



# 2018 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:
Grant: 20180819

RESUBMIT  
14  
GRANTEE I.D.: 18713  
\$25,000

## Organization / Agency Information

Organization/Agency Name: Rosie's House: A Music Academy for Children		
Physical Address: 1875 N Central Ave, Phoenix, AZ		City/State/Zip: 85004
Mailing Address: PO Box 13446, Phoenix, AZ		City/State/Zip: 85002
CEO or Director: Becky Bell Ballard		Title: Chief Executive Officer
Phone: 602-252-8475	Fax: 602-252-8473	Email: becky@rosieshouse.org
Contact Person: Alyson Hartsock		Title: Advancement & Marketing Director
Phone: 602-252-8475	Fax: 602-252-8433	Email: alyson@rosieshouse.org
Web Site Address: rosieshouse.org		Tax ID: 86-0650451

## Program / Grant Information

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

Program/Project Name: Rosie's House Propel Piano Program	Amount of Grant Requested: \$25,000
Purpose of Grant Request (one sentence): We are requesting support for our after-school piano music program that will positively impact the lives of economically disadvantaged youth in Arizona.	

## Signature

Executive Director/President: (Print Name and Title) Becky Bell Ballard, Chief Executive Officer	
Executive Director/President Signature: Becky Bell Ballard	Date: 9/10/18

**Organization / Agency Information**

<b>Organization/Agency Name:</b> Rosie's House A Music Academy For Children Inc		
<b>Physical Address:</b> 1875 N. Central Ave., Phoenix, AZ 85004		
<b>Mailing Address:</b> P.O. Box 13446, Phoenix AZ 85002		
<b>CEO or Director &amp; Title:</b> Mrs. Becky Bell Ballard, Chief Executive Officer		
<b>Phone:</b> (602) 252-8472	<b>Fax:</b>	<b>Email:</b> becky@rosieshouse.org
<b>Contact Person &amp; Title:</b> Alyson Hartsock, Advancement & Marketing Director		
<b>Phone:</b> (602) 252-8472	<b>Fax:</b>	<b>Email:</b> alyson@rosieshouse.org
<b>Web Site Address:</b> http://www.rosieshouse.org		<b>Tax ID:</b> 86-0650451

**Program / Grant Information**

**Program Area:** Education

<b>Program/Project Name:</b> Rosie's House Propel Piano Program			<b>Amount of Grant Requested:</b> \$25000
<b>Total Organization Budget:</b> \$757,740	<b>Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100):</b> 73%	<b>Per 990, Percentage of Management &amp; General Expenses Only (Column C / Column A x 100):</b> 17%	<b>Per 990, Percentage of Management &amp; General Expenses and Fundraising (Column C+D / Column A x 100):</b> 27%
<b>Purpose of Grant Request (one sentence):</b> We are requesting support for our Afterschool Music Program for the 2018-2019 program year. This support will positively impact the lives of economically disadvantaged youth in the Phoenix community.			
<b>Program Start Date (Month and Year):</b> 9/4/2018		<b>Program End Date (Month and Year):</b> 5/24/2019	
<b>Gimbel Grants Received: List Year(s) and Award Amount(s)</b> 2009: \$29,000 2011: \$30,000 2012: \$23,000 2014: \$25,000			

## Celia Cudiamat

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**From:** Alyson Hartsock <alyson@rosieshouse.org>  
**Sent:** Friday, September 21, 2018 3:03 PM  
**To:** Celia Cudiamat  
**Subject:** Rosie's House\_S.L Gimbel Foundation Resubmission  
**Attachments:** SLGimbel Cover Sheet.pdf

Good afternoon Celia,

Thank you for the opportunity to update some of the information in our proposal to the S.L. Gimbel Foundation. Please find our grant submission below, with the updated information in red, bold font. Our cover sheet is attached. If you or the trustees have any other questions, please do not hesitate to reach out.

2018 S. L. Gimbel Foundation Fund Grant Application

### Organization Information

#### Organization/Agency Information

Organization/ Agency Name

(If operating as a DBA, enter DBA name here)

Rosie's House A Music Academy For Children Inc.

Legal Name

If different from OBA/Organization/Agency Name

Rosie's House A Music Academy For Children Inc.

Tax ID

86-0650451

Tax Status

501(c)3

Organization Mailing Address

Street Address or P.O. Box (No residential addresses, please)

P.O. Box 13446

City

Phoenix

State

AZ

Zip Code

85002

Organization Physical Address

Street No, and Name, City, State, Zip (No resident/a/ addresses, please)

1875 N. Central Ave.

Phoenix, AZ 85004

Website Address

<http://www.rosieshouse.org>

Organizational Leadership (Please list CEO, President, Board Chair, Executive Director)

Prefix

Mrs.

First Name

Becky

Last Name  
Bell Ballard

Title  
Chief Executive Officer

Work Phone  
(xxx-xxx-xxxx)  
602-252-8475

Extension  
105

Cell Phone  
(xxx-xxx-xxxx)

**Fax**  
(xxx-xxx-xxxx)  
602-252-8473

E-mail Address  
[becky@rosleshouse.org](mailto:becky@rosleshouse.org)

Program/Project Contact Person  
Check this box if the Program/Project Contact Person Is the same as the organization's primary contact listed above  
Fields In this section will auto-fill.

Prefix  
Ms.

First Name  
Alyson

Last Name  
Hartsock

Title  
Advancement & Marketing Director

Work Phone  
(xxx-xxx-xxxx)  
602-252-8475

Extension  
101

Office Fax

E-mail Address  
[alyson@rosieshouse.org](mailto:alyson@rosieshouse.org)

Organization/Agency Background

## Organization Background

What is the history, mission, and purpose of your organization?

Rosie's House: A Music Academy for Children is committed to transforming the future of our community and providing students from disadvantaged backgrounds with guidance, opportunity, and hope through music training. Founded In 1996, by Rosebell and Woody Schurz, the afterschool music academy was established to provide students from low-income families with a life-changing opportunity.

Rosie's own story of war and hope inspires our values and mission. During World War II, as war ravaged the countryside, Rosie fled her home in Germany. On her family's journey to safety, seven-year-old Rosie had to leave her violin behind. Throughout her life, her sense of loss for her violin remained poignant; and finally, as an adult, she found respite in providing a second "home" to disadvantaged children. Our home, Rosie's House, provides children everything Rosie wanted as a child: safety, stability and music.

The mission of Rosie's House: A Music Academy for Children is to eliminate barriers to high-quality music education. Through music we support youth as they develop their full creative and personal potential.

## Length of Service (number of years)

How long has the organization been providing programs and services to the community?

22

## Organizational Accomplishments

What are some of your past organizational accomplishments in the last 3 years?

Accomplishments: Rosie's House provides an innovative afterschool program that functions as a method of intervention for students typically classified as "at-risk." Rosie's House students defy the statistics related to higher-education compared to their peers: 97% of Rosie's House graduating seniors enroll in college. This is compared to a college enrollment rate of 47% for their Phoenix peers and 38% for Arizona students.

