

2017 S.L. Gimbel Foundation Fund Grant Application

** NEW GRANTEE*

Internal Use Only:

Grant No: _____

GRANTEE I.D. 23785

Organization / Agency Information

Organization/Agency Name: The Dance Foundation		
Physical Address: 1715 27th Court South City/State/Zip: Birmingham, AL 35209		
Mailing Address: 1715 27th Court South City/State/Zip: 30 Birmingham, AL 35209		
CEO or Director: Mrs. Diane Litsey Title: Executive Director		
Phone: (205) 870-0073	Fax: (205) 870-1301	Email: diane@thedancefoundation.org
Contact Person: Sara Wallace		Title: Development Coordinator
Phone: (205) 870-0073	Fax: (205) 870-1301	Email: sara@thedancefoundation.org
Web Site Address: http://www.thedancefoundation.org		Tax ID: 63-0744601

Program / Grant Information

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

Program/Project Name: Community Partnership Program			Amount of Grant Requested: <u>\$15,000</u>
Total Organization Budget: \$788,091	Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100): 89%	Per 990, Percentage of Management & General Expenses Only (Column C / Column A x 100): 5%	Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100): 11%
Purpose of Grant Request (one sentence): 1,800 children will build social, cognitive and physical skills for school for success in school and beyond in classes with live music.			
Program Start Date (Month and Year): 7/1/2017		Program End Date (Month and Year): 6/30/2018	
Gimbel Grants Received: List Year(s) and Award Amount(s)			

2017 S. L. Gimbel Foundation Fund Grant Application**Welcome Page****Welcome to the 2017 S. L. Gimbel Foundation Fund Grant Application**

Thank you for applying to the S. L. Gimbel Foundation Fund Grant. The mission of the S.L. Gimbel Foundation is to enhance the quality of life for people and animals by providing effective support in the Founder's specific fields of interest: Animal Protection, Education, Environmental Protection and Enhancement, Health, and Human Dignity. Please take a moment to review the grant application guidelines before continuing the process (use "Guidelines" link above). After you have read and understood the guidelines, please proceed with the grant application process. Should you have any questions, please check the "FAQs" link above or refer to "Application Procedures" on our website. If your questions are not answered via FAQs or Application Procedures, contact us using the "Contact Us" link above.

Organization Information

NOTE: If you have already started an online application and would like to resume, please [CLICK HERE](#) to login to your Applicant Account Page.

Organization/Agency Information

Organization/Agency Name

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

The Dance Foundation

Legal Name

Childrens Dance Foundation

Tax ID

630744601

Tax Status

501(c)3

Organization Mailing Address

Street Address or P.O. Box

1715 27th Court South

City

Birmingham

State

AL

Zip Code

35209

Organization Physical Address (Street No. and Name, City, State, Zip)

No residential addresses, please

1715 27th Court South, Birmingham, AL 35209

Website Address

<http://www.thedancefoundation.org>

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

Prefix

Mrs.

First Name

Diane

Last Name

Litsey

Title

Executive Director

Work Phone

(xxx-xxx-xxxx)

205-870-0073

Extension

Cell Phone

(xxx-xxx-xxxx)

Fax

(xxx-xxx-xxxx)

E-mail Address

diane@thedancefoundation.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

Mrs.

First Name

Sara

Last Name

Wallace

Title

Development Coordinator

Work Phone

(xxx-xxx-xxxx)

205-870-0073

Extension

Fax

205-870-1301

E-mail Address

sara@thedancefoundation.org

Organization/Agency Background

Organization Background

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

The Dance Foundation's mission is to teach the art of dance to all, inspiring creativity and confidence. We believe that dance is a tool for learning the social, development, and cognitive skills that all children need - no matter age or ability. The Dance Foundation (TDF) brings dance to children and adults in the Birmingham, Alabama area every week during the school year and has for over 40 years. Our goal since our inception in 1975, is to bring education through the arts to all, especially those who do not have opportunities for the arts in their classrooms or communities.

