

# City of Prescott

## Civic Enhancement Committee



May 30, 2024 | 3:30 PM  
201 N. Montezuma Street  
Council Chambers, 3rd Floor  
Prescott, AZ 86301

### AGENDA

The following Agenda will be considered by the **Civic Enhancement Committee** at their meeting to be held **May 30, 2024**. Notice of this meeting is given pursuant to Arizona Revised Statutes, Section 38-431.02.

**1. CALL TO ORDER**

**2. ROLL CALL**

**3. DISCUSSION & ACTION ITEMS**

- A. Approval of the March 28, 2024, Civic Enhancement Committee Meeting Minutes.

**Recommended Action: MOVE to approve the meeting minutes as presented.**

**4. PRESENTATIONS**

- A. Presentation & Discussion Regarding an Update and Overview of Financials for the Acker Trust Grant Program.

**Recommended Action: This item is for discussion only. No formal action will be taken.**

- B. GRANT APPLICANT PRESENTATIONS

Each presenter is allotted 15 minutes total for presentation / Q&A.

Arizona Philharmonic Inc  
One Stage Family Theater  
POPS Symphony Orchestra Music Memory Concert  
Prescott Western Heritage Foundation

**5. CALL TO ENTER EXECUTIVE SESSION**

Upon a public majority vote of the members constituting a quorum, the Committee may hold an executive session that is not open to the public for the purposes set forth below. When the executive session ends, the Committee may adjourn or return to open session.

**6. EXECUTIVE SESSION**

Legal advice from the City's attorneys and discussion or consideration of employment, assignment, appointment, promotion, demotion, dismissal, salaries, disciplining or resignation of a public officer, appointee, or employee of any public body, except that, with the exception of salary discussions, an officer, appointee, or employee may demand that the discussion or consideration occur at a public meeting. The public body shall provide the officer, appointee, or employee with written notice of the executive session as is appropriate but not less than twenty-four hours for the officer, appointee,

or employee to determine whether the discussion or consideration should occur at a public meeting. A.R.S. 38-431.03(A)(1) & (3):

A. Discussion, Consideration and Recommendation(s) Regarding Applicants for the Acker Trust Grant Program.

**7. ADJOURN EXECUTIVE SESSION**

**8. RECONVENE CIVIC ENHANCEMENT COMMITTEE MEETING**

A. Consideration of Recommendation(s) for Awards of Acker Trust Grant Program Funds.

**Recommended Action: MOVE to approve recommendation(s) for award of Acker Trust Grant Program funds and forward the same to Council**

**9. ADJOURNMENT**

Upon a public majority vote of a quorum of the Board, the Board may hold an executive session, which will not be open to the public, regarding any item listed on the agenda but only for the following purposes:

- (1) Discussion or consideration of personnel matters (A.R.S. §38-431.03(A)(1));
- (2) Discussion or consideration of records exempt by law (A.R.S. §38-431.03(A)(2));
- (3) Discussion or consultation for legal advice with the city's attorneys (A.R.S. §38-431.03(A)(3));
- (4) Discussion or consultation with the city's attorneys regarding the city's position regarding contracts that are the subject of negotiations, in pending or contemplated litigation, or in settlement discussions conducted in order to avoid litigation (A.R.S. § 38-431.03(A)(4));
- (5) Discussion or consultation with designated representatives of the city to consider its position and instruct its representatives regarding negotiations with employee organizations (A.R.S. §38-431.03(A)(5));
- (6) Discussion, consultation or consideration for negotiations by the city or its designated representatives with members of a tribal council, or its designated representatives, of an Indian reservation located within or adjacent to the city (A.R.S. §38-431.03(A)(6));
- (7) Discussion or consultation with designated representatives of the city to consider its position and instruct its representatives regarding negotiations for the purchase, sale or lease of real property (A.R.S. §38-431.03(A)(7)).

**CERTIFICATION OF POSTING OF NOTICE**

The undersigned hereby certifies that a copy of the foregoing notice was duly posted at Prescott City Hall on 5/23/24 at 2:35 p.m. in accordance with the statement filed by the Prescott City Council with the City Clerk.

*Sarah M. Siep*

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Sarah M. Siep, City Clerk



TO: MAYOR AND CITY COUNCIL  
AGENDA: May 30 Civic Enhancement Committee Meeting  
DATE: May 30, 2024  
DEPT: City Clerk  
ITEM #: 3.A  
SUBJECT: Approval of the March 28, 2024, Civic Enhancement Committee Meeting Minutes.

## ITEM SUMMARY

This item is for the approval of the March 28, 2024, Civic Enhancement Committee Meeting Minutes. Staff recommends approval of minutes as presented.

## BACKGROUND

None.

## FINANCIAL IMPACT

None.

## RECOMMENDED ACTION

MOVE to approve the meeting minutes as presented.

