

# MCKINNEY COMMUNITY DEVELOPMENT CORPORATION

## Grant Application

Fiscal Year 2017

### IMPORTANT:

- Please read the McKinney Community Development Corporation Grant Guidelines prior to completing this application.
- The Grant Guidelines and Application are available at [www.mckinneycdc.org](http://www.mckinneycdc.org); by calling 972.547.7653 or by emailing [cschneible@mckinneycdc.org](mailto:cschneible@mckinneycdc.org)
- **Please call to discuss your plans for submitting an application in advance of completing the form.** A completed application and all supporting documents are required to be submitted via email or on a thumb drive for consideration by the MCDC board. Please submit the application to:

McKinney Community Development Corporation  
5900 S. Lake Forest Blvd., Suite 110  
McKinney, TX 75070

- *If you are interested in preliminary Board of Directors review of your project proposal or idea, please complete and submit the **Letter of Inquiry** form, available at [www.mckinneycdc.org](http://www.mckinneycdc.org), by calling 972.547.7653 or emailing [cschneible@mckinneycdc.org](mailto:cschneible@mckinneycdc.org).*

**Applications must be completed in full, using this form, and received by MCDC, via email or on a thumb drive, by 5:00 p.m. on the date indicated in schedule below.**

**Please indicate the type of funding you are requesting:**

| Application Deadline       | Presentation to MCDC Board | Board Vote and Award Notification |
|----------------------------|----------------------------|-----------------------------------|
| Cycle I: November 30, 2016 | December 2016              | January 2017                      |
| Cycle II: May 31, 2017     | June 2017                  | July 2017                         |

- Project Grant**  
Projects that are eligible for funding in accordance with the Type B sales tax statute (refer to examples in Grant Guidelines) and that advance the mission of MCDC.

- Promotional or Community Event Grant (maximum \$15,000)**  
Initiatives, activities or events that promote the City of McKinney for developing new or expanded business opportunities and/or tourism – and enhancing quality of life for McKinney residents.

### Promotional and Community Event Grants:

#### Project Grants:

| Application Deadline       | Presentation to MCDC Board | Board Vote and Award Notification |
|----------------------------|----------------------------|-----------------------------------|
| Cycle I: December 30, 2016 | January 2017               | February 2017                     |
| Cycle II: March 31, 2017   | April 2017                 | May 2017                          |
| Cycle III: June 30, 2017   | July 2017                  | August 2017                       |

## APPLICATION

### INFORMATION ABOUT YOUR ORGANIZATION

Name: **Crape Myrtle Trails of McKinney Foundation**

Federal Tax I.D.: **75-2788771**

Incorporation Date: **September 1998**

Mailing Address: **P.O. Box 2909**

City **McKinney**

ST: **TX**

Zip: **75070**

Phone: **972.768.7155**

Fax: **214.385.2434**

Email: **pdwheat@unitedplanners.com**

Website: [www.crapemyrtletrails.org](http://www.crapemyrtletrails.org)

**Check One:**

- Nonprofit – 501(c) Attach a copy of IRS Determination Letter  
 Governmental entity  
 For profit corporation  
 Other

Professional affiliations and organizations to which your organization belongs: **U.S. National Arboretum (Washington, D.C.), Texas Nursery and Landscape Association (TNLA) headquarters in Austin, TX), Dallas Arboretum and Botanical Garden (Dallas, TX), Crape Myrtle Society of America, McKinney Chamber of Commerce**

**REPRESENTATIVE COMPLETING APPLICATION:**

Name: **Susan Shuttleworth**

Title: **Board Secretary**

Mailing Address: **6401 S. Custer Rd. #2000**

City: **McKinney**

ST: **TX**

Zip: **75070**

Phone: **972.342.1413**

Fax: **214.385.2434**

Email: [shuttleworth.susan@gmail.com](mailto:shuttleworth.susan@gmail.com)

**CONTACT FOR COMMUNICATIONS BETWEEN MCDC AND ORGANIZATION:**

Name: Phil Wheat

Title: Board President

Mailing Address: 6401 S. Custer Rd., #2000

City: McKinney

ST: TX

Zip: 75070

Phone: 972.768.7155

Fax: 214.385.2434

Email: pdwheat@unitedplanners.com

**FUNDING**

Total amount requested: \$7,780.00

Matching Funds Available (Y/N and amount): No

Will funding be requested from any other City of McKinney entity (e.g. Arts Commission, City of McKinney Community Support Grant)?

