional evaluations through educational programs.

More than 7,000 youth participate in the organization's educational programming, and experience a diversity of approaches from adaptive theatre experts, educational specialists, and celebrated professionals of the theatre world. Scholarships to these programs will broaden the range of participants to put young people in touch with youth of all backgrounds.

Parents and students take surveys at the beginning and the end of the session to ensure that each learning event has provided quality educational content. Teachers complete a readiness rubric and students take surveys measuring their sense of purpose and belonging in the class. Teachers survey students one month after programming to see if the concepts in the class have been retained with the quality of Texas Essential Knowledge and Skills standards.

*Financial Information*

*Project Budget - Income*

**Income from programs (revenues from box office, admissions, memberships, tuition, class/workshop fees).**

Program income: \$ 165,337.25

**Net proceeds from galas, fundraisers, concessions, art sales, and/or space rentals.**

Fundraising proceeds: \$ 11,500.00

**Revenue derived from interest on investments and/or endowments.**

Investments / endowments: \$ 0

**Direct cash contributions from individuals.**

Cash contributions: \$ 136,000.00

**Income or financial support from businesses and/or corporations.**

Business / corporate support: \$ 0

**Income or financial support from foundations.**

Foundation support: \$ 44,000

**Amount requesting from Texas Commission on the Arts.**

TCA request: \$ 5,000

**Income or financial support from local, county, state, and/or federal governments.**

Government support: \$ 0

**Any additional income, revenue, and/or financial support derived from a source not listed above.**

Other support: \$0

Details - Other support

Total Revenues: \$0.00

*Project Budget - Expenses*

**Administrative salaries, contracts, and/or benefits.**

**Administrative salaries:** \$ 4,200

**Artistic salaries, contracts, and/or benefits.**

**Artistic salaries:** \$ 3,100

**Rent, mortgage, facility maintenance, and/or utilities.**

**Facility costs:** \$ 800

**Marketing & promotion:** \$ 0

**Program and exhibition production costs.**

**Program costs:** \$ 2,120

**Other expenses:** \$ 0

**Details - Other expenses:** Scholarships will assist in bringing in tuition income while not burdening or excluding financially stressed families.

*Please annotate your budget to help the evaluators understand sources of revenue and high-level details on all expenditures.*

**Notes to the budget**

*Character limit is 4000 (780/4000)*

████████████████████ has an overall budget of \$1,965,505, of which 23.8% (\$467,790.19) is generated by tuition. This income is vital to the operation of educational programming because the organization operates on a lean overhead cost of only 6.8%.

Salaries are 42% of project/program expenses. Therefore, 14 scholarships totaling ~\$10,000 includes an administrative expense of \$4,200.

Artistic fees are 31% of project/program expenses. Therefore, 14 scholarships totaling ~\$10,000 includes an artist expense of \$3,100.

Rent is 8% of project/program expenses. Therefore, 14 scholarships totaling ~\$10,000 includes a rent expense of \$800.

Scholarships average \$730: therefore, 14 scholarships cost \$10,220. The remaining \$2,120 will go to academic programming.

*Organization Financial Snapshot*

**Provide the organization's overall operating budget. Do NOT include in-kind, pro bono, capital campaign/building funds, etc.**

**Organization's Fiscal Year - Start Month:** January  
**Organization's Fiscal Year - End Month:** December  
**Previous Year - Actual Revenues:** \$ 2,117,525.56  
**Previous Year - Actual Expenditures:** \$ 2,015,414.09  
**Current Year - Budgeted Revenues:** \$ 2,704,103.00  
**Current Year - Budgeted Expenditures:** \$ 1,759,531.00  
**Next Year - Projected Revenues:** \$ 2,704,103.00  
**Next Year - Projected Expenditures:** \$ 1,759,531.00

*Explain any dramatic changes in your budget including surplus, deficit, accumulated debt, capital campaigns, changes in bookkeeping practices, etc.*

**Notes to the financial snapshot**

*(approximately 400 words; character limit not appearing)*

In 2021, [REDACTED] continued to experience the difficulties posed by the coronavirus pandemic; productions were either canceled or limited, and educational programming experienced similar issues. [REDACTED] received greater government funding due to the many COVID-19 relief programs available, but the organization's earned income was severely disrupted. Due to the relaxing of CDC guidelines on social distancing, the 2022-23 year is anticipated to see growth in line with pre-pandemic figures.

2022 actuals will be finalized in December: therefore, the 2022 revenue and expense figures are an estimate based on pre-pandemic years.

*If your organization tracks in-kind/pro-bono support, list the total amount from the last completed year (if you don't track in-kind, enter zero)*

**In Kind Support:** \$ 0

*Assurances*

**Minimum Acceptable Amount:** \$ 5,110  
**Maximum Acceptable Amount:** \$ 10,220



**I certify that the information included here is true and correct and that I am authorized to submit grants on behalf of this organization.**

**Yes**

No

*Documents (attachments)*

**Required documents for submission of application:**

[IRS letter of determination](#)

**Optional documents for submission of application:**

Letters of support - up to 3.

Letter of Support 1

Letter of Support 2

Letter of Support 3