

Organization / Agency Information

20,000


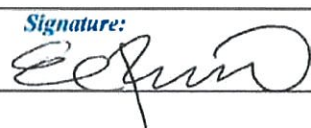
Organization/Agency Name: Laguna Playhouse		
Physical Address: 606 Laguna Canyon Road		City/State/Zip: Laguna Beach, CA 92651
Mailing Address: (same as above)		City/State/Zip:
CEO or Director: Ellen Richard		Title: Executive Director
Phone: 949 342-1784	Fax: 949 497-6948	Email: erichard@lagunaplayhouse.com
Contact Person: Doug Vogel		Title: Director of Development
Phone: 949 204-5341	Fax: 949 497-6948	Email: dvogel@lagunaplayhouse.com
Web Site Address: www.lagunaplayhouse.com		Tax ID: 95-1509841

Program / Grant Information

Interest Area: ☐ Animal Protection ☒ Education ☐ Environment ☐ Health ☐ Human Dignity

Program/Project Name: Laguna Playhouse Youth Education Programs – Engaging Disadvantaged Youth			Amount of Grant Requested: \$20,000
Total Organization Budget: (FY17) \$5,083,316	Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100): 80%	Per 990, Percentage of Management & General Expenses Only (Column C/ Column A x 100): 11%	Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100): 20%
Purpose of Grant Request (one sentence): To engage homeless and underserved youth in the performing arts through literature-based Youth Theatre at the Laguna Playhouse and curriculum-based touring performances to elementary schools that enhance literacy.			
Program Start Date (Month and Year): August 2017		Program End Date (Month and Year): July 2018	
Gimbel Grants Received: List Year(s) and Award Amount(s) No prior grants received from the S.L. Gimbel Foundation			

Signatures

Board President / Chair: (Print name and Title) Joe Hanauer, Co-Chair, Principal, Combined Investments, LLC	Signature: 	Date: 3/16/17
Executive Director/President: (Print name and Title) Ellen Richard, Executive Director, Laguna Playhouse	Signature: 	Date: 3/16/17

2017 S.L. Gimbel Foundation Application – Re-submitted by Laguna Playhouse

I. Organization Background

A) What are the history, mission and/or purpose of your organization?

The mission of the Laguna Playhouse is to enrich lives through the magic of live theatre, to provide educational opportunities for children and adults, and to create experiences that stimulate cultural and social interaction and inspire our community.

The Laguna Playhouse was launched in 1920 as a community theatre for Laguna Beach by a group of dedicated drama devotees. Initially, play readings and performances were held in private homes and storefronts. The group's first real home was The Playhouse, built in 1924 on Ocean Avenue in downtown Laguna Beach. Later, during the Great Depression, the theatre was sold to the City and then leased back by the company. During World War II, the Playhouse offered entertainment for the troops and hosted USO dances and other activities. Throughout the 1950s and 1960s, Laguna Playhouse continued to present a variety of staged productions, however, as the company's ambitions grew, the need for a larger, better-equipped venue became apparent.

In 1969, the Moulton Theatre was built with private funds on city-owned land along Laguna Canyon Road. As the community developed in step with the rapid growth of Orange County, the company produced work of increasing quality and its audience expanded in direct response. In 1996, the Playhouse formalized an agreement with Actors' Equity Association and became a member of the League of Resident Theatres (LORT), a prestigious body of the nation's largest nonprofit professional theatres which finalized its transformation into a professional theatre. Today more than 80,000 theater patrons attend performances at the Laguna Playhouse each season, and we provide innovative, high quality arts education for nearly 12,000 youth throughout the year – on our stage, in our Conservatory, and in local schools.

B) What are some of your past organizational accomplishments (last three years)?

Laguna Playhouse is culturally and historically significant in our community and, in its 96th Season, has the distinction of being one of the longest continuously running theaters in Southern California. It has earned a cherished place in our nation's history of regional theatres. Locally, it is one of the three oldest arts institutions in Laguna Beach, along with the Laguna Art Museum and the Festival of Arts/Pageant of the Masters. The theatre's continued growth, artistic excellence, audience popularity and critical acclaim have made it one of Southern California's most important nonprofit theatrical companies, for which it has received many awards, including recently awarded "Scenies" Awards in six categories for Outstanding Productions in 2015/2016 by StageSceneLA.com for *All Shook Up*, *Louis & Keely: Live at the Sahara*, and *Snow White Christmas*, and for the second year in a row was named by the *Orange County Register* as "Best of Orange County in Live Theatre." Laguna Playhouse award-winning, literature-based Youth Theatre and Youth Education Programs have been educating youth and entertaining family audiences for decades. Laguna Playhouse has won two national awards for its youth programs, including *Outstanding Children's Theatre* by the American Alliance for Theatre and Education.

