



2014 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:
Grant: 20140277

\$25,000

Organization / Agency Information

Organization/Agency Name: Rosie's House: A Music Academy for Children <u>18773</u>		
Physical Address: 1875 N. Central Avenue City/State/Zip Phoenix AZ 85004		
Mailing Address: P.O.Box 13446 City/State/Zip Phoenix AZ 85002		
CEO or Director: Becky Bell		Title: Executive & Artistic Director
Phone: 602-252-8472	Fax: 602-252-8473	Email: executivedirector@rosieshouse.org
Contact Person: Becky Bell		Title: Executive & Artistic Director
Phone: 602-252-8472	Fax: 602-252-8473	Email: executivedirector@rosieshouse.org
Web Site Address: www.rosieshouse.org		Tax ID: 86-0650451

Program / Grant Information

Interest Area: Health Environment Animal Protection Education Human Dignity

Program / Project Name: Rosie's House Afterschool Music Program for Underserved Students		
Amount of Grant Requested: \$25,000	Total Organization Budget: 371,041	Percentage of Organization's Total Budget used for Administration: 18%
Purpose of Grant Request (one sentence): To provide 400 youth from low-income families with music education, a loaned instrument, mentorship and performance opportunities to enhance their personal and academic achievement.		
Gimbel Grants Received: List Year(s) and Award Amount(s) 2012 - \$23,000 2010 - \$30,000		

Signatures

Board President / Chair: (Print name and Title) Chip Wise, Board President	Signature: 	Date: 2-27-14
Executive Director/President: (Print name and Title) Becky Bell, Executive + Artistic Director	Signature: 	Date: 2-27-14

2014 S.L. Gimbel Foundation Fund Application Narrative

I. Organization Background; Target Population:

A) Founded in 1996, Rosie's House: A Music Academy for Children is committed to playing a pivotal role in a child's future and strengthening our community. Our mission is to give underserved youth, in the greater-Phoenix area, the gift of music education by providing instruments and free instruction.

B) Recent accomplishments include being nominated for both the Governor's Arts Awards and the National Arts & Humanities Youth Program Award in 2014. In addition, Rosie's House has been selected as the National Society of Arts & Letters Arts Agency of the Year for 2014.

C) Accredited by the National Guild for Community Arts Education, Rosie's House has developed a high-caliber teaching faculty, quality curriculum and partnerships with prestigious performing arts institutions. Through this approach, Rosie's House provides a music education process that is rigorous, methodical and inspiring for students from low-income families that attend our after-school academy.

Our services are open to families that qualify financially in the Phoenix metropolitan area, but most come from Central Phoenix (75%). Each child must show financial need, which is evaluated using income thresholds listed in the HUD federal guidelines. 100% of the children are at or below the HUD very-low income thresholds for their households (less than \$49,500 per year for a family of 4). As published in the Federal Register on January 22, 2014, the HHS has determined that the Federal Poverty Level for a family of 4 is less than \$23,850 per year. When we calculate "low-income residents" using the defined 150% of the Federal Poverty Level, 79% of our children come from households of low-income residents (less than \$35,775 per year for a family of 4).

II. Project Information:

A) 1. The Rosie's House Afterschool Program for Underserved Youth serves the need of involving at risk youth in a positive and life-changing activity. Rosie's House is part of a community that grapples with the vital concern of developing successful and productive adults. At a time when Arizona's typical arts funding per pupil is less than \$1 per year in public schools and afterschool care and programs are underfunded throughout the state, Rosie's House is the only local agency that provides 100% free music education including instruction, a loaned instrument, curriculum and performance opportunities in the metro-Phoenix area.

B) 1. Our goal is not only to provide a life-long skill with free music education, but help students develop a commitment to academic and personal achievement. To foster youth development Rosie's House has an approach that combines formal music training with informal service, leadership and confidence-building activities. Service, and giving back to the local community, is a core value that we teach youth. In addition, providing college readiness resources and mentorship is critical in ensuring youth are on a path for success.

