



# 2016 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only: Grant : _____
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## Organization / Agency Information

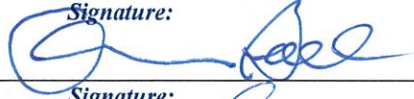
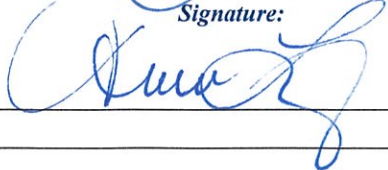
<b>Organization/Agency Name:</b> Children's Dance Foundation d/b/a The Dance Foundation		
<b>Physical Address:</b> 1715 27 <sup>th</sup> Court South	<b>City/State/Zip:</b> Birmingham, Alabama 35209	
<b>Mailing Address:</b> 1715 27 <sup>th</sup> Court South	<b>City/State/Zip:</b> Birmingham, Alabama 35209	
<b>CEO or Director:</b> Diane Litsey	<b>Title:</b> Executive Director	
<b>Phone:</b> 205-870-0073	<b>Fax:</b> 205-870-1301	<b>Email:</b> diane@thedancefoundation.org
<b>Contact Person:</b> Sara Wallace		<b>Title:</b> Development Coordinator
<b>Phone:</b> 205-870-0073	<b>Fax:</b> 205-870-1301	<b>Email:</b> Sara@thedancefoundation.org
<b>Web Site Address:</b> www.thedancefoundation.org		<b>Tax ID:</b> 63-0744601

## Program / Grant Information

**Interest Area:**  Animal Protection  Education  Environment  Health  Human Dignity

<b>Program/Project Name:</b> Community Partnership Program			<b>Amount of Grant Requested:</b> \$15,000
<b>Total Organization Budget:</b> \$788,201	<b>Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100):</b> 91%	<b>Per 990, Percentage of Management &amp; General Expenses Only (Column C/ Column A x 100):</b> 5%	<b>Per 990, Percentage of Management &amp; General Expenses and Fundraising (Column C+D/ Column A x 100):</b> 9%
<b>Purpose of Grant Request (one sentence):</b> More than 1,300 children will build creativity and a host of skills in weekly dance classes with live music at 30 social service agencies and schools in Birmingham, Alabama, including boys and girls who are typical, living in poverty, learning English as a second language, are experiencing homelessness, or have special needs.			
<b>Program Start Date (Month and Year):</b> July 1, 2016		<b>Program End Date (Month and Year):</b> June 30, 2017	
<b>Gimbel Grants Received: List Year(s) and Award Amount(s)</b> 2011, 2012, 2013, 2015 \$15,000 each of these years			

## Signatures

<b>Board President / Chair: (Print name and Title)</b> Charles Ball, Board President	<b>Signature:</b> 	<b>Date:</b> 10/18/14
<b>Executive Director/President: (Print name and Title)</b> Diane Litsey, Executive Director	<b>Signature:</b> 	<b>Date:</b> 10/18/16

**I. ORGANIZATION BACKGROUND**

- A) The Dance Foundation’s programs spark creative thinking, encourage collaboration and build confidence in the lives of children, teens and adults in the Birmingham, Alabama community. That is our mission: to teach the art of dance to all, inspiring creativity and confidence. What began in 1975 as a new approach to teaching dance to young children of all abilities and circumstances has flourished into something extraordinary. Our purpose is to teach the art of dance in the most inclusive, creative, and inspiring approach possible to anyone and everyone willing to join in. Our classes are a place of discovery.
- B) Creativity and collaboration are at the heart of our mission and our professional staff of dancers and musicians embody that. Programs are provided virtually every day, year-round. Less than 10% of our budget is for management and administration. As a not-for-profit, charitable dance education organization, The Dance Foundation is able to provide unique programs and services through the strong partnership of professional staff, a committed board of directors and a diverse collection of supporters. Our annual budget historically consists of 70% or more in earned income from fees for services - which is our commitment to match funding we receive- and 10% or less of our budget is allocated to management and fundraising expenses.
- C) The Dance Foundation is an organization now serving more than 2,000 students each week through our Community Partnership Program and Studio Program. Our dance classes and performances engage all involved – the growing toddler, the child who is homeless, disadvantaged or at-risk, the child who has special needs, and the inquisitive teen. The Dance Foundation is also home to dozens of artists and arts organizations for classes, workshops, rehearsals and performances with our Studio Use Program for Community Artists.

**II. PROJECT INFORMATION:**

**A) Statement of Need:**

1. All children need learning experiences which feed them – mind, body, and spirit. Dance is an ideal investment to develop social, cognitive, intellectual, physical and emotional skills. It is active and fun, building readiness for school and for life. However, to the detriment of many students, the arts are being erased from school curriculum in a push academics for preschooler and sedentary, test-result framework for elementary aged students. The arts are an integral part of a growing child’s life and are not made a priority in many educational settings, particularly with very young children, those with special needs, or children living in poverty.