Length of Service (number of years)

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

42

Organizational Accomplishments

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

Through strategic planning in 2014, we conducted an in-depth look at our mission and goals, including conversations with staff and board members. This led to four vital goals being set and met within the past few years. First, our organization name changed from Children's Dance Foundation to The Dance Foundation to encompass a broader range of the community we serve. Second, our Studio Program for students in 3rd -- 12th grades was reorganized to include two separate tracks: the Dance Explorations Program and the Dance Artist Program. The Dance Explorations Program is for students wishing to explore

various dance styles from year to year while only taking one or two class per week, and the Dance Artist Program is for students wishing to excel and progress in their dance technique from year to year with thorough training. These students also have opportunities to perform and experience additional classes and workshops. Third, TDF has gone through a revitalization of our 100-seat studio theatre, updating stage lights and equipment to better serve the local artists and organizations who need a professional and affordable performance venue. Fourth, we wanted to further explore reaching elementary-age students learning English as a second language, which we have expanded to English language enrichment for students already behind grade level.

Programs and Activities

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

Reaching over 2,000 students during the school year and an additional 500 in the summer months, our organization encompasses three specific programs: Studio, Studio Use, and Community Partnership. In the Studio Program, we offer tuition scholarships to our students in financial need, and a class dedicated to children with special needs meets for 45 minutes once a week. Community Partnership classes include classes for students who are very young, children with special needs, children learning and strengthening English Language skills, and children who are living in challenging circumstances and poverty. All Community Partnership sites are subsidized with some provided classes free of charge. Through the Studio Use Program, we host local artists and organizations through studio space rentals including a recently improved 100-seat performance theatre. These community artists include Arova Contemporary Ballet, Birmingham Irish Dance, Red Mountain Theatre Company, Natyananda Indian Dance, and many more.

Program/Project Information

Program / Project Information

Interest Area

Education

Program or Project Name

Community Partnership Program

Amount of Grant Requested

Use whole dollars, do not use \$ sign, comma, or decimal

15000

Total Organization Operating Budget

Use whole dollars, do not use \$ sign, comma, or decimal

788091

Per 990, Percentage of Program Service Expenses

Column B divided by Column A, x 100

89

Per 990, Percentage of Management & General Expenses Only

Column C divided by Column A, x 100

5

Per 990, Percentage of Management & General Expenses and Fundraising

Column C + Column D, divided by Column A, x 100

11

Purpose of Grant Request

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

1,800 children will build social, cognitive and physical skills for school for success in school and beyond in classes with live music.

Project Start Date

Month and Year

July 01, 2017

Project End Date

Month and Year

June 30, 2018

Gimbel Grants Received

List Years and Award Amounts

Statement of Need

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

The children we inspire, boys and girls alike, do not have consistent arts experiences in their classrooms -- experiences that can help them explore ideas and build skills with a creative approach. Our goal is to engender the learning and joy of dance in every child we meet, preparing them for success in elementary school and beyond. Our goals align with national dance standards as well as the school readiness conditions of Alabama's Developmental Standards for Preschool Children. "These classes really support all areas of development. I see milestones being met every year in this program," Director of Canterbury Child Development Center.

Our teachers travel to more than 30 elementary schools, child development centers, and social service agencies in the community, helping children grow crucial development skills with each class. Passionate teachers along with musicians lead dance classes every week during the school year, crafting lesson plans to gain coordination, body awareness, leadership, teamwork, language skills, and creativity. The children we teach are as varied and unique as our curriculum: we see energetic children in preschool, children with special needs, children living in challenging circumstances and poverty, and children improving English language skills.

The children we teach every week see improvement in many areas of learning and development, from speech to motor skills to creativity and participation - "We have one child who is extremely shy. She rarely speaks out in class and really keeps to herself most days. Thursday mornings, she is a totally different child. She is confident and free to move without judgement and criticism thanks to The Dance Foundation," Director of YWCA Childcare/Kids Korner. Our community partners who specialize in working with children with special needs, see the weekly progress and achievements that can be made during one of our unique classes - "Our 'My Friends' class is for children with sensory, social, and communication challenges -- I have seen these children grow so much in attention and behavior since TDF started coming to their class," Program Director for The Bell Center for Early Intervention.