Rosie's House: 2014 Grant Application Narrative

Students are able to perform service through two opportunities: our Rosie's House *Community Service Performance Series* and our *Music Mentor* program. Through the *Community Service Performance Series*, students practice public speaking and performance etiquette. In addition, Rosie's House students develop leadership and confidence through not only performing, but also volunteering as *Music Mentors* serving as a teacher's aide within our after-school program.

B 2. Objective I: Enroll 75 beginning and advanced piano music students

Activities: Recruitment for new students includes an Open House in Spring. Interested families are invited to campus to learn more about our program. Marketing activities also include e-blasts to Phoenix-area music educators and social service agencies.

Objective II: Develop Musical Proficiency of Students

Activities: Students learn proper piano technique, music notation, rhythmic notation and musicality. Over the course of the first year, students learn proper posture and the fundamentals of music making. Our group piano students utilize the Faber & Faber Method.

Objective III: Royal Conservatory Music Development System for Advanced Piano Students

Activities: The Royal Conservatory Music Development Program is a recognized national standard for excellence in piano. The program offers sequenced repertoire and theory and annual assessments for advanced students. The program is analogous to providing an AP level of coursework. Advanced piano students will participate in lessons that utilize this method.

Implementation of this project will begin in Spring of 2014 with recruitment, promotion and marketing of our free music lessons to Title 1 schools and social service agencies throughout Phoenix. In August of 2014, Rosie's House will conduct interviews with students that qualify for our program based on the HUD Guidelines for low-income housing. Classes for accepted students will commence in September of 2014, and conclude in May of 2014.

B) 3. The Rosie's House Afterschool Music program is offered to Phoenix students ages 5-18. seventy-five students will be served by this grant, and they will be involved in group (6-8 students) and individual (one on one) music lessons. They will attend 30 weeks of classes, participate in at least two performances and have the opportunity to participate in free field trips, volunteer activities and campus-wide events.

B) 4. Rosie's House is unique in the Metropolitan Phoenix area. We are the only 100% tuition-free 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 Symphony, Phoenix Chamber Music Society and the Musical Instrument Museum. Rosie's House works with Phoenix Youth at Risk, 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.

C) 1. The key anticipated outcomes of the project are:
Students demonstrate musical proficiency on piano

Students demonstrate knowledge of performance traditions, the role of the arts in promoting cultural understanding, and a broad historical understanding of music

Students develop a commitment to academic and personal achievement, and develop life skills including confidence and increased leadership skills

C) 2. Rosie's House assesses whether outcomes are achieved through a variety of methods. The first is that students are evaluated each semester on their musical progress. They receive a written evaluation and recommendations for improvement. The second method of assessment is to determine the impact of program participation on the development of life skills. This assessment is accomplished by surveying parents, and collecting grade reports each year. In addition, graduating seniors complete a survey that indicates their life plans, the progress they have made as students, and how Rosie's House has helped to make them successful.

C) 3. The outcomes are measured by reviewing students' evaluations, compiling survey information and tracking our alumni successes. In the past three years, 97% of Rosie's House graduating seniors have continued on to college – this success rate is remarkable especially because many of the students are the first in their families to attend college.

D) Grant funds will be used to support the music education, including instruction, music, supplies and loaned instruments for seventy-five piano students.

III. Project Future

A) Rosie's House has a track record of 18 years of programming and has diverse funding sources. The project will be supported by community supporters after the grant period.

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

A) The Board of Directors oversees the strategic direction, allocations of resources and overall financial and organizational decisions for Rosie's House. Committees include Executive Committee, Governance Committee, Development Committee, Programs 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.

B) The project will be led by Artistic & Executive Director Becky Bell, in conjunction with the Rosie's House Program Committee and faculty members. Bell has served as the Director since 2008 and previously managed the Education Department at the Phoenix Symphony. The majority of faculty has Masters Degrees or higher (70%) from notable institutions including The Cleveland Institute of Music, Peabody Institute of Music and Belgrade University.