C) What are your key programs and activities? Describe the communities you serve.

Core programming includes our seven-production season of plays plus three Youth Theatre productions and education programs for youth and adults. Because of our central location in South Orange County, and data that 87% of our audiences live, or are headquartered, in the 13

2017 S.L. Gimbel Foundation Application – Re-submitted by Laguna Playhouse

South County cities, the Playhouse is a dynamic, cultural center for performing arts that contributes to the economy, culture, vitality and livability of our region.

II. Project Information:

A) Statement of Need - Specify community need you want to address and seek funds for.

Need for Activity 1: More than 30,000 children are identified as homeless in Orange County by the Orange County Department of Education. Among them, more than 1,200 children live in motels with their families. They suffer the stress of chronic housing and food insecurity, which negatively impacts their development, morale and academic achievement. In addition to basic needs often going unmet, these at-risk youth lack access to stimulating, uplifting activities that could enrich them and brighten their outlook. Proposed spending cuts to the arts and afterschool programs may limit access even more for youth who would benefit the most. Through targeted outreach, Laguna Playhouse seeks to serve homeless children living in Orange County through exposure to the performing arts. Providing the magical experience of live theatre to kids living in transition awakens their imagination, enriches the senses, and fosters joy and a sense of hope. Hope is the motivator that helps individuals seek paths out of poverty. Grant-funding would enable Laguna Playhouse to develop new collaborations with local agencies serving homeless youth to provide artistic enrichment by bringing them to the Playhouse for Youth Theatre performances.

Need for Activity 2: We target economically disadvantaged students in Title I schools where at least 40% of the student body is low-income, per the Free and Reduced Lunch program. *TheatreReach* is very often a first exposure to live theatre for these students. We rely on private donations and grants from companies, foundations and individuals to sustain and expand this program to make sure it reaches the children who need literacy support and lack access to the arts. TheatreReach is an artistically excellent, educationally effective, affordable way to help fill the enrichment gap created by loss of arts funding in public schools.

B) Project Description

Activity 1: During its 2017-18 season, Laguna Playhouse proposes to bring middle school and high school students, identified as homeless or living in transition, to experience three Youth Theatre productions at the Laguna Playhouse. These productions are professionally produced, of high artistic quality, literature-based, educational, uplifting and inspiring. Recent productions include *The Wizard of Oz*, *Boxcar Children*, *The Tragedy of Romeo and Juliet* and *The Adventures of Tom Sawyer*. For some or many of these youth, it will be their first exposure to live theatre. The youth services agencies, with whom we are in talks to develop this program, tell us that these youth desperately need a respite from their circumstances, laughter, beauty, and an alternate lens on life and the human condition that theatre so movingly provides.

Activity 2: ***TheatreReach: Bringing Books to Life*** is Orange County's longest running, most successful curriculum-based, professional theatre touring program. It provides literacy support for thousands of elementary school children – in their schools - through tours of plays adapted from required books in the California State curriculum. TheatreReach is a unique and valuable resource for teaching California State Content Standards in history, literature and language. Since its inception in 1999, more than 100,000 students in Southern California have benefited from this

2017 S.L. Gimbel Foundation Application – Re-submitted by Laguna Playhouse

high quality performing arts program. TheatreReach tours an hour-long one-act play created around characters from curriculum books using professional actors, sets, costumes, props and sound equipment. Live music accompanies all performances. During the performance, actors encourage interactivity with the audience and conduct a question and answer session following. We currently tour By the Great Horn Spoon! – an adventure tale of the California Gold Rush, Charlotte's Web, and Island of the Blue Dolphins – a beloved classic of courage and survival that brings to life a chapter of American Indian history in California.

In 2016 we added a new feature: 45-minute, post-performance acting workshops taught by our teaching artists for 30 students at selected schools. Students learn how to experience for themselves what an actor does from warming up to using their voices, bodies and imagination to touch on character creation as they enact scenes from the TheatreReach play. Students responded enthusiastically to the workshops. Teachers express the deep value of this level of structured creative play for students who might never have an experience of this kind. In 2018, with the help of grant support, we hope to expand this well-received feature that deepens the students' artistic and educational experience.

C) Project Goal, Objectives, Activities and Expected Outcomes

1. State ONE project Goal - an aspirational, broad statement of purpose for the project

To bring joy, learning, inspiration, enrichment, and respite to at-risk, underserved youth through the magic of live theatre with the goal of sparking imagination and hope in youth who are struggling to overcome difficult circumstances.