## ATTACHMENTS

1. 03.28.24 CEC Minutes



# City of Prescott

## Civic Enhancement Committee

March 28, 2024 | 2:30 PM  
201 N. Montezuma Street  
Council Chambers, 3rd Floor  
Prescott, AZ 86301

### MINUTES

#### 1. CALL TO ORDER

City Clerk Sarah Siep called the meeting to order at 2:32 p.m.

#### 2. ROLL CALL

Susan Wiens - Chair

Christopher Briggs - Member

Timothy Holt - Member

Linda Nichols - Member

George Snyder - Member

#### 3. DISCUSSION & ACTION ITEMS

- A. Introduction of Staff, Members & Overview of Functions and Focus of the Civic Enhancement Committee.

Ms. Siep provided a presentation to the Committee with an overview of the founding Resolution and discussed the duties of the group. She welcomed new members and stated that upcoming meetings would be discussed later in the meeting, but the group is scheduled to meet once per quarter and to conduct a special meeting for the review of Annual Acker Trust Grant applications in May of each year as well.

***This item was for discussion only. No formal action was taken.***

- B. Presentation & Discussion Regarding Acker Trust Grant Processes.

Administrative Supervisor Michelle Stacey-Schroeder provided a presentation to the Committee regarding the Acker Trust Grant Process. A great sum of money and properties were left to the city when JS Acker passed away with the concept of promoting parks and enhancing music for the children of this community. Applications are received annually from local non-profits and the Committee will be responsible for reviewing these applications. There is a filing period then applications are reviewed along with the financial documents from the Finance Department and then determinations are made regarding the award of the grants. The process includes the application, budget report, financial statements and then a determination from the Committee. She will be present to go over the applications. Only given out the interest and not the principle typically.

Ms. Siep handed out the application packets that have been posted for the public over the last month. She informed the Committee that the filing period will be open through Friday, April 12 and they will convene in May to review and make determinations regarding awarding funds.

Chair Weins asked what the Committee Members can do to familiarize themselves with the Acker Trust.

Ms. Stacey-Schroeder stated that the portion of the will that pertains to this is included in the packet but she is also available to answer questions related to the item. She added that the Acker Music Showcase in December is not related to this grant process.

Member Nichols stated that she was on this team for several years and highlighted the importance of the will, she thanked staff for the presentation and asked for confirmation that she will be present for the application review meeting as well.

Ms. Stacey-Schroeder confirmed that she will be and that there is a ranking process that the Committee goes through to determine how the applications are ranked.

Recreation Services Director Joe Baynes added that there is approximately \$560,000 in the account and there has typically been about \$15,000 annually to disburse to local non-profits.

***This item was for discussion only. No formal action was taken.***

C. Presentation & Discussion Regarding Arizona Department of Environmental Quality (ADEQ) Grant Funded Project Opportunities.

Environmental Coordinator Matt Kileen provided a presentation regarding a grant to improve grant funding from ADEQ for water quality and community health. Staff would like to solicit feedback from the Committee about these types of funding opportunities and projects. He also welcomed Kieran Sikdar, Director of Green Infrastructure with West Consultants who has worked with the city on this.

Why:

- \* Surface Water Quality
- \* Supports Elements from the General Plan and Strategic Plan
- \* Not new to Prescott, but the community can do it better and smarter

Mr. Sikdar discussed the GSI Prioritization Tool used to rank the potential projects and discussed healthy landscape benefits. The goal is to support the economy of the community through sustainable, restorative, regenerative, green and conventional programs and design.

Stormwater Infrastructure Park:

- \* Infrastructure focused on human, animal, and plant health (irrigation water treatment, chemical vs biological management)
- \* Not giving up anything
- \* More robust, lush vegetation of all types including turf, trees, etc.
- \* Right plant and right place
- \* Maximize rainwater and stormwater benefits
- \* Lower cost and lower labor
- \* Long-term human health benefits

Mr. Kileen said this is mostly informative and would be hopeful in integrating all of this into the structure for Recreation Services in Prescott. Grant will also position staff to seek additional funding for future projects.

Member Briggs asked about water and recharge.

Mr. Kileen discussed recharge at the reclaim center and how water from varying distances can have different quality. Many of the plants on pallets have processes that pull pollutants out of streams so they don't continue downstream. Basically mini water quality treatment plants at each section.

Member Nichols asked about water catchment basins that were placed at Acker Park years ago and asked how this impacts these types of projects.

Mr. Kileen responded that those facilities reduce funding and help to enhance water quality elements as it goes downstream. It has also impacted the width of the flood plain that FEMA recognizes which is great. He did a review of the aerators that were placed in Watson Lake to circulate water to help generate additional oxygen throughout the lake. Good feedback has been received from the public to date as well and provides a great eco-tourism benefit.