2014 S.L. Gimbel Foundation APPLICATION

V. Project Budget

- A) Please provide a detailed line-item budget for your project by completing the table below. Include all sources of funding for the proposed project.

Line Item Description	Line Item Explanation (Formula/equation used as applicable. Example: 40 books @ \$100 each = \$4000)	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
Piano Tuning	\$850	\$50		\$800	
Piano Faculty	\$38,635	\$4,635	\$17,000	\$17,000	
Supplies/Curriculum Group Piano	\$600	\$300		\$300	
Supplies/Curriculum Royal Conservatory Music Development Program	\$1,780		\$1,500	\$280	
Artistic Direction & Evaluation (Juries)	\$9,700	\$530	\$4,850	\$4,320	
Performance Rental & Classroom Facility	\$2,980	\$980		\$2,000	
Marketing & Recruitment	\$1,800	\$150	1,650	\$0	
Keyboards & Instrument Costs	\$600	\$300		\$300	
TOTALS:	\$56,945	\$6,945	\$25,000	\$25,000	

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

Secured/Awarded

Name of Funder: Foundation, Corporation, Government	Amount
Nina Mason Pulliam Charitable Trust (\$20,000 allocated of \$25,000 grant to Royal Conservatory Music Development Program and Piano Program)	\$20,000
Western Refining (\$5,000 in support of each of the Piano, String, Wind and Choir Departments)	\$5,000

<i>Pending</i>		
Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
<i>Wells Fargo</i>	<i>5,000</i>	<i>April 2014</i>

VII. Financial Analysis

Agency Name: Rosie's House: A Music Academy for Children

Most Current Fiscal Year (Dates): From July 1, 2012 To: June 30, 2013

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!

Program to Total Expenses Ratio: Percentage of expenses used to support programming versus how much is spent for general management and fundraising. A general rule is that at least 75 percent of total expenses should be used to support programs – the higher the percentage the better.

Program Expenses	/Total Operating Expenses	= Program Expense Ratio
✓ \$ 289,430	✓ \$371,041	78% ✓
990: Part IX, Column B, Line 25	990: Part IX, Column A, Line 25	

Administrative Expense (100%-Program Expense ratio) per 990 above	Percentage of Organization's Current Total Budget used for Administration (from cover page)	Differential
21 78%	18 %	3 %

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

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
\$58,521	\$35,507	0	94,028

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$13,500	\$83,598

Notes:

Because we have no current liabilities or long-term liabilities our quick ratio is our current assets equaling \$94,028.

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	\$168,771	43%	Program Fees	\$0	
Fundraising/Special Events	\$14,970	4%	Interest Income & Misc. Income	\$2722	
Corp/Foundation Grants	\$93,194	23%	Other: Instrument Donations	\$27,319	7%
Government Grants	\$55,060	13%	Other: Donated Facilities	\$40,000	10%

Notes:

