



Credit Counseling of Arkansas

1111 Zion Road  
Fayetteville, AR 72703

Phone: 479-521-8877  
Website: ccoacares.com

08/05/2022

Fred Darragh Foundation  
Attn: Ernie Dumas  
P.O. Box 250746  
Little Rock, AR 72225

Dear Director Dumas and Esteemed Trustees:

Thank you for taking a moment to consider this letter of inquiry to the Fred Darragh Foundation. Credit Counseling of Arkansas, Inc., is a 501(c)(3) nonprofit that shares the Foundation's goals of advancing financial equity in Arkansas. We seek an opportunity to submit a proposal for a grant of \$15,000.

Good financial health means more than logistical stability: it is the freedom to make the life choices that bring us happiness. But, while everyone knows that saving and budgeting are important, these practices are never as simple and efficient as they seem. All too often, the most necessary expenses can become too burdensome to pay.

Northwest Arkansas is home to many people struggling to keep their heads above water and cannot afford unexpected crises. As one of the nation's biggest regions for income inequality, 48% of children in the region are classified as living in low-income households. When so many families are not making enough to support themselves and their children, it is unavoidable that most people have to borrow money.

The conclusion of the federal foreclosure moratorium and Pandemic Emergency Unemployment Compensation in 2021 created financial stress in low-income households. In 2022, this anxiety is being exacerbated by the worst inflation rate in 40 years. This inflation is making necessary living expenses intolerably high: food prices increased over 9% in the past year and Arkansas gas prices are at an all-time high. These populations are expected to experience greater hardship in the coming years.

But beyond these society-wide issues, there is a far more universal reason that many do not reach out for help when they begin to notice the signs of unmanageable debt. A pervasive stigma around owing money makes most people too embarrassed to ask for help. Traditional wisdom tells people who are doing everything they can do to somehow do more. This painful

and debilitating narrative is not only destructive: it is also wrong. People with financial hardships are not reckless or lazy: often, they are struggling with devastating circumstances beyond their control: 67% of bankruptcies result from medical crises.

Since 1995, CCOA has provided leadership and services that improve the quality of life of individuals and families through financial education, credit and housing counseling, and debt management services. The organization delivers outstanding, life-changing services that help clients plan and budget their finances, manage debt, and keep them in their homes. CCOA normalizes self-advocacy and encourages all people to get in touch for advice and education. The organization is a vital resource that stands in contrast to those telling people to simply work harder and think smaller. Life should not be a silent struggle to survive - it should be full of options, security, and support.

CCOA has three locations and is the only credit counseling agency in Northwest Arkansas providing both in-person and phone sessions. The organization is often a staple in local financial news. Media outlets in Northwest Arkansas reach out for explanations on complex topics and for inspirational stories of clients succeeding in their financial goals in dire situations. The organization reaches out to strengthen the financial health of the communities it serves.

CCOA offers eight counseling services under the umbrellas of Housing, Money Management, and Student Loans. The organization is a member of the National Foundation for Credit Counseling (NFCC). The organization has offices in Fayetteville, Bentonville, and Fort Smith, often serving clients from Missouri and Oklahoma as well. Beyond this region, CCOA is eligible to provide credit counseling in 19 states. CCOA also has three Department of Housing and Urban Development (HUD) certified housing counselors, allowing the organization to provide housing counseling to people in all 50 states.

CCOA has been an effective source of advice and advocacy for its clients since 1995. In that time, the organization has helped more than 111,000 families feel more in control of their finances and able to achieve their goals. The impact of individual counseling has been demonstrated to lower adverse financial outcomes significantly. Pre-purchase counseling, for example, has been shown to help reduce severe mortgage delinquency by 34%.

CCOA is often the last resort for households just barely hanging on. We ask for your help to continue being an invaluable resource to the region in a time when financial and housing services are so deeply needed. CCOA respectfully requests a donation of \$15,000 from the Fred Darragh Foundation to meet the needs of Arkansans to keep our communities financially and mentally well under adverse circumstances.

Regards,



Mary Catherine Harcourt  
Executive Director

June 29, 2022

The Carl & Allen McKinney Charitable Trust  
ATTN: Arvest Bank – Trust Division, Bentonville, Arkansas  
P.O. Box 2389  
Bentonville, AR 72712



Dear Distinguished Trustees:

Acknowledging the Carl & Allen McKinney Charitable Trust's support of nonprofits that serve children in Arkansas, we would like to introduce Trike Theater, a 501(c)(3) nonprofit established in 2008 with a mission to transform the lives of young people through exceptional theatre experiences.

When Artistic Director Kassie Misiewicz founded Trike Theatre, she envisioned the three pillars of Production, Outreach, and Education like a tricycle: moving together to keep the rider stable and propelled forward under their own power. This vision continues to inform the organization today. Initially founded to promote family theatre, the design of Trike Theatre's operations evolved to promote Social and Emotional Learning principles. Serving youth aged 4 through 18, programs aim to provide a space to activate their voices, foster a sense of belonging, and amplify empathy. Trike's opportunities also extend to adults, theatre professionals, and educators.

### **Meeting Community Need**

The current generation faces enormous obstacles to their mental and emotional well-being. The roar of visual and audio input, the pressure to excel, to fit in yet stand out, leads to youth to strive to be acceptable to others rather than true to themselves. In this din, young people sometimes need help seeing past the noise and getting in touch with what helps them thrive. One of the best tools they can have is a robust set of Social and Emotional Learning skills. Collaborative for Academic, Social, and Emotional Learning (CASEL) outlines five broad and interrelated areas of competence: self-awareness, self-management, social awareness, relationship skills, and responsible decision-making.

In order to develop social-emotional skills, young people need to be engaged in a social environment where they feel safe and are actively encouraged to explore self-awareness, concerns, ideas, and feelings. Theatre provides a community and context where children and teenagers can imagine, create, and experience success. By fostering self-expression and interpersonal relationships, it's no wonder many youths find a home within the theatre, a place where their perceived "differentness" is not only accepted but encouraged. Trike Theatre is dedicated to delivering this transformative space and cultivating a supportive community where young people can authentically be themselves.

### **Track Record of Success**

Trike Theatre challenges this generation to see past fears and anxieties to connect with an authentic expression of their humanity. When gaining a theatre education, children deepen their Social and Emotional Learning (SEL) competencies, strengthen their behavioral health, and develop a wide range of skills from problem-solving to collaboration. Trike Theatre creates unique learning experiences that yields a positive result, year after year. Academic enrichment through the arts and SEL are a combined force that empowers youth to become confident learners.

Trike Theatre measures outcomes by points of engagement, which calculates the number of times a person interacts with Trike programming, such as each class or performance they attend. In FY22, Trike Theatre impacted over 46,000 participants through Productions, Academy, and Outreach programs.

### **Programs**

Trike Theatre strives for its programming to be as immersive as possible and takes every opportunity through its Production, Outreach, and Academy to bring participants and young people into the creative process to express themselves.

Production: Trike produces four family-oriented stage productions each year, choosing topical plays with relevant themes for young people and aims to spark conversations with families and friend groups about the subjects that affect them today. As in everything Trike does, this program encourages youth to form their own opinions through discussion and reflection.

Outreach: Trike Theatre's Outreach pillar includes in-school residencies for students and educators to deepen their learning experience through Arts Integration. Trike also incorporates professional development into its programs to transform the classroom with Social and Emotional Learning.

Academy: Trike maintains a year-round Academy that has enjoyed popularity despite the past two years of obstacles imposed by the COVID-19 crisis. This pillar consists of classes and camp programs. As in all programs, youth participants are encouraged to take creative initiative in all aspects of production.

### **Beyond Northwestern Arkansas**

Since 2018, Trike Theatre has been taking its model beyond Northwestern Arkansas (NWA). Trike Theatre's programming is easily portable, scalable, and replicable. The 360 Trike-sperience and Playwriting programs tour to California and Indiana, collaborating with Notre Dame University. This partnership remained strong but safe during the coronavirus pandemic through virtual performances.

### **How You Can Help**

In years before 2020, Trike Theatre has historically sustained half of its budget through its many earned income streams, such as teaching residencies. While the COVID-19 pandemic slowed down this income, Trike Theatre continues making a significant amount of its budget.

Trike Theatre firmly believes in fairly compensating all professionals that make its productions possible. The majority of Trike's funding supports professional actors, directors, choreographers, designers, and technicians, resulting in significant production budgets that must rely on more than just ticket sales.