***This item was for discussion only. No formal action was taken.***

D. Review, Discussion & Possible Action Regarding a Proposal for a Bust Sculpture Honoring "Wish Man" Frank Shankwitz.

Mr. Baynes introduced Mr. Shankwitz's widow Kitty to address the Committee regarding this proposal.

Mrs. Shankwitz discussed her husband who passed away three years ago. He loved this place, spent his youth here and is buried here. Mr. Shankwitz created Make-a-Wish 40-years ago and they have been working on this project for three years now. She introduced Team Wish Man Lead Joe Bagley to provide a presentation regarding the sculpture.

Mr. Bagley provided a presentation to the Committee regarding the creation of Make-a-Wish in 1980. Mr. Shankwitz passed in 2021 and the group wants to fittingly honor him with a statue in the Courthouse Plaza.

Summary:

- \* Honor Frank with a monument in the City
- \* Local hero from Prescott & Yavapai County who made a worldwide positive impact
- \* Great opportunity for the community to highlight Mr. Shankwitz
- \* There is a strong and growing backing behind the effort
- \* Established team with a strong proposal

Impact of Mr. Shankwitz:

- \* True Prescott humanitarian
- \* Created Make-a-Wish in 1980
- \* Brought cheer to children who were diagnosed with life threatening illnesses by

granting their wishes

- \* Overcame a rough childhood & focused life on doing good
- \* Many notable awards, served on boards/committees and had a lifetime of public service
- \* Resident since the age of 14
- \* Reserve detective, Arizona DPS, Yavapai County Mounted Sheriff's Posse member, Western Heritage Foundation, Board of Directors USVets

The Plan:

- \* Dedicated and skilled team with a monument plan
- \* Sculptor Bill Nebecker and General Contractor Chuck Merritt
- \* Planning radio interviews, local press releases and social media
- \* Showed a rendering of the proposed monument for the north east side of Plaza on Cortez by Gurley next to the bus stop across from Bill's Pizza

Mr. Bagley stated that this location is within the city's jurisdiction and is on city property, he also read excerpts from letters received by the group in support of Mr. Shankwitz and showed a video from a local Wish recipient family.

Ms. Siep reviewed the art donation process and stated that generally this process begins once art has been created and can be donated.

Mr. Baynes suggested that the Committee make a recommendation to Council that the art sculpture be accepted once completed.

Mr. Bagley commented that it would be difficult to open up a 501(c)(3) if they don't have a project. He added that the group is looking for permission to proceed but don't have the funds to hire designers as of yet.

Deputy City Attorney Matt Podracky stated that the Committee could make a recommendation to the Council and added that generally the Art Donation Agreement would have additional details regarding the piece being donated. However, it could be forwarded to Council with the renderings with a recommendation if that is what the Committee would like to do.

Mary Nebecker addressed the Committee regarding a mockup of the Ernest A. Love statue, which was reviewed by the Council and approved. She and her husband would like to do something similar to that.

Member Briggs thanked the group for bringing this forward.

**MOTION BY MEMBER BRIGGS TO FORWARD A RECOMMENDATION TO COUNCIL TO APPROVE THE PROPOSED "WISH MAN" SCULPTURE TO BE PLACED AT THE PROPOSED LOCATION; SECONDED BY MEMBER NICHOLS: PASSED (5 - 0)**

- E. Consideration, Discussion & Possible Action Regarding an Art Donation from Marcella Hirschy for the Granite Creek Trail.

Member of the Granite Creek Trail Art Project Group Barbara Nelson addressed the Committee regarding the proposed art donation. They recently completed the Granite Creek Mural to enhance the corridor, and it is their desire to see

additional art in the area. Proposed sculptures have been donated by the artists' wife for placement in the area. Ms. Nelson reviewed the packet provided to members regarding the "sculpture walk". There is a floodplain which covers many of the lots in the area but not the one where they are proposing placing the sculptures. They would be anchored on concrete pads and the group will work with all city departments to appropriately place.

Local Artist Meriam Foster addressed the Committee regarding the importance of art in a community.

Citizen Donna Hannah addressed the Committee promoting this project. She discussed her appreciation of art and added that this is one portion of corridor that could still use some beautification and a sculpture park or contemplative garden would be wonderful there.

Mr. Nelson clarified that the location would be west of the Hilton Garden Inn at the southern end of Sam Hill Warehouse, which is the first large open space along the creek.

Ms. Nelson added that the group wants to provide quiet, calm places surrounding the park as well.

Mr. Baynes addressed the Committee and provided additional context regarding this proposal. He thanked the Nelsons for their work on the mural project and echoed comments around art in the community, however, he has some concerns regarding the flood plain and location of these sculptures as well as graffiti issues that could come about from this. He added that there is an emotional attachment to art and he would see this as an attractive nuisance which concerns him because it would be his responsibility to protect and honor the donation.