2. State ONE Objective

Through Laguna Playhouse Youth Theatre and TheatreReach, **7,450** underserved, low-income youth will experience educational, entertaining, live theatre, September 2017 - June 2018.

3. Specify the activities to meet the objective and number of participants for each activity.

Activity 1: Youth Theatre: **450** middle school/high school youth living in transition accompanied by 50 adult chaperones will attend three Playhouse Youth Theatre productions (200 in fall 2017, 100 in winter 2018 and 200 in spring 2018).

Activity 2: TheatreReach: Bringing Books to Life: **7,000** students in grades 3-5 will participate in performances in their schools (two tours/two literary works, 20 performances each).

4. Expected outcomes:

Activity 1: Hope and joy fostered by the performing arts will help **450** youth see beyond themselves and build resilience, helping them persevere through difficult circumstances. This introduction to theatre will potentially foster appreciation for and interest in the arts.

Activity 2: TheatreReach – **7,000** students will participate; outcomes will include:

- Students who view performances demonstrate an increased understanding of major comprehension points from their reading assignment.
- The program inspires love of reading and challenges inexperienced readers to visualize actions suggested by the words.
- English learners demonstrate an increased incentive to read their assigned books.

2017 S.L. Gimbel Foundation Application – Re-submitted by Laguna Playhouse

5. Evaluation:

Activity 1: Youth in transitional living attending Youth Theatre performances will be asked to share their impressions about the experience with program supervisors in conversations and through written surveys administered on our behalf by the collaborating youth services agencies. We will gather anecdotal evidence from a sampling of the **450** students served in order to gauge the impact and evaluate next steps for this new program.

Activity 2: TheatreReach: successful outcomes are tracked through written evaluations by teachers in the 40 schools we tour while serving **7,000** students. Student feedback during the Q&A sessions that follow each performance and TheatreReach staff observations are also outcome indicators. Teachers complete written surveys that include open-ended questions, multiple choice questions and rating scales. The questionnaires provide information to determine the success of the program to achieve desired outcomes. Teachers are also asked to observe and report on the attitudes of English-learners towards their reading assignments following the performances. Evaluations consistently indicate progress in reading comprehension, historical knowledge, vocabulary growth and interest in reading and learning history. One 4th grade teacher reported, *“Learning a second language is extremely difficult. Seeing actors move, touch, make actions, and use sound effects provides multiple avenues for interpretation.”* Each year, teachers provide input and ask that the performance return to their school for a new set of students.

D) Timeline for implementing the project --- **August 1, 2017 – July 31, 2018**

- **August**–October: program planning, outreach and scheduling with collaborators
- Students attend fall Youth Theatre performance at Laguna Playhouse
- October-February: collaborate w/school districts to schedule TheatreReach performances and complementary acting workshops in schools
- February-March: students attend winter Youth Theater’s Theatre for a New Generation performance
- March: First tour of TheatreReach: Bringing Books to Life
- April: Students attend spring Youth Theatre performance
- May: Second tour of TheatreReach: Bringing Books to Life
- **June-July**: program evaluations and reporting

E) Target Population - Who will this grant serve? How many people will be impacted?

Activity 1: 450 youth ages 12-18 plus 50 adult chaperones – (family members and agency staff)

Activity 2: 7,000 children in grades 3-5 in elementary schools, mostly Title I-designated, serving low-income, primarily Latino children in underserved communities

F) Projects in the Community - How this project relates to other projects in the community.

We are not aware of other theatre groups engaging youth living in transition in theatre performances; we are developing this outreach – in response to requests from youth services agencies – to fill an unmet need. We are collaborating with Project Hope Alliance and similar agencies serving homeless/motel youth. TheatreReach is the only program of its kind that brings curriculum-based performances - designed to enhance literacy - to elementary schools. We collaborate with school district administrators and elementary schools on scheduling and

2017 S.L. Gimbel Foundation Application – Re-submitted by Laguna Playhouse

evaluation of this program. Volunteers are not used in youth programs as participants are under-age and we require professional skills to achieve artistic and education outcomes.

G) Use of Grant Funds- How will you use the grant funds?

Grant funds will support a new P/T position, Youth Services Coordinator, in charge of outreach and coordination with schools and youth service agencies to provide the new Youth Theatre outreach program for youth living in transition, and to sustain the 2017 doubling of TheatreReach service to 40 schools. As bringing special youth to Youth Theatre, free of charge, is a new outreach program, funds will support the required bus transportation and help underwrite 25% of the ticket cost. Funds also support the added contract fees for the teaching artists (TheatreReach actor/educators) conducting the new drama workshops in selected schools.