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

BOARD OF DIRECTORS

DATED AS OF 2/26/2014

<p>Chip Wise* Director, Business Development Group, Navigant Consulting, Inc. 201 E Washington St., # 1700, Phoenix, AZ 85004 Tel: 602.257.0075 Cell: 602.300.3539 chip.wise@navigant.com President (7/2011)</p>	<p>Michael Lang* Attorney The Noblitt Group PLLC 8800 N. Gainey Center Dr. Suite 279 Scottsdale, AZ 85258 Phone: (480) 994-9888 Fax: (480) 994-9025 drmichaellang@gmail.com Vice-President (7/2012)</p>	<p>John Reimer* Director of Research, Portfolio Manager, Stellar Capital Management 2200 E Camelback Rd., # 130, Phoenix, AZ 85016 Tel: 602.778-0304 jreimer@stellarmgt.com Treasurer (7/2011)</p>	<p>Adam Christensen Senior Vice President Arizona Business Bank CoBiz Financial 1620 W. Fountainhead Pkwy. Ste. 119 Tempe, AZ 85282 Direct: 602-217-1584 Cell: 480-612-7803 Member achriste@azbizbank.com (2/2014)</p>	<p>Karen Bea Violist Phoenix Symphony Orchestra 3732 E. Laurel Lane Phoenix, AZ 85028 Tel: 602-923-3288 Cell: 602-697-0723 kebturtle@aol.com Member (8/2007)</p>
<p>Andrea BeDan Oncology Market Development Manager Sirtex Medical Inc. 5824 N. 18th Place Phoenix, AZ 85016 Tel: (480) 338-7520 andreabedan@gmail.com Member (8/2013)</p>	<p>Lee Fraley Attorney Snell & Wilmer One Arizona Center Phoenix, AZ 85004 Tel: 602-382-6250 Cell: 602-989-0545 Fax: 602-382-6070 lfraley@swlaw.com Member (3/2005)</p>	<p>Katy Heth Attorney Salt River Project 1521 North Project Drive, PAB341 Tempe, AZ 85281 Tel: 602-236-2242 Fax: 602-236-5952 Katy.Heth@srpnet.com Member (09/2009)</p>	<p>Orson Holt Tax Senior Manager CBIZ MHM, LLC 3101 North Central Avenue, Suite 300 Phoenix, AZ 85012 Tel: (602) 650-6239 Fax: (602) 265-7631 oholt@cbiz.com Member (7/2012)</p>	<p>RaeAnne Marsh Writer/Editorial Consultant Grammar & Glitz P.O. Box 41935 Phoenix, AZ 85080 Tel: 623-587-1429 Fax: RaeAnneMarsh@cox.net Member (6/2003)</p>
<p>Rose McCaffrey Attorney Kelly McCoy PLC 340 E. Palm Lane, Suite 300, Phoenix, AZ 85004-4610 U.S.A rmccaffrey@kelly-mccoy.com Member (4/2011)</p>	<p>Rebecca Pusch Senior Consultant F3 10565 N. 114th Street, Suite 100 Scottsdale, AZ 85259 Tel: 480-717-6710 Cell: 480-296-8799 Fax: 480-717-6752 rpusch@f3az.com Member (7/2009)</p>	<p>Brent Taylor Senior Managing Director F3 10565 N. 114th Street, Suite 100 Scottsdale, AZ 85259 Tel: 480-717-6710 Cell: 602-391-9566 Fax: 480-717-6752 btaylor@f3az.com Member (11/2003)</p>	<p>Danielle M. Long Sales Executive Lovitt & Touché Inc. 1050 W. Washington St. Ste. 233 Tempe, AZ 85281 Direct: 602-792-2303 Cell: 480-369-9289 Fax: 602-956-2258 dlong@lovitt-touche.com Member (2/2014)</p>	
<p>Mitchell Fleischmann Asst. Professor of Law Phoenix School of Law 4041 N. Central Avenue, Suite 100 Phoenix, AZ 85012 Tel: 602-682-6854 mwf@phoenixlaw.edu On Leave through April 2014 (12/2010)</p>	<p>Jessica Cronin Account Executive Litigation Services 3800 N. Central Avenue Suite 1700, City Square Phoenix, AZ 85012 C: 602.317.3768 jcronin@litigation-services.com On Leave (5/2012)</p>		<p><u>President's Council</u> Dr. Kimberly Marshall Faculty, School of Music Arizona State University P.O. Box 870405 Tempe, AZ 85287-0405 Tel: 480-965-2819 Fax: 480-965-2659 Kimberly.Marshall@asu.edu</p>	<p><u>President's Council</u> Mr. Mark Alan Greenburg Tresóna Multimedia, LLC, 6336 N. 48th Place, Building B, Paradise Valley, AZ 85253 Tel: 877.347.2543</p>