Yes

No

Please provide details and funding requested: Printing (Total = **\$2,780.00**), Sponsor Solicitation Pieces = **\$180.00**, Road Signs (like the ones candidates put out before elections) = **\$2,000**, School Posters (2 for each of McKinney's 30 schools including MCA and Serenity High; 1 in the gyms and the other in the front offices) = **\$100.00**, "Windshield" Event Save the Date Cards (placed on windshields at prior area runs) = **\$300**, Pre-Event Trail Signs (placed on the hike/bike trail we use for the run two weeks prior to our event), Minuteman Press = **\$200.00**, Radio Spots Total = **\$5,000** ( McKinney Station KLAK) = \$2,000 and TBD Dallas Station = **\$3,000**. Total Requested = **\$7,780.00**

**PROJECT/PROMOTIONAL/COMMUNITY EVENT**

Start Date: 09/23/2017

Completion Date: 09/23/2017

**BOARD OF DIRECTORS** (may be included as an attachment)

|                 |               |                    |               |
|-----------------|---------------|--------------------|---------------|
| Neil Sperry     | Kari McDaniel | Susan Shuttleworth | Andrea Harvey |
| Lynn Sperry     | Kerry Cassuto | Rodney Haynes      | Betty Comegys |
| Melanie Hedrick | Matt Latham   | Phil Wheat         | Barbra Dutton |
| Rick McDaniel   | Mark Bates    | Bram Franklin      |               |

**LEADERSHIP STAFF** (may be included as an attachment)

Phil Wheat, President

Melanie Hedrick, Vice President

Andrea Harvey, Treasurer

Susan Shuttleworth, Secretary

**Using the outline below, provide a written narrative no longer than 7 pages in length:**

**I. Applying Organization** (Our Narrative immediately follows this instructive outline.)

Describe the mission, strategic goals and objectives, scope of services, day to day operations and number of paid staff and volunteers. (See Written Narrative)

Disclose and summarize any significant, planned organizational changes and describe their potential impact on the Project/Promotional/Community Event for which funds are requested. (See Written Narrative)

**II. Project or Promotional/Community Event (whichever is applicable)** (See Written Narrative)

- Outline details of the Project/Promotional/Community Event for which funds are requested. Include information regarding scope, goals, objectives, target audience. (See Written Narrative)
- **For Promotional Grants/Community Events** – describe how this initiative will **promote the City of McKinney for the purpose of business development and/or tourism**. (See Written Narrative)
- Describe how the proposed Project/Promotional/Community Event fulfills strategic goals and objectives for your organization. (See Written Narrative)
- Please also include planned activities, time frame/schedule, and estimated attendance and admission fees if applicable. (See Written Narrative)
- Include the venue/location for Project/Promotional/Community Event. (See Written Narrative)
- Provide a timeline for the Project/Promotional/Community Event. (See Written Narrative)
- Detail goals for growth/expansion in future years. (See Written Narrative)

**Project Grants** – please complete the section below: (Not applicable for CMT submission)

- |                             |                              |                             |
|-----------------------------|------------------------------|-----------------------------|
| • An expansion/improvement? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • A replacement/repair?     | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • A multi-phase project?    | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • A new project?            | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

**Has a feasibility study or market analysis been completed for this proposed project?** *If so, please attach a copy of the Executive Summary. (Not applicable as we are a non-project submission)*

**Provide specific information to illustrate how this Project/Promotional/Event aligns with one or more of the goals and strategies adopted by McKinney City Council and McKinney Community Development:** *(See Written Narrative)*

- Eligible for MCDC consideration under Sections 501 to 505 of the Texas Local Government Code (refer to MCDC Grant Guidelines)
- Support cultural, sports, fitness, entertainment, community projects and events that attract resident and visitor participation and contribute to quality of life, business development and growth of McKinney sales tax revenue
- Highlight and promote McKinney as a unique destination for residents and visitors alike
- Meet citizen needs for quality of life improvements, business development and sustainable economic growth for residents in the City of McKinney
- Demonstrate informed financial planning – addressing long-term costs, budget consequences and sustainability of projects for which funding is requested
- Educate the community about the impact local dining and shopping has on investment in quality of life improvements in McKinney