Matching Gift Opportunity: In honor of Laguna Playhouse nearing its centenary, the City of Laguna Beach has awarded a 1:1 matching grant for all new and increased contributions to the Playhouse. Since a S.L. Gimbel Foundation grant would be a first-time gift for Laguna Playhouse, your grant in 2017 would be matched dollar for dollar.

III. Project Future - Sustainability after the grant period

Laguna Playhouse conducts an annual fundraising campaign for its youth education programs that includes annual donations from individuals, grants from foundations, and sponsorships from corporations and local business.

IV. Governance, Executive Leadership and Key Personnel/Staff Qualifications

A) Governance - board of directors' role, committees and decisions-making

The Board of Trustees has an active fiduciary role, governance in programs, and is overseeing a feasibility study examining the need for refurbishing and expanding the Laguna Playhouse to meet current facility needs and future growth in community programming. Committees of the board are: Audit, Branding, Capital Improvements, Content, Development, Finance, Governance /Nominating. The board meets monthly and holds committee meetings as needed at which decision making is made in collaboration with Laguna Playhouse executive leadership.

B) Management - Describe qualifications of key staff responsible for the project.

Donna Inglima, Director of Youth Theatre, Education and Outreach, is a director, writer, teacher, producer and actor. Donna directs Laguna Playhouse Youth Theatre and developed our outreach program, TheatreReach: Bringing Books to Life, adapting children's literature into musical plays. She also wrote and published the student Study Guides that accompany each TheatreReach production that are provided to the schools to enhance student learning. Donna was on the Drama Faculty of Syracuse University, Utica College and the American Musical and Drama Academy of New York, where she developed five improvisation comedy troupes. She served as Artistic Associate for American Playwrights Theatre in New York, and Director of the Apprentice Program at Berkshire Theatre Festival. She is a member of the Society of Stage Directors and Choreographers, and Actor's Equity Association. Donna received her MFA in Theatre from Syracuse University. Donna will supervise the Youth Services Coordinator's work in outreach with collaborators and scheduling participation and evaluation.

2017 S. L. Gimbel Foundation Grant Application Submitted by Laguna Playhouse

V. Project Budget and Narrative

REVISED 6-14-17

A) Budget Table: Provide a detailed line-item budget for your **entire** project by completing the table below. Requested line items should be limited to Ten (10) line items. The less the better.

A breakdown of specific line item requests and attendant costs should include:

- 1) Line item requests for materials, supplies, equipment and others:
 - a. Identify and list the type of materials, supplies, equipment, etc.
 - b. Specify the unit cost, number of units, and total cost
 - c. Use a formula/equation as applicable. (i.e. 40 books @ \$100 each = \$4000)
- 2) Line item requests for staff compensation, benefits: **Do not use FTE percentages.**
 - a. Identify the position; for each position request, specify the hourly rate and the number of hours (i.e. \$20/hr x 20 hours/week x 20 weeks = \$8,000)
 - b. For benefits, provide the formula and calculation (i.e. \$8,000 x 25% = \$2,000)
- 3) Line items on Salaries/Personnel included in budget (contribution or in-kind) but NOT requested from the Gimbel Foundation must be broken down per number 2) above: Provide rate of pay per hour and number of hours.

