Program Overview

Please provide the following information.

This application portal is to request funding from the City of Winston-Salem as part of the Transformational Non-Profits Application Process. Applications received through this portal will only be reviewed by the City of Winston-Salem. Other jurisdictions may have separate application processes. Please contact other jurisdictions (e.g., Forsyth County) for instructions regarding requests to those jurisdictions.

Submitting an application does not guarantee funding. Please see the section below regarding the scoring process. The Mayor and City Council will have final decision-making authority regarding program funding requests.

Non-profit organizations may submit funding requests for capital or operating costs.

Minimum Criteria

- Must be registered non-profit organization (includes faith-based organizations providing a public purpose)
- Must have been incorporated as a non-profit for at least one year

Scoring Process and Matrix

All completed applications will undergo a review to ensure required documents are attached. Fully completed applications will be reviewed by selected City staff members and scored based on the scoring matrix approved by the Mayor and City Council. Click here to view the scoring matrix. Scored applications will be reviewed by the City’s Management Team for potential recommendation to the Mayor and City Council who will have authority to appropriate funding for programs.

Staff reserves the right to contact any applicant to request clarification or additional details regarding application responses and materials.
Defining Performance Measures

Sections of the application will reference performance measures and outcomes as required by the U.S. Department of Treasury. Specifically, the application will request workload and effectiveness/outcome measures. Please see this video (https://www.cityofws.org/2809/Performance-Measures-Video) for general information on performance measures.

Upcoming Application Orientation Session

The City will host a virtual application orientation session on April 1, 2022 at 10:00 am. The meeting will take place virtually via the Zoom platform and will also have a live simulcast on the City’s YouTube page. The link for that meeting will be posted the morning of the meeting to the website: www.cityofws.org/clfrf

Contact Information

For any questions or concerns, please email ARPA@cityofws.org or call City Link at 336-727-8000.
A. Contact Information

Please provide the following information.

ORGANIZATION/AGENCY INFORMATION

A.1. Organization/Agency Name
The Little Theatre of Winston-Salem

A.2. Mailing Address
419 N Spruce St Winston-Salem, NC 27101

A.3. Organization Website
www.ltofws.org

A.4. Year 501 (c)(3) Status Obtained
1,950

A.5. Organization/Agency Fiscal Year
2,022

A.6. Federal Tax ID Number

A.7. Federal DUNS Number

A.8. Federal SAM Registered?
Yes

ORGANIZATION/AGENCY CONTACT INFORMATION

EXECUTIVE DIRECTOR

A9. First Name
Philip

A10. Last Name
Powell

A11. Title
Executive Director

A12. E-mail
exec@ltofws.org

A13. Phone Number
(336) 748-0857

BOARD CHAIR

A14. First Name
Jay

A15. Last Name
Matthews

A16. E-Mail
jmatthews@homestead-hills.com

A17. Phone Number
(336) 354-0805

A18. Term Expiration Date
06/30/2022
B. General Project Information

Please provide the following information.

PROJECT INFORMATION
B.1. Project/Program Title
General Operations

B.2. Project Location/Address
419 N. Spruce St Winston-Salem, NC 27101

PROJECT CONTACT/ManaGER
B3. First Name
Joelle

B4. Last Name
Irons

B5. Title
Director of Operations & Finance

B6. E-Mail
joelle@ltofws.org

B7. Phone Number
(336) 748-0857
Please provide the following information.

C.1. Provide description of project and how funds will be used
The Little Theatre of Winston-Salem's mission is to entertain, engage, and enrich our community by offering diverse opportunities to create and experience the value and impact of live theatre. We are committed to making theatre that engages, inspires and unifies communities. We pay local professional and semi-professional artists to direct, design and manage our six main stage productions a year. While our education department pays an average of 9 teachers a year to educate and engage students of all ages. Throughout our 88 years in operation we have generated nearly $10 million in ticket sales throughout our years of operations.