As our founder, Jennie Robertson, shared in our early days, “Dance is a celebration of life, a widening of horizons, an exercise in communication, an exploration into self-awareness. Through this discipline all the arts come into focus.” Today, we continue Jennie’s vision and use dance as a tool to explore the arts, academics, and the world around us. Our goal from our earliest efforts in the 1970’s has been to invest in early arts education as a foundation for life and for learning. Our belief in reaching the very young has always been at the core of our work, from which other programs have sprung. No other organization in our community has this calling to be a consistent creative investment in these children’s lives.

**B) Project Description:**

The Dance Foundation requests \$15,000 from the S.L. Gimbel Foundation to engage 1,300 children in weekly, skill-building dance education: the Community Partnership Program. Through this program we bring dance with live music to children at 30 social service agencies, child development centers, preschools and elementary schools in the Greater Birmingham, Alabama area. These children include boys and girls who are typical, living in poverty, learning English as a second language, who have special needs, or who do not have any arts education. The Dance Foundation provides distinctive learning opportunities to experience the arts during the child's day at school or preschool. All partnership sites are subsidized with those most in need being provided for no fee. Funds from the Gimbel Foundation will be used to help pay artist fees for the 2016-2017 fiscal year.

We are grounded by a commitment to foster healthy, active, creative children, empowering them regardless of circumstance, ability or challenge. Health, human dignity, and feeding the human spirit through dance are at the heart of our mission, and have been since our beginning days.

Smiles and squeals of accomplishment. Skipping, taking turns, exploring a story, building language skills, learning...this is a Dance Foundation Movement-to-Music class in action. This is how The Dance Foundation helps bring the arts back into the curriculum and supports the acquisition of developmental skills and academic concepts young children need for school and beyond. By design, our Community Partnership Program provides a positive, participatory introduction to dance-- harnessing the belief that dance is a foundation for learning. The Dance Foundation is unparalleled in its rich and extensive community service, continuing today the innovative programs started in 1975; reaching children who are fragile and disenfranchised – children living in poverty, who have special needs, and who are very young. This program has three elements – *Movement to Music*, *Dance for English Learners* and *Summer Arts Camps*.

***Movement to Music*** is a specially developed dance curriculum with live music as an essential element to the experience. A dance instructor and musician teach 1,100 children each week through the school year and some sites during the summer as well. This engaging and consistent investment in young children greatly assists them with the developmental skills they need to be better prepared for entering elementary school. This robust curriculum uses movement, music, stories and songs with scarves, shakers and other fun props to help develop core social, intellectual, emotional and physical skills. The skills and concepts presented in classes include: working as a group; taking turns and working alone; offering ideas and choices; understanding and demonstrating pattern and rhythm; differentiating sound and movement qualities; being imaginative; and exploring how to move with new skills such as hopping, skipping, jumping, galloping. Every child at each site participates--all abilities, boys and girls together.

*Dance for English Learners* classes use dance concepts and skills to help develop language skills as well as artistic ability for 70 kindergarten and first grade children who are learning English as a second language at local elementary schools. A dance teacher and musician lead sessions each week that help instill confidence and teamwork as they develop language and movement skills. Classroom teachers collaborate with us to define language goals for each class such as prepositions (over/under); hearing, reading, demonstrating language skills; and patterns.

*Summer Arts Camps* enrich the lives of children who are considered at-risk and living in difficult circumstances with a week-long summer arts camp at The Dance Foundation's studios. These camps benefit children who are homeless or who have been removed from their homes for their health and safety by the Alabama Department of Human Resources (DHR). Campers explore dance, drama, drumming, and visual art supporting their acquisition of a variety of school and life skills such as collaboration, concentration, and creativity. These camps are specifically designed for these children who are greatly in need of positive, enriching experiences. An average of 30 children discover their individual artistry and build academic and life skills in these camps each summer.

**C) Project Goal, Objectives, Activities and Expected Objectives**

1. **PROJECT GOAL:** students of all ages, abilities, and circumstances will engage in dance classes which provide consistent opportunities to build creativity, confidence and an array of skills.
2. **Objective I:** Students with little to no arts education will participate in weekly dance classes.

**Activities:** students in preschool and those with special needs will participate in creative movement classes with live music at their school or agency, each week of the school year. Some will dance in the summer months also. The curriculum is designed with developmental benchmarks in mind, using a fun, imaginative framework to develop a host of skills.

**Expected Outcomes:** students will participate in classes otherwise not available to them; measurable outcomes include number of students, number of classes, review of no/some arts programs being increased with our classes at each school; selected skills include motor and social skills (increase from unable to able).