Funds from this grant will help us continue this legacy of learning and fun for our community!

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?

Our Community Partnership Program encompasses four major areas of focus: Dance for Pre-K, Dance for Children with Special Needs, Dance for English Language Learners, and Dance for Children Living in Challenging Circumstances.

For the child who is very young, our classes focus on the skills needed to have a successful journey through elementary school and beyond using our Movement to Music curriculum. These skills include creative thinking, identifying colors, shapes, numbers, and sounds, working together, problem-solving, and taking turns. With every wave of a scarf or sway of the arms comes creativity, balance, motor skills, social skills, and coordination. Whether it is finding rhythm with the musician or holding a feather while floating across a balance beam, children in preschool begin a journey of self-discovery and learning in our classes.

Our dance classes for children with special needs uses our Movement to Music curriculum and molds it to fit the individual needs of children who have Autism, Down Syndrome, Cerebral Palsy, or other cognitive and physical delays. Partnering with sites across Birmingham, these classes have a strong focus on fun while working on skills these children need most -- standing, walking, fine motor skills, and social interaction. We believe that dance is for all, no matter ability or learning differences, and partners such as The Bell Center for Early intervention can attest to this curriculum's achievements.

Children learning English in the K-2nd grades dance with us using our curriculum designed to build language skills in tandem with dance skills -- complete with live music. These students have little or no arts education in their school. Students in at least 5 area elementary schools will participate in weekly 45minute dance classes for a series of at least 5 consecutive weeks at their schools. The curriculum is designed in collaboration with classroom teachers to support language arts goals: As they dance, students physicalize language elements such as prepositions (over/under); reading, comprehension, and movement patterns. These students need positive, creative experiences to enhance language and social skills for their success in school and life.

For the child living away from their homes and families or in poverty, the art and benefits of dance is not easily found. We allow these children to experience dance in a positive and safe environment -- learning through dance. At 5 different preschools such as the YWCA, we teach our Movement to music curriculum to 2-4 year olds from low income families and those living in transitional housing, focusing on healthy social skills, interactive learning, and, most importantly, fun! For older students in elementary through high school, we use dance as a tool for learning and a chance to cultivate skills such as leadership, teamwork, and problem-solving. Working with partners such as Grace House Ministries and Restoration Academy, we have week-long camps that incorporate dance and theatre classes along with opportunities to create their own dance project to share with their peers and families.

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 and Objective

GOAL:

In Birmingham, Alabama more than 1800 children who are typical and very young, have special needs, live in poverty, are homeless, or need to improve English language capacity for their grade level will benefit from weekly dance classes with live music, building social, cognitive and physical skills for success in school and beyond.

OBJECTIVE:

Weekly classes with live music will be taught to 1800 children at 30 community partner sites, 1300 children during the school year and 500 additional children during the summer.

2. Project Activities

Activities include:

1,300 students of all ages, abilities, and circumstances will participate in regular, weekly dance classes during the school year.

During the summer months, we will hold week-long arts camps and weekly classes for 500 children.

All classes and camps are specially designed to work on individual needs and development skills children necessary for growth and success.

3. Expected Outcomes

1800 children will benefit from weekly dance classes, using national dance standards to set program goals as well as developmental goals for preschool children and language arts capacity for elementary school children.

4. Evaluation

Evaluation of this program reaching 1800 children is built into the framework, providing data to program leadership to strengthen services. Assessment includes: Quantitative Tools: Number of sites; number of children served; number of classes. Qualitative Tools: For the Director of the Community Partnership Program and Artistic Director -- Class Benchmark Survey for pre- and post-assessments relative to the age and program goals; periodic class observation over the course of the term; For the Community Partner - Classroom Teacher and Director Surveys.

***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.

Children/Families

Project Timeline

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

Program dates are July 1, 2017 through June 30th, 2018; Or schedule runs through the school year (September-May) and then in the summer (June-early August).

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?

