

MCKINNEY COMMUNITY DEVELOPMENT CORPORATION

Grant Application

Fiscal Year 2014

IMPORTANT:

- Please read the McKinney Community Development Corporation Grant Guidelines prior to completing this application.
- Application is available at www.mckinneycdc.org; by calling 214.544.0296 or by emailing cgibson@mckinneycdc.org
- Please call to discuss your plans for submitting an application in advance of completing the form provided. Completed application and all supporting documents are required to be submitted electronically or on a CD 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 a preliminary review of your project proposal or idea, please complete and submit the **Letter of Inquiry** form, available at www.mckinneycdc.org, by calling 214.544.0296 or emailing cgibson@mckinneycdc.org.

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

Please indicate the type of funding you are requesting:

- Project Grant**
Quality of Life projects that advance the mission of MCDC and are eligible for funding in accordance with the Type B sales tax statute (refer to examples in Grant Guidelines).
- Promotional or Community Event Grant (maximum \$15,000)**
Initiatives, activities and events that promote the City of McKinney for the purpose of developing new or expanded business opportunities and/or tourism – and enhance quality of life for McKinney residents.

Promotional and Community Event Grants:

Application Deadline	Presentation to MCDC Board	Board Vote and Award Notification
Cycle I: January 3, 2014	January 2014	February 2014
Cycle II: June 30 2014	July 2014	August 2014

Project Grants:

Application Deadline	Presentation to MCDC Board	Board Vote and Award Notification
Cycle I: January 31, 2014	February 2014	March 2014
Cycle II: April 30, 2014	May 2014	June 2014
Cycle III: July 31, 2014	August 2014	September 2014

APPLICATION

ORGANIZATION INFORMATION

Name: Dennis Williams

Federal Tax I.D.: 27-3890253

Incorporation Date: November 4, 2010

Mailing Address: P. O. Box 1565

City McKinney

ST: Texas

Zip: 75070

Phone: 972-562-7219
dscustomwood@gmail.com

Fax: 972-562-7219

Email:

Website: www.mckinneykiwanis.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: McKinney Chamber of Commerce

REPRESENTATIVE COMPLETING APPLICATION:

Name: Dennis Williams

Title: Chairman

Mailing Address: 406 Brook Lane

City: McKinney

ST: Texas

Zip: 75069

Phone: 972-562-7219
dscustomwood@gmail.com

Fax: 972-562-7219

Email:

CONTACT FOR COMMUNICATIONS BETWEEN MCDC AND ORGANIZATION:

Name: Dennis Williams

Title: Chairman

Mailing Address: 406 Brook Lane

City: McKinney

ST: Texas

Zip: 75069

Phone: 972-562-7219

Fax: 972-562-7219

Email: dscustomwood@gmail.com

FUNDING

Total amount requested: \$5,000

PROJECT/PROMOTION/COMMUNITY EVENT

Start Date: March 23, 2014

Completion Date: March 23, 2014

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

Rob Nelson, President

Jim Cairo, President Elect

Margaret Harsh, Vice President

Payton Brooks

Bob Cole

Tijmen Felix

Shannon Patterson

Jim Smith

Kirk Saxon

Sandra Williams, Secretary

Brian Cunningham, Treasurer

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

Dennis Williams

Keith Reeder

Mark Carswell

Payton Brooks

Rob Nelson

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

I. Applying Organization

Describe the mission, strategic goals and objectives, scope of services, day to day operations and number of paid staff and volunteers.

Disclose and summarize any significant, planned organizational changes and describe their potential impact on the Project/Promotion/Community Event for which funds are requested.

II. Project or Promotion/Community Event (whichever is applicable)

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

Project Grants – please complete the section below:

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

Provide specific information to illustrate how this Project/Promotion/Event will enhance quality of life and further business and economic development in the City of McKinney, and support one or more of MCDC’s goals:

- Develop and strengthen community amenities to improve quality of life
- Support projects eligible for Type B support under state law
- Contribute to business and economic development within McKinney
- Strengthen relationships with our partners
- Maintain financial sustainability
- Educate the community about the impact of MCDC investments on quality of life in McKinney

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

Yes

No

III. Financial

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

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

\$38,000

(Please include a budget for the proposed Project/Promotion/Community Event.)