On average we bring 9,000 people to the downtown area. The North Carolina Arts Council has found that ticket buyers spend an additional $23.50 per person when attending an event. This is seen at the local restaurants and bars before and after the shows.

These grant funds would be used to further this mission by providing additional funds to better pay these individuals and thus increase the basic income of performing arts professionals in the Winston-Salem area. These jobs both enrich the patrons and students who attend the performances and classes as well as contributing to the economic welfare of the city.

C.2. How will a participant access the proposed project/program, use the services, and derive a beneficial outcome from participation?
Each year, hundreds of volunteers get involved as actors, crew members, and ushers, while thousands participate as audience members. We encourage individuals of all ages and experience to be a part of our productions and learn from our professional directors, designers, and staff. As a fundamental part of Winston-Salem's cultural scene, we invite everyone in the community to exercise their imaginations, stretch their creative muscles, and experience the transformative magic of live theatre. With the support of our professional staff and contractors, these volunteers get hands on experience on stage, behind the scenes and in the office. Volunteers have access to see any performance of the show they have worked towards making a reality. They have a great sense of pride when they see their work represented on the stage and witness the pleasure the audience derives from the experience. With the wide variety of volunteer positions there is something for everyone. We pride ourselves on the range of ages, backgrounds and experience levels we work with. The age range for our volunteers is 16-71 with all racial and socioeconomic peoples being represented.

C.3 Total estimated number of unique participants to be served annually
9,000

C.4. Will program beneficiaries be only residents of Winston-Salem?
No

Describe the other areas (counties) that will benefit
While the majority of our patrons are from Winston-Salem we see patrons from all over the Triad and as far as Raleigh
and Charlotte. These ticket buyers will enjoy the night of arts and entertainment we provide as well as spending additional monies in the city to have dinner or drinks before the performance. Additionally, the artists we hire and who volunteer with us are both Winston-Salem residents and those living in other cities in the triad.

**Estimate the percentage of beneficiaries that will be residents of Winston-Salem**
80.00%

**TOTAL FUNDING REQUEST**
C.5. Total Operating Funding Request
$126,300.00

C.6. Total Capital Funding Request
$50,000.00

**SPENDING TIMEFRAME**
C.7 Capital Spending Timeframe
August 2022

C.8 Operating Spending Timeframe
July 2022-June 2023
D. Project Budget Categories

Please provide the following information.

Use templates below to input the total Project Budget (only requested expenses and estimated revenues related to the program or project for which you are requesting funding) by clicking Add Column. Please include all funding from the City and other sources.

### Operating Costs

<table>
<thead>
<tr>
<th>Item</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Salaries</td>
<td>$126,300.00</td>
</tr>
<tr>
<td></td>
<td>$126,300.00</td>
</tr>
</tbody>
</table>

### Capital Costs

<table>
<thead>
<tr>
<th>Item</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Box Truck Purchase</td>
<td>$50,000.00</td>
</tr>
<tr>
<td></td>
<td>$50,000.00</td>
</tr>
</tbody>
</table>

### PROJECT/PROGRAM REVENUE CATEGORIES

Please fill out the revenue estimate table. Note: operating revenues and expenses must be balanced (be equal).

### Operating

<table>
<thead>
<tr>
<th>Item</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket sales</td>
<td>$121,800.00</td>
</tr>
<tr>
<td>Costume Rentals</td>
<td>$4,500.00</td>
</tr>
<tr>
<td></td>
<td>$126,300.00</td>
</tr>
</tbody>
</table>

### Capital

<table>
<thead>
<tr>
<th>Item</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Box Truck Purchase</td>
<td>$50,000.00</td>
</tr>
<tr>
<td></td>
<td>$50,000.00</td>
</tr>
</tbody>
</table>

Please list below all known/expected individual grants and contributions totaling 10% or more of the project's budget. Note: capital revenues and expenditures must be balanced (be equal)
E. Demographic and Geographic Distribution

Please provide the following information.