While no other organization in our community has a similar mission or program, our partnerships are a huge part of our mission and history. We collaborate with local and statewide schools and organizations such as Birmingham City and Jefferson County Schools, UAB Engel Therapeutic Preschool, The Bell Center for Early Intervention, Grace House Ministries, Inc., United Ability, the Alabama Dance Council, and dozens of area child development centers. The Community Partnership Program has been the foundation of our work and our mission since 1975, and we add to our list of partners each year. Every year we have a number of individual, student, and parent volunteers from the community who aid in community fundraising and other projects both in our studio and in the community.

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.

The Community Partnership Program is and has been the cornerstone of our work since it's inception in the 1970's. Every year, we receive donations from generous and diverse supporters including corporations, foundations, individuals, and government support. The students and educators we reach are enthusiastic about our mission and our work. It is because of our strong mission and the continued support from our partners that we believe this program will continue to grow and be a great resource for our community.

Governance, Executive Leadership, and Key Personnel / Staff Qualifications

Governance

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

Executive Leadership

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

We employ nearly thirty professional teaching artists who have experience and training in dance education and performance, music, or theatre. Our core staff are: Diane Litsey, Executive Director: Masters in Public and Private Management from Birmingham-Southern College, B.S. in Arts Management from Eastern Michigan University; Rachael Inman, Artistic Director: MFA in Dance from Florida State University and a BFA in Communications with a Dance minor the University of Alabama at Birmingham. Blakely Cottle, Community Partnership Director, B.A. from the University of Alabama at Birmingham in Theatre.

Attachments

Attachments

REQUIRED .PDF ATTACHMENTS: The maximum size for all attachments combined is 25 MB. Please note that files with certain extensions such as “exe”, “com”, “vbs”, or “bat” cannot be uploaded. You must **1. BROWSE FILES** on your computer, **2. SELECT FILES**, then **3. CLICK UPLOAD** to attach files.

***IMPORTANT:** For each set of required documents below, please scan all pages of each set into one .pdf, as only a single document upload is permitted for each item being requested.

1. Project Budget and Budget Narrative

Please provide a detailed line-item budget for your **entire** project. Download the **V. Project Budget and Narrative Worksheet**, complete, and **Upload**. SEE **SAMPLE Budget & Narratives Worksheet**,

Project Budget and Narrative 2017.pdf

2. Sources of Funding

Please list your current sources of funding and amounts. Download the **VI. Sources of Funding Worksheet**, complete, and **Upload**.

Sources of Funding.pdf

3. Financial Analysis

Please provide all information requested for your **entire organization**. Included any notes that may explain any extraordinary circumstances. Download the **VII. Financial Analysis Worksheet**, complete, and **Upload**.

Financial Analysis.pdf

4. Current Year Operating Budget

Please provide a copy of your current year's operating budget

Org. Budget for 2017-18 development - adopted.pdf

5. Budget Comparison

Download the **SAMPLE Budget Comparison Worksheet**, complete, and **Upload**.

Op. Budget WITH VARIANCE.pdf

6. Part IX only of the 990 form

Statement of Functional Expenses (one page). If you completed a 990-EZ, Download the **Part IX Functional Expenses sample** of the 990 form using figures from your 990 EZ, complete, and **Upload**.

Part IX 990.pdf

7. Financial Statements

Please provide a copy of your most recent year-end financial statements (audited, if possible)

TDF audit 2016-17 approved draft.pdf

8. Most Recent 990

Please provide a copy of your most recent 990 form

[990 2015 signed part 1.pdf](#)

9. Tax Exemption Letter

Please provide an electronic copy of your IRS 501 (c) (3) determination letter.

[CDF IRS DETERMINATION LETTER.pdf](#)

10. Board of Directors List

Please provide a list of your current Board of Directors, including their name, position on the board, and professional affiliation(s).

[Board of Directors 2017-18.pdf](#)

11. Evaluation & Expenditure Report

For past grantees, provide a copy of your most recent final evaluation report, including your most recent expenditure report.