Ms. Nelson stated that Mr. Baynes did address these concerns with them, she added that there is graffiti protection which they used for the Granite Creek Mural project and that would be used on these sculptures as well.

Member Nichols commented that it appears these are off the trail and asked if walkways would be established to get to the artwork. She commented that the sculptures at Yavapai College are very accessible and monitored but these seem to be further away.

Ms. Nelson responded that there are gazebos where they would be viewable from. People will be able to see them, and she doesn't anticipate that they will be hidden in any way but needed to bring them out of the floodplain. She believes this is the best place for people to see them.

Mr. Nelson added that the slope from the back of Sam Hill Warehouse is not walkable to the sculptures as a walkway, but would be able to see the sculptures from above, and the Granite Creek Trail is 10-feet below the art. The sculptures are steel and very durable ranging from 4 ft to 7 ft in height.

Member Briggs asked if there would be lighting at night to showcase the

sculptures.

Mr. Baynes stated there is no lighting in the gazebos. He feels this is a great project but doesn't think this is the right place.

Chair Wiens commented that perhaps everyone could be on the same page if there was lighting in a more appropriate spot.

Ms. Nelson responded that they are open to looking at that, and also willing to look at other locations.

Member Nichols stated that she knows the art is beautiful, and she would like to see it in a more prominent place where everyone could see it.

Chair Wiens concurred, it would enhance the area but the trails are not accessible to all citizens and that is a problem for her.

Member of the public Bob Parker stated that the city invested money in enhancements to the Granite Creek Corridor and the mural is a special feature for this town. The attraction and increased use of this trail is beneficial to this city, and placement of this art could lead to additional art being placed in this area.

Member of the public Jonathan Decker addressed the Committee stating that if this area were lit it would be a good location because of the proximity to the Hotel, Founding Fathers etc.

Member Nichols said it would be worth going out and looking at the location, she loves the idea of the art but would like to make sure it is placed in the right area.

Chair Wiens thanked the group for their presentation.

**MOTION BY CHAIR WIENS TO POSTPONE ACTION ON THIS ITEM UNTIL THEY CAN WALK THE LOCATION AND THAT THE ITEM BE BROUGHT BACK FOR CONSIDERATION AT THE NEXT QUARTERLY MEETING; SECONDED BY MEMBER HOLT: PASSED (5 - 0)**

Mr. Podracky added that Resolution No. 4279-1488 addresses how to consider art donations and what types of art can be considered and accepted. Staff can provide this document to the Committee when they return to discuss this at a future meeting.

Ms. Siep concurred and added that she will coordinate on scheduling a walk-through of the location prior to the next quarterly meeting in June.

#### **4. UPDATES**

##### **A. Staff Announcements & Upcoming Meeting Schedule**

Ms. Siep discussed the quarterly meetings and suggested scheduling the next meeting in June.

Committee consensus to do so.

Member Nichols asked about the review of the Acker Board grant applications and how many meetings will be held for that.

Ms. Siep and Mr. Baynes responded that the Acker meetings will outside of the quarterly meetings. It will be one additional meeting in May after the application filing period has closed. Staff will also schedule the walk through for the proposed location for the sculptures.

**5. ADJOURNMENT**

There being no further business to discuss, Chair Wiens adjourned the meeting at 4:19 p.m.

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SUSAN WIENS, Chair

ATTEST:

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Staff Liaison



TO: MAYOR AND CITY COUNCIL  
AGENDA: May 30 Civic Enhancement Committee Meeting  
DATE: May 30, 2024  
DEPT: City Clerk  
ITEM #: 4.A  
SUBJECT: Presentation & Discussion Regarding an Update and Overview of Financials for the Acker Trust Grant Program.

## ITEM SUMMARY

Board Members will receive a presentation from the City's Finance Department regarding the current status of the Acker Trust Grant Program financials.

## BACKGROUND

None.

## FINANCIAL IMPACT

There is no fiscal impact associated with this item.

## RECOMMENDED ACTION

This item is for discussion only. No formal action will be taken.

## ATTACHMENTS

1. Acker Trust Fund Current Year Activity

**CITY OF PRESCOTT  
ACKER TRUST FUND  
Statement of Revenues, Expenditures and Changes in Fund Balance  
For the Ten Months Ending April 30, 2024  
BUDGET BASIS**

	Budget	Actual
<b>Revenues:</b>		
Interest Income	\$ 14,500	\$ 12,455
Total Revenue	14,500	12,455
<b>Expenditures:</b>		
Grants	14,500	
Total Expenditures	-	-
<b>Excess of Revenue over Expenditures</b>	\$ 14,500	\$ 12,455

**ACKER ASSETS  
As of April 30, 2024**

Cash		\$ 40,307
Market Value US Treasury Bond		
Face Value \$500,000 Coupon 2.875% 4/15/2025		500,000
(Annual Earnings \$14,375.)		
Capital Assets		29,998
Total Assets		\$ 570,305



TO: MAYOR AND CITY COUNCIL  
AGENDA: May 30 Civic Enhancement Committee Meeting  
DATE: May 30, 2024  
DEPT: City Clerk  
ITEM #: 4.B  
SUBJECT: GRANT APPLICANT PRESENTATIONS  
Each presenter is allotted 15 minutes total for presentation / Q&A.