Demographic distribution is an assessment of the level of the project funds spent on a program or service provided at a physical location in a Qualified Census Tract (QCT), OR where the primary intended beneficiaries live within a QCT, OR whether the program benefits residents that earn less than 60 percent of median income for the City, OR whether over 25 percent of program beneficiaries are below the federal poverty line.

E.1 Is this project/program located in a QCT or serve residents that live in a QCT?
Yes

If yes, what percentage of clients served are estimated to be residents of QCTs? Click here to view the QCT mapping tool
50.00 %

E.2 If the project or program is not a QCT or specifically serve residents in a QCT, will residents meet the follow criteria:

☑ 25% or more of participants below the federal poverty line or participants served make less than 60% of the Area Median Income
☐ The project/program does not operate in a QCT, and beneficiaries neither reside in a QCT nor meet the income thresholds mentioned above.
Please provide the following information.

Strategic planning is a process in which organizational leaders determine their goals and objectives, and allocate needed/limited resources to successfully achieve those goals and objectives. Click here to view Winston Salem's Strategic Plan. The Strategic Plan includes three (3) tiers of priorities:

**Tier 1:**
- Focus on job creation/sustainability and workforce development
- Collaboration and funding for pre-K opportunities
- Funding for affordable housing
- Funding for economic development

**Tier 2:**
- Poverty reduction/cessation
- COVID reopening plan
- Community engagement (Power of connections)
- Funding for arts

**Tier 3:**
- Community Fundraising
- Environmental initiatives
- Address digital divide
- Address childcare needs
- Neighborhood maintenance
- Organization efficiency and public-private partnerships
- Law enforcement reform

**F.1. Please select the primary priority from the list above addressed by your project/program.**
Tier 2

**F.2. Please select the secondary priority from the list above addressed by your project/program.**
Tier 3

**F.3. Please describe how the workload or outcomes from your project/program addresses the primary priority you**
As an arts organization we are part of Tier 2. Both in the COVID reopening and Funding for the Arts. COVID hit the performing arts very hard. Not only were we unable to produce shows and sell tickets for over a year once we were able many were still scared or unwilling to come out to the theatre. We have been putting on performances since August of 2021 but we still hear from patrons that they are not comfortable sitting in a room with a crowd of strangers yet. This has continued to impact our ticket sales and thus our income.
G. Collaboration

Please provide the following information.

Collaboration is when an organization is partnering or proactively working with one or more external stakeholders to achieve the same goal.

G.1. How many other external partners, organizations, stakeholders will you be collaborating with to provide the project/program?

G.2. Please provide the names of the organizations and the roles they will serve in the project/program?
H. Administration/Reporting

Case Id: 15112
Name: Irons, Joelle - 2022
Address: *No Address Assigned

Please provide the following information.

Per U.S. Treasury rules and associated guidance, the City's framework for using these funds aligns with specific administrative reporting requirements. The administration/reporting criterion has three core elements: 1) the organization's/project's development of clear performance indicators and measurable outcomes, 2) the use of evidence-based interventions, 3) and the City's evaluation of organization and project risk.

H.1. Please clearly define the workload and outcome measures that are associated with your project/program

<table>
<thead>
<tr>
<th>Workload</th>
<th>Over the course of a season we put on 6 mainstage productions totaling in 61 performances. The education department hosts classes and workshops all year with three youth productions a year. The organization has five staff employees, hires over 40 contract employees a year to facilitate the needs of performances and classes. Additionally hundreds of volunteers learn and assist in these productions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effectiveness/Outcome</td>
<td>The most effective measurable unit of effectiveness we use is in ticket sales and class registrations. These are our two most active forms of earned income. Our budget for these outcomes is based on prior tickets sales information and class registrations. We also consider new patrons added to the data base as positive as it shows we are appealing to more and more people.</td>
</tr>
</tbody>
</table>

H.2. Does the project/program use evidence-based interventions?
Yes

Please provide a link to (or attach a copy of) the evaluation of the program model

In theatre the traditional Post Show Report shows Profit and Loss, departmental categories and ticket sales information. Donors and season ticket holders are not included, resulting in what is recorded as a loss. But is budgeted as such.