Student Successes: Rosie's House puts youth on a path for college and long-term success. One alumni, 18-year-old Melina Cordero never dreamed of attending college until she enrolled at Rosie's House: "The rigor of instruction prepared me for my audition for college, and I am so thrilled to now be attending Northern Arizona University on scholarship." Melina is a first-generation college student and is pursuing a degree in Bio-Medicine and minoring in music,

Accolades: Rosie's House is a certified institutional member of the National Guild for Community Arts Education, a member of Local First Arizona and an institutional member of Arizona Citizens for the Arts.

In the past three years, Rosie's House has received state and national recognition, including:

- Recipient of the National Society of Arts & Letters Award in March 2014
- Winner of the 2014 Arizona Governor's Art Award in Arts Education
- 2016 Charity of Choice" by Country Music Association Foundation
- Two-time finalist in the National Arts & Humanities Youth Program Award (2015, 2016)
- Proclamation of Honor from the City of Phoenix Mayor
- Finalist in the Sterling Award for Non-Profit Excellence from the Scottsdale Chamber of Commerce

## Programs and Activities

What are some of your current key programs and activities? Describe the communities you serve. Include populations and geographic locations.

As one of the largest 100 percent free afterschool music programs nationwide, serving nearly 500 youth ages 5-18, Rosie's House is a safe place for students to play their hearts out, and find their path for future success. Annually, Rosie's House provides over 18,000 free music lessons, loans 250 free musical instruments, performs over 60 concerts to 12,000 audience members, and in our 22nd year of changing lives through music, we are still 100% free serving youth from disadvantaged backgrounds. Rosie's House believes music

education creates hope, fuels the imagination, sparks creativity and is a powerful force for social justice and vitality in our community.

Rosie's House employs 24 professional music educators to deliver the following programs:

- Propel Piano Program
- Strive String Program
- Aim Brass & Woodwind Program
- Mariachi Floreclente Program
- Core Choir Program
- Chamber Ensemble Program
- Arts Achieve Program
- College Path Program
- Musician Active In Community Program (M.A.C.)
- Musician Mentoring In Classrooms Program (M.M.C.)

**Target Population:** Rosie's House serves vulnerable students between the ages of 5 and 18. Within their peer groups, high-school drop out rates are alarmingly high while college enrollment rates are low. Current Income demographics also reflect this vulnerability: all Rosie's House students' families are classified as low-income by HUD Guidelines and the average household income is less than \$30,000 a year. In addition, Rosie's House serves populations that are traditionally underrepresented in the arts. Our student population is diverse: 79% Hispanic, 8% Caucasian, 4% African American, 4% Multi-racial, 3% Asian, 0.5% Native American, 0.5% Pacific Islander American, and 1% other.

**Geographic Reach:** Rosie's House students primarily reside in West and South Phoenix (75%) and the remaining students are from valley cities including Tempe, Mesa, and Glendale.

**All of the afterschool programs at Rosie's House take place on a collaborative campus that includes Central United Methodist Church and other arts organizations, located in Central Phoenix. The campus has four buildings that includes classrooms, performance halls and multi-use spaces. We work with students from all over Maricopa County, with the majority living in the following zip codes: 85007, 85008, 85017, 85019, 85035, 85339, 85040, 85041, and 85042.**

**The location of our campus fills a critical role towards our mission, as its central location provides access to more students. The campus is located on the Light Rail line, as well as along various major public bus routes. The proximity to public transportation make our campus and program more accessible to our target population.**

#### **Program/Project Information**

Program/ Project Information  
Interest Area  
Education

Program or Project Name  
Rosie's House Propel Piano Program

Amount of Grant Requested  
Use whole dollars, do not use \$sign, comma, or decimal  
25000

Total Organization Annual Operating Budget  
Use whole dollars, do not use \$ sign, comma, or decimal  
801500

Per 990, Percentage of Program service Expenses

Column B divided by Column A, x 100 (Please enter no more than 2 digits, i.e., 7.9)

73

Per 990, Percentage of Management & General Expenses Only

Column C divided by Column A, x 100 (Please enter no more than 2 digits, i.e., 7.9)

17

Per 990, Percentage of Management & General Expenses and Fyndra!5ing

Column C + Column O, divided by Column A, x 100 (Please enter no more than 2 digits, i.e., 7.9)

27

#### Purpose of Grant Request

Please summarize the project (In 25 words or less).

We are requesting support for our Afterschool Music Program for the 2018-2019 program year. This support will positively impact the lives of economically disadvantaged youth In the Phoenix community.

#### Use of Grant Funds

How will you use the grant funds?

Funding from The S.L. Gimbel Foundation will help Rosie's House to bridge the education achievement gap through music for youth from low-income families, and develop the next generation of arts aware, creative and productive citizens. We will accomplish this by using funding in the following ways: Funding will support the cost to hire and train highly-qualified and professional music educators who will teach our students to be musically proficient. Utilizing National Arts Standards as well as standards developed by the National Guild for Community Arts Education, they will provide a program of rigorous piano instruction. The end result is that students leave the program having developed a high-level of musical ability. In addition to supporting the expense of high-quality educators and curriculum development, funding will also help cover the cost of translation services as many Rosie's House students and families are bi-lingual or primarily Spanish speaking. The S.L. Gimbel Foundation's support will also assist in covering expenses related to classroom space, supplies and instrument purchases.

#### Project Start Date

Month and Year

September 04, 2018

#### Project End Date

Month and Year

May 24, 2019

#### Gimbel Grants Received

List previous years with award amounts, if applicable

2009: \$29,000

2011: \$30,000

2012: \$23,000

2014: \$25,000

#### Statement of Need

Specify the community need you want to address and are seeking funds for.

On a national level, young people are increasingly disconnected from their communities.

For youth from low-income backgrounds, this frequently means they are cut off from the people and resources they need to be successful in life.



Today's growing number of under-resourced youth face rapidly changing economic, social, technological, and environmental challenges that call for community-based solutions. Without solutions our economy, justice system, and even civil discourse is negatively impacted. Research indicates that these young people are underemployed, or less likely to become employed, and are more inclined to rely on government support during their lives. More importantly than the costly implication of these factors, it is an unacceptable fact that far too many of our young people grow up in situations that impede their success. It is a challenge society cannot afford to overlook.

Quality out-of-school programs fill a critical need in our community. In Arizona, the need for engaging and purposeful after school activities, including innovative arts programs, is overwhelming. The average per pupil expenditure on arts instruction is less than \$1, and after school programs are sorely underfunded statewide. Rosie's House plays an integral role in fulfilling this essential community need and is the only 100 percent free professional music program of its kind in the state.