A grant of \$10,000 from the Carl & Allen McKinney Charitable Trust will provide direct program support to continue serving our community. Thank you so much for your consideration of this request. If you have any questions, please do not hesitate to contact me at (479) 326-4009 or [paul@triketheatre.org](mailto:paul@triketheatre.org).

With gratitude,

A handwritten signature in black ink that reads "Paul Savas". The signature is written in a cursive, slightly stylized font. The first letter "P" is large and prominent, followed by "a", "u", "l", "S", "a", "v", "a", "s". There is a long horizontal line extending from the end of the signature.

Paul Savas, Executive Director

**Texas Commission on the Arts  
Arts Respond Project**

**Application ID:**

**Online portal:** <https://arts.fluxx.io/dashboard/index>

**ID:** ron@georgetownpalace.com

**PW:** Musicals69#

**Notes:** Commission staff are available to consult with applicants by telephone at 512/463-5535 or 800/252-9415

**Amount:** \$10,000

**Organization**

Georgetown Palace Theatre

**Location**

Georgetown Palace Theatre - headquarters

**Primary Contact**

Jessie Drollette

**Authorizing Official**

Ron Watson

**Board Chair - was left blank on previous application**

*Board Chair*

*Enter new*

**Executive Director**

Ron Watson

**Our organization is a member of Texans for the Arts.**

Yes

No

**Mission Statement**

Characters limit: 259/1000

The Georgetown Palace Theatre, Inc. is a non-profit organization dedicated to enhancing the quality of life in Georgetown and Williamson County by providing a venue for quality and affordable entertainment and educational opportunities in the performing arts.

**Number of Staff by Ethnicity**

Asian: 1

Black: 1

Hispanic:

Native American/Alaskan:

Pacific Islander/Hawaiian:

White: 7

Multi-Racial:

**Number of Board of Directors by Ethnicity**

Asian:

Black: 1

Hispanic: 2

Native American/Alaskan:

Pacific Islander/Hawaiian:

White: 10

Multi-Racial:

*Percentage of board members who made a cash contribution to this organization this year?*

**Board members who contributed last year**

100%

*Priority Area***Which one of the following priority areas does this project address**

Economic Development

Education

Health & Human Services

Natural Resources & Agriculture

**Public Safety & Criminal Justice**

*Period of Support (Funding can only be supported for projects taking place between the dates of Sept 1, 2022 & Aug 31, 2023.)*

**Starting Dates** - Sept 1, 2022

**Ending Dates** - Aug 31, 2023

**Payment Date** - Sept 1, 2022

*Audience Information*

**How many adults (over age 18) will be engaged in "in person" arts experiences?**

Adults

**How many children/youth (0-18 years) will be engaged in "in person" arts experiences?**

Children/Youth:14

**Total Audience:** (no place to enter text)

**How many artists will be directly involved?**

Artists

**Indicate if this proposal serves**

Arts Education (Pre-K)

**Arts Education (K-12)**

Arts Education (teachers or adults)

Cultural tourism (check)

International exchange (artist or art; import or export)

None of these groups

*Choose one that describes the project activities for which support is requested. Arts learning is an organized and systematic educational effort with the primary goal of increasing a learner's knowledge of and/or skills in the arts with measurable outcomes.*

**Arts Education**

None of this project involves art education

**50% or more are arts education directed to: K-12 students**

50% or more are arts education directed to: higher education students

50% or more are arts education directed to: pre-kindergarten children

50% or more are arts education directed to: adult learners (including teachers and artists)

Less than 50% of this projects activities are arts education directed to: K-12 students

Less than 50% of this projects activities are arts education directed to: higher education students

Less than 50% of this projects activities are arts education directed to: pre-kindergarten children

Less than 50% of this projects activities are arts education directed to: adult learners (including teachers and artists)

*For the next set of questions, select all categories that, by your best estimate, make up 25% or more of the population served directly by this performance.*

**Available Options**

**Population Served by Race/Ethnicity**

(N) American Indian/Alaskan Native

(A) Asian

(B) Black/African American

(H) Hispanic/Latino

(P) Native Hawaiian/Pacific Islander

(W) White

(G) No single racial/ethnic group made up 25%

### **Population Served by Age**

(02) Young Adults (19-24 years)

(03) Adults (25-64 years)

(04) Older Adults (65+ years)

(09) No single age group made up 25%

(01) Children/Youth (0-18 years)

### **Distinct Groups Served**

(D) Individuals with Disabilities

(I) Individuals in Institutions (hospitals, correctional facilities, shelters, etc.)

(P) Individuals below the Poverty Line

(E) Individuals with Limited English Proficiency

(M) Military Veterans/Active Duty Personnel

(Y) Youth at Risk

(G) No single group made up 25%

### **One sentence summary of project**

*Character limit is 250 (245/250)*

The Georgetown Scholarship 22-23 Program offers financial aid to 14 youth from socioeconomically marginalized communities. Participants will get the chance to attend classes and camps that instill empathy, good behavioral skills, and confidence.

### **One page organizational history**

*Character limit is 4000 (2947/4000)*

The Georgetown Palace Theatre serves Williamson County, Texas, and the surrounding area by producing professional-level performances that showcase the full theatre spectrum: classic plays, Broadway musicals, newer and edgier titles, thrillers, slapstick comedies, and everything in between.

The Georgetown Palace Theatre building has served as an entertainment center for Central Texas, Georgetown, and Williamson County since 1926. Originally operated as a "Moving Picture" theater featuring silent films, the building was renovated as an art deco movie theater in 1936 and continued operating as a movie theater through the late 1980s.



In 1991, a group of citizens purchased the historic theater building to become The Georgetown Palace Theatre, Inc., a nonprofit 501(c)(3) corporation. Following significant restoration and renovation, the theatre began operating as a community theatre in 2002. It has produced high-quality, affordable productions and educational opportunities for theatre lovers of all ages for two decades. The Georgetown Palace Theatre is committed to enhancing the historic preservation of Georgetown by properly maintaining the historic Palace Theatre building.

The Georgetown Palace was the first theatre in Texas to offer inclusive shows free of charge and continues to be the only theatre in the area offering the shows for free. Inclusive shows are shortened, sensory-friendly versions of full-length productions that adjust special effects and loud noises to accommodate those with autism or audio impairment. Shortened productions consider the audience's aptitude to stay attuned to the show, and performances include sign language interpreters, audio description, and other adaptive methods.

Since its inception, The Georgetown Palace Theatre has produced 350 shows, provided 1,600 education scholarships, and engaged more than 4,000 youth in theatre programming. The Georgetown Palace Theatre is producing 16 live performances on its Springer and Playhouse stages during the current season, bringing stories to life for thousands of Central Texas theatre lovers. Based on experience, The Georgetown Palace Theatre projects the following for the 2021/22 season:

- Over 36,000 patrons attend live performances
- Over 460 volunteer actors and crew
- Over 7000 youth participate in camps, classes & Theatre for Young Audiences

A theatre is the heart of the community. The Georgetown Palace Theatre opens its arms and hearts to the community, values each person's unique contributions, and considers all who come to The Georgetown Palace to be a member of the family. Through the power of live theatre, The Georgetown Palace entertains Central Texans of all ages while ensuring the arts are available to everyone. The Georgetown Palace Theatre's programs enrich lives, inspire the next generation of theatre lovers, and nurture an inclusive community that brings the intrinsic value of live theatre to people of all abilities.

**One page project description (include specific information on the project including the key personnel, targeted audience, and goals)**

*Character limit is 4000 (3957/4000)*

The Georgetown Scholarship 22-23 Program offers 14 young people financial aid to attend the organization's theatre classes and camps. This will give students from Title-1 schools the chance to be exposed to many opportunities to attend transformative after-school and camp programs. These students are provided many kinds of theatre opportunities by trained professionals. These programs are:

- Palace Academy
- Education Productions
- Palace Performance Company
- Georgetown Palace Theatre Camps
- Palace Special Needs Program
- Theatre for Young Audiences

Scholarships are offered based on financial need, ensuring that programs are not gatekept behind grades or other performance records. These are exactly the metrics these educational programs aim to improve for students of all backgrounds, so educational scholarships are as inclusive and welcoming to all young people as possible.