**Indicate which goal(s) listed above will be supported by the proposed Project/Promotional/Event:**  
*(See Written Narrative)*

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**Has a request for funding, for this Project/Promotional/Community Event, been submitted to MCDC in the past?**

Yes                      X  No (We applied for the "Project Grant" only Dec. 30, 2015)

**Date(s):**

### **III. Financial**

- Provide an overview of the organization's financial status including the impact of this grant request on organization mission and goals.
- Please attach your organization's budget for the current year and audited financial statements for the preceding two years. If audited financials are not available, please indicate why.

Our latest balance sheet report (April 17, 2017) is attached, which includes the 2017 operations budget and run budget. Our entire operational budget is funded by our annual event, and the impact the MCDC grant has on this is shown on the 2017 Run Budget.

As stated above, our 2017 Budget is attached. Due to the size of our organization and net worth, the audited financial statement requirement has been waived in all past years.

**What is the total estimated cost for this Project/Promotional/Community Event?**

**\$21,000** – Expenses related to our CMT event

**(Please provide a budget specific to the proposed Project/Promotional/Community Event.)** (See written narrative)

**What percentage of Project/Promotional/Community Event funding will be provided by the Applicant?** 67% - If MCDC grant is approved, CMT will raise 67% of the expenses through runner fees and sponsorships.

**Are Matching Funds available?**  Yes  No

|            |        |            |
|------------|--------|------------|
| Cash \$    | Source | % of Total |
| In-Kind \$ | Source | % of Total |

**Please provide details regarding other potential sources for funding. Include name of organization solicited; date of solicitation; amount of solicitation and date that notice of any award is expected.**

No other federal, state, or municipal entities or foundations have been approached by CMT for funding or matching funds.

#### **IV. Marketing and Outreach**

Describe marketing plans and outreach strategies for your organization, for the Project/Promotional/Community Event for which you are requesting funding – and how they are designed to help you achieve current and future goals.

Our marketing plans and outreach strategies for our event and how they are designed to help us achieve current and future goals are as follows:

- Our marketing and outreach goals will primarily include a combination of high-touch personal promotion and sponsorship solicitation efforts, high-tech social media, and email efforts.
- Board member, Kerry Cassuto, is in charge of the email blasts and social media campaign, as well as promotion through our website. Media outreach will involve expanded radio advertising and increasing the number of our press releases.
- RunOn (our run timer and consultant) will promote our event on their website and calendar, as well as send an email promoting our event to their 60,000-runner list.
- Our high-touch effort will again include personal solicitation of sponsorships. Posters will be distributed to businesses throughout August and September. Six email blasts will go out, spread evenly between August 1 and September 22.
- MISD has agreed to include the CMT event on their on-line communications to students and parents. This will take place in early September. We will visit each McKinney campus the first week of September to speak with the PE coaches and deliver three posters per school.
- Board members Kari McDaniel and Lynn Sperry will coordinate our efforts with McKinney schools as well as our neighboring districts. They will start communication efforts the second week of August.

- Lifelong running enthusiast Lisa Higgins is providing consulting services for our Run Team's efforts to attract runners from outside of McKinney. Her initiatives already include getting on local, state and national runner calendars starting January 2017.

## V. Metrics to Evaluate Success

Outline the metrics that will be used to evaluate success of the proposed Project/Promotional/ Community Event. If funding is awarded, a final report will be required summarizing success in achieving objectives outlined for the event.

Our metrics that will be used to evaluate success of our proposed Community Event are shown below. We understand that if funding is awarded, a final report will be required summarizing success in achieving objectives outlined for the event.

The metrics we will use to evaluate success of our event include the following:

1. Sponsor Donations Goal - \$21,000
2. Runner Fees Goal - \$15,000
3. MCDC Return on Investment Goal - 100%
4. Participant Count Goal: 1,100
5. Non-McKinney Participant Goal: 35%
6. Broad Sponsorship Base Goal: 40
7. Profit Goal: \$21,000

## WRITTEN NARRATIVE:

### **The Crape Myrtle Trails of McKinney Foundation is the Applying Organization for Promotional/or Community Event Grant**

Our mission, strategic goals, objectives, scope of services, day-to-day operations, and number of paid staff and volunteers are as follows:

The Crape Myrtle Trails of McKinney Foundation is an all-volunteer organization made up of 15 McKinney citizens at this time. Most of us own businesses or are in McKinney public service roles. The names of our board members and those in leadership positions are shown on another part of this application. We have no paid staff.