Rosie's House believes all young people should have equitable access to opportunities that assist them in developing their worldview and personal potential. Over the past forty years, numerous studies have indicated the life-long positive effects for youth engaged in rigorous creative arts education programs. The Arts and Achievement in At-Risk Youth Report by the National Endowment for the Arts indicates that per longitudinal data, low-socioeconomic youth engaged in art making have better academic outcomes, higher career goals and are more civically engaged.

At Rosie's House, our graduating seniors are two times more likely to attend college than their peers. The college attainment statistics are: 38% of Arizona Students, 47% of Phoenix Peers and 97% of Rosie's House students attend college after high school graduation. In addition, our impact measurements indicate that the top three areas of student impact are: 1) Academic Success 2) Social Skills 3) Leadership.

Rosie's House fulfills a vital community need as a result of generous public, and private support. At this time, however, demand for our programs greatly exceeds our capacity, and Rosie's House is only able to accept 1 in 10 students who apply. Presently, nearly 500 students take lessons multiple times each week over at least a five-year period. With your investment, we can increase the number of young people we serve and grow equitable access to opportunities that develop the personal potential of youth from economically disadvantaged backgrounds.

### **Project Description**

Describe your project. How will this project enable this organization to better meet community needs? What is unique and innovative about this project?

Rosie's House seeks a grant of \$25,000 in support of our Propel Piano Program. Classes include **17 group lessons, as well as 16 advanced individual lessons**. Over **170** students, ages 5-18, participate. **Each student is enrolled in 1-3 one-hour classes each week. Additionally, students are required to practice at least an additional five hours per week, with a signed practice log from a parent or guardian, and participate in other weekly Rosie's House opportunities such as college-readiness workshops, mentoring in other classes and volunteering at community sites. Throughout the arc of a child's music education at Rosie's House, the majority of students are involved for 5 years, participate in 300 hours of directly supervised learning and commit at least 22,500 hours of intense practice.**

The Rosie's House Propel Piano Program works to provide a positive and life-changing opportunity for underserved youth in Arizona. Rosie's House students reside in communities plagued by violence, drugs and gang activity.

Students who attend Rosie's House are particularly vulnerable - within their peer groups, high-school drop-out rates are alarmingly high while college attendance rates are low. Many of the schools where Rosie's House students attend have cut music programs, leaving few alternatives for high-quality music education. Through music, Rosie's House helps students to develop an appreciation of the arts, improve academic achievement,

build self-confidence, creative thinking, leadership aptitude and other life skills that encourage them to complete their education and reach their full potential.

#### Program Description Enrollment & Curriculum:

To enroll in the Propel Piano Program, students qualify through an admittance process that verifies economic need and musical aptitude.

Group classes emphasize a fun, nurturing environment for young beginners as they learn fundamental techniques. Students selected for individual lessons build on the solid foundation developed within the group class, with tailored instruction and a strong mentoring relationship with their teacher. Throughout the arc of a child's music education at Rosie's House, the majority of students are involved for 5 years, participate in 300 hours of directly supervised learning and commit at least 22,500 hours of intense practice.

Based upon skill level and experience, students are accepted into a five-year curriculum with group instruction or the advanced individual lesson program. Classes are in session from September through May for 30 weeks of instructions. Each year, students participate in two recitals undergo two playing assessments, attend master class and participate in field trip opportunities.

#### Commitment:

Both students and parents are required to show a high level of commitment to Rosie's House. Students adhere to a strict attendance policy of no more than three absences per semester. Additionally, students commit to practicing each day and complete a weekly practice log that is signed by a parent or guardian. Students and parents sign a commitment form before classes begin and stating that they will arrive on time and be prepared for their lessons. To ensure parents are equally committed and engaged, they are asked to dedicate at least four hours of service to Rosie's House each semester.

#### Faculty:

The curriculum at Rosie's House is taught by a 24-member professional music faculty under the guidance of four Department Chairs. Faculty has advanced degrees from universities such as the Cleveland Institute of Music, University of Southern California, Peabody Conservatory of Music and Belgrade University. In addition, faculty members teach at institutions such as Arizona School for the Arts, Paradise Valley Community College, Scottsdale Community College and the Scottsdale Unified School District.

**Project Goal, Objectives, Activities, Expected Outcomes, and Evaluation:** In fields below, state in the following order: 1. ONE Project Goal that is a broad, aspirational statement of purpose for the project and ONE Objective that is a specific, measurable, verifiable, action-oriented, realistic, and time-specific statement intended to guide your organization's activities toward achieving the goal. 2. Specify the Project Activities you will undertake to meet the objective and number of participants for each activity. 3. Expected Outcomes are the individual, organizational, or community-level changes that can reasonably occur during the grant period as a result of the proposed activities or services. What are the key anticipated outcomes of the project and impact on participants? State in quantifiable and verifiable terms. 4. Evaluation How will progress towards the objectives be tracked and outcomes measured?

Provide specific information on how you will collect relevant data and statistics that meet your objective and validate your expected outcomes in a quantifiable manner as you describe your evaluation process.

#### 1. Project Goal

Goal: Provide Rosie's House students, ages 5-18, with a lifelong skill through free music instruction and loaned instruments; services that help develop a commitment to academic and personal achievement; and resources including mentorship, service-learning opportunities and college-readiness programs that ensure students are on a path for long-term success.

#### 2. Project Objective

Objective: Enroll 160 students in the Rosie's House Afterschool Propel Piano Program in the 2018-2019 program year.

### 3. Project Activities

#### Activity: Recruitment ,

Rosie's House staff will promote, market and recruit students for open enrollment spots for the 2018-2019 program year. Recruitment to Title 1 schools and social service agencies throughout Phoenix began in May 2018. This activity will include the work of three participants: Program Director and two Program Coordinators.

#### Activity: Hiring

The Program Department will need to ensure that all five piano faculty positions are filled for the beginning of the 2018 - 2019 program year. To ensure this is accomplished, recruitment began in Spring 2018 through online promotions and marketing to high-quality piano instructors in the community. This activity will be led by the Program Director with assistance from the Advancement & Finance Manager.

#### Activity: Curriculum Development

Over the summer hiatus, faculty will develop the curriculum for 160 students for the coming program year. The Piano Department Head will lead these efforts with the help from the Program Director and four piano faculty members.

#### Activity: Interviewing and Enrolling

Staff and faculty will interview interested students that qualify for Rosie's House programs based on HUD income guidelines. Classes for accepted students will commence in September of 2018, and conclude in May of 2019. Interviews and enrollment require work from the Program Director, two Program Coordinators and five Piano faculty members.