Education programming is designed and executed by our Director of Education, Kristen Rogers. Kristin is an award-winning director, teacher, and actor. She comes to the Palace with years of experience teaching and directing children and adults of all ages. Kristen holds a Ph.D. in Interdisciplinary Fine Arts (Theatre) from Texas Tech University and an MFA in Acting from the Actors Studio Drama School in New York City.

Each program provides a nuanced take on arts education that speaks to each student differently: age, ability, theatre background, and level of interest are all accounted for in these programs. Each program's goals are specifically tailored to the participants of each class. The Palace Academy provides high quality training to students of all ages that builds up skills and encourages confidence in every student. Students develop vocal and physical presence through classes in acting, dance, voice, improvisation, sketch and stand-up comedy, stage combat, and musical theatre.

Education Productions give young people a chance to feel the energy of a professional stage show while prioritizing learning and fun. Participants attend rehearsals that focus on self-expression and exploration as they build empathy with characters and learn to persevere through the fast-paced and dynamic production process. This program culminates in a staged performance in front of a live audience, giving students an authentic production experience.

Participants of the Georgetown Palace Theatre Camps spend two weeks planning and training for a live performance outside the hectic school year. Students learn about musical theatre and gain experience in dance, acting, improvisation, and more. These activities give young people without theatre experience the chance to focus on their creativity, try new artistic disciplines, and bond with a close-knit community that loves theatre.

Theatre for Young Audiences exposes young people to professional theatre experiences designed with them in mind. Consuming art is a significant part of building artistic ability and creative thinking. These performances broaden their interest in the arts and refine their art analysis abilities.

Georgetown Palace Theatre has a long history of creating accommodating theatre experiences for young people of all abilities. The Palace Special Needs program makes the introspective qualities of theatre available to everyone. Trained professionals help students tap into their creative energy and talent while supporting their unique background and skill-set. Adaptive Dance and Adaptive Performance are the two current classes being offered currently.

The Palace Performance Company takes theatre programs for youth to a professional level. Participants are young people who have already discovered their passion for theatre and are ready to commit to advanced performing arts training. This program pushes students beyond their current skill set, helps them capitalize on performance opportunities, and creates a professional network between aspiring performing artists and industry professionals.

### **How does this project address the priority area?**

*Character limit is 2000 (1924/2000)*

Access to arts education positively affects youth criminality, especially truancy. Studies show that absenteeism is 60% to 85% higher for youth from low-income families. This feeds into a cycle of inequality that perpetuates itself in the criminal justice system. In Georgetown, 49.8% of Title-1 school students come from incomes low enough to qualify them for free or reduced lunches: this means that almost half of those kids came from families making less than 200% of the Texas poverty line. As a result, 48.5% of Georgetown students are considered at risk of becoming truant.

An education in performing arts has been shown to keep academically *at-risk* youth in school. Theatre promotes reading comprehension and critical thinking as students read and analyze plays, making school more manageable and engaging to attend. Georgetown Palace Theatre's after-school programs in particular connect students from areas with low social capital to industry professionals. This is fantastic for creating mentorship, opening career doors down the line, and learning how to interact professionally with others. This will promote financial success and can significantly affect crime that results from poverty.

However, access to the arts is not evenly distributed in Georgetown. The devastating impact of truancy courts on families and low-income neighborhoods profoundly ripples out to other crimes.

Scholarships to Georgetown's future stars and citizens are an investment in our civic and social health. Many students will find a passion to pursue a career that will eventually generate income. For many more, their time in theatre education will become a significant pillar in their technical skills, behavioral health, and learning aptitude. A theatre education deepens learning

and noncognitive skills, strengthens behavioral health, and provides young people with a wide range of skills, from problem-solving to collaboration.

### **How will you gauge the success/impact of this project?**

*Character limit is 2000 (1615/2000)*

Each Academy camp and class is measured for the goals of individual audiences. Theatre for Young Audiences focuses on expanding students' literary analysis and criticism abilities. The success of this program is measured by a teacher survey of students one month after programming. These surveys determine if the concepts discussed on stage have been retained with the quality of Texas Essential Knowledge and Skills standards.

The Palace Academy employs teacher evaluations at the beginning and end of the year to measure if general learning skills have been promoted. Education Productions use parent and student surveys to determine a participant's comfort and happiness with their performance. Camps are measured by return enrollments as well as parent and student surveys focusing on fun, community, and interest in the subjects learned throughout camp. Special Needs programming is measured by teacher and parent surveys to determine if students' behavioral, technical, and social skills improved, as well as their comfort with self-advocacy.

Palace Performance Company has more advanced metrics for success, such as readiness for admission to Fine Arts colleges. Georgetown Palace Theatre assists these students in preparing for auditions for Bachelor's of Fine Arts programs. Students complete a readiness rubric for college admissions and are assessed for proficiency in dance, singing, or/and acting, depending on their area of concentration. Success is also determined by interview and audition skills and a more general expression of an increased sense of purpose and belonging in the theatre community.

### **How will you ensure the artistic quality of this project will be high?**

*Character limit is 2000 (1255/2000)*

Georgetown Palace Theatre's seasoned professionals approach theatre training from all angles. Academy programs expose students to the many resources that produce a generation of theatre-literate adults. Young people with differing levels of experience receive appropriate training from a highly educated and well-trained staff. Those with little or no experience will receive their first professional evaluations through educational programs.

More than 7,000 youth participate in the organization's educational programming, and experience a diversity of approaches from adaptive theatre experts, educational specialists, and celebrated professionals of the theatre world. Scholarships to these programs will broaden the range of participants to put young people in touch with youth of all backgrounds.

Parents and students take surveys at the beginning and the end of the session to ensure that each learning event has provided quality educational content. Teachers complete a readiness rubric and students take surveys measuring their sense of purpose and belonging in the class. Teachers survey students one month after programming to see if the concepts in the class have been retained with the quality of Texas Essential Knowledge and Skills standards.

*Financial Information*

*Project Budget - Income*

**Income from programs (revenues from box office, admissions, memberships, tuition, class/workshop fees).**

Program income: \$ 165,337.25

**Net proceeds from galas, fundraisers, concessions, art sales, and/or space rentals.**

Fundraising proceeds: \$ 11,500.00

**Revenue derived from interest on investments and/or endowments.**

Investments / endowments: \$ 0

**Direct cash contributions from individuals.**

Cash contributions: \$ 136,000.00

**Income or financial support from businesses and/or corporations.**

Business / corporate support: \$ 0

**Income or financial support from foundations.**

Foundation support: \$ 44,000

**Amount requesting from Texas Commission on the Arts.**

TCA request: \$ 5,000

**Income or financial support from local, county, state, and/or federal governments.**

Government support: \$ 0

**Any additional income, revenue, and/or financial support derived from a source not listed above.**

Other support: \$0

Details - Other support

Total Revenues: \$0.00

*Project Budget - Expenses*

**Administrative salaries, contracts, and/or benefits.**

**Administrative salaries:** \$ 4,200

**Artistic salaries, contracts, and/or benefits.**

**Artistic salaries:** \$ 3,100

**Rent, mortgage, facility maintenance, and/or utilities.**

**Facility costs:** \$ 800

**Marketing & promotion:** \$ 0

**Program and exhibition production costs.**

**Program costs:** \$ 2,120

**Other expenses:** \$ 0

**Details - Other expenses:** Scholarships will assist in bringing in tuition income while not burdening or excluding financially stressed families.

*Please annotate your budget to help the evaluators understand sources of revenue and high-level details on all expenditures.*

**Notes to the budget**

*Character limit is 4000 (780/4000)*

Georgetown Palace Theatre has an overall budget of \$1,965,505, of which 23.8% (\$467,790.19) is generated by tuition. This income is vital to the operation of educational programming because the organization operates on a lean overhead cost of only 6.8%.

Salaries are 42% of project/program expenses. Therefore, 14 scholarships totaling ~\$10,000 includes an administrative expense of \$4,200.

Artistic fees are 31% of project/program expenses. Therefore, 14 scholarships totaling ~\$10,000 includes an artist expense of \$3,100.

Rent is 8% of project/program expenses. Therefore, 14 scholarships totaling ~\$10,000 includes a rent expense of \$800.

Scholarships average \$730: therefore, 14 scholarships cost \$10,220. The remaining \$2,120 will go to academic programming.