[Gimbel report 16-17.pdf](#)

2017 S.L. Gimbel Foundation APPLICATION

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.

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel/TCF	Line Item Total of Project
1. Teaching artists payroll	See Project Budget Narrative		\$55,000- see narrative	\$15,000	\$70,000
2. Program management/curriculum dev.	See Project Budget Narrative		\$65,000		\$65,000
3. Organizational Capacity	See Project Budget Narrative		\$65,000		\$65,000
4. Mileage	See Project Budget Narrative		\$6,500		\$6,500
5. Teaching Supplies	See Project Budget Narrative		\$3,000		\$3,000
6. Professional Development	See Project Budget Narrative		\$4,000		\$4,000
TOTALS:			\$198,500	\$15,000	\$213,500

- 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

Line Item Explanation:

1. Teaching Artists Payroll: Pay for dance teachers and musicians; \$21-35 pay per hour of service for 30 sites each week; average for an hour of service is @\$50 for a pair of artists; travel time between sites; @1400 hours of service per year

1a. Teaching Artist Payroll - Support from other Funders:

Sources for the match include prorata of the total earned income from some partner sites, local foundations and corporate contributions. For the total project, earned income is typically 25%, corporate and individual contributions is 25%, foundation support is 25%, and fundraising events provide 25% of total income.

2. Program management: Prorata of \$130,000 of salaries for artistic director who oversees all programs and curricula (50% of time), program director who oversees day to day program management (50% of time), and executive director who oversees all organizational efforts and supervision (25% of time)

3. Organizational Capacity: Prorata (30%) of \$215,000 towards utilities, repairs and maintenance, custodial services, mortgage, technology, insurance, office supplies

4. Mileage: Estimate based on history for travel to 30 sites each week; \$0.45 per mile; @14,500 miles for the year

5. Teaching Supplies: Props, keyboards, books, music, percussion instruments, balls, portable balance beams, parachutes, etc, are items added or replaced each year to our resource collection and the “baskets” each teaching team takes to each site

6. Professional Development: Teaching artists attend our faculty institute each August, monthly meetings and training sessions, observe co-worker classes (\$10 per hour); 400 hours @\$10 an hour

All listed expenses are necessary to implement our program on a day to day basis – a dance teacher and musician travel to 30 community sites each week during the school year, 10 sites during the summer (i.e. year-round). The teaching artists are paid by the hour, and are paid for travel time, professional development time, and mileage.

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

2017 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
Arts Education License Tag Fund	\$2,500
Dorothy Gillespie Foundation	\$500

Pending

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Alabama State Council on the Arts	\$19,000	9/1/2017
Robert R. Meyer Foundation	\$10,000	12/1/2017
BBVA Compass	\$5,000	unknown
IPC Beeson Fund	\$5,000	12/1/2017
Comer Foundation	\$5,000	unknown
COSTCO	\$3,500	9/1/2017

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	\$ 27,476	3.4%	Program Fees	\$ 541,022	67%
Fundraising/Special Events	\$ 92,204	11.4%	Interest Income	\$ 326	<1%
Corp/Foundation Grants	\$ 96,145	11.9%	Other:	\$ 13,443	1.7%
Government Grants	\$ 18,675	2.3%	Other:	\$ 17,156	2.2%

Notes:

These are from our profit/loss cash basis, July 1, 2016-June 30, 2017; corporate/foundation grants include corporate contributions; fundraising is comprised of one large event and a variety of smaller activities.

2017 S.L. Gimbel Foundation APPLICATION

VII. Financial Analysis

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

Most Current Fiscal Year (Dates): From 7/1/2016 To: 7/1/2016

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

Form 990, Part IX: Statement of Functional Expenses

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

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$ 765,533	\$ 677,747	\$ 43,122	\$ 44,664

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

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

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	89 %	5 %	6 %

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
11 %	11 %	0 %

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

We have a consistent history of our administrative expenses staying at or below 11% of our budget. We strive to keep our administrative investment lean but effective. We anticipate the current year to continue that commitment.