### 4. Expected Outcomes

By participating in our afterschool piano program, 160 Rosie's House students will:

- Demonstrate proficiency on piano including the ability to read musical notation, play musical scales and perform repertoire appropriate for their level;
- Demonstrate knowledge of performance traditions, the role of the arts in promoting cultural understanding, and a broad historical understanding of music;
- Demonstrate critical thinking and the ability to evaluate performances; and
- Demonstrate life skills such as dedication, creativity, teamwork and confidence

### 5. Evaluation

160 Rosie's House piano students' learning will be assessed through the following measurements:

1. Each semester Faculty will conduct a learning assessment with each student. The teacher will use a rubric that documents the student's skill in music theory, technique, rhythm, musicality and practice routine. The student will receive a grade and a copy of the assessment.
2. Advanced students that are in the individual lesson curriculum will perform for a jury during the spring semester. This jury will include faculty members from the piano department and written comments from all teachers will be given to the students. The faculty members in the piano department determine the expectations for the student jury which are typically scales, etudes, solo repertoire and site reading.
3. Each of the parents will complete a survey at the end of the program year, reporting on their child's grades in school and observations regarding the program's impact on the student's academic and personal achievements.
4. Learning assessment, parent survey data and enrollment numbers are managed and tracked using Rosie's House Salesforce database.

\*Below are some examples of how to list your Goals, Objectives, Activities, Expected Outcomes, and Evaluation: Objective, Outcome and Evaluation should align and should be written in a linear format using actual numbers and data that are quantifiable and verifiable.

**STATE ONE GOAL, ONE OBJECTIVE, ONE OUTCOME;**

- **GOAL:** House all homeless youth ages 18-24 in Mariposa County who are physically, mentally, and legally able to work within 24 hours and help them become self-sufficient in 90 days.
- **OBJECTIVE:** House up to 145 homeless youth referred or who contact us within 24 hours.
- **OUTCOME:** We expect to provide rapid rehousing to over 45 homeless youth in 2017.

**EVALUATION:** Using Build Futures' Salesforce database client management and tracking system, generate reports on the number of clients served and housed. Track our role in housing 145 youth. Account for additional success or lower numbers of youth in the program.

**Target Population**

Who will this grant serve? How many people will be impacted? Provide a breakdown: Number of children, youth, adults, seniors, animals.

Rosie's House serves nearly 500 vulnerable students between the ages of 5 and 18. Within their peer groups, high-school drop-out rates are alarmingly high while College enrollment rates are low. Current income demographics also reflect this vulnerability: all Rosie's House students' families are classified as low-income by HUD Guidelines and the average household income is less than \$30,000. In addition, Rosie's House serves populations that are traditionally underrepresented in the arts. Our student population is diverse: 79% Hispanic, 8% Caucasian, 4% African American, 4% Multi-racial, 3% Asian, 0.5% Native American, 0.5% Pacific Islander American, and 1% other.

**Project Timeline**

Provide a timeline for implementing the project, include timeframes for specific activities, as appropriate.

April 2018: Recruitment and program promotion to neighboring schools and social service agency began

June 2018: Hiring for piano faculty began.

June 2018: New student enrollment process opens. Students are accepted based on income qualifications (need) and on aptitude (ability).

September 2018 - May 2019: 30-weeks afterschool instruction provided by professional music educators

**Projects in the Community**

How does this project relate to other existing projects in the community? Who else in the community is providing this service or has a similar project? Who are your community partners, if any? How are you utilizing volunteers?

Rosie's House is unique in the Metropolitan Phoenix area. We are the only 100% tuition-free music program for youth from low-income families. However, our project interfaces with other performing arts organizations in the community, as well as social service agencies that provide services to students from low-income families. Rosie's House has partnerships with the Phoenix Art Museum, Phoenix Chamber Music Society and the Musical Instrument Museum. Rosie's House works with Phoenix Youth at Risk and Title 1 schools for student referrals.

Rosie's House actively utilizes volunteers. As part of their commitment to community service, students perform at various venues throughout the Phoenix area including local hospitals and retirement communities. In addition, parents are required to complete volunteer hours each semester as part of their commitment to Rosie's House. Activities include our campus clean-up days, office support, special event logistics and supply drives.

**Project Future**

**Project Future / Sustainability**

Explain how you will support the project after the grant performance period. Include plans for fundraising or increasing financial support designated for the project.

Rosie's House has a 22-year track record of securing community support through a blend of individual donor, corporate, foundation, government and special event revenue. Additionally, we are certified as an Arizona Charitable Tax Credit Organization. For the past two years, our Board of Directors has run a successful tax credit campaign raising over \$100,000 in new revenue and the organization saw an overall revenue surplus in 2017. Additional fundraising personnel were added to the staff to ensure continued revenue growth and program sustainability. Additionally, Rosie's House continues to partner with corporations such as Wells Fargo, SRP, and the CMA Foundation to ensure the program has a sustainable future.

#### **Governance, Executive Leadership, and Management: Key Personnel/ Staff Qualifications**

##### **Governance and Executive Leadership**

Describe your Board of Directors and the role it plays in the organization. What committees exist within your Board? How does your Board make decisions?

The Board of Directors oversees the strategic direction, allocations of resources and overall financial and organizational decisions for Rosie's House. Committee's include Executive Committee, Governance Committee, and Finance Committee. Voting occurs at monthly Board Meetings. The Rosie's House Board of Directors creates a Strategic Plan every three years and assesses progress annually.

##### **Management**

Describe the qualifications of key personnel/staff responsible for implementing the project.

The project will be led by Program Director, Catherine Reid in conjunction with the Plano Department Head and faculty members. Reid has served as the Program Director since 2014 and previously taught music programs in public schools. The majority of faculty have Masters Degrees or higher from notable Institutions Including the Cleveland Institute of Music, Peabody Institute of Music and Belgrade University.

#### **Resubmission Attachment Information**

##### **1. Evaluation Follow-Up**

###### **a.) Expenditures:**

**Rosie's House utilized grant funding to support piano faculty (\$17,000), artistic direction and evaluations (\$4,320), performance rental and classroom facilities (\$2,000), piano tuning (\$800), keyboard and instrument costs (\$300) and supplies and curriculum (\$580).**

###### **b.) Students Served**

**The total number of students impacted by Rosie's House in 2014 was 400. However, the S.L. Gimbel funding specifically supported the Propel Piano program, directly affecting 75 students. Over the past four years, Rosie's House has grown, flourished and expanded programs to enroll more students. Overall, there are over 460 students enrolled in Rosie's House programs. The funding that we have requested in 2018 is again for the Propel Piano program and will directly impact over 170 students at Rosie's House.**

##### **2. Budget**

**a.) Curriculum development is not only necessary to continuing the program, but is essential in our students' development. Currently, the Propel Piano program has a five-year, sequential learning curriculum that allows students to stay engaged in the program long-term. Through this model, more students are staying involved for a longer period of time, requiring that the curriculum be updated, modified and implemented to meet the ever changing needs of our student population. As students**

continue to grow and improve their musical and life skills, new classes and curriculum needs to be developed to allow them to stay engaged and challenged in the program.

b.) The current cost of translation services for the Propel Piano program is \$2,500. Over the last year, Rosie's House has hired the essential staff to make the translation services more efficient, essentially cutting our costs in half. The \$5,000 number listed in the budget was an outdated figure.