Line Item Request	Line Item Explanation	Support from Laguna Playhouse	Support from other Funders	Requested Amount from Gimbel/TCF	Line Item Total of Program
Personnel					
Director of Youth Theatre & Youth Education Programs	\$37/hr x 18 hours/week x 48 weeks = \$31,968	\$ 13,484	\$ 13,484	\$ 5,000	\$ 31,968
Youth Services Coordinator	20 hours/week x \$15/hour x 25 weeks = \$6,000	\$ -	\$ 1,000	\$ 5,000	\$ 6,000
Artistic Production Personnel	6 at hourly rate range of \$15.00 - \$16.50	\$ 4,460	\$ 4,460	\$ -	\$ 8,920
Benefits	\$46,888 x 25% = \$11,722	\$ 11,722	\$ -	\$ -	\$ 11,722
Personnel Total:		\$ 29,666	\$ 18,944	\$ 10,000	\$ 58,610
Program Expenses					
Activity 1: Youth Theatre					
Student Bus Transportation	10 buses (50 participants/bus) x \$500/bus	\$ -	\$ 2,500	\$ 2,500	\$ 5,000
Youth Theatre Performance Tickets	500 tickets x \$20/ticket = \$10,000	\$ 5,000	\$ 2,500	\$ 2,500	\$ 10,000
Supplies	Permission Slips, Surveys, Educational Handouts	\$ 250	\$ -	\$ -	\$ 250
Activity 1 Total:		\$ 5,250	\$ 5,000	\$ 5,000	\$ 15,250
Activity 2: TheatreReach					
Union Actors (7 per production x 2 productions)	14 at \$3,000 contract fee (\$25/hr x 20 hours/week x 6 weeks = \$3,000 p/p x 14 actors = \$42,000)	\$ 21,000	\$ 21,000	\$ -	\$ 42,000
Artistic Production Contractors (3)	3 at \$1,200 contract fee (\$20/hr x 30 hours/week x 2 weeks = \$1,200 p/p x 3 = \$3,600)	\$ 3,600	\$ -	\$ -	\$ 3,600
Teaching Artists (4)	4 Teachers x \$120/hour workshop x 16 workshops = \$7,680)	\$ -	\$ 2,680	\$ 5,000	\$ 7,680
Travel: Van Rental and Fuel to transport Scenery, Props, and Costumes	Van Rental (1 Van x 6 weeks x \$200 per week = \$1,200), Van Fuel (2 tanks/week x 15 gal per tank x \$3.05 per gal = \$91.50/wk x 6 weeks = \$549) Total Van rental & fuel cost = \$1,749	\$ 874.50	\$ 874.50	\$ -	\$ 1,749

2017 S. L. Gimbel Foundation Grant Application Submitted by Laguna Playhouse

V. Project Budget and Narrative

page two

REVISED 6-14-17

Line Item Request	Line Item Explanation	Support from Laguna Playhouse	Support from other Funders	Requested Amount from Gimbel/TCF	Line Item Total of Program
Travel: Mileage reimbursement for 14 actors	14 actors x average 50 miles/day x 5 days/week x 6 weeks x \$0.53/mile = \$11,130	\$ 5,565	\$ 5,565	\$ -	\$11,130
Artistic Materials	Costume replacement pieces: (7 pairs shoes x \$60 = \$420) (specialty vintage shirts, overalls, pants, coats, hats estimated at \$2,500); scenery paint (5 quarts x \$10 each = \$50); prop scrim \$800	\$ 1,885	\$ 1,885	\$ -	\$ 3,770
Script Copies	50 pages x \$0.20/page x 16 copies = \$160	\$ 160		\$ -	\$ 160
Rehearsal Space Rental	\$1,125/wk x 2 weeks = \$2,250	\$ 1,125	\$ 1,125		\$ 2,250
Royalties	Rights to use each script; \$2,500 each x 2 = \$5,000	\$ 2,500	\$ 2,500	\$ -	\$ 5,000
Study Guides	50 at \$5.00 each	\$ 250	\$ -	\$ -	\$ 250
Activity 2 Total:		\$ 36,960	\$ 35,630	\$ 5,000	\$ 77,589
TOTAL PROGRAM BUDGET:		\$ 71,876	\$ 59,574	\$ 20,000	\$ 151,449
		47%	39%	13%	100%

- V. **B) Narrative:** The budget narrative is the justification of “how” and/or “why” a line item helps to meet the project deliverables. Provide a description for each line item request as necessary. Explain how the line item relates to the project. If you are requesting funds to pay for staff, list the specific duties of each position. See attached SAMPLE Project Budget and Budget Narrative

Laguna Playhouse Budget Narrative - page 1:

1 **Personnel: Donna Inglima is Director of Youth Education Programs at Laguna Playhouse. Inglima produces and directs Youth Theatre, and is co-founder of TheatreReach. She provides artistic direction and directs implementation of the program. Additionally, she provides the education components of Youth Theatre (Dramaturgy and Stage Talks) and TheatreReach (study guides and acting workshops). Her salary allocation to this program budget is 41%.**

2 **The Youth Services Coordinator will be in charge of outreach to community youth services agencies and schools to schedule youth attending Youth Theatre and touring performances of TheatreReach in schools. The new Youth Services Coordinator position will make it possible to offer this new program for transitional living children in our community and sustain TheatreReach service to 40 schools each year.**

3 **Artistic Production Personnel: Carpenter, Stagehand, Scenic Painter, Electrician, Stage Manager, Costumer**

4 **Personnel Benefits are calculated at 25% (25% of budgeted personnel total of \$46,888 for this program proposal is \$11,722)**

5 Student Bus Transportation: Youth Services Agencies will organize student attendance (students are enrolled in their programs); Laguna Playhouse arranges and funds bus transportation to/from the Playhouse.