Arizona Philharmonic Inc  
One Stage Family Theater  
POPS Symphony Orchestra Music Memory  
Concert  
Prescott Western Heritage Foundation

## ITEM SUMMARY

Annual presentations from grant applicants for FY25.

## BACKGROUND

None.

## FINANCIAL IMPACT

None.

## RECOMMENDED ACTION

This item is for discussion only. No formal action will be taken during presentations.

## ATTACHMENTS

1. Arizona Philharmonic Inc\_FY25 Application\_R
2. One Stage Family Theater\_FY25 Application\_R
3. POPS Symphony Orchestra\_FY25 Application R
4. Prescott Western Heritage Foundation\_FY25 Application\_R



## ACKER TRUST GRANT GUIDELINES & APPLICATION

1. Application materials are now available for Fiscal Year 2025 (July 1, 2024, to June 30, 2025). Applications may be obtained through the city website at [www.prescott-az.gov](http://www.prescott-az.gov). Please call Sarah Siep at 928-777-1437 with questions.

2. Deadline for all application materials for Fiscal Year 2025 will be 5:00 P.M. on Friday, March 15, 2024. Incomplete applications, including missing attachments, will not be considered. Completed applications may be filed online, via email at [city.clerk@prescott-az.gov](mailto:city.clerk@prescott-az.gov) or returned to this address:

CITY OF PRESCOTT- CITY CLERK'S OFFICE  
RE: ACKER TRUST GRANT APPLICATIONS  
201 N MONTEZUMA STREET, SUITE 302  
PRESCOTT, AZ 86301

3. It is considered desirable that applying agencies identify where non-Acker funds are available or are being sought. Acker Trust may fund a project in part, or in its entirety, at the discretion of the Board. Those organizations which have established a history of successful activities will be given a higher priority.

4. To be eligible, **ALL** agencies wishing to apply must be incorporated in the State of Arizona and recognized as a nonprofit 501(c)(3) by the IRS prior to application deadline of March 15, 2024. The 501(c)(3) cannot be pending. Include a copy of your IRS 501(c)(3) letter of nonprofit status determination.

5. To be considered for a grant, the application must include the following items:

Funding requests for less than \$5,000:

- A completed City of Prescott Acker Trust Fund Application
- A copy of IRS 501(c)3 letter of nonprofit status
- A project budget for the funds being requested (use attached form).
- A one-page balance sheet. Additional documents may be requested.

Funding requests for more than \$5,000:

- A completed City of Prescott Acker Trust Fund Application
- A copy of IRS 501(c)3 letter of nonprofit status
- A project budget for the funds being requested (use attached form)
- A one-page balance sheet. Additional documents may be requested
- Most recent Corporate Tax Return (IRS Form 990)- first two pages. If your organization is exempt from this requirement, please provide an IRS 990-N E-filing receipt or proper documentation

6. The City of Prescott's Civic Enhancement Committee requires an evaluation and financial report within 60 days after the completion of each funded project. Organizations not in compliance with this requirement may not be considered for future funding.

**7. Only funding requests meeting the criteria set by the August 7, 1959, Court Decree which settled Mr. Acker's estate will be considered. (See attached).**

8. It is mandatory that the applicants appear at a Civic Enhancement Committee meeting when applications are being considered, for a five-minute oral presentation to the Committee. Organizations not represented at this meeting will not be considered. It is the responsibility of the applicant organization to confirm the presentation date by contacting the City Clerk's Office at 777-1437 or the address listed in

Item 2 (an approximate timetable is attached).

9. All materials (posters, flyers, programs, etc.) pertaining to funded projects must list the City of Prescott's Acker Trust as a funding source. The acknowledgement of the City of Prescott's Acker Trust should be obvious to all who read the materials. Recipient organizations should also endeavor to ensure that news accounts contain acknowledgement of City of Prescott's Acker Trust support.

10. Should funds, for any reason, not be utilized as requested and stated in the application for the Acker Trust Grant, those funds must be returned to the City of Prescott's Acker Trust Board within 60 days.