**Alyson Hartsock**

Advancement & Marketing Director



**Email:** [alyson@rosieshouse.org](mailto:alyson@rosieshouse.org)

**Mail:** P.O. Box 13446, Phoenix, AZ 85002

**Physical Address:** 1875 N. Central Ave., Phoenix, AZ 85004

**Office:** 602-252-8475 ext. 101

**Cell:** 517-230-7623

[www.rosieshouse.org](http://www.rosieshouse.org)

***Creating Music...Changing Lives***

## 2018 S.L. Gimbel Foundation APPLICATION

Organization Name:

Rosie's House

**V. Project Budget and Narrative (Do not delete these instructions on your completed form).**

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.
- 4) Line Item Description should be no more than two lines; otherwise, it will get cut off. Additional descriptions should be included in the Budget Narrative.

Line Item Request	Line Item Description (Maximum two lines)	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel/TCF	Line Item Total of Project
Instruction	30 Weeks of Lessons x 33 Classes x rate of \$40 = \$39,600		\$22,800	\$16,800	\$39,600
Program Management	Department Head stipend of \$3,000 x 1 department head = \$3,000		\$2,000	\$1,000	\$3,000
Classroom Space	Maintenance rate of \$2,500 x 2 classrooms = \$5,000		\$2,500	\$2,500	\$5,000
Curriculum Development	Development of curriculum for 33 classes and 160 students			\$1,000	\$1,000
Supplies	Classroom supplies for 160 students x \$10 each = \$1,600	\$800	\$400	\$400	\$1,600
Instrument Repair & Purchases	Repairs for student keyboards = \$1,000; 25 new keyboards=\$3,000	\$1,000	\$1,800	\$1,200	\$4,000
Translation Services	Services to translate parent notices and communications = \$5,000	\$500		\$2,000	\$2,500
Concert Production and Travel	Performance site rental = \$500; Travel for performances = \$500	\$900		\$100	\$1,000
<b>TOTALS:</b>		\$ 3,200	\$ 29,500	\$ 25,000	\$ 57,700

**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

**BUDGET NARRATIVE:**

**Instruction:** Five Piano Faculty Instructors: Music educators with experience in piano performance and pedagogy. Performs teaching duties and participates in program evaluation processes within the Piano Department. 33 classes per week x 30 weeks x \$40 per class = \$39,600

**Program Management:** One Department Head: Leads a collaborative team and helps build the piano program, in addition to their teaching duties. Oversees the management, administration and community outreach of the piano department. \$3,000 stipend per department head = \$3,000

**Classroom Space:** Maintenance of the classrooms includes cleaning, facility updates, and rental costs. \$2,500 per classroom x two piano classrooms = \$5,000

**Curriculum Development:** Development of curriculum for 160 students, 17 group classes of varied skill and 16 private lessons of varied skills. This also includes the development of evaluation and student juries. \$1,000

**Supplies:** Classroom supplies for 160 students including folders, pencils, sheet music. 160 students x \$10 each for supplies = \$1,600

**Instrument Repair & Maintenance:** Repair and maintenance for keyboards that are loaned to students. \$1,000

**Instrument Purchase:** Purchase of 30 new keyboards for new students. \$120 per keyboard x 30 keyboards = \$3,000

**Translation Services:** Translation of parent newsletter, communications, flyers, outreach materials, etc. All translation is done through one bi-lingual Program Coordinator. \$2,500

**Performance Travel:** Several times semester, students perform at community locations as part of the service learning programs within the piano department. Travel expenses include gas costs and upkeep for company vehicle. \$500

**Concert Production:** At the end of each semester, students perform at a third-party location for parents, faculty and the greater community. Concert Facility Rental = \$500



## 2018 S.L. Gimbel Foundation APPLICATION

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

### *Secured/Awarded*

Name of Funder: Foundation, Corporation, Government	Amount
Phoenix Office of Arts and Culture: Government	\$4,000
Arizona Commission on the Arts: Government	\$4,000
	\$
	\$
	\$
	\$
	\$
	\$

### *Pending*

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Wells Fargo: Corporate	\$ 6,000	September
The Phoenix Suns: Corporate	\$ 10,000	October
The Max and Victoria Dreyfus Foundation: Foundation	\$ 4,000	September
	\$	
	\$	
	\$	

**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	\$347,836	46 %	Program Fees	\$0	0 %
Fundraising/Special Events	\$ 67,592	9 %	Interest Income	\$ 1,280	0 %
Corp/Foundation Grants	\$209,000	28 %	Other:	\$17,985	2 %
Government Grants	\$58,352	8 %	Other:	\$55,653	7 %

### **Notes:**

Included dollar amounts for secured and pending funding are specific to the Propel Piano Program and not the secured and pending funding as related to our organizational budget.

Additionally, the amounts given in the Diversity of Funding section are from FY17, the last audited fiscal year.

## 2018 S.L. Gimbel Foundation APPLICATION

### VII. Financial Analysis

Agency Name: Rosie's House

Most Current Fiscal Year (Dates): From July 1, 2016 To: June 30, 2017

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
\$ 490,219	\$ 358,207	\$ 82,052	\$ 49,960

**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
490,219	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	73 %	17 %	10 %

**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 <u>Current</u> Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
13 %	17 %	-4 %

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.

<b>Cash</b>	<b>+ Accounts Receivables</b>	<b>/Current Liabilities</b>	<b>= Quick Ratio</b>
\$ 335,092	\$ 0	0	335,092

---

### **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>
\$ 161,848	\$ 10,213

### **Notes:**

Because we have no current liabilities or long-term liabilities our quick ratio is our current assets equaling \$335,092.

Revenue surplus in most recently audited fiscal year (FY17) is largely due to restricted capacity grant received from the Virginia G. Piper Charitable Trust. The capacity grant is allocated for administrative and fundraising expenses and cannot be used for program related activities. This is what is caused our administrative and fundraising expense percentages to be higher than the desired 25%. In the current fiscal year, we plan to have administrative and fundraising expenses lower than 25%.