☑ Program Model Evaluation
The Drowsey Chaperone 22 03.pdf

H.3. For transparency purposes, the risk matrix is attached. This is NOT required, however, you can self-assess if you wish. Please fill out and upload the Risk Matrix.

☑ Risk Matrix
Risk Assessment WS ARPA LTWS.xlsx
I. Capacity

Please provide the following information.

An organization’s capacity can be defined as its ability to implement the proposed project, as characterized by the alignment of its mission and vision with the proposed project, existing internal infrastructure to support it, and its plan for implementation and assessment of project success.

I.1. Please provide your organization’s vision and mission statements and explain the alignment between the proposed project/program and the organizational mission.

Our mission is to entertain, engage, and enrich our community by offering diverse opportunities to create and experience the value and impact of live theatre.

We are committed to making theatre that engages, inspires and unifies communities. Each year, hundreds of volunteers get involved as actors, crew members, and ushers, while thousands participate as audience members. We encourage individuals of all ages and experience to be a part of our productions and learn from our professional directors, designers, and staff.

Our regular programming aligns with our mission statement as each production is selected with consideration towards it’s entertainment and engagement qualities. Not only are they intended to entertain the audience but to engage the actors and volunteers as they work and experience the production.

I.2. Describe the organization’s current infrastructure and capacity to deliver the program services or complete the project. Include any relevant current programming and experience providing similar services.

The Little Theatre of Winston-Salem is coming to the end of our 87th season. With a resounding come back from over a year of being shut down due to COVID restrictions. The Little Theatre of Winston-Salem is the oldest arts organization in the triad.

Currently we employ an Executive Director to oversee the organization with the assistance of the Board of Directors. The Director of Operations runs the business and customer service side of the organization, taking care of the bookkeeping and ticket sales. The Marketing Director ensures that emails and social media posts are conducted timely and efficiently while also developing the programs for the productions. The Costume Shop Manager assists the costume designers and facilitates rentals to paying clients and free rentals to Winston-Salem/Forsyth County Schools. The Technical Director oversees the construction of the sets including the training of volunteers while also providing rentals of props and set pieces to the schools and other community theater organizations.

I.3. Describe the program/project implementation plan. Include any known barriers to success and how those will be overcome.

The coming season was announced on March 1 with season ticket sales going one sale at that time. Single ticket sales will become available August 15. The first production of the 88th season is slated to open September 9. With the following productions opening October 7, December 9, February 10, March 24, and June 9. Production personnel is being contracted currently with half of the needed personnel in place. Auditions will be held two months before the first performance.

There are two outside barriers we will be working to overcome. The first being the continued concern over COVID
strains as outbreaks occur patrons are less likely to purchase tickets. There is little we can do to overcome this beyond being aware of it and budgeting accordingly and conservatively with regards to ticket sales. The second barrier we have seen this past year become stronger is the competition with other performing arts organizations for actors, technicians and patrons. We strive to be welcoming to our volunteers and paid contractors while putting on high quality community theatre. This has given us the reputation to attract these individuals over other organizations. It is something we will continue to strive for; as it is our legacy.

I.3a. Describe the program assessment plan including how the data will be collected for selected performance metrics and any other evaluation tools that will be used to determine program/project success.

Ticket sales are conducted on an online platform called Audience View. Through this program we collect patron information to further grow our marketing database. This system tracks past and current donations and ticket sales. Through reports run on this system we can track how a show is selling and the ticket types that are selling. We have an additional system for tracking class registrations. At the conclusion of a production a report is created showing actual ticket sales compared with budgeted sales. With the additional information of new patrons added to the system. This is all used to track income and overall sales of the performances. Monthly there is a Board of Directors meeting where the budget and monthly financial reports are reviewed.
J. Impact/Community Need

Please provide the following information.

Impact/Community needs concern whether or not the proposed project will address an identified need within the community and what the short term (One year) and long term (3 years) impact of this project will be.