**Objective II:** Students who are English Language learners in K-2<sup>nd</sup> grades will participate in weekly dance classes with live music. The curriculum is designed to build language skills in tandem with dance skills. These students have little or no arts education in their school.

**Activities:** students in K-2<sup>nd</sup> grades in at least four area elementary schools will participate in weekly 30-45 minute dance classes for a series of at least 5 consecutive weeks at their schools. The curriculum is designed using language and dance standards, selecting skills in collaboration with classroom teachers. Class content will include a focus on partnering and working as a group to learn dance concepts and skills, concurrently as they build language skills.

2015 S.L. GIMBEL FOUNDATION APPLICATION

Expected Outcomes: Students will participate in classes otherwise not available to them; measurable outcomes include number of students, number of classes, review of no/some arts programs being increased with our classes at each school; selected dance and language skills from state standards will be woven into the curriculum together and reviewed for an increase in the ability to hear/understand, speak, read, and execute.

Objective III: Students in elementary and high school grades in the care of several social service organizations will participate in dance classes in our studios as part of a half-day summer arts camp experience; these students have little to no arts education. The curriculum is designed to provide a safe place to explore creativity, collaboration, and social skills through dance.

Activities: Students will participate in classes in our studios for camp format for 3-5 afternoons in one week in the summer with each group receiving 6-15 hours of arts instruction. The partnering agencies will bring their group of students to our studios for camp. One agency will bring boys and girls, the other two will bring girls only. Some of these youth live in poverty, live in homeless shelters, or have been removed from their homes by the Department of Human Resources for their own health and safety,

Expected Outcomes: Students will participate in classes otherwise not available to them; measurable outcomes include number of students, number of classes, review of no/some arts programs being increased with our classes at each school; selected observations and skills include fundamental dance skills and vocabulary, the ability to collaborate, and the willingness to engage and explore new activities.

**D) Timeline:**

Program dates are July 1, 2015 – June 30, 2016; we have a school – year schedule September through early May and a summer schedule June through early August.

**E) Target Population**

Our target populations are children with little to no arts education in their school day; children who are very young and working on development goals; children who have special needs; children who live in poverty; children who are learning English as a second language; and children who are experiencing homelessness or who have been removed from their home for their health and safety.

**F) Projects in the Community**

No other organization in our community has a similar mission or program of this scope and longevity. Community partnerships are essential to our mission and The Dance Foundation has a robust history of local and statewide collaborators: Birmingham City, Hoover City, and Jefferson County Schools; YWCA; The Bell Center for Early Intervention; the Alabama Dance Council; Grace House Ministries, Restoration Academy, and dozens of area child development centers.

**G) Evaluation:**

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The overall outcome for this program is that 1,300 children in Alabama will build skills and confidence through dance. Students will gain a variety of fundamental skills through weekly dance classes which are selected for each age, grade or group. Skills gained include motor, social and intellectual skills for preschoolers and students with special challenges; problem-solving, collaboration, confidence, and language skills for elementary-age students. Evaluation of this program is built into the framework, providing data to program leadership to strengthen services. Assessment includes: Quantitative Tools: Number of sites; number of children served; and number of classes. Qualitative Tools: For the Dance Teacher – Teaching Artist Reflections Forms; For the Director of the Community Partnership Program and Artistic Director – Class Benchmark Survey; Teacher and Musician Mentorship Forms and site visits; For the On-site Classroom Teacher - Classroom Teacher and Director Surveys.

- H) Use of Grant Funds: Funds will support pay for our teaching artists. Our dance teachers and musicians embody our mission each day, and paying our teaching artists is one of our core values. We believe in paying artists for their expertise. Payroll is our largest expense, and funding from the S.L. Gimbel Foundation will greatly assist with this need.

**III. PROJECT FUTURE**

**A) Sustainability:**

Our Community Partnership Program has been the cornerstone of our work since 1975. This program continues to reach enthusiastic students and educators each year. Our funding for this program comes from a diverse collection of sources including individuals, foundations, government, and corporations. We are confident that this program will continue, and will expand as resources allow.

**IV. GOVERNANCE, EXECUTIVE LEADERSHIP, AND KEY STAFF:**

**A) Governance:**

The board of directors is a critical partner with professional staff to fulfil our mission. The board raises funds and provides oversight, sets policy and shares necessary expertise and community knowledge. Board committees include: executive, fund development, governance, and finance. Strategic planning sets the course for board and staff together, which directs the board committee work and areas of focus for the board as a whole.