### **Summary of significant planned organizational changes and their potential impact on the Project/Promotional Activity/Community Event for which funds are requested.**

We have not had, nor do we anticipate, any organizational changes. The evolution and changes pertaining to our event are described in the previous section.

Our formal mission is as follows:

**The mission of the Crape Myrtle Trails of McKinney Board is to be an integral part of elevating the beauty and appeal of our great city to the highest levels by showcasing the premier flowering plant of the South throughout our community in a thoughtful and meaningful manner and by promoting McKinney, Texas - as "America's Crape Myrtle City!!"**

Our goals, objectives, and "scope of services" are described below, with "day-to-day operations" shown parenthetically:

- Continual development and improvement of McKinney's World Collection Park! *(Our horticulture team works with the City's Parks Department to maintain and improve the park; we provide fertilization and pruning of the park's crape myrtle trees, as well as replacing crape myrtle trees as needed.)*

- Promoting and funding strategic plantings of crape myrtles in key venues throughout the city! *(We work with McKinney businesses and schools to implement and/or help design crape myrtle plantings within their landscapes.)*
- Continuing to award cash grants to the Physical Education Departments of McKinney schools to promote the health of our youth! *(We donate \$5 to the PE department of each school for every student and adult who participates in our annual run and registers under the school's name – including neighboring city schools outside MISD).*
- Growing the positive impact our annual event has on our city's culture and tradition! *(We continually strive to improve our [Crape Myrtle Run the Trails](#) event. In the past four years we have added "Myrtle Village," which includes a world-class petting zoo, an inflated obstacle course, face painting, and other attractions. Our stage show engages audience participation with musical pre-run calisthenics, a chicken dance contest, and a kiss-the-pig show. Our awards include medals for all children who participate in the 1-mile fun run; and medals in age-based categories for winners of the 5 and 10K races. We also coordinate promotional efforts with McKinney's Oktoberfest celebration, which is the same weekend as our event.)*
- Providing Crape Myrtles annually since 2006 to 5th grade students of McKinney ISD elementary schools the Friday immediately prior to Mother's Day to take home to Mom! *(With the help of several McKinney service clubs, we now provide a crape myrtle tree to every 5th grade student in the McKinney Independent School District. This is a major milestone for us, and a great "feel-good" tradition for McKinney.)*
- Continuing to promote McKinney as America's Crape Myrtle City and to be a special "piece in the puzzle" of McKinney's continued and improving national recognition! *(Our promotional efforts have resulted in McKinney being officially proclaimed as "America's Crape Myrtle City" by the Texas House of Representatives, the Texas Senate, and the United States Congress. Great cities have a "heart and soul" element, and we are committed to being an ever-growing part of this piece of the puzzle for McKinney!)*

#### **Our Community Event - Scope, Goals and Target Audiences**

- The scope of our event can be described as a combination of a family fun run, a school-centered fitness and spirit-building endeavor, a healthy morning option to burn off calories before indulging at Oktoberfest, a free community festival, and two competitive races along officially certified 5K and 10K courses.
- The goals and objectives of our event are to raise funds for our annual budget, to promote the objectives of our financial supporters, to bring a substantial number of visitors to McKinney for the day or weekend and to increase the positive influence our annual event has on the culture of our city. Our specific goal for the MCDC grant is to provide a return on its investment amount of 100 percent or more.
- The primary target audiences for our event are the school children and their families from the McKinney Independent School District and those of our neighboring districts, plus professional runners from North Texas and beyond who would be attracted to a combination of our event and staying over for McKinney's Oktoberfest.