J1. Describe the identified community need for this project/program. *Cite specific data or studies/reports that have identified this as a community need.*

There are countless studies showing that the arts contribute to the vitality of a city. The city of Winston-Salem knows this and it why it strives to be the "Arts and Innovation" city. The Arts and Economic Prosperity 5 report for the Piedmont triad showed that Nonprofit Arts and Cultural Organizations and their audiences produced $392,933,673 in economic movement. The economic impact for households in the Piedmont Triad is $292,819,000 with revenue for local government being $16,467,000. The National Endowment for the Arts has reported that 47% of North Carolina adult residents attend live music theatre or dance performances. The Little Theatre of Winston-Salem brings 9,000 people into downtown Winston-Salem every year. These people are then estimated to spend an additional $23.50 in parking and food as shown by a study done by North Carolina Arts Council. Through our volunteer program we are also able to provide entertainment and artistic opportunities to hundreds more individuals at no charge to them.

J2. Describe the short-term impacts of the project/program and how they align with the community need identified above.

Over the short-term (one year) The Little Theatre of Winston-Salem produces 6 mainstage production equalling in 61 performances. This results in over 9,000 individuals coming downtown throughout the year. These individuals are estimated to spend an additional $23.50 per person. Equaling $211,500 spent at local restaurants, bars and hotels. Additionally over the course of one year the staff salaries are $126,300 and the contracted employees income is an additional $11,230. Roughly 300 volunteers experience live theatre, learn more about the craft and have the opportunity to express themselves creatively at no cost throughout the year.

J3. Describe the long-term impacts of the project/program and how they align with the community need identified above.

Over the course of the next three years The Little Theatre of Winston-Salem will continue to do performances while employing professional and semi-professionals in the performing arts. As well as growing out volunteer pool. We are only just beginning to come out of the dark time of the COVID shutdown and know that as people continue to feel safer coming out our volunteer and patron numbers will increase. As we continue to strive to produce high quality productions we will attract more volunteers and patrons to participate in the audience, on the stage and behind the scenes.

J4. Referencing previous section on outcomes, describe how the impacts noted above will be measured.

Ticket sales and class registrations will continue to be monitored and reported. New patrons will continue to be added to the marketing data base. Volunteers will continue to attend work calls and performances.
K. Funding Stability

Please provide the following information.

Funding stability is an assessment of both the organization's annual funding and the planned funding mechanism for the project/program from grants, donations, sales, and other income generators. To the extent possible, the City wishes to ensure applying entities have sustainable funding sources outside the City's ARPA allocation. An entity will be deemed as having superior funding stability if it demonstrates at least three years of sustainable grant, contribution, and/or fee-based revenues to cover operating costs. The entity must also demonstrate commitments from other organizations to cover the full cost of project deficits or future-year operating costs (in combination with realistic fee-based revenue assumptions).

K.1. Have your organization’s operating revenues covered operating expenses the last three years?
Yes

K.2. Approximately what percentage of your organization’s total budget is covered by competitive grants that you must re-apply for?
18.00 %

K.3. What percentage of your project/program’s budget is covered by City ARPA funds as part of this request?
30.00 %

K.4. Please provide narrative on funding for this program after City ARPA funding has been exhausted.
This City ARPA funds are meant to be a post COVID revitalization. They will help restrengthen our financial stability after nearly a year and a half of being shut down. The COVID shutdown not only was a time of little income it began with the need to refund a large number of people's ticket sales despite having had to purchase set material and performance rights. This put a great strain on the organization. These funds will help bolster our financial state so that we are better able to provide the services for our patrons and the community in which we perform.

K.5. Please attach commitment letters from other organizations showing financial support for the project/program.

☐ Commitment Letters

**No files uploaded**
L. Representation

Please provide the following information.

Representation deals with how diverse an organization's leadership is compared with community demographics, which includes Winston-Salem's race/ethnic backgrounds as well as gender. Local non-profit organizations should reflect the communities they serve. Since organizations are requesting to receive ARPA funding through the City, we must ensure these entities hold themselves accountable to having diverse staff and leadership panels.