**B) Management:**

Staff provides fund and program development expertise in daily operations. We employ nearly thirty professional teaching artists (dancers and musicians) who have experience and training in dance education and performance, music, or theatre. Diane Litsey, Executive Director: Masters in Public and Private Management from Birmingham-Southern College, B.S. in Arts Management from Eastern Michigan University; Rachael Inman, Artistic Director: MFA in Dance from Florida State University and a BFA in Communications with a Dance minor the University of Alabama at Birmingham. Blakely Cottle, Director Community Partnership Program, B.A. from the University of Alabama at Birmingham in Theatre.

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### V. Project Budget and Narrative

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel/TCF	Line Item Total of Project
Teaching artists payroll	Pay for dance teachers and musicians; \$21-35 pay per hour of service for 30 sites each week; average for an hour of service is @\$50 for a pair of artists; travel time between sites; @1400 hours of service per year		\$55,000  Matching funds for this grant	\$15,000	\$70,000
Program management and curriculum development	Prorata of \$130,000 of salaries for artistic director who oversees all programs and curricula (50% of time), program director who oversees day to day program management (50% of time), and executive director who oversees all organizational efforts and supervision (25% of time)		\$65,000		\$65,000
Organizational Capacity	Prorata (30%) of \$215,000 towards utilities, repairs and maintenance, custodial services, mortgage, technology, insurance, office supplies		\$65,000		\$65,000
Mileage	Estimate based on history for travel to 30 sites each week; \$0.45 per mile; @14,500 miles for the year		\$6,500		\$6,500
Teaching supplies	Props, keyboards, books, music, percussion instruments, balls, portable balance beams, parachutes, etc,		\$3,000		\$3,000

	are items added or replaced each year to our resource collection and the “baskets” each teaching team takes to each site				
Professional development	Teaching artists attend our faculty institute each August, monthly meetings and training sessions, observe co-worker classes (\$10 per hour); 400 hours @\$10 an hour		\$4,000		\$4,000
<b>TOTALS:</b>			\$198,500	\$15,000	\$213,500

**Narrative:**

All listed expenses are necessary to implement our program on a day to day basis – a dance teacher and musician travel to 30 community sites each week, year-round. The teaching artists are paid by the hour, and are paid for travel time, professional development time, and mileage.

Expenses related to the capacity of The Dance Foundation to be able to provide such extensive services are included here in addition to artist payroll and teaching resources. We own our facility and manage our programs from this location; a prorate of costs associated with the facility are included here as well as organizational management expenses.



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**VI. Sources of Funding:** Please list your current sources of funding and amounts.

### *Secured/Awarded*

Name of Funder: Foundation, Corporation, Government	Amount
The Daniel Foundation (F)	\$25,000
Alabama State Council on the Arts (G)	\$18,600
UAB Benevolent Fund (F)	\$5,000

### *Pending*

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Robert R. Meyer Foundation (F)	\$10,000	Dec. 2016
Hugh Kaul Foundation (F)	\$10,000	Dec. 2016
Publix Charities (C)	\$5,000	Dec. 2016
Hill Crest Foundation (F)	\$5,000	Dec. 2016
Corporate proposals will be submitted in November-January	Varies	varies

**Diversity of Funding Sources:** A financially healthy organization should have a diverse mix of funding sources. Complete those categories that apply to your organization using figures from your most recent fiscal year.

Funding Source	Amount	% of Total Revenue	Funding Source	Amount	% of Total Revenue
Contributions	\$49,080	7%	Program Fees	526,953	70%
Fundraising/Special Events	\$82,220	11%	Interest Income	\$129	<1%
Corp/Foundation Grants	\$63,010	8%	Other:	\$1,3173	<2%
Government Grants	\$18,900	2%	Other:	\$	

**Notes:**

The fundraising total is comprised of one major special event (\$58,250 of the total) and a variety of smaller activities.

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### VII. Financial Analysis

**Agency Name:** Children's Dance Foundation d/b/a The Dance Foundation

**Most Current Fiscal Year (Dates):** From July 1, 2015 To: June 30, 2016

This section presents an overview of an applicant organization's financial health and will be reviewed along with the grant proposal. Provide all the information requested on your **entire organization**. Include any notes that may explain any extraordinary circumstances. Information should be taken from your most recent 990 and audit. **Double check your figures!**

#### Form 990, Part IX: Statement of Functional Expenses

**1) Transfer the totals for each of the columns, Line 25- Total functional expenses (page 10)**

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$744,070	\$672,224	\$39,187	\$32,659

**2) Calculate the percentages of Columns B, C, and D, over A (per totals above)**

- Program services (B) – A general rule is that at least 75% of total expenses should be used to support programs
- Management & general administration (C) – A general rule is that no more than 15% of total expenses should be used for management & general expenses
- Fundraising (D) – A general rule is that no more than 10% of total expenses should be used for fundraising

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	91%	5%	4%

**3) Calculate the difference between your CURRENT year budget for management & general expenses and your previous management & general expenses per your 990 (Column C)**

Percentage of Organization's Current Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
5 %	5 %	0%

If the differential is above (+) or below (-) **10%**, provide an explanation:

We have a consistent history of our administrative expenses staying at or below 10% of our budget. We strive to keep our administrative investment lean but effective. We anticipate the current year to continue that commitment.