#### **How our event will promote the City of McKinney for the purpose of business development and/or tourism.**

- With regard to business development and tourism, our Fun Run and Festival event is taking



bold steps to increase our north Texas appeal and attract visitors to McKinney. In 2014 we moved the date from the beginning of the Thanksgiving holiday to the McKinney Oktoberfest weekend, which marks the end of summer. We also added a 10K run to our race format. In conjunction with Oktoberfest, we are teaming with downtown merchants and local hotels to draw runners, participants, and overnight guests to our run and festival. For example, we encourage runners to stay for Oktoberfest by arranging for them to show their "runner bib" to get food and beverage tickets at Oktoberfest! In 2017, we would like to expand our radio advertising, post on national "runners' calendars, and promote our event in runners' publications. All of this is intended to increase tourism and encourage trade with McKinney businesses.

- With regard to the promotion of the City of McKinney, this is our 12<sup>th</sup> year for this event and it has become a family-oriented part of our McKinney culture. For example, McClure Elementary School has won the coveted, traveling "Myrtle Trophy" for five consecutive years for having the most participants of all McKinney schools. For achieving their first four consecutive "titles", they were awarded a permanent version of the "Myrtle Trophy" at a school assembly in October 2014. And Myrtle the Pig was among the honored guests, and yes, she kissed Coach Niki one more time in front of over 500 very enthusiastic McClure students! The coach at McClure has informed us of concerted efforts by their sister schools to unseat them. We arrange to award the checks to the schools' PE departments, as well as the Mother's Day crape myrtle trees, during their Friday assemblies. The enthusiasm is fantastic! Believe us, these kiddos are building lasting memories of something really cool about growing up in McKinney! Oh, and did we mention that both Texas legislative bodies and the U.S. Congress have proclaimed McKinney, Texas, as "America's Crape Myrtle City".

#### **How our Community Event fulfills strategic goals and objectives for the organization.**

- Having a positive impact of the image of our city is one of our strategic goals, as is growing the positive impact our annual event has on our city's culture and traditions! In addition, our event is our only fund raiser, which is responsible for our being able to maintain and improve McKinney's World Collection Park, monetarily contribute to the physical health of our school children (through our grants to PE departments), cooperate with city staff and private businesses to further beautify medians, parks, corporate properties, and other landscapes, continue to supply the Mother's Day crape myrtle gift to every McKinney 5th grade student and to continue to be a "piece in the puzzle" for McKinney being recognized as one of the very finest cities in America!

#### **Planned activities, time frame/schedule, and estimated attendance and admission fees if applicable.**

- Our event's activities (in scheduled order) are: booth setup (6am), on-site runner registration and opening of Myrtle Village; welcome & instructions (7am); musical calisthenics (7:30am); 1-Mile Fun Run start (8am); 5K and 10K race start (8:30am), chicken dance contest (9:45am); School Spirit Awards & Kiss the Pig Show (10 a.m.); Run Awards (10:30 a.m.). In addition, prizes (such as gift cards from local businesses) will be given out from the stage throughout the morning with random drawings of registered participants. Also continuous promotion from stage to recognize sponsors and generate participation for Oktoberfest in downtown McKinney.
- Our entire event will take place Saturday morning, September 23, 2017, 6am to 10:30am and the festival is free to the public. We plan for our runner's fee structure to remain as it has been - Race participant fees are \$15 for students, \$25 for adult 5K runners, and \$30 for adult 10K runners. The fees go up by \$5 for adult runners who register after September 16, 2017.

### **The venue/location for Project/Promotional/ Activity/Community Event?**

- Our venue for the start/finish line of the runs, the event stage, Myrtle Village and parking will be the North parking lot of McKinney Boyd High School, located at 600 North Lake Forest Drive, McKinney, TX 75071. The [certified run trails](#) will all take place on the McKinney "hike and bike" trail, which is adjacent to and just North of the school parking lot.