2017 S.L. Gimbel Foundation APPLICATION

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

Cash	+ Accounts Receivables	/Current Liabilities	= Quick Ratio
\$ 155,796	\$ 28,387	65,440	2.8

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$ 14,197	\$ 9,621

Notes:

THE DANCE FOUNDATION

CASH BUDGET

July 1, 2017 - June 30, 2018

Income

Contributions	109,500
Fundraising	49,500
Grants	57,000
Interest Income	250
Other Income	14,000
Outreach Income	61,500
Performance Inc	72,730
Registration Fee	19,250
Rent Income- other bldg	19,500
Studio Rental	43,000
Tuition	341,861
Total Income	<u>788,091</u>

Expense

Accounting	8,620
Consultant	8,000
Development	2,500
Equipment	2,500
Fundraising Exp	19,250
Insurance	15,500
Marketing	21,000
Misc expenses	13,500
Mortgage P&I	44,571
Office Mgt	35,000
Outreach Expenses	850
Performance Exp	45,000
Repairs & Maintenance	28,000
Teaching Equipment	2,500
Staff Training	2,750
Teaching Supplies	7,250
Tuition Refund	3,000
Utilities	32,000
Wages	496,300
Total Expense	<u>788,091</u>

Net Income	<u>0</u>
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THE DANCE FOUNDATION					
CASH BUDGETS					
		ACTUALS	ADOPTED	VARIANCE	
		Jul '16-Jun '17	Jul '17-Jun '18		
	Income				
	Contributions	99,197	109,500	10,303	additional projects
	Fundraising	46,029	49,500	3,471	additional projects
	Grants	89,275	57,000	(32,275)	one local foundation provides 3-year funding and this year is our "off" year
	Interest Income	327	250	(77)	
	Other Income	13,444	14,000	556	
	Outreach Income	70,510	61,500	(9,010)	one partner has put our program on hold while they review budget
	Performance Inc	69,712	72,730	3,019	studio enrollment increase
	Registration Fee	20,418	19,250	(1,168)	prepaid in previous year
	Rent Income- other bldg	17,157	19,500	2,343	increase in lease terms
	Studio Rental	49,364	43,000	(6,364)	local university no longer needs our space for dance program this year
	Tuition	331,016	341,861	10,845	studio enrollment increase
	Total Income	806,447	788,091		
	Expense				
	Accounting	8,620	8,620	-	
	Consultant	9,388	8,000	(1,388)	
	Development	2,271	2,500	229	
	Equipment	12,818	2,500	(10,318)	performance space improvements in previous year
	Fundraising Exp	20,369	19,250	(1,119)	
	Insurance	15,185	15,500	315	
	Marketing	23,745	21,000	(2,745)	prepaid expenses in previous year
	Misc expenses	13,386	13,500	114	
	Mortgage P&I	44,571	44,571	-	
	Office Mgt	30,030	35,000	4,970	new software and equipment
	Outreach Expenses	832	850	18	
	Performance Exp	43,381	45,000	1,619	
	Repairs & Maintenance	33,502	28,000	(5,502)	new server in previous year
	Capital Improvements	1,500	2,500	1,000	
	Staff Training	1,794	2,750	956	
	Teaching Supplies	7,909	7,250	(659)	
	Tuition Refund	1,360	3,000	1,640	
	Utilities	32,067	32,000	(67)	
	Wages	475,094	496,300	21,206	pay increases and additional part time project support
	Total Expense	777,822	788,091		
	Net Income	28,625	0		

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	62,458	19,268	21,595	21,595
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	378,815	356,563	4,405	17,847
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits				
10 Payroll taxes	33,783	28,773	1,990	3,020
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	2,470	2,223	247	
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.)	15,538	13,984	1,554	
12 Advertising and promotion	26,016	24,715		1,301
13 Office expenses	30,029	27,628	1,500	901
14 Information technology				
15 Royalties				
16 Occupancy (Utilities)	32,067	30,464	1,603	
17 Travel	4,734	4,024	710	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	1,794	1,794		
20 Interest	20,249	19,237	1,012	
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	47,736	42,962	4,774	
23 Insurance	15,185	14,426	759	
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a Outreach and performance	44,213	44,213		
b Supplies and equipment	8,292	8,292		
c Repairs and maintenance	33,502	31,827	1,675	
d Other	8,652	7,354	1,298	
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	765,533	677,747	43,122	44,664
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)	No joint costs	No joint costs	No joint costs	No joint costs