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**Quick Ratio:** Measures the level of liquidity and measures only current assets that can be quickly turned to cash. A generally standard Quick Ratio equals 1 or more.

<b>Cash</b>	<b>+ Accounts Receivables</b>	<b>/Current Liabilities</b>	<b>= Quick Ratio</b>
\$131,434	\$25,256	60,570	2.59

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### Excess or Deficit for the Year:

<b>Excess or (Deficit) Most recent fiscal year end</b>	<b>Excess or (Deficit) Prior fiscal year end</b>
\$9,621	\$(28,331)

### Notes:

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Variances are due to: anemic fund development success in 2014-15; leadership and program development investments in 2014-15 and 2015-16 which are now producing growth in 2016-17; vacancy in artistic director for portion of 2015-16 which decreased wages.

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### VIII. Application submission check list:

<b><u>Submit FOUR (4) Copies: 1 ORIGINAL (WITH ORIGINAL SIGNATURES) and 3 copies, collated and stapled together of the following:</u></b>	<b><u>Submit ONE (1) Copy:</u></b>
Completed Grant Application Form (cover sheet, narrative), budget page and budget narrative (see sample) and sources of funding, financial analysis page	A copy of your current 501(c)(3) letter from the IRS
A list of your Board members and their affiliations	A copy of your most recent year-end financial statements (audited if available; double-sided)
Your current operating budget and the previous year's actual expenses (see sample Budget Comparison)	A copy of your most recent 990 ( double-sided)
Part IX only of the 990 form, Statement of Functional Expenses (one page). If you completed a 990-EZ, fill out the attached Part IX, Functional Expenses of the 990 form using figures from your 990-EZ	
For past grantees, a copy of your most recent final report.	



**Board of Directors 2016-17**

**Charles Ball – President**

Executive Director; Regional Planning Commission of Greater Birmingham

**James Jockisch – President-Elect/Vice President**

VP Senior Regional Credit Officer, Wells Fargo

**Kara Barlow – Secretary**

CPA, Studio Parent

**Grey Yeager – Treasurer**

Vice President, Private Banker, Wells Fargo Private Bank

**Paige Casey / Attorney; Lloyd, Gray, Whitehead & Monroe, P.C.**

**Reed Estes, MD / Chief, UAB Sports Medicine, Director, Dance Medicine Clinic, Assistant Professor, Division of Orthopaedic Surgery**

**W. Patton Hahn / Attorney; Baker, Donelson, Bearman, Caldwell & Berkowitz, P.C**

**Tiffany Kaczorowski / Physician Marketing Team Lead; Children's of Alabama**

**Ryan Leahy / Manager, Business Development, Kinder Morgan**

**April Mize / Organizational Development Director, Patient Engagement Advisors**

**Hilary Moreno / Graphic Designer**

**Graham Smith / President 2016-17; Children's Art Guild**

**Alan Weintraub / First Vice President – Investments, Wells Fargo Advisors**

**Amy Williams / Pediatric Physical Therapist, Mountain Brook School System**

THE DANCE FOUNDATION CASH BUDGETS				
	ACTUALS	ADOPTED	VARIANCE	
	Jul '15-Jun '16	Jul '16-Jun '17		
<b>Income</b>				
Contributions	114,231	127,000	12,769	
Fundraising	41,048	42,000	952	
Grants	74,160	80,000	5,840	
Interest Income	64	50	(14)	
Other Income	31,202	13,000	(18,202)	
Outreach Income	64,473	72,000	7,527	
Performance Inc	61,577	62,225	648	
Registration Fee	19,927	20,000	73	
Rent Income- other bldg	20,130	18,400	(1,730)	
Studio Rental	52,220	43,000	(9,220)	
Tuition	305,225	310,225	5,000	
<b>Total Income</b>	<b>784,257</b>	<b>788,201</b>		
<b>Expense</b>				
Accounting	8,075	8,100	25	
Consultant	8,352	6,250	(2,102)	
Development	2,002	1,750	(252)	
Equipment	1,999	1,750	(249)	
Fundraising Exp	18,085	18,000	(85)	
Insurance	15,383	15,500	117	
Marketing	24,141	20,000	(4,141)	rebranding expenses in 15-16
Misc expenses	15,012	14,000	(1,012)	
Mortgage P&I	76,134	46,000	(30,134)	refinanced note
Office Mgt	27,857	31,000	3,143	
Outreach Expenses	318	300	(18)	
Performance Exp	42,065	43,500	1,435	
Repairs & Maintenance	27,199	28,200	1,001	
Capital Improvements	6,050	15,000	8,950	performance space lighting
Staff Training	2,821	3,250	429	
Teaching Supplies	9,190	7,250	(1,940)	
Tuition Refund	3,241	3,000	(241)	
Utilities	31,158	31,500	342	
Wages	449,136	493,851	44,715	artistic director position vacant in 15-16; pay increases
<b>Total Expense</b>	<b>768,218</b>	<b>788,201</b>		
<b>Net Income</b>	<b>16,039</b>			