### **Timeline for the Project/Promotional Activity/Community Event.**

- The timeline for the project itself starts February 1, 2017 with Rodney Haynes, Barbra Dutton, Mark Bates, and Susan Shuttleworth as event co-chairs. They will start interacting with the [RunOn organization](#) to coordinate marketing and promotional efforts. They will continue to evaluate the positions of the stage, the start/finish line, and Myrtle Village to cultivate more enthusiasm as participants finish.
- [RunOn](#) has already been contracted to time our runs as well as promoting us on their website and calendar.
- Our sponsor solicitation will start in May 2017, and the deadline for sponsorships is September 1. Posters will be distributed to area schools and businesses in August and September. Six email blasts will go out, spread out evenly between August 1 and September 22nd.
- Promotional items design/production (road signs, school posters, save-the-date windshield cards, pre-event trail signs, and promotional road signs) starts in May with distribution through September 22<sup>nd</sup>.
- MISD has agreed to include our event in their on-line communications to students and parents. This will take place in early September. We will visit each McKinney campus the first week of September to speak with the PE coaches and deliver three posters per school.
- Board members Kari McDaniel and Lynn Sperry will coordinate our efforts with McKinney schools, as well as our neighboring districts. They will start their communication efforts the second week of August.
- Lifelong runner Lisa Higgins has agreed to serve in an advisory capacity to our Run-Team. Her vast experience and love of the sport will help us attract more out-of-town runners, as well as greatly help our passion to move from "good to great" in the perceived quality of our event!

### **Detail goals for growth/expansion in future years.**

- We had over 1000 registered runners in 2016, which was an increase of over 25%. Our goal is to register 1,100 runner participants in 2017. Considering that many or most runner participants (especially students) bring other (non-runner) family members, our total attendance and impact exceed what runner participant numbers would otherwise indicate.

### **How this Project/Promotion/Event will enhance quality of Life and further business and economic development in the City of McKinney, and support a key MCDC goal:**

#### **Contributing to economic development and/or tourism within McKinney and quality of life improvements:**

All of the following is intended to increase tourism, encourage trade within McKinney businesses, and assist in meeting citizen need for healthy opportunities for quality of life improvements:

- With regard to economic development and tourism within McKinney, our Fun Run and Festival staff is

taking bold steps to increase our county-wide appeal and attract visitors to McKinney. In 2014 we moved the date from the beginning of the Thanksgiving holiday to the McKinney Oktoberfest weekend, which is at the end of summer.

- We also added a 10K run to our race format to attract more serious community runners and out-of-town runners. In conjunction with Oktoberfest, we are teaming with downtown merchants and local hotels to draw customers and overnight guests to enjoy both our Run and Festival and Oktoberfest. For example, we encourage runners to stay for Oktoberfest by arranging for them to show their "runner bib" to get free food and beverage tickets at Oktoberfest in 2017.
- We will expand our radio advertising, post on national runners' calendars and advertise in national runners' publications.
- In regard to enhancing quality of life for McKinney citizens, this is the 12<sup>th</sup> annual year providing citizens a Saturday morning run event as an excellent option for families to participate in before indulging in Oktoberfest.

## **Acknowledgements**

***If funding is approved by the MCDC board of directors, Applicant will assure:***

- The Project/Promotional/Community Event for which financial assistance is sought will be administered by or under the supervision of the applying organization.
- All funds awarded will be used exclusively for the purpose described in this application.
- MCDC will be recognized in all marketing, advertising, outreach and public relations as a funder of the Project/Promotional/Community Event. Specifics to be agreed upon by applicant and MCDC and included in an executed performance agreement.
- Organization's officials who have signed the application are authorized by the organization to submit the application;
- Applicant will comply with the MCDC Grant Guidelines in executing the Project/Promotional/ Community Event for which funds were received.
- A final report detailing the success of the Project/Promotional/Community Event, as measured against identified metrics, will be provided to MCDC no later than 30 days following the completion of the Project/Promotional/Community Event.
- Up to 80% of the approved grant may be provided, on a reimbursement basis, prior to conclusion of the Project/Promotional/Community Event with submission of invoices/receipts to MCDC. The final 20% may be paid following MCDC's receipt of unpaid invoices/receipts; documentation of fulfillment of obligations to MCDC; and final report on the Project/Promotional/Community Event.

The required performance agreement will contain a provision certifying that the applicant does not and will not knowingly employ an undocumented worker in accordance with Chapter 2264 of the Texas Government Code, as amended. Further, should the applicant be convicted of a violation under 8 U.S.C. § 1324a(f), the applicant will be required to repay the amount of the public subsidy provided under the agreement plus interest, at an agreed to interest rate, not later than the 120<sup>th</sup> day after the date the MCDC notifies the applicant of the violation.