6 Youth Theatre Performance Tickets are provided free of charge to students and adult chaperones; Laguna Playhouse donates 50% of the ticket cost and seeks community support to offset revenue reduction on the other 50%.

7 Supplies for Activity 1 include permission slips for each child, surveys for program coordinators to evaluate outcomes, and dramaturgy handouts for students to inform them about the show they will see and any historical or literary notes.

Laguna Playhouse Budget Narrative - page 2:

8	TheatreReach is a professionally staged performance with Equity Actors that are paid union rates. 7 actors per production x 2 productions - 40 total performances in spring 2018.
9	TheatreReach also employs Equity artists for its production staff that include set designers, costumers and stage manager. They typically work one full week prior to each production to ready the sets, props and costumes, which require annual repair or replacement.
10	The new acting workshops offered post-performance for selected schools are also taught by Equity Actors who are teaching artists. Workshops accommodate 30 students and run one hour on the school site. They deepen the educational and artistic experience and provide exposure to dramatic arts instruction. Teacher evaluations indicate that these workshops are popular and beneficial for their students.
11	We rent a van to transport scenery, props, and costumes between the Laguna Playhouse and school sites throughout Orange County. The van is driven by the stage manager.
12	Union rules require mileage reimbursement at the government rate of \$0.53/mile for Equity actors for miles driven in excess of 50 miles per day. Several of our actors live in Los Angeles, Long Beach and North County. During the two-week rehearsals in Laguna Beach prior to each production, several commute 100+ miles per day. During productions, they commute to the performance sites 5 days per week for 6 weeks. Performance sites range in locales from Laguna Beach, Anaheim, Santa Ana, Irvine, San Juan Capistrano, and Huntington Beach.
13	Artistic Materials: Travel and packing/unpacking sets several times a day, 5 days a week over 3 weeks puts wear and tear on the sets and props. Also, the actors are very physical in their roles, and that causes wear and tear to the costumes. Set and costume repair and replacement are a normal course of operation for TheatreReach. Vintage shoes and clothing called for by the historic settings of our stories are expensive. The scrim called for in the detail above is a special fabric used to create the many web props used in <u>Charlotte's Web</u> .

Laguna Playhouse Budget Narrative - page 3:

14 Script copies are needed each year for new actors filling the roles and to update scripts when new adaptations are created.

15 Rehearsal Space Rental: We need to rent a community hall to rehearse TheatreReach - 2 weeks, 5 days per week prior to each production. This is because the Laguna Playhouse is fully booked with its 7-Season productions and special engagements that run year-round.

16 Royalties: we are required to annually renew our rights to perform each play.

17 TheatreReach Study Guides are provided for each participating school, a different guide for each story presented (two stories per year). Teachers use guides to lead their students through extra activities related to the work of literature before and after the performance. Teachers find these guides to be a valuable enhancement to their lesson plans.

NOTE: This budget is \$4,493 higher than the program budget we submitted with our original proposal in March. That is because the 2017 TheatreReach tour has now taken place and we have updated our figures based on 2017 tour Actuals. The amount requested of the Gimbel Foundation remains the same.

2017 S.L. Gimbel Foundation APPLICATION

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

Secured/Awarded

Updated: June 2017

Name of Funder: Foundation, Corporation, Government	Amount
Allergan Foundation	\$7,500
Angels Baseball Foundation	\$4,000
Assistance League of Laguna Beach	\$10,000
Capital Group Charitable Trust	\$5,000
Dyer Foundation	\$5,000
Festival of Arts Foundation	\$5,000
Lon V. Smith Foundation	\$1,000
Marisla Fund of the Orange County Community Foundation	\$10,000
Marshall Fund of the Orange County Community Foundation	\$5,000
O.L. Halsell Foundation	\$15,000
Pacific Life Foundation	\$10,000
Rotary Clubs (three)	\$4,500
Southern California Edison	\$5,000
Ueberroth Family Foundation	\$10,000
Union Bank Foundation	\$5,000
William Gillespie Foundation	\$5,000
Wells Fargo Foundation	\$5,000

Pending

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Ebell Club	\$2,500	June
Helping Hands – Anaheim Community Foundation	\$5,000	June

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	\$1,128,093	22%	Program Fees	\$3,021,639	58%
Fundraising/Special Events	\$261,019	5%	Interest Income	\$1,344	<1%
Corp/Foundation Grants	\$128,691	2%	Other: Rental, In-kind, Concessions	\$466,788	9%
Government Grants	\$210,115	4%	Other:	\$	

Notes:

Based on the information presented in our most recently completed audit

2017 S.L. Gimbel Foundation APPLICATION

VII. Financial Analysis

Agency Name: Laguna Playhouse

Most Current Fiscal Year (Dates): From: 7-1-14 To: 6-30-15 *(Most Recent FY Tax Return)*

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
\$4,388,839	\$3,531,958	\$470,653	\$386,228

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%	80%	11%	9%

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
11.05%	10.72%	.34%

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

2017 S.L. Gimbel Foundation APPLICATION

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.