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 . . . . .				
2 Grants and other assistance to domestic individuals. See Part IV, line 22 . . . . .				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 . . . . .				
4 Benefits paid to or for members . . . . .				
5 Compensation of current officers, directors, trustees, and key employees . . . . .	60,935	53,590	3,203	4,142
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .				
7 Other salaries and wages . . . . .	356,088	313,168	18,715	24,205
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits . . . . .				
10 Payroll taxes . . . . .	31,903	28,057	1,677	2,169
11 Fees for services (non-employees):				
a Management . . . . .				
b Legal . . . . .				
c Accounting . . . . .	2,203	1,983	220	
d Lobbying . . . . .				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees . . . . .				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.) . . . . .	14,284	12,855	1,429	
12 Advertising and promotion . . . . .	26,143	24,836		1,307
13 Office expenses . . . . .	27,857	25,628	1,393	836
14 Information technology . . . . .				
15 Royalties . . . . .				
16 Occupancy (utilities) . . . . .	31,158	29,600	1,558	
17 Travel . . . . .	6,722	5,714	1,008	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings . . . . .	2,565	2,565		
20 Interest . . . . .	21,016	19,965	1,051	
21 Payments to affiliates . . . . .				
22 Depreciation, depletion, and amortization . . . . .	59,914	54,631	5,283	
23 Insurance . . . . .	15,383	14,614	769	
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a Outreach and performance	42,475	42,475		
b Supplies and equipment	8,082	8,082		
c Repairs and maintenance	27,199	25,839	1,360	
d Other	10,143	8,622	1,521	
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	744,070	672,224	39,187	32,659
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) . . . . .	No joint costs	No joint costs	No joint costs	No joint costs

## Celia Cudiamat

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**From:** Celia Cudiamat  
**Sent:** Wednesday, December 14, 2016 10:31 AM  
**To:** 'Diane Litsey'; 'sara@thedancefoundation.org'  
**Subject:** Gimbel Foundation Grant  
**Attachments:** Children's Dance Foundation Grant Agreement 20160817.pdf

**Importance:** High

December 14, 2016

Diane Litsey  
Executive Director  
Children's Dance Foundation  
1715 27<sup>th</sup> Court South  
Birmingham, AL 35209

Dear Ms. Litsey:

Congratulations! A grant has been approved for **Children's Dance Foundation** in the amount of \$15,000 from the S.L. Gimbel Foundation. The performance period for this grant is **December 1, 2016 to November 30, 2017**. Additional funding beyond the performance period is not guaranteed. It is highly recommended that alternative funding sources be sought accordingly. The grant is to support the following as specified in your proposal:

*Provide 1,300 children with a host of skills in weekly dance classes with live music at 30 social service agencies and schools targeting children who are typical, living in poverty, learning English as a second language, experiencing homelessness or have special needs.*

Note from Reviewers: "Include numbers of people served in follow-up grant outcomes and evaluations. All objectives, outcomes and evaluations should contain the same numbers. Please include this information on the evaluation of this grant. Narrative information regarding success in increases and or percentages of improvements should be included in the discussion portion of the evaluation."

This grant is subject to the terms outlined in the enclosed Grant Agreement. After you have reviewed the terms and conditions of the Grant Agreement, please sign and date the agreement and **EMAIL to me with original signature ASAP, no later than December 21**. Be sure to copy the signed agreement for your records. Funds will be released immediately upon receipt of the signed Grant Agreement.

A condition of this grant is that you agree to submit the Grant Evaluation Form which includes a narrative report and fiscal report. **The Grant Evaluation is due by December 15, 2017** and a copy will be available online.

We wish you great success and look forward to working with you during the grant performance period. If you have any questions, please call me at 661-241-7177, ext. 114, or email me at [ccudiamat@thecommunityfoundation.net](mailto:ccudiamat@thecommunityfoundation.net).

Sincerely,

Celia Cudiamat | Executive Vice-President of Programs  
The Community Foundation



Strengthening Inland Southern California through Philanthropy

3700 Sixth Street, Suite 200

Riverside, CA 92501

P: 951-684-4194

F: 951-684-1911

[www.thecommunityfoundation.net](http://www.thecommunityfoundation.net)

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**S. L. Gimbel Foundation Fund  
Grant Agreement**

Organization: Children's Dance Foundation  
Grant Amount: \$15,000 Grant Number: 20160817  
Grant Period: 12/1/2016 – 11/30/2017  
Purpose: Provide 1,300 children who are living in poverty with weekly dance classes.