**We certify that all figures, facts and representations made in this application, including attachments, are true and correct to the best of our knowledge.**

**Chief Executive Officer**




Signature

Phil Wheat, Board President

Printed Name

Date May 29, 2017

**Representative Completing Application**



Signature

Susan Shuttleworth, Board Secretary

Printed Name

Date May 29, 2017

***INCOMPLETE APPLICATIONS, OR THOSE RECEIVED AFTER THE DEADLINE, WILL NOT BE CONSIDERED.***

**CHECKLIST:**

**Completed Application:**

- Use the form/format provided
- Organization Description
- Outline of Project/Promotional/Community Event; description, budget, goals and objectives
- Indicate the MCDC goal(s) that will be supported by this Project/Promotional/Community Event
- Project/Promotional/Community Event timeline and venue
- Plans for marketing and outreach
- Evaluation metrics
- List of board of directors and staff

**Attachments:**

- Financials: organization's budget for current fiscal year; Project/Promotional/Community Event budget; audited financial statements
- Feasibility Study or Market Analysis if completed (Executive Summary)
- IRS Determination Letter (if applicable)

***A FINAL REPORT IS TO BE PROVIDED TO MCDC WITHIN 30 DAYS OF THE EVENT/COMPLETION OF THE PROJECT/PROMOTIONAL/COMMUNITY EVENT.***

***FINAL PAYMENT OF FUNDING AWARDED WILL BE MADE UPON RECEIPT OF FINAL REPORT.***

***PLEASE USE THE FORM/FORMAT OUTLINED ON THE NEXT PAGE.***



## **McKINNEY COMMUNITY DEVELOPMENT CORPORATION**

### **Final Report**

**Organization:**

**Funding Amount:**

**Project/Promotional/Community Event:**

**Start Date:**

**Completion Date:**

**Location of Project/Promotional/Community Event:**

**Please include the following in your report:**

- Narrative report on the Project/Promotional/Community Event
- Identify goals and objectives achieved
- Financial report – budget as proposed and actual expenditures, with explanations for any variance
- Samples of printed marketing and outreach materials
- Screen shots of online Promotions
- Photographs, slides, videotapes, etc.
- Performance against metrics outlined in application

**Please submit Final Report no later than 30 days following the completion of the Project/Promotional/Community Event to:**

McKinney Community Development Corporation  
5900 S. Lake Forest Blvd., Suite 110  
McKinney, TX 75070

Attn: Cindy Schneible  
[cschneible@mckinneycdc.org](mailto:cschneible@mckinneycdc.org)

2016 Cape Myrtle Trails of McKinney "Cape Myrtle Run & Festival" Budget

| REVENUE                           |             |             |             |
|-----------------------------------|-------------|-------------|-------------|
|                                   | Goal        | Received    | To Receive  |
| Registration Fees                 | \$16,000.00 | \$15,710.00 | \$16,000.00 |
| 800 runners @ \$21                | \$25,000.00 | \$13,800.00 | \$25,000.00 |
| Sponsorship                       | \$6,000.00  | \$6,000.00  | \$6,000.00  |
| MCDC                              | \$47,000.00 | \$47,000.00 | \$47,000.00 |
| Totals                            |             |             |             |
| * adjusted for pledge level and   |             |             |             |
| REVENUE TOTAL                     |             |             | 2845.5      |
| EXPENSES                          |             |             |             |
|                                   | Budget      | Paid        | Remaining   |
| Race Mgt Team, Signs              | \$3,600.00  | \$4,106.35  | -\$506.35   |
| Promo Material                    | \$9,600.00  | \$9,191.47  | \$408.53    |
| (\$6,000 MCDC for Pre-Event Only) |             |             |             |
| Extra Help, etc                   | \$0.00      | \$480.00    | -\$480.00   |
| Security                          | \$250.00    | \$320.00    | -\$70.00    |
| Basic Rentals & Purchases         | \$1,000.00  | \$900.00    | \$100.00    |
| Stage, Toilets, etc.              |             |             |             |
| Myrtle Village Fees & Rentals     | \$4,200.00  | \$7,525.91  | -\$3,325.91 |
| Prizes                            | \$300.00    | \$0.00      | \$300.00    |
| Medals & Trophies                 | \$650.00    | \$875.60    | -\$225.60   |
| Misc                              | \$500.00    | \$891.30    | -\$391.30   |
| BUDGET EXPENSE TOTAL              | \$21,000.00 | \$23,810.63 | -\$2,810.63 |
| Expense Actual                    |             |             |             |
| Revenue Anticipated               |             |             |             |
| Misc:                             |             |             |             |
| Magician                          | 500         | +100 tip    |             |
| LINKS                             | 291.3       |             |             |
| Gretchen                          | 480         |             |             |
| Signs:                            |             |             |             |
| Minutemai                         | 1346.24     |             | 86.04       |
| Pro Marketing Whowie              | 300         |             | 198.9       |
| PGS - T Shirts                    | 3708.5      |             | 458.3       |
| Steph Thomas                      | 590.54      |             | 1260.85     |
| Pro Marketing                     | 174.06      |             | 328.89      |
| KLAK                              | 2000        |             |             |
| Myrtle Village:                   |             |             |             |
| Cathy's                           | 1392        |             | 150         |
| Big d                             | 4226.5      |             |             |
| Metro Linen                       | 752.41      |             |             |
| Toilets A-1                       | 750         |             |             |
| Jump City                         | 555         |             |             |
| Rentals:                          |             |             |             |
| MISD                              |             |             |             |
| Medals:                           |             |             |             |
| Active                            |             |             | 725.6       |
| Engraving                         |             |             | 150         |