Cash	+ Accounts Receivables	/Current Liabilities	= Quick Ratio
\$504,331	\$252,000	\$179,397	4.2

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$368,490	\$59,690

Notes:

VIII. Application submission check list:

	<u>Submit FOUR (4) Copies: 1 ORIGINAL (WITH ORIGINAL SIGNATURES) and 3 copies, collated and stapled together of the following:</u>		<u>Submit ONE (1) Copy:</u>
✓	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
✓	Your current operating budget and the previous year's actual expenses (see sample Budget Comparison)	✓	A copy of your most recent year-end financial statements (audited if available; 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	✓	A copy of your most recent 990 (double-sided)
	For past grantees, a copy of your most recent final report. <i>(First time applicant)</i>	✓	A list of your Board members and their affiliations

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	280,037	204,209	65,718	10,110
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	1,295,634	935,250	141,692	218,692
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	51,100	15,176	35,924	
9 Other employee benefits	87,691	56,563	25,548	5,580
10 Payroll taxes	133,669	93,016	22,820	17,833
11 Fees for services (non-employees)				
a Management				
b Legal				
c Accounting				
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)	417,203	309,799	61,118	46,286
12 Advertising and promotion	356,874	352,809	4,065	
13 Office expenses	56,434	48,585	4,807	3,042
14 Information technology				
15 Royalties				
16 Occupancy	180,453	153,527	20,593	6,333
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	55,734	45,102	6,957	3,675
20 Interest	91,922	87,993		3,929
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	101,908	85,746	13,310	2,852
23 Insurance	79,415	37,325	40,016	2,074
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 Theatrical Fees	737,981	737,981		
b Concession and Other	201,207	136,414	3,077	61,716
c Repairs and Maintenance	124,778	107,933	16,845	
d Costumes, Scenery & Spe	78,616	77,308	1,308	
e All other expenses	58,183	47,222	6,855	4,106
25 Total functional expenses. Add lines 1 through 24e	4,388,839	3,531,958	470,653	386,228
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)				

Laguna Playhouse FY16 Budget ACTUALS to FY17 Budget FORECAST Comparison

		Actuals Most Recently Completed Year 2015-2016	Budget Projections Current Year 2016-2017	Variance
Income				
	Individual Contributions	\$ 665,738	\$ 877,749	\$ 212,011
	Corporate Contributions	\$ 61,692	\$ 71,000	\$ 9,308
	Foundation Grants	\$ 120,049	\$ 155,165	\$ 35,116
	Government Contributions	\$ 210,115	\$ 217,560	\$ 7,445
	Special Event	\$ 366,888	\$ 390,240	\$ 23,352
	Other Earned Income	\$ 3,308,917	\$ 3,176,678	\$ (132,239)
	Interest & Dividend Income			
	In Kind	\$ 171,964	\$ 172,000	\$ 36
Total Income		\$ 4,905,363	\$ 5,060,392	\$ 155,029
Expense				
	Production Expense	\$ 1,697,709	\$ 1,729,537	\$ 31,828
	Education Programming	\$ 193,338	\$ 329,089	\$ 135,751
	Artistic Management	\$ 178,857	\$ 208,064	\$ 29,207
	Education Management	\$ 89,541	\$ 87,087	\$ (2,454)
	Production Staff/Facilities	\$ 581,355	\$ 610,385	\$ 29,030
	Sales & Marketing	\$ 760,023	\$ 732,302	\$ (27,721)
	Development	\$ 306,398	\$ 369,618	\$ 63,220
	Special Events	\$ 173,175	\$ 172,240	\$ (935)
	General & Administrative	\$ 737,445	\$ 731,014	\$ (6,431)
	In Kind	\$ 171,964	\$ 172,000	\$ 36
	Depreciation			
Total Expenses		\$ 4,889,806	\$ 5,141,336	\$ 251,530
NET SURPLUS (DEFICIT)		\$ 15,557	\$ (80,944)	\$ (96,501)