What percentage of Project/Promotion/Community Event funding will be provided by the Applicant? N/A

Are Matching Funds available? Yes

No

Cash \$

Source

% of Total

In-Kind \$

Source

% of Total

Are other sources of funding available? *If so, please list source and amount.*

Have any other federal, state, or municipal entities or foundations been approached for funding? *If so, please list entity, date of request and amount requested.*

IV. Marketing and Outreach

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

V. Metrics to Evaluate Success

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

Acknowledgements

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

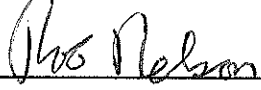
- The Project/Promotion/Community Event for which financial assistance is sought will be administered by or under the supervision of the applying organization;
- All funds awarded will be used exclusively for the purpose described in this application;

Acknowledgements - continued

- MCDC will be recognized in all marketing, outreach, advertising and public relations as a funder of the Project/Promotion/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/Promotion/Community Event for which funds were received.
- A final report detailing the success of the Project/Promotion/Community Event, as measured against identified metrics, will be provided to MCDC no later than 30 days following the completion of the Project/Promotion/Community Event.
- Up to 80% of the approved grant may be provided, on a reimbursement basis, prior to conclusion of the Project/Promotion/Community Event with submission of invoices/receipts to MCDC. The final 20% will be paid following MCDC's receipt of unpaid invoices/receipts; documentation of fulfillment of obligations to MCDC; and final report on the Project/Promotion/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 120th 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.

President

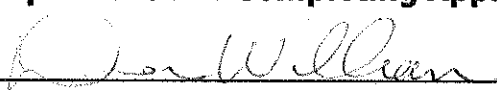


Signature

Rob Nelson
Printed Name

December 19, 2013
Date

Representative Completing Application



Signature

Dennis Williams
Printed Name

December 19, 2013
Date

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/Promotion/Community Event; description, goals and objectives
- Project/Promotion/Community Event timeline
- Plans for marketing and outreach
- Evaluation metrics
- List of board of directors and staff

Attachments:

- Financials: organization's budget for current fiscal year; Project/Promotion/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/PROMOTION/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.

Kiwanis

Texas/Oklahoma District

Kiwanis Club of McKinney P. O. Box 1565 McKinney, Texas 75070

I. Applying organization

The Kiwanis Club of McKinney is a non-profit service organization. We are a member of Kiwanis International which is a global organization dedicated to changing the world, one child and one community at a time. We meet every Thursday at noon for lunch and a program. We have a board meeting once a month and planning meetings as needed during the month. Our officers change each year on October 1st. This project will not see a change of our board or committee members.

We are incorporated as a 501c 3 under the Federal Tax guidelines and dedicated to serving the needs of McKinney and Collin County. There is no paid staff in our organization. All money that is raised from our fund raising events goes back to the community. Last year we were able to make significant donations to CASA, the Children and Adult Health Clinic, Community Lifeline, The Food Pantry, and our Scholarship fund through MEF. Other donations went to building wheel chair ramps for the needy (free of charge to the recipients), ManeGait, our Terrific Kids programs in the Elementary schools and the Key Clubs in the High Schools.

II. Special Event Project, Campaign or Initiative

Triathlons are the modern day test of endurance. Applicants will swim 300 yards in the McKinney High School pool. They will then bike approximately 13 miles and run 3 miles. The event will begin at the McKinney High School pool and end at the school. We are hoping for 450 applicants with an entrance fee of \$50.00 each. We anticipate an average of two people coming with each applicant. The event is on the internet on Triathlon web sites and magazines. We are giving the information out to health clubs, hospitals, sporting stores and centers. We are giving the applicants names of the hotels and restaurant available in McKinney. The success of this event will be measured in attendance, safety, and profit.

For the fourth year we are incorporating the Kids Triathlon to encourage young children to stay physically fit. The Kids Triathlon will be on Sunday and have a 50 yard swim, 2 mile bike course and a 1 mile run. All of this will occur around McKinney High School. We start in January contacting the Physical Education departments in the schools to encourage them to get children interested in physical fitness and possibly entering the event. Last year we had 50 kids participate.

We plan on having 400 in the triathlon and 150 in the children's triathlon. That would be over 1,000 participants and spectators.

We feel that we are making a significant impact on the quality of life in McKinney by promoting the physical aspect of wellness and have chosen our triathlon route to incorporate the historic nature of McKinney and bring in new visitors to our town. We hope a significant number will use the hotels and restaurants as we grow this event into a weekend of fitness.

III. Marketing and Outreach

This event is already posted on the internet on Triathlon web sites and goes out to thousands of athletes throughout the Metroplex and surrounding states. It is also advertised in magazines and we will be posting information about the event in running stores and health clubs, hospitals, sporting stores and centers. The participants will be provided with information on the restaurants and hotels in McKinney.

IV. Metrics to Evaluate Success

The success will be measured in attendance, safety and profit.