### Criteria for Application and use of

## CITY OF PRESCOTT'S ACKER TRUST ASSETS

### J.S. Acker Will

The Superior Court Decree of Distribution dated August 7, 1959, which settled the Estate of J.S. Acker and established what is now known as the Acker Trust, is the controlling legal document for conduct of the Trust. It states the Trust is for *"purposes of improving and perpetually maintaining parks and for the purpose of promoting music, all for the use and benefit of the public."*

Some further guidance as to Mr. Acker's intent can be found in his Will of March 25, 1949. After describing two tracts of land, he left specifically for parks, Mr. Acker states, *"I give to the City of Prescott... for the use of our people, the children in particular."*

Paragraph six of his Will states: *"All the residue of my estate, after payments as above set forth, together with expenses incident thereto and administrators fees, / give to the City of Prescott, to be used for parks and for promotion of music particularly for children."*

His instructions to his Administrators further state, *"As funds are realized from the Estate, you can apportion and spend such moneys for the improvement of said parks and for the promotion of music in the City Schools or otherwise in advancement of musical culture in the community."*

Opinions of three past City Attorneys indicate that funds are restricted to use by residents of the City of Prescott. Funds for parks are limited to capital expenditures and maintenance of those items purchased with Acker Trust funds, while funds for promotion of music are not limited to capital expenditures.

## TIMELINE FOR APPLICANTS

### Acker Grant Fiscal Year 2025

DATE:	ACTION:
February 1, 2024 – March 15, 2024	<b>Applications Available</b> and can be completed through the City of Prescott Website: <a href="http://www.prescott-az.gov">www.prescott-az.gov</a> or downloaded from the above link and forwarded to the City Clerk's Office as listed in Item 2 of these instructions. Or call Sarah Siep at 777-1437 for additional information.
March 15, 2024	<b>Application Deadline</b>
Early May 2024	<b>Presentation &amp; Distribution Determination Meeting</b> - Applicants must present their proposal to the Civic Enhancement Committee (Date & Location to be determined); Committee will review and determine distribution recommendations for Council's approval.
No Later than May 30, 2024	Committee Recommendation letters will be sent to applicants through the City Clerk's Office.
June 25, 2024	City Council reviews Civic Enhancement Committee recommendations and vote.
June 26, 2024	Council approval letters will be sent to applicants from the City Clerk's Office.

Funding:	Funds will be dispersed upon completion of grantee's program. A request letter must be submitted.
Note:	Dates are approximate and it is the applicant's responsibility to confirm deadlines and presentation dates, which are applicable to them.

## CITY OF PRESCOTT ACKER TRUST FUND

FY 2025 GRANT APPLICATION (July 1, 2024 to June 30, 2025)

**Name of Organization** Arizona Philharmonic, Inc.

**Mailing Address** 406 Arena Drive  
Prescott, AZ, 86301

**Person to Contact** Abby Coffey

**Daytime Phone Number** [REDACTED]

### 1. Provide a one sentence description of the project for which Acker funds are being sought:

Arizona Philharmonic is seeking funding for a Composition Outreach project for 350 third grade students in the Prescott Unified School District (PUSD), that will incorporate learning to play the recorder as well as compose a piece that will be performed twice by the Arizona Philharmonic mentoring high school musicians.

**2. Funding Request Amount: \$** \$9,831

### 3. Brief History and Background of your Organization (300 words or less):

Arizona Philharmonic is seeking funding for a Composition Outreach project for 350 third grade students in the Prescott Unified School District (PUSD), that will incorporate learning to play the recorder as well as compose a piece that will be performed twice by the Arizona Philharmonic mentoring high school musicians.

AZ Phil is proud of its quality and fundamentally engaging youth outreach to schools and after-school mentoring programs. We have presented our unique and highly acclaimed orchestral composition workshops to schools, Boys to Men, Yavapai Big Brothers and Big Sisters, and summer workshops. We are committed to helping the youth of Prescott hear, create, and perform music of their own making. This dedication is seen in our "Compose an Action Movie Theme" compositional workshops held in 2018 and 2019. The Covid-19 Pandemic interrupted the planned school outreach in 2020, so the Manos Percussion Trio presented outdoor concerts to 1452 students instead. In 2022, 300 second graders composed two pieces after experiencing and studying nature at the Highland Center for Natural History. In the 2023 project "Discover the Wonder," 300 students combined observation of nature with composing their own music. AZ Phil's unique Art4All™ program offers donate-as-you-can or free tickets so that our concerts remain available to all members of our community.

### 4. Primary goals and objectives:

Primary Goal:

Introduce 350 third-grade students from Prescott Unified School District to the fundamentals of music through playing recorders, composing music, and performing their own compositions. This initiative, in collaboration with professional musicians Henry and Maria Flurry, classroom music teachers, and Erin Johnson (PUSD Music Department Chair), aims to provide students with their first experience of playing a "real" instrument in their music classrooms.

Expanded Goal:

AZ Phil's youth outreach programs are designed to:

- Create authentic learning experiences that connect art with students' life experiences.
- Enable youth to envision themselves as creative individuals.
- Build connections between the community and students.

Long-Range Goal:

Foster an environment where students view music as a vital outlet for self-expression and creativity, benefiting them throughout their lifetimes.