*Organization Financial Snapshot*

**Provide the organization's overall operating budget. Do NOT include in-kind, pro bono, capital campaign/building funds, etc.**

**Organization's Fiscal Year - Start Month:** January  
**Organization's Fiscal Year - End Month:** December  
**Previous Year - Actual Revenues:** \$ 2,117,525.56  
**Previous Year - Actual Expenditures:** \$ 2,015,414.09  
**Current Year - Budgeted Revenues:** \$ 2,704,103.00  
**Current Year - Budgeted Expenditures:** \$ 1,759,531.00  
**Next Year - Projected Revenues:** \$ 2,704,103.00  
**Next Year - Projected Expenditures:** \$ 1,759,531.00

*Explain any dramatic changes in your budget including surplus, deficit, accumulated debt, capital campaigns, changes in bookkeeping practices, etc.*

**Notes to the financial snapshot**

*(approximately 400 words; character limit not appearing)*

In 2021, The Georgetown Palace Theatre continued to experience the difficulties posed by the coronavirus pandemic; productions were either canceled or limited, and educational programming experienced similar issues. The Georgetown Palace Theatre received greater government funding due to the many COVID-19 relief programs available, but the organization's earned income was severely disrupted. Due to the relaxing of CDC guidelines on social distancing, the 2022-23 year is anticipated to see growth in line with pre-pandemic figures.

2022 actuals will be finalized in December: therefore, the 2022 revenue and expense figures are an estimate based on pre-pandemic years.

*If your organization tracks in-kind/pro-bono support, list the total amount from the last completed year (if you don't track in-kind, enter zero)*

**In Kind Support:** \$ 0

*Assurances*

**Minimum Acceptable Amount:** \$ 5,110  
**Maximum Acceptable Amount:** \$ 10,220

**I certify that the information included here is true and correct and that I am authorized to submit grants on behalf of this organization.**

**Yes**

No

*Documents (attachments)*

**Required documents for submission of application:**

[IRS letter of determination](#)

**Optional documents for submission of application:**

Letters of support - up to 3.

Letter of Support 1

Letter of Support 2

Letter of Support 3





## Molly Lawson Foundation Grant Application 2016

### Summary

- The organization's mission, goals, and history
- The purpose of the proposed project and/or the services you currently provide to the community
- How does the purpose relate to the mission of the Molly Lawson Foundation
- The results you aim to achieve

### Mission, Goals, and History

One Step Beyond, Inc. (OSBI) provides comprehensive and person-centered programs to adults with Intellectual Disability in northwest Maricopa County. The mission of OSBI is to provide responsive, progressive, and dynamic programs to empower individuals with intellectual disability to realize their dreams of optimal independence, meaningful employment, significant social relationships, and full participation in our community. Programs focus on training in employment and life-skills preparation, access to recreational and cultural opportunities, and advocacy for people with disabilities and their families. All of these programs accomplish the clear goal of enhancing the quality of life for the individuals we serve. Our participants include individuals with Down syndrome, cerebral palsy, autism and other disabilities living mainly in Peoria, Glendale, Phoenix, Surprise, and surrounding communities.

OSBI began in 2001 by assessing community need and researching programs providing services to adults with intellectual disabilities (ID) in Maricopa County. In response to this initial research and identified need for such services in our community, OSBI formulated its mission. In 2003, OSBI opened its first life skills training and recreational programs for persons with ID focusing on household management, community resource utilization, practical academics, recreation activities, and community service.

The Next Step Employment Development Program, an employment training, placement, and support program was established in 2004, followed by the One Step Culinary Training Program and Catering in 2007. These programs offer an inclusive workplace immersion experience by creating partnerships with businesses and community organizations that provide actual workplace experience. Ongoing job coaching ensures success. In 2009, OSBI developed partners and funding to design a physical fitness program that incorporates physical training, nutrition education, and diet planning to further increase participants' workplace success as well as their personal esteem.

Organizational growth has been substantial; we have increased the scope of our service from 2 programs serving 16 individuals to 11 programs serving 267 individuals on a daily basis in 4 locations in Glendale, Peoria, and Surprise. We serve 121 females and 146 males between the ages of 18 and 64; all of them are low income and ethnically diverse.

Because of this growth, we have expanded our campuses to accommodate the need. In August 2014, we opened a campus in Surprise to serve individuals in far northwest Maricopa County. In November 2015,



the Peoria based life skills, performing and fine arts, and sports and fitness programs moved to Arrowhead Creekside in Glendale. The new Glendale space, located at 72nd Avenue and Bell Road, provides our participants with an additional 3,000 sq. ft. of program space, and a more centralized location for both our Peoria and Glendale residents. We are exploring the relocation of our pre-vocational and vocational programs, which are still located in Peoria, and the home-style culinary program, which teaches basic cooking skills needed for daily living, to an additional building at the Glendale location in summer 2016. The One Step Beyond catering business and the vocational culinary training program will remain in their current location in Peoria.

## Services Currently Provided

OSBI offers programs to meet the needs of participants and their families: employment development, culinary training, life skills training, performing and fine arts opportunities, sports and fitness programs, and resources for families. Each participant, in collaboration with their parent/guardian and the OSBI staff, develops a schedule to meet their specific needs and interests. Transportation is provided daily to and from participants' homes as well as to daily activities.

Employment development teaches basic employment skills and provides opportunities for both group supported employment and independent supported employment in the community. Culinary training teaches basic cooking skills necessary for independent living, then advances to skills necessary for employment. Our culinary catering component provides daily opportunities to prepare and serve food at our campuses as well as in the community. OSBI provides ongoing job coaching, both in the classroom and on the job-site, to help our participants be successful and gain independence.

Recreational programs include art, music, dance, and sports activities. We offer classes in: art, such as drawing, painting, and ceramics exhibited at an annual art showcase; music, dance and theater including performance opportunities; and daily fitness training as well as Special Olympics training. Our Personally Fit Program, which was started with support of the Molly Lawson Foundation, continues to help our participants address health issues related to obesity.

Life skills training teaches practical academics and household management skills to assist each of our individuals achieve optimal independence. Weekly social activities, community service, and special events enhance participants' quality of life.

With consistent increases in the number, and life span, of adults living with intellectual disability, and a clear preference towards inclusive community-based versus institutional service options, it is necessary for One Step Beyond not only to continue to provide these services, but to grow and develop them to ensure that current and future individuals with intellectual disability have equal access to the opportunities to ensure a meaningful life. We envision a world in which people with disability are fully included in all areas of our community and are recognized for their potential, their talent, and their contributions to our society.



## **Our Proposal and the Molly Lawson Foundation**

One Step Beyond is requesting support for its biennial camping trip which is a three-day, two-night recreational opportunity offered to all of our participants. This aligns with the interest of the Molly Lawson Foundation in optimizing opportunities for social interaction among adults with intellectual disabilities by providing social events and trips of unique interest to them. The camping trip addresses the general well-being of our participants; it promotes personal growth and fosters independence for adults with disabilities.

## **Project Purpose**

- The problem or opportunity being addressed
- The work to be done – how, where, when, how it will be carried out
- Who will benefit from the work, including the number of people served
- Timetable
- Partners and their roles if applicable

## **Problem/Opportunity**

Everyone, whether disabled or not, enjoys regular recreation that develops skills, promotes good health, relieves stress, facilitates social interactions, and provides a general joy for living. Because of their intellectual disabilities, our participants face numerous obstacles every day of their lives. Access to opportunities that the general population enjoys such as transportation and travel, outdoor recreation, health and fitness, and social interaction is limited. OSBI addresses these issues through its daily programming, weekend social opportunities, and unique travel experiences, specifically, the biennial camping trip.

The camp setting is restorative in that natural environments help to promote restorative feelings in individuals who take part in them. Current research indicates many positive health outcomes resulting from participation in recreational therapy programs including physical health status, cognitive status, and an improved ability to deal with life. The social interaction is invaluable for those with intellectual disabilities who may not normally have these opportunities because of their disabilities.

## **Who, What, Where, When and How**

Every year, One Step Beyond offers all of its participants an opportunity for an overnight vacation with their peers. Every other year, this vacation is a fall “camping trip” which is the equivalent of a short summer camp experience. The most recent camping experience was attended by 93 participants and 33 staff members and as OSBI continues to grow, the number of attendees on future trips will increase.



One Step Beyond contracts with Pinerock Camp and Retreat Center in Prescott, Arizona, to provide lodging and meals for the OSBI staff and participants for the three-day, two-night experience. Participants and staff arrive by chartered bus in time for lunch on Day One and depart on Day Three after breakfast. Everyone is housed in dormitory style lodging with shared bathroom facilities, and meals are served in the camp dining hall. Staff members provide 24-hour supervision for the participants at a ratio of 1 staff member to 2.5 participants. Campers are divided into teams of three to facilitate supervision and rotation through planned activities.