V. Financial Information

Attached



Triathlon Leadership Staff

Mark Carswell

Dennis Williams

Rob Nelson

Mike Livezey

Payton Brooks

Brian Hazelwood

Glynn Wingard



Historic McKinney Kiwanis Adult/Kids Triathlon Event Schedule

Sunday March 23, 2014 7:30 a.m. – 1:00 p.m.
Participants will pick up their event packets at Play Tri on Saturday

Adults will begin the swim event at 7:30 a.m. followed by biking then running

Last adult athlete will finish around 10:30 a.m.
Awards Ceremony

Kids will begin the swim event at 10:30 a.m. followed by biking then running

Last Kid will finish around 12:00 noon
Awards Ceremony



Kiwanis Club of McKinney Board of Directors

President – Rob Nelson

President-Elect: Jim Cairo

Vice President – Margaret Harsh

Secretary: Sandra Williams

Treasurer: Brian Cunningham

Past President: Brian Hazelwood

**Directors: Payton Brooks, Bob Cole, Tijmen Felix,
Shannon Patterson, Kirk Saxon, Jim Smith**

Contact Information For Your Organization:

Name of Organization: Kiwanis Club of McKinney

Contact Name: Mark Carswell

Telephone: 214-717-9212

Email: carswellmr@aol.com

Mailing Address 2109 Rockwood Lane

City: McKinney

State: Texas

Zip: 75070

Phone 1: 214-717-9212

Phone 2: 972-547-0063

FAX: 972-540-1480

Website: www.geocities.com/kiwanis_mckinney

Federal ID# (if applicable): 74-6073526

Please attach a copy of the IRS Recognition of Exemption letter under Section 501 (c) (3) if applicable.

Funding Request

Amount of funds requested: \$5,000

Other non-personal funding sources: See attached

Project/Event start date: August 3, 2013

Project/Event completion date: August 4, 213

ASSURANCES

If funding is awarded, the applicant gives assurances to MCDC that:

- The special event, project, or program for which financial assistance is sought will be administered by or under the supervision of the applicant organization.
- All funds received will be used solely for the special event, project or program described in the application.
- The officials signing the application form have been authorized by the applicant organization to submit this applications.
- MCDC must be mentioned in all advertising and publicity as a sponsor or contributor of the event, program, or project.
- Copies of invoices/receipts must be submitted for funding verifications.
- The applicant shall retain a copy of the MCDC guidelines for Promotional Funding for Special Events, Projects, or Programs and shall execute the funding by the rules stated therein.

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

DEPARTMENT OF THE TREASURY

Date: 'AUG 19 2011

MCKINNEY KIWANIS FOUNDATION INC
PO BOX 667
MCKINNEY, TX 75070

Employer Identification Number:
27-3890253
DLN:
401081148
Contact Person:
JOHN C RICE ID# 31615
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
September 30
Public Charity Status:
509(a)(2)
Form 990 Required:
Yes
Effective Date of Exemption:
November 4, 2010
Contribution Deductibility:
Yes
Addendum Applies:
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Sincerely,



Lois G. Lerner
Director, Exempt Organizations

Enclosure: Publication 4221-PC

Letter 947 (DO/CG)

HISTORIC MCKINNEY KIWANIS TRIATHLON			
	2014 Budget		12/12/2013
EXPENSES: (Based on 200/200/150/450 competitors)			
ITEM	EXPLANATION	PROJECTED	ACTUAL
Advertising		\$5,500.00	
Signs and Banners	\$2,500		
Competitor Triathlon Magazine	\$500		
Flyers & Printing	\$2,000		
Newspaper Ads	\$500		
T-Shirts- Athletes	900 @ 9	\$8,100.00	
T-Shirts - Volunteers	200 @ 9	\$1,800.00	
Awards		\$1,000.00	
McKinney High Pool		\$1,500.00	
Food pre & post event		\$2,000.00	
Ice		\$300.00	
Officials		\$1,000.00	
Permits		\$50.00	
Police		\$2,500.00	
Cones rental		\$2,000.00	
Race event		\$1,500.00	
Timing		\$1,800.00	
Toilets		\$800.00	
Race Director/Set up/Racks		\$5,000.00	
Ambulance Svc		\$450.00	
USAT Sanction		\$150.00	
Misc		\$500.00	
TOTAL		\$35,950.00	\$ -
INCOME			
Entrants	400x25/450x50	\$32,500.00	
Sponsors		\$24,000.00	
TOTAL		\$56,500.00	
NET INCOME		\$20,550.00	\$ -