**1. Use of Grant Funds**

Grant funds must be expended within the grant period, for the purpose and objectives described in your grant proposal. Grant funds may not be expended for any other purpose without prior written approval by The Community Foundation. If there are significant difficulties in making use of the funds as specified in your proposal, or if the grant funds cannot be spent within the grant period, notify us in writing promptly.

Formal requests for extensions or variances must be submitted to the Foundation's Board of Directors for approval a minimum of 60 days before the end of the grant period.

Requests for variances or extensions are reviewed on a case-by-case basis and approved by the Board of Directors. If a request is denied, unused funds must be immediately refunded to the Foundation.

Grant funds will not be expended for any political or lobbying activity or for any purpose other than one specified in section 170(c)(2)(b) of the Code.

**2. Payment of Grant Funds**

The grant funds will be paid in full by the Foundation upon receipt of the signed Grant Agreement. Challenge grant funds will be paid in full upon receipt of the signed Grant Agreement and upon receipt of documentation providing evidence that condition(s) of the challenge grant has/have been met.

**3. Certification and Maintenance of Exempt Organization Status**

This grant is specifically conditioned upon Grantee's status as an eligible grantee of The Community Foundation. The Foundation has obtained a copy of the Grantee's IRS determination letter. Grantee confirms that it has not had any change in its legal or tax-exempt status, and shall notify the Foundation immediately of any such change.

**4. Final Report and Records**

The Grantee will submit the Grant Evaluation report per the deadline set forth in the award letter. This report includes a narrative on outcomes based on goals and objectives set forth in the grant proposal and an expenditure report documenting use of grant funds. If equipment was purchased, copies of receipts need to be included.

**5. Grantee's Financial Responsibilities**

Grantee will keep records of receipts and expenditures of grant funds and other supporting documentation related to the grant at least four (4) years after completion of the grant and will make such records of receipts, expenditures and supporting documentation available to the Foundation upon request, for the purpose of conducting financial audits, making verifications, and investigations as deemed necessary concerning the grant.



**6. Publicity**

The Community Foundation appreciates publicity for the grant in all relevant published materials, such as brochures, newsletters and annual reports. The credit line of "Made possible in part by a grant from "The Community Foundation, *Strengthening Inland Southern California through Philanthropy*" is suggested. The Grantee will allow the Foundation to review and approve the content of any proposed publicity concerning the grant prior to its release, upon request. When your donors are listed in printed materials, include the Foundation in the appropriate contribution size category. Sending a brief press release to your local paper is appreciated. Please email Charee Gillens, our Marketing & Communications Officer, at [cgillens@thecommunityfoundation.net](mailto:cgillens@thecommunityfoundation.net) with copies of any printed or publicity materials that highlight the grant. When publishing our name, please note the "The" at the beginning of our name is a legal part of our name. It should always be used and capitalized. Attaching a logo is also appreciated. Our logo can be downloaded on our website at [www.thecommunityfoundation.net](http://www.thecommunityfoundation.net).

Grantee agrees to allow the Foundation to include information about this grant in the Foundation's periodic public report, newsletter, news releases, social media postings, and on the Foundation's website. This includes the amount and purpose of the grant, any photographs you have provided, your logo or trademark, and other information and materials about your organization and its activities.

**7. Indemnification**

In the event that a claim of any kind is asserted against the Grantee or the Foundation related to or arising from the project funded by the Grant and a proceeding is brought against the Foundation by reason of such claim, the Grantee, upon written notice from the Foundation, shall, at the Grantee's expense, resist or defend such action or proceeding, at no cost to the Foundation, by counsel approved by the Foundation in writing.

Grantee hereby agrees, to the fullest extent permitted by law, to defend, indemnify, and hold harmless the Foundation, its offices, directors, employees, and agents, from and against any and all claims, liabilities, losses, and expenses (including reasonable attorneys' fees) directly, indirectly, wholly, or partially arising from or in connection with any act or omission by Grantee, its employees, or agents in applying for or accepting the Grant, in expending or applying the Grant funds or in carrying out any project or program supported by the Grant, except to the extent that such claims, liabilities, losses, and expenses arise from or in connection with any bad faith act or omission by the Foundation, its officers, directors, employees, or agent.