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## Rosie's House Operational Budget FY 19

## Budget

FY19

## INCOME

4100 Unrestricted Contributions	
4101 Unrestricted Contr-Individuals	\$335,000:00
4102 Unrestricted Contr-Corporations	\$40,000:00
4104 Unrestricted Contr-Foundations	\$40,000:00
Total 4100 Unrestricted Contributions	\$415,000:00
4200 Grant Contributions	
4202 Grant Contr-Corporations	\$47,000:00
4203 Grant Contr-Foundations	\$61,000:00
4204 Government - City	\$14,000:00
4206 Government - State	\$18,000:00
4207 Government - Federal	
Total 4200 Grant Contributions	\$140,000:00
4400 Fundraising	
4401 Special Events - Misc	\$4,500:00
4404 Special Event #4 - Gala	\$100,000:00
Total 4400 Fundraising	\$104,500:00
4500 Donated Instrument Income	\$32,000:00
4700 Restricted Funds Released - Income	
4703 Restricted Funds Released - Foundation	\$57,000:00
5100 Other Revenue	
5101 Interest Income	\$1,200:00
5107 Donated Rent	\$40,000:00
5110 Misc. Income	\$12,000:00
5111 Special Purpose Grants - Piper	
Total 5110 Misc. Income	\$53,200:00
Total 5100 Donated Instrument & Other Revenue	\$142,200:00
Total	\$801,700:00
7103 Temporarily Restricted Grant Foundation	\$64,000:00

Total Income	808,700.00
--------------	------------

Expenses	FY 19
6000 Music Programs Expense	
6001 Teacher Salaries	\$169,935.00
6002 FICA/Medicare	\$13,000.03
6003 Program Supplies & Other	\$18,200.00
Total 6000 Music Programs Expense	\$201,135.03
6100 Staff and Program Expenses	
6101 Staff and Program Salaries	\$273,377.00
6102 Staff Health/Life Ins	\$20,000.00
6103 FICA/Medicare	\$20,913.34
6104 Workers Compensation	\$1,200.00
Total 6100 Staff and Program Expenses	\$315,490.34
6300 Administrative Expenses	
6307 Dues and Subscriptions	\$1,000.00
6309 Fundraising Expense	\$12,705.00
6310 Insurance	\$10,000.00
6311 Travel	\$1,000.00
6312 Conferences & Meetings	\$500.00
6313 Food & Entertainment	\$2,000.00
6314 Travel Lodging & Meals	\$500.00
6315 Advertising & Marketing	\$25,000.00
6322 Postage & Shipping	\$7,000.00
6323 Printing Expenses	\$20,000.00
6324 Office Supplies	\$6,000.00
6325 Telephone & Internet Expenses	\$4,068.00
6331 Professional Fees	\$26,000.00
6332 Professional Development	\$1,800.00
6333 Bank Fees	\$5,000.00
6334 Accounting & Audit Fees	\$6,500.00
6335 Payroll Processing	\$5,000.00
6339 Other Administrative Expenses	\$2,000.00
6340 Rent Expense	\$40,000.00
	\$176,073.00
6343 Special Events Expenses	
6344 Bowling	

6345 Gala Concert	\$42,335.00
6346 Other	\$3,150.00
Total 6343 Special Events Expenses	\$45,485.00
6600 Facility Expenses	
6601 Utilities	\$27,000.00
6604 Vehicle Expenses	\$900.00
6605 Other Facility Expenses	\$7,450.00
Total 6600 Facility Expenses	\$35,350.00
6700 Depreciation Expense	\$28,000.00
Amortized Equipment Expense	
Total Expenses	801,533
Net	\$7,166.63

## Rosie's House Budget Comparison

	Actuals		Budget			
	Most Recently		Projections		Variance	
	Completed Year		Current Year			
	20 18		20 19			
Income						
Individual Contributions	339,673	-	335,000	-	-4,673	-
Corporate Contributions	73,137	-	87,000	-	13,863	-
Foundation Grants	102,600	-	125,000	-	22,400	-
Government Contributions	34,014	-	34,000	-	0	-
Other Earned Income	93,482	-	104500	-	11,018	-
Other Unearned Income	91,875	-	99,000	-	7125	-
Interest & Dividend Income	1,400	-	1200	-	-200	-
Total Income	\$736,181	-	\$785,700	-	\$49,519	-
Expenditures						
Personnel						
Salary: All Staff and Faculty	376,381	-	443,312	-	66,931	-
Salary: Other		-		-		-
Payroll Taxes	29,546	-	33913	-	4367	-
Insurance - Workers' Comp	977	-	1,200	-	223	-
Insurance - Health	18,975	-	20000	-	1025	-
Payroll Services	6005	-	5000	-	-1005	-
Retirement	0	-	0	-	0	-
Total Personnel	\$431,884	-	\$503,425	-	\$71,541	-
General Program/Administrative						
Bank/Investment Fee	4,400	-	5,000	-	600	-
Dues and Memberships	1,243	-	1,000	-	-243	-
Conferences, Meetings and Travel	4,442	-	4,000	-	-442	-
Program Supplies	21,949	-	21,200	-	-749	-
Audit & Accounting	8,460	-	6,500	-	-1,960	-
Professional Fees	39895	-	26,000	-	-13,895	-
Insurance Expense	12,815	-	10,000	-	-2,815	-
Telephone and Internet	4,507	-	4,068	-	-439	-
Marketing and Advertising	24,032	-	25,000	-	968	-
Event Expenses	40,016	-	45,485	-	5,469	-
Office Supplies	5,499	-	3,000	-	-2,499	-
Postage & Delivery	5,614	-	7,000	-	1,386	-
Printing & Copying	14,892	-	20,000	-	5,108	-
Misc.(incl.rent and utilities, depreciation)	102,094	-	103,350	-	1,256	-
Total General Program/Administrative	289,858	-	281,603	-	-8,255	-
Total Expenditures	721,742	-	785,028	-	63,286	-
Revenue Less Expense	14,439	-	672	-		-

**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. . . . .				
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. . . . .	297,188.	246,154.	29,037.	21,997.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions). . . . .				
9 Other employee benefits. . . . .	13,182.	9,010.	2,593.	1,579.
10 Payroll taxes. . . . .	25,687.	20,257.	3,691.	1,739.
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.) . . . . .				
12 Advertising and promotion. . . . .				
13 Office expenses. . . . .	3,626.	1,651.	1,511.	464.
14 Information technology. . . . .				
15 Royalties. . . . .				
16 Occupancy. . . . .				
17 Travel. . . . .				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials. . . . .				
19 Conferences, conventions, and meetings. . . . .	886.	264.	338.	284.
20 Interest. . . . .				
21 Payments to affiliates. . . . .				
22 Depreciation, depletion, and amortization. . . . .	24,012.	18,729.	5,283.	0.
23 Insurance. . . . .				
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 DUES & SUBSCRIPTIONS. . . . .	1,258.	900.	358.	0.
b VEHICLE EXPENSE. . . . .	1,414.	866.	548.	0.
c MARKETING & PUBLIC RELATIONS. . . . .	16,206.	2,134.	8,915.	5,157.
d . . . . .				
e All other expenses. . . . .	106,760.	58,242.	29,778.	18,740.
25 Total functional expenses. Add lines 1 through 24e. . . . .	490,219.	358,207.	82,052.	49,960.
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). . . . .				