Final Report for the S.L. Gimbel Foundation

- 1: Children's Dance Foundation d/b/a The Dance Foundation
2. Grant #20160817
3. July 1, 2016 – June 30, 2017 (date of grant award: December 14, 2016)
4. Birmingham, Alabama
5. Diane Litsey, Executive Director
6. 205-870-0073
7. diane@thedancefoundation.org
8. served through this funding: 1,380 children
9. Key outcomes: Goals for our Community Partnership Program are to provide an introduction to dance, using movement as an exploration of academic content and developmental skills to children in need, ages pre-k to elementary aged students. These include building social skills, engagement and confidence, as well as language and math skills. Evaluation by our program partners state improvement in these qualities and their high value of this program. Our measurable impact is detailed here for our largest Community Partnership Program element, Movement-to-Music.

1266 students at 23 sites during the school year each week; additional children in the summer), gained a variety of skills preparing them for their next preschool class or for Kindergarten. The survey feedback from our partner sites' classroom teachers and directors included:

- 92% shared that our program is of good or excellent quality
- 99% shared "yes" that our program had an impact on their students' coordination, body awareness, and ability to reach movement goals, with a majority stating that it was a "noticeable" impact.
- 96% shared "yes" that our program had an impact on their students' confidence or willingness to participate in new activities, with a majority stating that it was a "noticeable" impact.

The 75 students in our Dancing with Words – Dance for English Language Learners – gained a better understanding of prepositions and story-building elements through their dance classes. Three Birmingham elementary schools had 6 or 7 weekly classes with a dance teacher and musician, exploring language skills through movement. Staff observed an increase in understanding the material presented in the majority of the students in each class as well as enthusiasm for the creative approach to the material.

The 39 children and youth who attended our Summer Arts Camps from the YWCA Afterschool Enrichment for Homeless Children and Grace House Ministries participated in four afternoons of dance, drama and art classes in our studios. The camps focused on building teamwork, creative expression, and willingness to join in a new activity. Staff observed an improvement in these areas from the first class to the last of that week in (12 hours of arts activities) for more than half of the students in each group.

10. Challenges: Our obstacle this year was onboarding our new Artistic Director and revising our leadership team positions to better serve our students. Re-thinking responsibilities of each position and aligning the work with the program goals gave us a productive and effective structure for us to allow for growth and improvement.

11. Overcoming obstacles: Redefining those positions led us to better position our new Artistic Director to review the overall curriculum and program offers, faculty capacity and needs, and student needs.

12. Unintended positive outcomes: Increased engagement with teaching artists, students, families and community partners was hoped for but became a reality.

13. Impact: The impact of this funding cannot be overstated – with our local foundations being stretched with ever-increasing community needs and funding requests for what is “new”, this funding has been a significant source for us to continue our community outreach and focus on teaching these children with creativity, care, and commitment. We are thankful that our local funding does not completely go away but it does ebb and flow from year to year. This funding makes possible consistent classes for children through a school year, a summer, or both.

Summary of Children Served

School year program for pre-k and special needs	1266
Dance for English Language Arts enrichment	75
Summer Arts Camps for children in distress	<u>39</u>
Total	1,380; proposed 1,300

14. Financial narrative: Funds were used to help pay for our teaching artists – dance teachers and musicians – who travel to 25-30 sites each week throughout Birmingham, Alabama.