The stay at camp is planned and implemented by OSBI staff who have access to general camp amenities including recreational fields, hiking trails, and campfire sites. Activities include: sports, hiking, arts and crafts, games, a nature-themed scavenger hunt, a dance, and an evening campfire. Meals are eaten as a group in the dining hall allowing time for socialization with those not in their assigned team or dormitory setting. Campers are encouraged to try new experiences in order to build self-confidence and, because they are away from parents/guardians, gain independence.

All OSBI program participants are eligible to attend the camping trip; in December 2015 there were 267 program participants and the December 2016 enrollment goal is 325 program participants. We are requesting funds for our 2017 camping trip in anticipation of significantly increased participation and costs. As the organization has grown, OSBI has had to re-evaluate the annual travel opportunities as they are all covered by fundraising. The camping trip continues to be an excellent value.

OSBI partners with Pinerock Camp for lodging, meals and camp amenities; Cox Communications has provided scholarship dollars for those participants who do not have the financial means to pay the nominal fee; and parents/guardians, staff, donors, local businesses, and the participants themselves work together to raise the money needed to finance the trip. It is truly a team effort to bring this experience to a group of individuals who may not otherwise have this opportunity.

## Assessment

- The goal(s) of your project and/or services
- How success will be defined, measured, and documented
- What role, if any, the population to benefit from the project/program will play in measuring its success
- How the results of your assessment will be used

The all-encompassing goal of the camping trip is to enhance the quality of life for our participants. Additional psychological benefits could include a perceived sense of freedom, independence, and autonomy; enhanced sense of self-worth, self-reliance, and self-confidence; improved ability to socialize with others; enriched capabilities for team membership; greater adaptability and resiliency; and a more positive outlook on life.



All of our programs are ongoing, addressing the consistent need for services for this population. Each participant has a plan specific to their own goals and needs; these personalized plans are developed with input from the staff and the participant's parent/guardian while taking into consideration the participant's interests. The plans are evaluated and updated on a regular basis. Monthly progress reports are prepared for each participant and these reports are used to evaluate their goals and program participation.

Staff members are assigned a team during the trip and track their participation in the various activities during the day. Staff members can also observe each participant's ability to perform daily living skills when away from home. Accomplishments, successes, and/or issues noted by staff during the trip will become part of this progress report.

Participants are part of the camping trip evaluation process. They are encouraged to express themselves, sharing success stories and reflections about the trip, during the closing campfire.

Marchell is an example of a participant who benefited from the trip. She lives with a friend and doesn't receive respite services. Prior to the most recent camping trip, she was new to One Step Beyond and had just begun creating new friendships. She was very interested in attending the trip; however, she was not able to afford it. Through donations and the generosity of others, Marchell was able to experience her first-ever independent trip as an adult. Her smile of joy and excitement said it all. The three-day trip was a break from her normal living arrangements as well as an opportunity to be independent. She returned full of stories about all the good times she had experienced and the new friendships she had made.

Our evaluation process is integral to the assessment and continuous improvement of staff implementation of the program, and the enhancement of the value of our participants' experiences. Our evaluation is used regularly to identify what we are doing right for our participants and where there may be need for improvement. OSBI is required to submit regular reports to DES/DDD for each participant: monthly for those in the life skills program and quarterly for those in group supported employment. Turnover in our program is less than 2%; thus, we are essentially providing lifelong support to the individuals we serve.

**Organization Status** (for operating support grants) N/A

**Budget** (for program support grants)

- The amounts committed and requested for the project/program for all sources, including the Molly Lawson Foundation
- Expenses for the project/program including line items or a budget narrative
- Which expenses are priorities for funding in the event the Foundation can provide some but not all of the support requested



OSBI is requesting \$15,000 in support of its camping trip which would enable 150 adults with intellectual disabilities to experience a three day outdoor adventure at an established camp. The total trip has an anticipated budget of \$34,605; fundraisers, donations, sponsorships, and an affordable fee paid by the participants will cover the balance.

Grant funds would be used to pay for staff lodging and meals, charter buses for the entire group, and purchase miscellaneous supplies. In past years, the participants have paid a \$100 fee to attend; with grant funds supporting transportation and staff expenses, OSBI would be able to reduce the participant fee to \$75 making it more affordable for our individuals on limited incomes.

OSBI relies on grants and other fundraising efforts to provide the extras that make our programs unique and successful and enable us to go one step beyond what other programs provide to enrich the lives of our participants. The majority of our clientele consists of low income individuals who are Title XIX (Medicaid) eligible and receive federal matching funds through the Arizona Department of Economic Security/Division of Developmental Disabilities to pay for their participation in our programs. These funds, which are based on the hours each participant attends daily and reimbursed accordingly, covers salaries, operating expenses, and daily transportation for our participants.

Expenses for the camping trip are paid entirely through fundraising, donations, and an affordable fee paid by each participant. Participants and their families sell merchandise twice a year, hold car washes, support restaurant nights (OSBI receives a percentage of sales), and coordinate other fundraising opportunities. Staff time is covered by DTA hours and respite reimbursements through DES/DDD but staff lodging, meals, and transportation are covered by fundraising. With staff to participant ratios at 1 to 2.5, the number of staff and associated costs increase significantly as the number of participants grows.

If the Molly Lawson Foundation can only provide a portion of the amount requested, the priorities would be staff expenses and charter buses. These are the two largest expenses after camp fees for the participants and are required for the trip to occur.



## One Step Beyond, Inc. Biennial Camping Trip Projected Budget

Expenses		Proposed Budget	Actual Expenses
Camp Fees	2 nights lodging and 7 meals: 150 Participants @ \$105	\$15,750	
	2 nights lodging and 7 meals: 60 Staff @ \$105	\$6,300	
Bus Charter	4 (56 passenger buses) @ \$1,800	\$7,200	
Supplies			
Snacks	210 @ \$2.50 per person	\$525	
Bottled Water	30 cases @ \$6 per case	\$180	
T-Shirts/Backpacks	210 @ \$15 per person	\$3,150	
Miscellaneous	Art project, first aid kits, prizes/awards, dance decorations, camping supplies	\$1,500	
<b>Total</b>		<b>\$34,605</b>	

Income		Proposed Budget	Actual Income
Molly Lawson Foundation		\$15,000	
Fundraisers	Sales, car washes, restaurant nights, coin drop	\$6,500	
Donations	Cash, gift cards, in-kind	\$855	
Sponsorships		\$1,000	
Participant Fee	150 @ \$75	\$11,250	
<b>Total</b>		<b>\$34,605</b>	

## Attachments

- IRS Determination Letter (not required, previous applicant)
- IRS Form 990 (not required, previous applicant)
- Current organizational operating budget, including revenues and expenses (Attached)
- List of Current Board of Directors (Attached)

### **1. Define the need in Peoria for the proposed program, supported by statistics or other valid proof.**

The Department of Economic Security/Division and Developmental Disabilities reports that there are 5,000 individuals with Developmental Disabilities of all ages residing in Northwest Maricopa County. One Step Beyond(OSB) is one of eleven organizations dedicated to providing performing arts experiences to individuals with disability in the state of Arizona. However (as stated previously), OSB is the only nonprofit organization in the City of Peoria providing integrated performing arts opportunities to individuals with and without disability; making the demand in our city substantial. With consistent increases in the number and life span of adults living with Developmental Disability, and a clear preference towards inclusive community-based versus institutional service options, it is necessary for One Step Beyond to not only continue to provide these services, but to grow and develop them to ensure that current and future individuals have equal access to the opportunities, like the arts, to ensure a meaningful life.

For people with Developmental Disability, participation in arts programs can provide so much more than a mere visual and/or physical experience. Integrated arts programs provide benefits in areas of physical functioning (coordination and endurance), emotional functioning (self-confidence and decrease in anxiety), social functioning (self-initiated peer interaction), and day/community program functioning (ability to retain information), more so than models that exclusively offer programs to individuals with disability. These new-found skills are then transferable to other areas of life, including employment readiness, as the individual is more able to communicate with confidence during job interviews and job placement. In fact, 70% of the individuals that participate in our Performing Arts Programs are also employed through the One Step Beyond Employment Development Program.