Objectives:

1. Understanding and Mastery of Music Fundamentals:
  - Students will gain and demonstrate an understanding of rests (silence), a basic building block of music and composition.
  - Students will perform pieces that showcase their mastery of the concept of rests.
2. Standards for Music Education Achievement:
  - Listening/Performance: Students will write, recognize, and perform rests within an 8-count phrase.
  - Composition and Performance: Students will compose and perform an 8-count ostinato on body percussion and recorders, incorporating rests.
  - Composition: Students will write orchestral pieces utilizing their ostinatos and elements like melody, mode, tempo, dynamics, tessitura, and pedal.
  - Performance: High School percussionists and string orchestra will perform the student-composed ostinatos in an Arizona Philharmonic performance.
3. Observation of Musical Growth:
  - Changes and improvements will be observable in students' performances and their ability to articulate relevant concepts and vocabulary. Their body language should reflect pride in their achievements.
4. Enhancement of Group Dynamics:
  - The composition process will be a group effort, fostering cooperation and community pride, especially when students perform their piece and hear it performed by professionals.
5. Promotion of Musical Interest and Cognitive Development:
  - Exposure to instrumental music will nurture the students' interest in music, supporting cognitive development, language development, emotional expression, teamwork, cooperation, dedication, and discipline.
6. Physical and Psychological Benefits:
  - Learning the recorder improves hand-eye coordination, hearing, memory skills, resilience, and self-worth, preparing students for more complex instruments in the future.

Long-Term Vision:

If implemented for the next ten years, this project aims for every PUSD student to receive an enriching introduction to playing an instrument, performing, and composing music. The initiative seeks to leverage the transformative power of music in shaping the community's fabric positively.

**5. How many Prescott schoolchildren do you anticipate your program will serve?**

375: Approximately 350 third grade students from three elementary schools: Lincoln, Abia Judd, and Taylor Hicks. Eight percussionists and 25 string players from Prescott High School will also be involved in this program.

**6. Organization Profile Describe your organization and how it serves the community:**

Arizona Philharmonic (AZ Phil) is a professional regional orchestra with a mission to embody artistic excellence and inspire the growth of symphonic music through diversity in genre, programming, collaborations, audiences, and musicians. With no professional orchestra within 100 miles, Arizona Philharmonic is not just a symphonic orchestra that performs classical and contemporary concerts but is

an engaging and vital addition to the vibrant Prescott arts community. AZ Phil has a vision to empower a robust regional music community that brings together people from all walks of life.

Arizona Philharmonic serves a county with a 12% poverty rate and a per-capita income 11% less than the US average; without Arizona Philharmonic, no orchestra would regularly provide professional classical music concerts to this area. 72% of our seated musicians are women. 11% are non-white. We have seven women and one man on our board. Our board members have diverse backgrounds and professional careers both inside and outside the field of music. Our two principal conductors are Maestro Peter Bay, who is the Music Director of Austin Symphony Orchestra in Texas, and Dr. Joshua Harper, the former head of Yavapai College Choral Department and founder of the professional chorus Quartz Ensemble.

In addition to performing as a full orchestra and in a variety of smaller chamber ensembles, AZ Phil works to collaborate with local performing ensembles such as Quartz Ensemble, Prescott Chorale, and local professional pianist James D'León. In the same way that Prescott offers "something for everyone" (whether historical, outdoor activities, rodeos, or the arts), Arizona Philharmonic offers diverse and bold musical offerings that reach all ages and walks of life. Arizona Philharmonic brings the community together in meaningful ways that improve the quality of life for Prescott and the surrounding areas.

Arizona Philharmonic has a passion for education and outreach since its inception in 2018. AZ Phil has offered educational content such as OLLI classes, recital lectures, and pre-concert lectures. Our youth programs have included free concerts for youth and their families, composition workshops for schools and after-school mentoring programs and school concerts. We also offer free tickets for community members, and we partner with 13 other nonprofits to help connect Art4All™ opportunities to underserved members of our community. We offer free tickets to veterans and heavily discount tickets to youth and K-12 teachers.

Not only does Arizona Philharmonic actively work with other local groups to support our community in impactful ways, but it also aims to increase the vitality and diversity of the Prescott region's music scene. Many of the 100+ Arizona musicians AZ Phil has introduced to Prescott have also joined other ensembles in the region, further supporting the artistic development of the community. AZ Phil also helped create the region's first professional chorus, whose premiere performance featured vocalists from across the Southwest. AZ Phil continues to lead efforts to improve and create performance spaces, and support the Prescott downtown business district through collaborations with Ruth Street Theater, and other downtown businesses.