Expense Summary

Teaching Artist Pay (including staff development)	65,535
Program Management and Development	68,000
Organizational Capacity	65,000
Mileage	4,048
Teaching Supplies	<u>4,000</u>
Total	207,583

15. Success story: we have chosen several classroom teacher comments to share:

“We have one child who is extremely shy. She rarely speaks out in class and really keeps to herself most days. Thursday mornings, she is a totally different child. She is confident and free to move without judgement and criticism thanks to The Dance Foundation.” -YWCA Childcare/Kids Korner Director

"These classes really support all areas of development. I see milestones being met every year in this program."
-Canterbury Child Development Center Director

"Dance Foundation classes help reach our curriculum goals for our students by inviting them to be creative, listen, follow directions, and enjoy learning."
-Harris Early Learning Center Director

"Dance Foundation classes help my students most by giving [them] a chance to go into a new environment and still learn and have fun."
-Harris Early Learning Center Teacher

"Our My Friends class is for children with sensory, social, and communication challenges – I have seen these children grow so much in attention and behavior since TDF started coming to their class!"
-The Bell Center for Early Intervention Program Director

18. performing arts

19. dance education

20. ethnicity: @30% of students in this program are African American, and 5% of students are Hispanic or other minority ethnicity, 65% are white; @25% of student from all programs combined are of minority ethnicity, 75% of all students are white.

21. ages: infants-10nd graders served in this program, with 95% being 2 years-2nd grade; infants-adults served in all programs combined.

22. students with disabilities: @15% of students in this program have special needs or learning differences; @10% of students in all programs combined have special needs or learning differences,

23. Economic circumstances: 20% of students in this program live in poverty, some are homeless; @30% of students from all programs live in low-to-middle income families.

24. all students served are in the Birmingham Metro area, Jefferson County, Alabama.



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Amy Williams / Pediatric Physical Therapist, Mountain Brook School System

Internal Revenue Service
District Director

Department of the Treasury

JF DEC 23 1981
Date:

Childrens Dance Foundation
2426 Henrietta Road
Birmingham, Alabama 35223

Our Letter Dated:
January 19, 1978
Person to Contact:
D. DeGarmo/eb
Contact Telephone Number:
(904) 724-2113
FFN: 580015236
EIN: 63-0744601

This modifies our letter of the above date in which we stated that you would be treated as an organization which is not a private foundation until the expiration of your advance ruling period.

Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Internal Revenue Code, because you are an organization of the type described in section 509(a)(1) *. Your exempt status under section 501(c)(3) of the code is still in effect. * & 170(b)(1)(A)(vi)

Grantors and contributors may rely on this determination until the Internal Revenue Service publishes notice to the contrary. However, a grantor or a contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act that resulted in your loss of section 509(a)(1) status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a section 509(a)(1) organization.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,


District Director



Strengthening Inland Southern California through Philanthropy

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November 30, 2017

S. L. Gimbel Foundation Fund

Mrs. Diane Litsey
Executive Director
The Dance Foundation
1715 27th Court South
Birmingham, AL 35209

Dear Mrs. Litsey:

Congratulations! A grant has been approved for **The Dance Foundation** in the amount of **\$15,000.00** from the S.L. Gimbel Foundation. **The performance period for this grant is December 1, 2017 to November 30, 2018.** Additional funding beyond the performance period is not guaranteed. It is highly recommended that alternative funding sources be sought accordingly. The grant is to support the following as specified in your proposal:

To provide 1,800 children with music ed. to build cognitive, social, physical skills

This grant is subject to the terms outlined in the enclosed Grant Agreement. After you have reviewed the terms and conditions of the Grant Agreement, **please sign and date the agreement and return with original signature to The Community Foundation by Friday, December 29, 2017.** Be sure to copy the signed agreement for your records. Funds will be released upon receipt of the signed Grant Agreement.

A condition of this grant is that you agree to submit the Grant Evaluation Form which includes a narrative report and fiscal report. **The Grant Evaluation is due by December 15, 2018** and will be available online at:

<https://www.thecommunityfoundation.net/grants/grants/forms>.

We wish you great success and look forward to working with you during the grant performance period. If you have any questions, please feel free to contact me at 951-241-7777.

Sincerely,

Celia Cudiamat
Executive Vice President of Programs

23785 The Dance Foundation

20170867 GIMB