## Request for Taxpayer Identification Number and Certification

Give Form to the  
requester. Do not  
send to the IRS.

Print or type  
See Specific Instructions on page 2.

|   |   |
|---|---|
| Name (as shown on your income tax return)<br><b>Crape Myrtle Trails of McKinney Foundation</b>  |   |
| Business name/disregarded entity name, if different from above  |   |
| Check appropriate box for federal tax classification:<br><input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate<br><input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____<br><input checked="" type="checkbox"/> Other (see instructions) ▶ <b>Non-Profit, 501-C3</b> |   |
| <input type="checkbox"/> Exempt payee   |   |
| Address (number, street, and apt. or suite no.)<br><b>6401 South Custer Road, Suite 2000</b>  | Requester's name and address (optional) |
| City, state, and ZIP code<br><b>McKinney, Texas 75070</b>   |   |
| List account number(s) here (optional)  |   |

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

| Social security number |  |  |   |  |  |  |  |  |
|------------------------|--|--|---|--|--|--|--|--|
|                        |  |  | - |  |  |  |  |  |

| Employer identification number |   |   |   |   |   |   |   |   |   |
|--------------------------------|---|---|---|---|---|---|---|---|---|
| 7                              | 5 | - | 2 | 7 | 8 | 8 | 7 | 7 | 1 |

**Note.** If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

### Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.

**Sign Here**      Signature of U.S. person

Date ▶ **04/15/2013**

### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

#### Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

INTERNAL REVENUE SERVICE  
DISTRICT DIRECTOR  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date **SEP 13 1999**

THE CRAPE MYRTLE TRAILS OF MCKINNEY  
FOUNDATION  
ONE NATURE PLACE  
MCKINNEY, TX 75069

Employer Identification Number:  
75-2788771  
DLN:  
17053215016049  
Contact Person:  
GARY MUTHERT ID# 31518  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
December 31  
Foundation Status Classification:  
509(a)(1)  
Advance Ruling Period Begins:  
September 31, 2002  
Addendum Applies:  
No

Dear Applicant:

Based on information you supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably expect to be a publicly supported organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

Accordingly, during an advance ruling period you will be treated as a publicly supported organization, and not as a private foundation. This advance ruling period begins and ends on the dates shown above.

Within 90 days after the end of your advance ruling period, you must send us the information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, we will classify you as a section 509(a)(1) or 509(a)(2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, we will classify you as a private foundation for future periods. Also, if we classify you as a private foundation, we will treat you as a private foundation from your beginning date for purposes of section 507(d) and 4940.

Grantors and contributors may rely on our determination that you are not a private foundation until 90 days after the end of your advance ruling period. If you send us the required information within the 90 days, grantors and contributors may continue to rely on the advance determination until we make a final determination of your foundation status.

If we publish a notice in the Internal Revenue Bulletin stating that we will no longer treat you as a publicly supported organization, grantors and contributors may not rely on this determination after the date we publish the

Letter 1045 (DO/CG)