*Executive Committee members

Budget Comparison

	Actuals Most Recently Completed Year	Budget Projections Current Year	Variance
Income	2013	2014	
Individual Contributions	\$168,771	\$170,000	1.007282057
Corporate Contributions	\$49,550.00	\$55,000	1.109989909
Foundation Grants	\$43,644	\$40,000	0.916506278
Government Contributions	\$55,060	\$60,000	1.089720305
Other Earned Income – Special Events	\$14,970	\$20,000	1.336005344
Other Unearned Income	\$1,008	\$1,000	0.992063492
Interest & Dividend Income	\$1,714	\$1,700	0.991831972
Total Income (does not include in-kind)	\$334,717	\$347,000	1.036696672
Expenditures			
Personnel			
Salary Artistic & Executive Director	\$53,983	\$55,700	1.031806309
Salary Program Manager	\$30,648	\$32,000	1.044113808
Salary Office Development Assistant	\$27,067	\$28,000	1.034470019
Insurance - Workers' Comp	\$1,366	\$1,400	1.02489019
Insurance - Health	\$8,889	\$8,000	0.89998875
Payroll Services	3,140	3,200	1.01910828
Guitar Instructors	\$8,576	\$9,000	1.049440299
Piano Instructors	\$43,143	\$42,000	0.97350671
Wind Instructors	\$27,664	\$28,000	1.012145749
Mariachi Instructors	\$10,241	\$11,000	1.074113856
Choir Instructors	\$9,955	\$10,000	1.004520342
Site Supervisor & Security	\$8,283	\$7,500	0.905469033
Total Personnel	\$232,955	235,800	1.012212659


General Program/Administrative			
Bank Fees Expense	\$107.50	\$100	1.109989909
Computer Repair & Maintenance	\$784.23	\$800	1.109989909
Dues and Subscriptions	-	\$700	
Fundraising Expenses	\$13,849.92	\$14,000	1.109989909
Insurance	\$10,415.74	11,000	1.109989909
Newsletters, Marketing & PR	\$1,146.03	\$4,000	1.109989909
Meeting Exp - Board & Other	\$426.09	\$500	1.109989909
Program Supplies	\$3,590.74	\$3,500	1.109989909
Postage Expenses	\$2,204.52	\$2,000	1.109989909
6319 · Printing Expenses	\$5,466.27	\$5,000	1.109989909
Telephone & Internet Expenses	\$3,361.32	\$3,400	1.109989909
Professional Fees	\$15,000.00	\$6,000	1.109989909
Copier Expenses	\$46.64	\$50	1.109989909
Bank Processing Fees	\$938.77	1,200	1.109989909
Accounting & Audit Fees	\$5,050.00	5,500	1.109989909
Employment Screen/Bkgrd Checks	\$51.00	\$50	1.109989909
Professional Development	\$725.00	1200	1.109989909
Minor Computer Equipment	\$287.98	300 -	1.109989909
Other Administrative Expenses	\$1,347.06	1,500	1.109989909
Professional Fees-Music Accompaniment	\$4,485.00	\$4,000	1.109989909
Other Artistic Direction Exp	\$1,229.94	\$1,300	1.109989909

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 to any question 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 governments and organizations in the United States. See Part IV, line 21				
2 Grants and other assistance to individuals in the United States. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the United States. 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	230,782.	218,245.	12,537.	0.
8 Pension plan accruals and contributions (include section 401(k) and section 403(b) employer contributions).				
9 Other employee benefits				
10 Payroll taxes	20,383.	19,100.	1,283.	0.
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	5,050.	0.	5,050.	0.
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amt exceeds 10% of line 25, column (A) amt, list line 11g expenses on Sch O)				
12 Advertising and promotion				
13 Office expenses	3,591.	0.	3,591.	0.
14 Information technology				
15 Royalties				
16 Occupancy	0.	0.	0.	0.
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest	224.	0.	224.	0.
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	24,010.	22,735.	1,275.	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 <u>DUES & SUBSCRIPTIONS</u>	784.	0.	784.	0.
b <u>VEHICLE EXPENSE</u>	1,639.	1,271.	368.	0.
c <u>MARKETING & PUBLIC RELATIONS</u>	1,146.	0.	1,146.	0.
d <u>MISCELLANEOUS EXPENSES</u>	3,826.	1,230.	2,596.	0.
e All other expenses	79,606.	26,849.	40,482.	12,275.
25 Total functional expenses. Add lines 1 through 24e.	371,041.	289,430.	69,336.	12,275.
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).				