L.1. Provide a list of board members including the race, ethnicity, and gender identification for each member.

<table>
<thead>
<tr>
<th>Name</th>
<th>Race</th>
<th>Ethnicity</th>
<th>Gender Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jay Matthews</td>
<td>White</td>
<td>Caucasian</td>
<td>Male</td>
</tr>
<tr>
<td>Dustin Greene</td>
<td>White</td>
<td>Caucasian</td>
<td>Male</td>
</tr>
<tr>
<td>Daniel Alvarez</td>
<td>White</td>
<td>Hispanic</td>
<td>Male</td>
</tr>
<tr>
<td>Chris Cohen</td>
<td>White</td>
<td>Jewish</td>
<td>Male</td>
</tr>
<tr>
<td>Kathy Cisna</td>
<td>White</td>
<td>Caucasian</td>
<td>Female</td>
</tr>
<tr>
<td>Chad Edwards</td>
<td>White</td>
<td>Caucasian</td>
<td>Male</td>
</tr>
<tr>
<td>Erik Hall</td>
<td>White</td>
<td>Caucasian</td>
<td>Male</td>
</tr>
<tr>
<td>Sarah Jenkins</td>
<td>White</td>
<td>Caucasian</td>
<td>Female</td>
</tr>
<tr>
<td>Tamison Jewwett</td>
<td>White</td>
<td>Caucasian</td>
<td>Female</td>
</tr>
<tr>
<td>Brian Joyce</td>
<td>White</td>
<td>Caucasian</td>
<td>Male</td>
</tr>
<tr>
<td>Ron Law</td>
<td>White</td>
<td>Caucasian</td>
<td>Male</td>
</tr>
<tr>
<td>Jennifer Lenchik</td>
<td>White</td>
<td>Caucasian</td>
<td>Female</td>
</tr>
<tr>
<td>Robert Muhammad</td>
<td>Asian</td>
<td>Middle Eastern</td>
<td>Male</td>
</tr>
<tr>
<td>Loy Ann Pacula</td>
<td>White</td>
<td>Caucasian</td>
<td>Female</td>
</tr>
<tr>
<td>Elizabeth Rief</td>
<td>White</td>
<td>Caucasian</td>
<td>Female</td>
</tr>
<tr>
<td>Daryl Rosenbaum</td>
<td>White</td>
<td>Caucasian</td>
<td>Male</td>
</tr>
<tr>
<td>Garry Wadell</td>
<td>Black</td>
<td>African-American</td>
<td>Male</td>
</tr>
<tr>
<td>Jordan Xu</td>
<td>White</td>
<td>Caucasian</td>
<td>Female</td>
</tr>
</tbody>
</table>
M. Required Documents

Please provide the following information.

For North Carolina Secretary of State - Current and Active Status, [Click Here]

Documentation

- **Code of Conduct/Conflict of Interest Policy** *Required*
  LTWS Conflict of Interest Policy.pdf

- **Copy of the agency’s latest 990 Form as submitted to the Internal Revenue Service** *Required*
  2019 990 Public Disclosure Copy.pdf

- **Organization By-Laws** *Required*
  TCS Bylaws 2020-07.pdf

- **Articles of Incorporation** *Required*
  LT articles of incorp.pdf

- **Organization Policies (including personnel, formal non-discrimination, procurement, accounting, etc)** *Required*
  Current Employee Handbook - LTWS version of 2015 HB.pdf

- **IRS 501(c)3 Designation Letter** *Required*
  501c3 certification.gif
☑ Most recent audited financial statements or a third-party review *Required
 audit-21.final.pdf

☑ North Carolina Secretary of State - Current and Active Status *Required
 Issuance of License.pdf
Please provide the following information.

☑️ I certify that all information entered into this application is true.

Joelle Irons

*Electronically signed by joelle@ltofws.org on 4/15/2022 12:08 PM*

04/15/2022