Benefits are seen in not only the participants with disabilities, but for the participants without disability as well. Studies have shown that through artistic collaborative programs, like ours, participants without disability begin to strengthen their ideas of diversity and tolerance. The fact is, these individuals will interact and work with each other outside of recreational experiences, and these programs enhance and strengthen the social relationship skills in the adults with disabilities and the inclusive ideals for those without disability.

### **2. Describe all public outreach and citizen participation efforts undertaken during the development of this program or activity.**

With growth and development playing a significant role in the strategic goals set for our organization in the past and oncoming years, expansion of our employment program is paramount to the success of the individuals we serve in order to provide them the services they need. Historical data has shown us that with each past planned expansion we were able to answer the needs of all of the individuals on our waiting list. However, after each expansion we found that our waiting list would grow again immediately, necessitating further strategic planning for growth to answer this community need. It is clear that the effectiveness of our uniquely responsive program model for individuals with DD has made us the program of choice in Peoria and the West Valley. Because of our success, families of participants are our best marketing resource; their word-of-mouth referrals are the primary source for recruitment of individuals in need of our programs and services. Other trends we have recognized in terms of program expansion involve the largest influx of new enrollees happening in June after High School Commencement. It is our goal over the next months to form stronger collaborations with special education programs in the Unified School Districts in Maricopa County, especially in Peoria due to our program location. In addition to collaborating with school districts to provide information on basic services available, we work exclusively with the Peoria Unified school district to provide community based work experience. Other Peoria organizations that we currently collaborate with in order to provide work experiences include the Peoria Unified School District, Performing Arts Center, Peoria Preschool, and SouthWest Indian Ministries.

### **3. Describe methods used for assuring that program funds will be used for the original purpose of the program or activity.**

Constant managerial overview of program funds is common practice at One Step Beyond as we hold regular meetings with our Board of Directors (5 per year), during which a Treasurer's Report is presented and approved. Our CFO prepares monthly profit and loss and balance statements for approval by our Board Financial Oversight Committee. An independent CPA prepares an audit of our financial records and our Federal 990 and AZ 99T Tax Returns annually. All of these documents are available for public inspection upon request. Additionally, as a qualified vendor with the Arizona Department of Economic Security, Division of Developmental Disability, OSB program operations are semi-annually monitored by AZ DES/DDD, OLCR, and Dept of Health.



**4. Specify the eligibility criteria, if any, necessary for Peoria residents to receive services.**

One Step Beyond's (OSB) Performing Arts Program serves adults with Developmental Disability (DD) living in Peoria and other West Valley communities. The majority of our clientele consists of individuals who are Title XIX (Medicaid) eligible and receive federal matching funds to pay for their participation in our programs. However, some individuals with disability are not eligible for Title XIX funding. We offer our program to such individuals at a reasonable cost of \$20 per day. Other programs in our area of service either do not accept private-pay participants or charge daily fees that exceed \$60 per day. Thus, we are able to serve participants who would not otherwise access the services they need.

**5. Specify the timeline from when a Peoria resident applies for service to when they receive proposed services.**

Recruitment and placement of an individual in One Step Beyond programs takes on average 1-2 months. Placement is dependent on openings in the program of interest to the prospective participant as well as on an enrollment process involving an assessment of individual needs, tours of program facilities, and observation days during which the prospective participant attends programs for a day to determine responsiveness of the program(s) to individual needs. Once an appropriate match between OSB programs and the individual's needs is identified, an individual service plan and schedule of activities is developed, and services for transportation and program are authorized by DES/DDD. This final step takes approximately 1 month.

**6. If your organization currently has a waiting list for the proposed service, describe the approximate wait time and the number of citizens on the list.**

Our 12 week performance sessions have never incurred a waiting list, but have routinely declined participants due to space constraints. With the addition of a second session, we hope to offer this unique program to 65 more participants during the fall of 2015, increasing our participation by 100%.

For participation in our year-round programs, occurring at the our life-skills campuses, planned strategic expansion of One Step Beyond program facilities in 2015 and 2016, has enabled us to actively enroll new participants at an average rate of 5 individuals per month through Dec. 2015. Majority of the enrollment will, and routinely has, taken place in June after teen individuals transition from High School and into a day program model.

**7. Name partnering agencies or collaborative efforts with other non-profit, profit and/or governmental agencies that are a part of this program. Describe their roles and quantify the value of partner contributions.**

Since 2007, One Step Beyond (OSB) has partnered with Theater Works to provide our 12-week Performance Programs. What started as an exclusive program for 28 adults with Developmental Disabilities exploring the concepts of theater and performance art, the OSB Performing Arts Program is now inclusive, offering educational arts enrichment to all OSB Participants (currently 221) and performance opportunities for both adults with and without disabilities (currently 65). Through Theater Works, our organization and participants gain access to resources that we would otherwise not have. Our participants get the opportunity to work with professional writers, directors, and actors to develop a new show every year. They work in a professional rehearsal space and perform on professional stages, with professional sets, props, and costumes. In turn Theater Works is able to impact a population of individuals that deserve to participate in the arts, and further their own mission of providing opportunities for children, patrons and artists to experience theater that inspires, enriches and enlightens their lives through the celebration of the performing arts.

Other organizations that we partner with throughout the year in order to provide exposure to additional performing arts outlets include Ballet Arizona, Arizona State University, Detour Theater Company, and Valley Youth Theater.

**8. Identify the program's target population(s) and service delivery area in Peoria, include specific geographic boundaries.**

Our target population is adults and teens with developmental disability. We serve all communities in the city boundaries of Peoria, in addition to other communities in West Maricopa County, including Anthem, Avondale, Glendale, Phoenix, the Sun Cities, Surprise, Whitman, Morristown, and Wickenburg. Our geographical service area boundaries are north of Interstate 10, south of Anthem, west of 15th Street, and east of Wickenburg. A map of our service area is provided in the Attachment section of this grant application.

**9. Identify community problems, conditions and/or challenges this target population must overcome.**

In 2009, the Journal of Applied Theater and Performance published a case study discussing the Improbable Theater Company, a performing arts organization for individuals with disability in Phoenix, AZ. This study reported that integrated community programs, especially for adults, are either not available or adequately used by residents of Maricopa County. Whether due to affordability, physical barriers, or societal stigmas, access to inclusive cultural arts programming continues to be an unserved need in our communities.

**10. Share a recent success story of a Peoria client from this program.**

Not only is theater an outlet for creativity and fun, education in the theatrical arts is an integral part of the development of each human being. Studies show that there is a correlation between the arts and achievements. A report by Americans for the Arts states that young people who participate regularly in the arts are four times more likely to be recognized for achievements in other areas of life, including work or school. One Step Beyond is no exception to these findings. By encouraging our participants with full support and inclusion of arts education programs we have watched many of our members blossom from their shells. For example, we have watched one of our very shy and withdrawn participants with autism respond extraordinarily well in this program. When Sarah first started attending classes at Theater Works she wouldn't even go up onto the stage. Slowly with help from her non-disabled peers and a lot of hard work she began to open up and take part in the rehearsals and theater games. She now is able to stay and dance onstage in full view of a crowd of 200 people, when before she would have hid offstage. "It is nothing short of magic!" Concluded one of our parents after watching this young lady on stage, and hers is just one of the many other success stories. Through this opportunity Sarah and her peers were able to overcome hardships and experience their accomplishments together as a team, which has created a social bond that continues to this day. We fully believe that all our members should have that experience as we continue our work to foster the combined fields of arts education with adults with disabilities by working with Theater Works.

**11. The City of Peoria City Council has set high-level goals in several areas. Please select the goal your program most closely addresses:**

- a. Arts/Culture (expanding or preserving quality of life)

**12. Explain how the proposed program supports the City Council goal selected above.**

One Step Beyond's Performing Arts Program creates a unique opportunity for adults with Developmental Disability (DD) to learn and participate in the arts. The City of Peoria has a vested interest in services that support arts and culture exposure for its citizens. Our programs offer this year-round to not just the individuals with disability that attend our programs, but community members without disability as well.

One Step Beyond, Inc. - Next Step Employment Development Program-PeoriaForm 3: Proposal Summary (City of Peoria Gen Fund FY16-July 1, 2015-June 30, 2016)

**1. Program Name/Title**

One Step Beyond Performing Arts Program

**2. Program Description**

The One Step Beyond Performing Arts Program strives to provide equal access and opportunity to performing arts opportunities for adults with Developmental Disability in Peoria and surrounding communities of Northwest Maricopa County. Our program is two-fold as we provide year-round educational activities and community outings to view professional performances from local cultural institutions like Ballet Arizona, in addition to a 12-week integrated performance program aimed at producing and performing an artistic work through partnership with Peoria-based arts organization, Theater Works.