# ROSIE'S HOUSE A MUSIC ACADEMY FOR CHILDREN, INC.

## BOARD OF DIRECTORS

**DATED AS OF 11/1/2017**

<p><b>Chip Wise</b> Senior Vice President, Enterprise Solutions MedAssets 100 N. Point Center East, Suite 200 Alpharetta, GA, 30022 Cell: 602-300-3539 <a href="mailto:Chip.Wise@vizientinc.com">Chip.Wise@vizientinc.com</a> <b>Member</b> <i>Nominating Committee</i> (7/2011)</p>	<p><b>Michael Lang*</b> Attorney Jennings, Strouss and Salmon One East Washington Street ,1900, Phoenix, AZ 85004 Cell: 602- 769-6686 Fax: 480- 994-9025 <a href="mailto:drmichaellang@gmail.com">drmichaellang@gmail.com</a> <b>Past – President</b> <i>Corporate Governance</i> <i>Executive Committee</i> (7/2012)</p>	<p><b>Christina Nordvall*</b> Director of Research, Portfolio Manager, PricewaterhouseCoopers 1850 N. Central Ave. Suite 700, Phoenix, AZ 85004 Tell: 1 602 364 8053 <b>Cell: 1 703 349 9972</b> <a href="mailto:christina.nordvall@pwc.com">christina.nordvall@pwc.com</a> <b>om</b> <b>Treasurer</b> <i>Executive Committee</i> <i>Finance Committee</i> <i>Gala Committee</i> (11/2016)</p>	<p><b>Nick Kirby</b> Compliance Arizona Public Service 400 N. 5<sup>th</sup> Street Phoenix, AZ 85004 Tel: 520-275-9361 Fax: 602-382-6070 <a href="mailto:Nicholas.Kirby@aps.com">Nicholas.Kirby@aps.com</a> <b>Member</b> <i>Corporate Governance</i> (12/2015)</p>	<p><b>Theresa Esparza*</b> Director, Global Tax Reporting ON Semiconductor 5005 E. McDowell Rd.Phoenix, AZ 85008 Tel: 602-244-5647 Cell: 602-881-7068 <a href="mailto:Theresa.Esparza@onsemi.com">Theresa.Esparza@onsemi.com</a> <b>m</b> <b>Secretary</b> <i>Executive Committee</i> <i>Gala Committee</i> (1/2016)</p>
<p><b>Tim Fontes</b> Attorney Polsinelli, PC One East Washington St., Suite 1200 Phoenix, AZ 85004-2568 <b>602.650.2096</b> <a href="mailto:tfontes@polsinelli.com">tfontes@polsinelli.com</a> <b>Member</b> <i>Nominating Committee</i> (1/2017)</p>	<p><b>Derren G. Thompson</b> Senior Vice President First Western Trust 7025 N. Scottsdale Rd. Suite 100 Scottsdale, AZ <b>Direct 480.596.1813</b> <b>Cell: 801.556.1805</b> <a href="mailto:Derren.Thompson@myfw.com">Derren.Thompson@myfw.com</a> <b>m</b> <b>Member</b> <i>Finance Committee</i> (11/2016)</p>	<p><b>Amelia Valenzuela</b> Attorney Quarles &amp; Brady LLP One Renaissance Square Two North Central Ave. Phoenix, Arizona 85004 Tel: 602-229-5696 <a href="mailto:Amelia.Valenzuela@quarles.com">Amelia.Valenzuela@quarles.com</a> <b>Member</b> <i>Corporate Governance</i> (8/2015)</p>	<p><b>Sarah Weiss*</b> COO Elite Roofing Supply 5150 N. Tom Murray Ave Phoenix, AZ 85020 Cell: 213-268-2962 <a href="mailto:sweiss@eliteroofingsupply.com">sweiss@eliteroofingsupply.com</a> <b>m</b> <b>President</b> <i>Executive Committee</i> <i>Facilities Task Force</i> (9/2015)</p>	<p><b>David Weinglass</b> Manager, Finance Arizona Public Service 400 N. 5<sup>th</sup> Street Phoenix, AZ 85004 Tel: 602 250 3796 Cell: 608 438 9466 <a href="mailto:david.weinglass@aps.com">david.weinglass@aps.com</a> <a href="mailto:dweinglass@gmail.com">dweinglass@gmail.com</a> <b>Member</b> <i>Nominating Committee</i> (1/2016)</p>
<p><b>Kathryn Leonard</b> State Historic Preservation Officer 23751 N. 23rd Ave. #190 Phoenix, AZ 85085 (602) 542-4009 <a href="mailto:kleonard@azstateparks.gov">kleonard@azstateparks.gov</a> <b>Member</b> <i>Facilities Task Force</i> (9/2017)</p>	<p><b>Barb Berastegui, AIA</b> Senior Associate RNL, now part of Stantec 2715 E. Indian School Road, Phoenix, AZ 85016 Cell: (602) 690-7685 <a href="mailto:barb.berastegui@stantec.com">barb.berastegui@stantec.com</a> <b>m</b> <b>Member</b> <i>Facilities Task Force</i> (10/2017)</p>	<p><b>Lisa Paine</b> Attorney Law Offices of Lisa Paine 11425 N. 37th Place Phoenix, AZ 85028 (480) 825-8599 <a href="mailto:LPaine@LPaineLaw.com">LPaine@LPaineLaw.com</a> <b>Member</b> 11/2017</p>		
		<p><b><u>President's Council</u></b>  <b>Lee Fraley</b> Attorney Snell &amp; Wilmer One Arizona Center Phoenix, AZ 85004 Tel: 602-382-6250 Cell: 602-989-0545 Fax: 602-382-6070 <a href="mailto:lfraley@swlaw.com">lfraley@swlaw.com</a></p>	<p><b><u>President's Council</u></b>  <b>Dr. Kimberly Marshall</b> Faculty, School of Music Arizona State University P.O. Box 870405 Tempe, AZ 85287-0405 Tel: 480-965-2819 Fax: 480-965-2659 <a href="mailto:Kimberly.Marshall@asu.edu">Kimberly.Marshall@asu.edu</a></p>	<p><b><u>President's Council</u></b>  <b>Mark Alan Greenburg</b> Tresóna Multimedia, LLC, 6336 N. 48th Place, Building B, Paradise Valley, AZ 85253 Tel: 877.347.2543</p>

\*Executive Committee members

Submitted online – 5/15/2015

Community Impact Final Evaluation Report Questions.  
Questions 1- 5 are required and must be completed

1. Name of your organization. Rosie's House
2. Grant # 20140277
3. Grant Period: May 1, 2014 – April 30, 2015
4. Primary location of services provided by grant. Phoenix, AZ
5. Name and Title of person completing evaluation.  
Becky Bell, ED
6. Phone Number: 602-252-8472
7. Email address. [executivedirector@rosieshouse.org](mailto:executivedirector@rosieshouse.org)
8. Total number of clients served through this grant funding:  
400

9. Describe the project's key outcomes and results based on the goals and objectives:

The purpose of the grant was to support Rosie's House in providing 400 youth from low-income families with music education, a loaned instrument, mentorship and performance opportunities to enhance their personal and academic achievement.