 **IRS** Department of the Treasury
Internal Revenue Service
P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248421964
Dec. 31, 2007 LTR 4168C E0
86-0650451 000000 00 000
00047836
BODC: TE


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

21256

Employer Identification Number: 86-0650451
Person to Contact: MS. MITCHELL
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your request of Dec. 20, 2007, regarding your tax-exempt status.

Our records indicate that a determination letter was issued in May 1991, that recognized you as exempt from Federal income tax, and discloses that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records also indicate you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

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

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,

Michele M. Sullivan

Michele M. Sullivan, Oper. Mgr.
Accounts Management Operations I



The Community Foundation

Serving the Counties of Riverside and San Bernardino

S. L. Gimbel Foundation Fund

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Dr. Jonathan Lorenzo Yorba
President and CEO

April 17, 2014

Ms. Becky Bell
Executive & Artistic Director
Rosie's House: A Music Academy for Children
PO Box 13446
Phoenix, AZ 85002

Dear Ms. Bell:

Congratulations! A grant has been approved for **Rosie's House: A Music Academy for Children** in the amount of **\$25,000** from the S.L. Gimbel Foundation. The **performance period for this grant is May 1, 2014 to April 30, 2015**. 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:

Afterschool Music Program for Underserved Students: Provide 400 youth from low-income families with music education, a loaned instrument, mentorship and performance opportunities to enhance their personal and academic achievement.

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 enclosed copy and return the original copy to The Community Foundation within the next two weeks. Please retain a copy of 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 on May 15, 2015** and a copy will be available online at The Community Foundation website.

We wish you great success and look forward to working with you during the grant performance period.

If you have any questions, please call me at 951-684-4192 ext. 114 or email me at ceudiamat@thecomunityfoundation.net.

Sincerely,

Celia Cudiamat
Executive Vice President

18773 Rosie's House

20140277

GIMB1



Confirmed in Compliance
with National Standards for
U.S. Community Foundations

2014 S.L. Gimbel Foundation Fund

Grant Agreement

Organization: Rosie's House: A Music Academy for Children
Grant Amount: \$ 25,000 **Grant Number:** 20140277
Grant Period: May 1, 2014 through April 30, 2015
Purpose: Afterschool Music Program for Underserved Students: Provide 400 youth from low-income families with music education, a loaned instrument, mentorship and performance opportunities to enhance their personal and academic achievement.

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.

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 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.

6. Publicity

The Community Foundation recommends publicity for the grant and acknowledging The Community Foundation in internal correspondence, brochures as appropriate; newsletters, annual reports and email blasts or e-newsletters.

The credit line of "Made possible in part by a grant from the "S.L. Gimbel Foundation Advised Fund at The Community Foundation – Inland Southern California" is suggested. When your donors are listed in printed materials, include the S.L.

Gimbel Foundation Advised Fund at The Community Foundation in the appropriate contribution size category. 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 our logo is also appreciated. Our logo can be downloaded from our website at www.thecommunityfoundation.net.

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, withhold payments, or both 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.

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.