**3. Program Location Address**

Peoria Performing Arts Center  
8355 West Peoria, Ave.  
Peoria, AZ 85345

One Step Beyond Performing Arts Center

8877 W. Union Hills Dr.  
Peoria, AZ 85345

One Step Beyond Surprise Life Skills Center  
1877 W. Reems Rd.  
Surprise, AZ 85374

**3a. Program Location City** Peoria  
**3b. Program Location State** AZ  
**3c. Program Location Mailing Address Zip + 4 Code** 85345

**4. Provide targeting boundaries of the proposed activity; provide a map if necessary.**

One Step Beyond serves Northwest Maricopa County, including the cities of Peoria, Glendale, Anthem, Phoenix, Sun City, Surprise, Mirage, Whitman, Morristown, and Wickenburg. In the past year, we have also begun to offer our services to the cities of Goodyear and Scottsdale. Our geographical service area boundaries are North of Interstate 10, South of Anthem, West of 32nd street, and East of Wickenburg. A map of our service area is provided in the attachment section of this grant application.

**5. Describe the goal of the program**

The activities provided by the One Step Beyond Performing Arts Program have been proven to improve the quality of life for adults with disability in areas of physical, emotional and social development. Through integrated participation with professionals in the arts field, everyone, including the audience, is able to experience a inclusive recreation; promoting acceptance, respect, and appreciation for the and contributions that adults with disability can provide to their community.

**6. Amount Requested** 6,200.00

**7. Amount of match provided by agency, if any.** 0.00

**8. If your agency is providing match, please define the "type" of match if it is not cash.**

No matching funds will be provided; Yet, One Step Beyond intends to more than match funds we are able to receive from the City of Peoria with Foundation, Government, and private contributions to insure the sustainability of this vital program.

**9. Explain exactly what Peoria funds would be used for (salaries, utilities, equipment, facilities, etc.)**

Over the past 8 years, our Performing Arts Program has grown in its program offerings, as well as in its participation. In 2014, our annual program offered activities to 225 adults with Developmental Disability, while our 12-week integrated program served 65 adults with and without disabilities. Over the next year and through 2016, we hope to continue to grow our community impact by providing an additional week integrated program in the fall, and by increasing our participation by 100%. The funds provided by the City of Peoria will be used to supplement program fees, to cover operational costs related to supplies and educational materials to enhance the learning process and production value of the performance. By underwriting these costs, participants are able to continue to take part in the program, while the organization works to enhance current offerings and ensure that the necessary materials are available to meet the growing needs of our expanding organization.

**10. Total Program Budget** 38,956.00

**11. Indicate what percent of funding you are requesting for this program as it relates to the entire organizational budget**

16%

**12. Disclose the minimum amount of funds needed in order for service to be delivered in Peoria**

All of the requested funds are necessary for implementation of our program. Not only do these programs provide enrichment to a deprived sector of the population of Peoria (individuals with Developmental Disabilities), we utilize Peoria resources such as the Peoria Performing Arts Center, and collaborate with Peoria-based Nonprofit Organizations such as Theater Works, to increase our potential impact in the community.

**13. How is this program unique compared to programs currently being offered within the City of Peoria, in adjacent communities or through private programs?**

The One Step Beyond Performing Arts Program is the only nonprofit organization in the City of Peoria that provides this unique model of integrated performing arts activities and opportunities to individuals with and without disabilities. This model has been successfully utilized by the Detour Theater Company in Scottsdale, Arizona for the last 15 years; however, Detour does not provide transportation services so individuals in the West Valley can benefit from these programs. This unfortunately creates accessibility difficulties for a substantial percentage of our population. The City of Peoria Adaptive Recreation Program, also offers these kinds of performance opportunities; however, their programs are exclusive to individuals with Developmental Disabilities. Through this particular program, One Step Beyond strives to create inclusive opportunities for adults with and without disabilities to share in recreation experiences together.

**14. What other cities/towns currently provide funding to this program?**

At this point we currently do not receive, nor are we pursuing, funding from other cities for this particular program. We feel that we provide a unique program that operates within the City of Peoria, primarily utilizes Peoria community resources, and serves individuals and parents within the Peoria City limits. Therefore, funding from the City of Peoria has been our focus.

**15. State the number of volunteers used to serve Peoria residents.** 30

**16. State number of volunteers hours donated to serve Peoria residents.** 2,500

**One Step Beyond, Inc. - Next Step Employment Development Program-Peoria Form 6: Demographic Data (City of Peoria Gen Fund FY16-July 1, 2015-June 30, 2016)**

**RACE/ETHNICITY**

	<b>July 1, 2012-June 30, 2013</b>	<b>July 1, 2013-June 30, 2014</b>	<b>July 1, 2014-June 30, 2015</b>
American Indian or Alaskan Native	1	1	
Asian	2	2	
Black or African American	5	7	
Native Hawaiian or Other Pacific Islander	2	1	
White	128	133	
American Indian or Alaska Native and White	0	0	
Asian and White	0	0	
Black or African American and White	2	2	
American Indian or Alaska Native and Black or African American	0	0	
Other (including Hispanic & Latino)	33	33	
<b>Total</b>	<b>173</b>	<b>179</b>	

**INCOME DATA**

	<b>July 1, 2012-June 30, 2013</b>	<b>July 1, 2013-June 30, 2014</b>	<b>July 1, 2014-Dec. 31, 2014</b>	<b>Projected 2015-June 30, 2016</b>
Extremely Low (0-30% of Median Income-\$0-\$18,550/year)	173	179	221	
Low (31%-50% of Median Income-\$30,951-\$49,500/year)				

	July 1, 2012- June 30, 2013	July 1, 2013- June 30, 2014	July 1, 2014- Dec. 31, 2014	Projected 2015-J
Moderate (51%-80% of Median Income-\$30,951-\$49,500/year)				
Non-Low Moderate(81%+ of Median Income-\$49,501+year)				

**OTHER DATA**

	July 1, 2012-June 30, 2013	July 1, 2013-June 30, 2014	July 1, 2014-Dec. 31, 2014	Projected 2015-June 3
Female Head of Household				
Elderly (Age 62 or older)				
Handicap/Disabled	173	179	221	

**LOCATION DATA**

	July 1, 2012-June 30, 2013	July 1, 2013-June 30, 2014	July 1, 2014-December 31, 2014	Projected 2015-June 3
Peoria residents	49	52	69	
Glendale residents	43	44	49	
Sun City/Surprise residents	37	38	58	
Avondale/Goodyear residents	0	0	0	
Other West Valley residents	4	5	5	
Phoenix residents	38	40	40	
Scottsdale residents	0	0	0	
Tempe residents	0	0	0	
Mesa residents	0	0	0	
Chandler residents	0	0	0	
Other East Valley residents	2	0	0	
Other residents	0	0	0	
Homeless/Transient residents	0	0	0	
Total	173	179	221	

**LOCATION DATA CITY OF PEORIA %**

	July 1, 2012-June 30, 2013	July 1, 2013-June 30, 2014	July 1, 2014-December 31, 2014	Projected 2015-June 3
City of Peoria Residents Percentage	28	29	31	

## **Bid to Host the 2019 Conscious Capitalism Annual Conference**

**First Name**

Scott

**Last Name**

McIntosh

**Phone**

602.999.2070

**Email**

scott@consciouscapitalismaz.com

**City**

Phoenix

**Country**

United States

**State**

Arizona

**Postal Code**

85282

## **CCAZ Bid for Annual 2019 CC Conference**

Submitted 1-31-2018, Scott McIntosh

*Application Questions:*

**Hosting the 2019 Conscious Capitalism Annual Conference is an opportunity to show off your area's local Conscious Capitalism community. Why do you think your community should be featured in 2019 amongst the global CC community?**

Conscious Capitalism AZ (CCAZ) was and is continuing to be one of the defining leaders in the conscious capitalism movement. After Australia and Chicago, we were the third formal chapter established in our movement.

We have been building significant interest and engagement in conscious capitalism with our business community since 2012 and have the support of city and state leadership, civic groups, entrepreneurial hubs, the media, and thousands of individuals involved in *work for good* operational models.