Specifically, the funds supported our Piano Program and seventy-five students to participate in our Group and

Individual Propel Piano Program. We recruited for new students through a variety of methods to find youth that would most benefit from our free after school program. All youth are from families that are at the low-income limits per HUD guidelines and the majority have a household income below \$35,000 for a family of four. Throughout the year, piano students developed their musical proficiency through sequential repertoire, music theory activities and utilizing both the Faber & Faber method/curriculum as well as the Royal Conservatory Music Development Program. Students attended 30-Weeks of instruction, submitted weekly practice logs, performed in recitals each semester, performed at local hospitals as part of our Service Program, and underwent performance evaluations each semester. The structured curriculum for the 2014-2015 program year resulted in the attainment of the following goals for students: students demonstrated musical proficiency on the piano and in musical notation; students demonstrated knowledge of performance traditions; students developed a commitment to academic and personal achievement. Reflecting the progress of the Propel Piano Program 5 of the 9 winning students for our annual Great Performers Competition were pianists.

10. Please describe any challenges/obstacles the organization encountered (if any) in attaining stated goals & objectives.

During the Summer of 2014, Rosie's House hired a new Piano Department Head, Mrs. Holly Kordahl. It was a challenge and opportunity that occurred because our previous Piano Department Head resigned at the end of 2014 to pursue a Masters Degree at Arizona State University.

Mrs. Kordahl was hired because of her experience in directing large piano programs and because of her pedagogy expertise. Kordahl completed her Bachelor's degree in piano performance at Wartburg College and a Master's degree in piano performance at University of Kansas. She is currently pursuing a doctoral degree from Arizona State University. During her time in Kansas, Ms. Kordahl volunteered for the Music Mentors program, which provided no-cost music lessons for underprivileged children. Currently, Kordahl teaches at Arizona School for the Arts, Rosie's House: A Music Academy for Children and maintains a private piano studio.

As a performer, Ms. Kordahl won the Arizona State University Concert of Soloists competition in 2011 and performed with the ASU Symphony. In the summer of 2010 and 2013, Kordahl toured the Midwest, giving recitals in four different states. Kordahl studied with renowned piano pedagogue Scott McBride Smith and has a strong background in arts administration including serving as the Competitions Coordinator for the 6<sup>th</sup> Annual Bösendorfer and Yamaha USASU International Piano Competitions.

11. How did the organization overcome and/or address the challenges and obstacles?

Rosie's House determined that in re-structuring the Piano Department Program under Mrs. Kordahl's leadership, we had an opportunity to re-organize the lab and instructional space. Mrs. Kordahl created a work plan that we utilized to create a hand-on activity area, a showcase performance area and a music library space. The piano lab is now a more coherent

instructional space that supports the activities and curriculum needs of our program.

12. Describe any unintended positive outcomes as a result of the efforts supported by this grant.

We were thrilled to have our advanced piano students participate in the Arizona Study Program. The Arizona Study Program (ASP) was started in 1958 to provide a consecutive and comprehensive plan of music study designed to motivate and encourage students to strive for growth and excellence. The Arizona Study Program is a graded program developed by ASMTA to provide for the development of musical Performance, Theory and Technique. Our students that utilized the new curriculum methods that this grant supported were at the level to participate in the graded evaluations in April. Students completed theory exams, performed four repertoire selections from memory and had to sight read. They all did incredibly well, and having outside adjudicators give them feedback on their musicality, theory and technique was incredibly valuable.

13. Briefly describe the impact this grant has had on the organization and community served

Rosie's House is part of a community that grapples with the vital concern of developing successful and productive adults. Now in our 19<sup>th</sup> year, Rosie's has a long-term track record of putting our students on a path for success. The funding enabled Rosie's House to offer our Propel Piano Program; and in turn serve as a beacon of hope for youth that need the arts to build them up and are searching for a safe place to express their creativity and dreams. Piano training and music

education in general is a low-priority for funders and school systems throughout Arizona. By funding our Propel Piano Program, S.L. Gimbel Foundation is ensuring that youth without access to the arts in their schools have the opportunity within their community.

14. Please provide a brief narrative on how the funds were used to fulfill grant objectives. Support documents (receipts or expense reports) can be emailed to [klampert@thecommunityfoundation.net](mailto:klampert@thecommunityfoundation.net) or faxed to 951-684-1911.

Rosie's House utilized grant funding to support piano faculty and instruction (\$38,700), supplies including tuning/repair, keyboards, curriculum (\$2,431), artistic direction/evaluations (\$9,700), space expenses (\$3,100) and marketing/recruitment (\$1,800) as detailed in the Grant Budget. The total expense for the 2014-2014 Propel Piano Program was \$55,731 and the other funders included Nina Mason Pulliam Charitable Trust, Western Refining, Opus Bank and individual donors.

15. Please relate a success story.

There are so many success stories within our Piano Program. We would like to share the story of Yuna Kang. Yuna started within the Piano Propel Program this year. Her parents have struggled to make ends meet. Her father is a minister for a small congregation and they have a large family. She is so thankful for the opportunity to be at Rosie's House. She worked diligently and in the past year she received Superior

Ratings within the Arizona Study Program. In addition, she won 1<sup>st</sup> Place for her age category (ages 10-13) in our Rosie's House Great Performers Competition. We created a video vignette about her experiences and life lessons that she has learned at Rosie's House. To view, visit <https://www.youtube.com/user/RosiesHouse1>

The most moving statement she made about Rosie's House is how she has learned time management, how she has learned to choose challenges (the selection she competed with for the Great Performers Competition was her most challenging piece of repertoire) and she has learned the power of hard work. Her statements illustrate the power of music to teach our students much more than just the musical notes on a page – our students are learning valuable skills that put them on a long-term path for success.



ATLANTA GA 39901-0001

In reply refer to: 0752453551  
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ROSIES HOUSE A MUSIC ACADEMY FOR  
CHILDREN INC  
PO BOX 13446  
PHOENIX AZ 85002-3446



009182

Employer ID Number: 86-0650451  
Form 990 required: Yes

Dear Taxpayer:

This is in response to your request dated Oct. 04, 2017, regarding your tax-exempt status.

We issued you a determination letter in May 1991, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

Our records also indicate you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If a return is required, you must file Form 990, 990-EZ, 990-N, or 990-PF by the 15th day of the fifth month after the end of your annual accounting period. IRC Section 6033(j) provides that, if you don't file a required annual information return or notice for three consecutive years, your exempt status will be automatically revoked on the filing due date of the third required return or notice.

For tax forms, instructions, and publications, visit [www.irs.gov](http://www.irs.gov) or call 1-800-TAX-FORM (1-800-829-3676).

If you have questions, call 1-877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific Time).



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ROSIES HOUSE A MUSIC ACADEMY FOR  
CHILDREN INC  
PO BOX 13446  
PHOENIX AZ 85002-3446

Sincerely yours,

A handwritten signature in cursive script, appearing to read "Teri M. Johnson".

Teri M. Johnson  
Operations Manager, AM Ops. 3