Becky Bell Ballard
Signature

4/22/2014
Date

Becky Bell Ballard
Printed Name

Executive + Artistic Director
Title

Organization: 18773 Rosie's House: A Music Academy for Children
Grant Number: 20140277

4/22/14



April 22, 2014

Ms. Celia Cudiamat
Executive Vice President-Programs
The Community Foundation
3700 Sixth St., Suite 200
Riverside, CA 92501

Dear Ms. Cudiamat:

Rosie's House: A Music Academy for Children is delighted to submit our 2014 S.L. Gimbel Foundation Fund Grant paperwork. On behalf of our Board of Directors and the students we serve, please accept my sincere thank you.

I am also excited to share that Rosie's House is the 2014 Governor's Art Award recipient in Arts Education, a highly-competitive award that honors organizations with a critical community impact.

We look forward to submitting our final report in May of 2015, and will keep you informed of our progress throughout the year. We look forward to including the publicity credit as listed in the grant award paperwork in our materials.

We are so thankful for the support of the S.L. Gimbel Foundation in the past years and in this coming year. Your support of the power of music education and the life-changing gift of the arts is inspiring.

Sincerely,

A handwritten signature in cursive script that reads "Becky Bell Ballard".

Becky Bell Ballard
Executive & Artistic Director
Direct: 602-252-8472



Serving the Counties of Riverside and San Bernardino

S. L. Gimbel Foundation Fund

BOARD OF DIRECTORS May 2, 2014

James Cuevas
Chair of the Board

Ms. Becky Bell
Executive & Artistic Director
Rosie's House: A Music Academy for Children
PO Box 13446
Phoenix, AZ 85002

Philip Savage IV
Vice Chair of the Board

Pat Spafford, CPA
Chief Financial Officer

Sean Varner
Secretary of the Board

Dear Ms. Bell:

Glenda Bayless

Sergio Bohon

Rabbi Hillel Cohn

Andrea Dutton

Robert Fey

Paul Granillo

Stanley Grube

Kirk Harns

Dr. Albert Karnig

D. Matthew Pim

Patrick O'Reilly

Rose Salgado

Beverly Stephenson

Grover Trask
Immediate Past Board Chair

Dr. Jonathan Lorenzo Yorba
President and CEO

The Community Foundation is pleased to enclose a grant check for **\$25,000** from the S. L. Gimbel Foundation, a component fund at The Community Foundation. By cashing the grant check, you are agreeing to the conditions stated under the *Terms of Grant* which you have signed and returned. The completed Grant Evaluation form is due by May 15, 2015 and will be available online on The Community Foundations website under Grants/Forms. Please note that any grant variances or extensions must be requested in writing and in advance. Any remaining grant funds must be returned to The Community Foundation at the end of the grant period.

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

If you have any questions, please contact me at 951-684-4194.

Sincerely,

Celia Cudiamat
Executive Vice President

20140277

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GIMB1



Confirmed in Compliance
with National Standards for
U.S. Community Foundations

3700 Sixth Street, Suite 200 ~ Riverside, California 92501
P: 951.241.7777 ~ F: 951.684.1911 ~ www.thecommunityfoundation.net

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The Community Foundation
Serving the Counties of Riverside and San Bernardino

3700 SIXTH STREET, SUITE 200
RIVERSIDE, CA 92501
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PAY * Twenty-Five Thousand and no/100 *

TO THE ORDER OF

DATE 05/01/2014 AMOUNT \$****25,000.00

Rosie's House: A Music Academy for Children
PO Box 13446
Phoenix, AZ 85002



Jonathan Lorenzo Galba
Dina Underwood
AUTHORIZED SIGNATURE

Security features. Details on back.

⑈037323⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

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18773	Rosie's House: A Music Academy for Children	05/01/2014	037323
20140277	04/17/2014 Afterschool Music Program for Underserved Students		25,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		25,000.00

CHECK TOTAL: \$****25,000.00

The Community Foundation

37323

18773	Rosie's House: A Music Academy for Children	05/01/2014	037323
20140277	04/17/2014 Afterschool Music Program for Underserved Students		25,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		25,000.00

CHECK TOTAL: \$****25,000.00