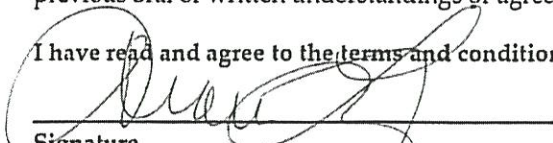
**8. Termination**

The Community Foundation may terminate this agreement, modify or withhold payments under this grant award, require a total or partial refund of any grant funds, or all at any time, if, in the Community Foundation's judgment: a) The Community Foundation is not satisfied with the quality of the Grantee's progress toward achieving the project goals and objectives; b) the Grantee dissolves or fails to operate; c) the Grantee fails to comply with the terms and conditions of this agreement; d) the Grantee fails to comply with the requirements of any law or regulation applicable to you, the Foundation, or this grant.

**9. Limitation of Support**

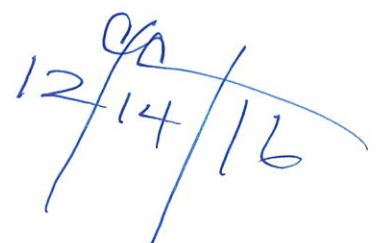
This Agreement contains the entire agreement between the parties with respect to the Grant and supersedes any previous oral or written understandings or agreements.

I have read and agree to the terms and conditions of the Grant Agreement.

  
\_\_\_\_\_  
Signature  
Diane Litsey  
Printed Name

12-14-16  
\_\_\_\_\_  
Date  
Executive Director  
Title

Grant Number: 20160817  
Organization: Children's Dance Foundation



BOARD OF DIRECTORS

Philip Savage IV  
*Chair of the Board*

Sean Vamer  
*Vice Chair of the Board*

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Diane Valenzuela

Dr. Jonathan Lorenzo Yorba  
*President and CEO*

December 14, 2016

Ms. Diane Litsey  
Executive Director  
Children's Dance Foundation  
1715 27<sup>th</sup> Court South  
Birmingham, AL 35209

Dear Ms. Litsey:

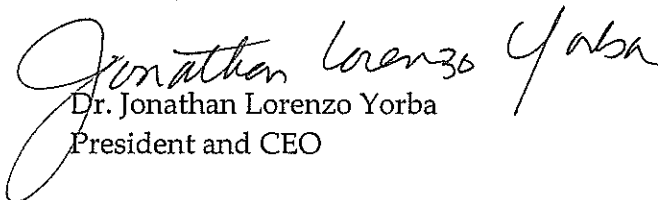
The Community Foundation is pleased to enclose a grant check for \$15,000 from the S. L. Gimbel Foundation, a component fund at The Community Foundation. By cashing the grant check, you are agreeing to the conditions stated under the *Terms of Grant* which you have signed and returned.

The completed Grant Evaluation form is due by December 15, 2017 and will be available online on The Community Foundations website under Grants/Forms. Please note that any grant variances or extensions must be requested in writing and in advance. Any remaining grant funds must be returned to The Community Foundation at the end of the grant period.

We greatly appreciate any help you can give us in publicizing the grant. Please use the following credit in any grant announcements or materials funded by the grant: "The (name of project/program) is supported by a grant from The S. L. Gimbel Foundation." You may send copies of articles printed in local papers, stories in your agency newsletter, annual report, press releases, and other publications for our files.

Please feel free to contact Celia Cudiamat, Executive Vice President of Programs at 951-241-7777, ext. 114, if you have any questions.

Sincerely,

  
Dr. Jonathan Lorenzo Yorba  
President and CEO

20160817

41773

GIMB5



**The Community Foundation**  
 Strengthening Inland Southern California through Philanthropy  
 3700 SIXTH STREET, SUITE 200  
 RIVERSIDE, CA 92501  
 951-241-7777 / FAX 951-684-1911

**CITIZENS BUSINESS BANK**  
 A Financial Services Company  
 3695 Main Street, Riverside, CA 92501  
 90-3414/1222

EZCheck<sup>SM</sup> Check Fraud  
 Protection for Business

PAY \* Fifteen Thousand and no/100 \*

TO THE ORDER OF DATE AMOUNT  
 12/15/2016 \$ \*\*\*\*15,000.00

Children's Dance Foundation  
 1715 27th Court South  
 Birmingham, AL 35209



*Jonathan Lorenzo Garcia*  
 AUTHORIZED SIGNATURE

⑈041773⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation 41773

17965	Children's Dance Foundation	12/15/2016	041773	
20160817	12/13/2016 Provide 1,300 children who are living in poverty with			15,000.00
GIMB	S.L. Gimbel Foundation Advised Fund			15,000.00

CHECK TOTAL: \$ \*\*\*\*15,000.00

The Community Foundation 41773

17965	Children's Dance Foundation	12/15/2016	041773	
20160817	12/13/2016 Provide 1,300 children who are living in poverty with			15,000.00
GIMB	S.L. Gimbel Foundation Advised Fund			15,000.00

CHECK TOTAL: \$ \*\*\*\*15,000.00

Security features. Details on back.