Strengthening Inland Southern California through Philanthropy

BOARD OF DIRECTORS

Sean Varner
Chair of the Board

J. Sergio Bohon
Vice Chair of the Board

Pat Spafford, CPA
Chief Financial Officer

Dr. Paulette Brown-Hinds
Secretary of the Board

Rabbi Hillel Cohn

Paul Granillo

Stanley Grube

Dr. Fred Jandt

Andrew Jaramillo

Nefertiti Long

Kirtland Mahlum

Brian McDonald

Meredyth "Charlie" Meredith

Susan Ovitt

Teresa Rhyne

Kathleen Sawa

Philip Savage IV
Immediate Past Board Chair

Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Paula Myles
Interim President and CEO

July 21, 2017

S. L. Gimbel Foundation Fund

Ms. Ellen Richard
Executive Director
Laguna Playhouse
606 Laguna Canyon Road
Laguna Beach, CA 92651

Dear Ms. Richard:

Congratulations! A grant has been approved for **Laguna Playhouse** in the amount of **\$20,000.00** from the S.L. Gimbel Foundation. **The performance period for this grant is August 1, 2017 to July 31, 2018.** 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:

Engage homeless/underserved youth in literature based theatre

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 return with original signature to The Community Foundation by Friday, August 25, 2017.** Be sure copy the signed agreement for your records. Funds will be released 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 August 15, 2018** 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 feel free to contact me at 951-241-7777.

Sincerely,

Celia Cudiamat
Executive Vice President of Programs

23474 Laguna Playhouse

20170378 GIMB



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

Organization: Laguna Playhouse
Grant Amount: \$20,000.00 **Grant Number:** 20170378
Grant Period: August 1, 2017 to July 31, 2018 (*Evaluation Due: August 15, 2018*)
Purpose: Engage homeless/underserved youth in literature based theatre

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 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.

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.

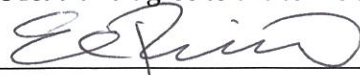
8. Termination


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

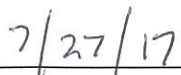
This Agreement contains the entire agreement between the parties with respect to the Grant and supersedes any previous oral or written understandings or agreements.

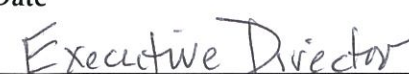
I have read and agree to the terms and conditions of the Grant Agreement.

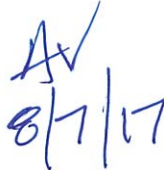


Signature


Printed Name



Date


Title


Organization: **Laguna Playhouse**

Grant Number: **20170378**



Strengthening Inland Southern California through Philanthropy

BOARD OF DIRECTORS

August 9, 2017

S. L. Gimbel Foundation Fund

Sean Varner
Chair of the Board

J. Sergio Bohon
Vice Chair of the Board

Pat Spafford, CPA
Chief Financial Officer

Dr. Paulette Brown-Hinds
Secretary of the Board

Rabbi Hillel Cohn

Paul Granillo

Stanley Grube

Dr. Fred Jandt

Andrew Jaramillo

Nefertiti Long

Kirtland Mahlum

Brian McDonald

Meredith 'Charlie' Meredith

Susan Ovitt

Teresa Rhyne

Kathleen Sawa

Philip Savage IV
Immediate Past Board Chair

Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Paula Myles
Interim President and CEO

Ms. Ellen Richard
Executive Director
Laguna Playhouse
606 Laguna Canyon Road
Laguna Beach, CA 92651

Dear Ms. Richard:

The Community Foundation is pleased to enclose a grant check for \$20,000.00 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 August 15, 2018** 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: *"Laguna Playhouse is supported by a grant from The S. L. Gimbel Foundation."* You may send us 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 me at 951-241-7777 should you have any questions.

Sincerely,

Celia Cudiamat
Executive Vice President of Programs

20170378

42714

GIMB2



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

Check Fraud
Protection for Business

42714

PAY * Twenty Thousand and no/100 *

TO THE
ORDER OF

DATE

08/08/2017

AMOUNT

\$ ****20,000.00

Laguna Playhouse
606 Laguna Canyon Road
Laguna Beach, CA 92651

[Signature]
Phon-unds
AUTHORIZED SIGNATURE

⑈042714⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

42714

23474 Laguna Playhouse

08/08/2017 042714

20170378	07/20/2017	Engage homeless/underserved youth in literature based	20,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		20,000.00

CHECK TOTAL: \$ ****20,000.00

The Community Foundation

42714

23474 Laguna Playhouse

08/08/2017 042714

20170378	07/20/2017	Engage homeless/underserved youth in literature based	20,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		20,000.00

CHECK TOTAL: \$ ****20,000.00