We are the first chapter to offer CC consultant certification, a beta program rising in interest. We will be one of the first chapters to create a sustainable business model with no more than 20% of our revenue coming from grants and philanthropy. The income will be directed toward not only chapter meetings, but more specifically our laser focus on bringing conscious capitalism into education. Other generated revenue will be directed towards special events and outreach, national broadcast programs, and publishing.

Most importantly, CCAZ is also one of the first to focus on sharing our principles through public and private education, creating a true grass roots base for “raising” and training some of the finest young minds in innovative conscious business practices. **Conscious Capitalism in Education** would an excellent theme for the 2019 conference.

Due to our chapter’s influence, conscious capitalism tenets have already been incorporated into business curriculum for seven different undergraduate and graduate courses at Grand Canyon University (GCU). This April we are co-hosting a collegiate challenge with GCU during which students from multiple universities and colleges will be able to pitch innovative “work as a force for good” business ideas. The expected number of attendees will be nearly 2,000.

Phoenix is also home to Arizona State University, which was ranked in 2017 by U.S. News and World Report as the nation’s most innovative university. Stanford was ranked #2, and MIT, #3. Our reach is extending into ASU, Northern Arizona University, University of Arizona, and K-12 schools.

Just two weeks ago, Arizona Governor Doug Ducey spoke about his 2018 proposed \$371 million budget for education in Arizona. We will invite Governor Ducey to play a role in the 2019 Annual Conference. Based on a relationship we have with his office and his bid for re-election (November 2018 to prove what we know to be positive support), we expect this to be a relatively secure opportunity. Ducey is also widely known for his background in business and lifelong interest in capitalism.

Should we receive the honor of hosting the Conscious Capitalism Conference in 2019, our potential for impact on the city of Phoenix, the state of Arizona, and the global CC community is clearly developed and poised for measurable success.

**Who from the chapter would be most involved in helping to organize the event? Please provide their name, position, skills, and LinkedIn profiles.**

Lead:

**Susan Kavanaugh**, CCAZ Executive Director, certified CC consultant, event specialist

<https://www.linkedin.com/in/susan-kavanaugh-4011474/>

Supporting Roles:

**Adam Goodman**, CEO *Goodmans Interior Structures*, Corporate and Board of Directors' member, connector, prominent civic figure

<https://www.linkedin.com/in/adamkgoodman/>

**Heidi Jannenga**, President and Co-Founder *WebPT*, Corporate and Board of Directors' member, CCAZ public speaking representative, physical therapist with high-level business acumen

<https://www.linkedin.com/in/heidijannenga/>

**Scott McIntosh**, CCAZ Founder and Chairman, Co-Founder *MAC6*, Angel Entrepreneur, connector, consultant

<https://www.linkedin.com/in/scottlmcintosh/>

**Brian Mohr**, CEO *Y Scouts*, Corporate and Board of Directors' member, human resource and management strategist

<https://www.linkedin.com/in/bmohr/>

**Randy Gibb**, Grand Canyon University dean of Coangelo College of Business , Corporate and Board of Directors' member, education leader



<https://www.linkedin.com/in/randy-gibb-156a0b6/>

**Ray Delmuro**, Owner Refresh Glass, Corporate and Board of Directors' member, 2017 CC Inc. CEO Summit featured speaker, entrepreneur, hospitality industry connector

<https://www.linkedin.com/in/ray-delmuro-89b04110/>

**The success of the Annual Conference will depend largely on the involvement of local Conscious Capitalism businesses being involved. Please list every Conscious Capitalism business in your area that you believe could be involved with the conference, and what kind of involvement you'd seek from them (e.g. joining the host committee, sponsor, in-kind donations, hosting activities at their location, etc.)**

Our chapter has powerful in-growing corporate commitment and engagement through: our CCAZ Board of Directors, group of 121 Arizona CEOs who attended the recent conscious capitalism CEO Summit, and through recent corporate engagement in our highly successful Sum and Substance event. Key support is available from all of our corporate members including Local First Arizona, an organization with 3,000 business members.

All of our corporate members and their employees will support us. This is a moderate base of 19+ highly-committed, highly-involved prominent companies. Our growing individual member base (just now under 200, but doubled or more by the date of the conference) has shown consistent support and would, without doubt, engage in our development and execution of the 2019 Annual Conference. From our membership base we have 53 trained ambassadors of Conscious Capitalism who were instrumental in our promotion of the recent Sum and Substance event, attended by more than 220 people, and through impactful outreach in the state of Arizona in 2017

Additional local businesses and organizations that will engage in creating and promoting the event include:

**Supporting Corporations:**

Bar Napkin Design

CES Study Abroad

CurrIQnet

DMB Community Life

Fairy Tale Brownies

Goodmans Interior Structures

Grand Canyon University  
Hool Coury Law, PLC  
Jaburg Wilk  
Kadima Ventures  
Keyser  
Local First Arizona  
Lucid  
MAC6  
MJ Insurance  
Moses Inc.  
Nextiva  
Refresh Glass  
Resound Creative  
U & Improved  
Upwards Projects (Postino's)  
WebPT  
YScouts  
zeNPO

**Civic and Business Leadership Organizations:**

Arizona Commerce Authority  
Arizona Community Foundation  
Entrepreneurs Organization  
Junior Achievement  
Governor's Office  
Greater Phoenix Economic Council  
Greater Phoenix Leadership  
Phoenix Chamber of Commerce  
Phoenix Rotary 100  
Social Venture Partners  
Tucson Rotary  
Tempe Chamber of Commerce  
Vistage  
West Valley Women  
Women of Central Phoenix  
Young Presidents Organization

**Media:**

The Phoenix Business Journal  
AZ Republic  
Channel 12  
Green Living Magazine

**Universities:**

Arizona State University

Grand Canyon University  
Northern Arizona University  
University of Arizona

**Investment Groups:**

Arizona Tech Investors  
AZ Founders Fund  
Desert Angels  
Canyon Angels

Our business relationships extend into Tucson, with the advent of a Tucson Chapter developing. Less than 2 hours from our metro area, Tucson has multiple business and hundreds of individuals backing business as a way to elevate humanity. We will also tap into this group.

**The conference will require a venue that fits 1,000-1,500 attendees. Do you have any locations already in mind that would fit this need? If so, where and why?**

Phoenix is the *conference capital* of the US based on its climate, sunshine, and outdoor activities.

There are at least four major hotels downtown capable of hosting the conference and providing block room rates for the majority of attendees. Any of these are great venues for the 2019 event. They include Hyatt Regency, Sheraton Grand, Kimpton Hotel Palomar, and Hotel San Carlos and Convention Center. Any and every type of cuisine can be enjoyed at many notable restaurants.

The entire downtown has been renovated, refreshed, and refurbished. We now have a light rail system through out the city. The local downtown also features Roosevelt Row (art district), vibrant university campuses, many parks and pedestrian-friendly areas to roam.

Just south of downtown the Wild Horse Pass Resort| Casino| Spa and the Arizona Grand and Spa at South Mountain offer 4-Star accommodations, meeting spaces, and activities.

We invite your committee to join us in site visits to all of these locations.

Please note that spring training for Major League Baseball attracts many out of town visitors, so bringing the conference to Phoenix will require early securement of meeting space and accommodations.

**Please provide any additional information on why your city would be the best venue to host the 2018 Conscious Capitalism Annual Conference.**

Phoenix continues to be one of the fastest growing cities in America. Our population is nearly 5 million people. An especially large number of Fortune 500 companies are headquartered here or hold a significant presence in Phoenix. Technology and service industries account for more than 75% of the city's economy. We have enormous branding opportunities for Conscious Capitalism, Inc.

We will add that there are hundreds of reasons to visit our city, but the top ten for April include:

1. Perfect weather. Leave your parka and umbrella at home. The average high temperature is 85° in April.
2. Spring Training for Major League Baseball
3. It's prime season for food and drink fests. Visitors can explore the local culinary scene at events such as the Street Eats Food Truck Festival, Devour Culinary Classic, and Flavors of the West.
4. Golf courses
5. Swimsuit season
6. World-class spas
7. Casinos
8. Family-Friendly activities such as water parks, an all-new aquarium, the Arizona Science Center, the Phoenix Children's Museum, and even the Legoland Discovery Center.
9. Mountain trails for hiking and outdoor meditation
10. Natural Sonoran Desert Preserves