Kiwanis Club of McKinney - Administrative
Annual Budget
Fiscal Year 2013 - 2014

	<u>Oct '12 -Aug '13</u> <u>Actual</u>	<u>Monthly</u> <u>Average</u>	<u>Monthly</u> <u>Budget</u>	<u>Annualized</u> <u>Budget</u>	<u>Notes</u>
Income					
Member Dues	31,554.00	2868.55	3,024.00	36,288.00	\$42 @ 72 members
Project Club Dues	830.00	75.45	120.00	1,440.00	\$10 @ 12 members
New Memberships	1,219.00	110.82	-	-	Assume 0 net gain
Meals					
Guests	415.00	37.73	32.00	384.00	\$8 @ 4 per month
Installation Banquet	1,125.00	102.27		1,200.00	\$15 @ 80 people
Inter-Club Guests	8.00	0.73	8.00	96.00	\$8 @ 1 per month
Seniors	522.00	47.45	48.00	576.00	\$8 @ 6 per month
Brags & Fines	1,133.00	103.00	100.00	1,200.00	Based on Prior Year
Merchandise Sales	22.00	2.00	4.00	48.00	Based on Prior Year
Background Checks	524.00	47.64			Club pays for interim checks
Wierd Thursday Auction	307.00	27.91		375.00	5 events @ \$75 each
Interest Income	7.00	0.64		-	
Total Income	37,666.00			41,607.00	
Cost of Goods Sold					
Installation Banquet Costs	2,305.00	-		2,300.00	80 @ \$29
Meal/Food Costs					
Lunch Costs	17,150.00	1559.09	1,600.00	18,800.00	\$400 x 4 w/ 3 off weeks
Room Fees	4,165.00	378.64	340.00	4,080.00	\$85 per week
Special Meal Costs	200.00	18.18		625.00	Fish Fry, etc.
Merchandise Purchases	609.00	50.75	55.00	660.00	Based on Prior Year
Total COGS	24,429.00			26,465.00	
Gross Profit	13,237.00			15,142.00	
Expense					
Advertising/Marketing		0.00		300.00	
Awards		0.00		500.00	CT Bush Award
Bank Charges	59.00	4.92		-	
Dues & Subscriptions	275.00	22.92	25.00	300.00	Chamber of Commerce
Gifts	35.00	2.92		100.00	
Inter-Club Expenses	308.00	25.67	40.00	480.00	1 a month
Kiwanis Foundation Donation		0.00		-	Optional
License & Fees	25.00	2.08	8.00	96.00	
Membership Fees					
TX/OK District				-	
Kiwanis Int'l	8,154.00	679.50		8,500.00	\$88.50 x 95 members
Miscellaneous		0.00		300.00	Miscellaneous Items
Office Supplies	94.00	7.83	10.00	120.00	
Postage & Delivery	104.00	8.67		100.00	
Repairs		0.00		-	
Background Checks - Members	350.00	29.17	8.00	96.00	12 screenings
Travel					
Int'l Convention	2,000.00	166.67		3,000.00	2 members @ \$1000
TX/OK Conventions	635.00	52.92		1,000.00	Register entire club
Website Costs		0.00		250.00	Annual fees
Total Expense	12,039.00			15,142.00	
Net Income	1,198.00			0.00	

CASH ON HAND @ 8/29/13

\$ 13,000.00

McKinney Kiwanis Foundation
Fiscal Year 2013 - 2014

	<u>Prior Year</u>	<u>Activities Budget</u>	<u>Triathlon Event</u>	<u>TOTAL BUDGET</u>
Holy Family School		500		500
Mane Gait				-
Key Club Support				
Boyd				
Stipen		500		500
Activities		750		750
Lovejoy				
Stipen		500		500
Activities		750		750
McKinney				
Stipen		500		500
Activities		750		750
McKinney North				
Stipen		500		500
Activities		750		750
Miscellaneous		1,000		1,000
Salvation Army		-	-	-
Samaritan Inn		-	-	-
Scholarships				
Scholarship Endowment			2,500	2,500
Sophomore of the Year		250		250
Key Club Scholarship			1,500	1,500
Collin College			1,500	1,500
Seniors Helping Seniors		500		
Total Community Assistance Projects	-	10,300	9,000	18,800
Community Services				
Bingo		360	-	360
Ramp Building				
Kiwanis Club of Richardson		-	3,500	3,500
Supplies & Materials		300	-	300
Mileage Reimbursements		400	-	400
Total Community Services	-	1,060	3,500	4,560
Kiwanis Int'l Service Projects				
Kiwanis Int'l Foundation		450	-	450
TX/OK District Foundation		450	-	450
Division 37		325	-	325
Total Kiwanis Int'l Service Projects	-	1,225	-	1,225
Total Community Support Donations	-	16,385	12,500	28,385

McKinney Kiwanis Foundation
Fiscal Year 2013 - 2014

	<u>Prior Year</u>	<u>Activities Budget</u>	<u>Triathlon Event</u>	<u>TOTAL BUDGET</u>
Expense				
Insurance		500	-	500
Bank Charges			-	-
Licenses & Fees			-	-
Miscellaneous		100	-	100
Total Expense	-	600	-	600
Budget Surplus (Deficit)	-	495	5,000	5,995