## **7. Previous Funding (If your organization received previous funding from the Acker Fund, please describe the project. What project goals were achieved? Who were the participants? What was the total in attendance? (Summarize how the funds received assisted the organization.)**

In collaboration with Chaparral Art, Inc., Arizona Philharmonic was partially funded by the Acker Grant for August 2018 to produce a "Compose an Action Movie Theme" workshop. 25 students (high school, college, and adults) worked with Henry and Maria Flurry (workshop facilitators) for three days to write music for an imaginary action movie, which was performed at the end of the workshop. The funds provided covered supplies needed, two workshop facilitators, technical assistance, facility rental and concert tickets for 63 Prescott youth.

Partial funding by the Acker Grant provided 32 students of Big Brothers Big Sisters of Yavapai County to attend a three-day composition workshop in August of 2019. Participants listened to music from "Game of Thrones" to identify effective musical elements and collaborated to compose music for their action movie. The Acker Grant provided supplies, two workshop facilitators, technical assistance, and tickets for youth.

The Arizona Philharmonic applied for Acker funding through Chaparral Arts, but concerts in the schools were canceled due to the Covid-19 Pandemic. With permission from the Acker Trust organization, the Manos Percussion Trio presented 17 outdoor concerts on school playgrounds instead of in classroom workshops. 1452 students were impacted by these performances, by listening attentively, participating on instruments, and asking questions after the performances. The funds from the Acker Trust were used to pay the musicians' artist fees.

In 2021, Arizona Philharmonic received funding to support Chaparral Arts with five scholarships for the

June 2021 Chaparral Chamber Music Workshop, as well as Arizona Philharmonic chamber concerts in six Prescott Unified School District Schools, and improvisation workshops/concerts with Jonathan Best and Maria Flurry (workshop facilitators) in three Prescott Unified School District schools.

In 2022, five scholarships were requested to support student attendance at the Chaparral Arts Workshop. These scholarships enabled students to participate in the chamber music workshop and further their musical education outside of the classroom.

Arizona Philharmonic received partial funding from the Acker Trust Fund in 2023 for a composition project for 300 third and sixth graders. The students were taken on a field trip to the Highlands Center for Natural History and then used the events and emotions generated by the trip to compose two pieces, describing their experiences. The pieces were composed cooperatively in each grade level and were performed in the first concert of the 2023 season of AZ Phil. The Acker Fund provided for the materials that were used in the composing of the pieces and the funding of the teaching artists involved.

Throughout Arizona Philharmonic's history, funding from the Acker Trust has helped the organization impact students and community members in a variety of positive ways. Arizona Philharmonic is passionate about using music as a way to bring together people from all walks of life, and funding from the Acker Trust has supported that vision.

## **8. Describe the project to take place with the assistance of Acker Trust Funds.**

Arizona Philharmonic seeks to offer a Composition Outreach Program to Prescott Unified School District, allowing 350 third-grade students to experience playing recorders, composing music, and performing it.

During October and November, the facilitators will offer ten classes, twice a week. These ten visits will cover a curriculum that teaches rests and starts the composition of a 4-minute work. Session 3 addresses finishing the composition and will be accomplished in ten visits in January 2025. The Composition Outreach Program will culminate in an AZ Philharmonic/Prescott High School student performance in late April 2025 and the third graders will perform their own works on their respective schools' Spring 2025 concerts.

Session one will introduce students to the elements of music, including rests (silences) on recorders. Session two will offer composition opportunities. Session three will contain performance skills to prepare students for their final performance of their work.

The final performance of the students' composition will be performed both by the students, and then by Arizona Philharmonic in a professional concert setting.

## **9. What activities will take place? What age groups will be targeted?**

Educational activities involving elements of music, composition, and music performance will allow third grade students in PUSD to develop important skills of musicianship and provide enrichment opportunities for deeper musical learning outside of the classroom.

PHS high school musicians will rehearse and perform the third graders' composition alongside Arizona Philharmonic's professional musicians.

Project timeline for 350 third grade students:

- Summer 2024: recorders are purchased and distributed to the classroom teachers who will prepare them for use during the 2024-2025 school year.
- October 2024: Henry and Maria Flurry, workshop facilitators, meet with each third-grade music class for three sessions each.

Session 1:

- Introduce the elements of orchestral music: sound, silence (rests), rhythm, melody, accompaniment, timbre.
- Identify rests in diverse musical genres.
- Using rests and sounds, write and perform an ostinato on a single body percussion sound.

Session 2: Review the non-pitched ostinato.

- Perform the non-pitched ostinato on a recorder using the note "A".
- Play a game with the pitched ostinato by putting the rests in different places.
- Play with the pitched ostinato by changing some of the notes to "A".
- Perform the ostinato.
- If time is available, perform the ostinato at different animal's tempi of movement.

Session 3:

- 1st group: The first class writes the melody.
- 2nd group: Determine the mode (or mood) and tempo.
- 3rd group: Writes a bass line or pedal note.
- 4th group: Writes an "answer" to the melody.
- 5th group: Writes the conclusion.
- 6th group: Writes the introduction.
- 7th group: Writes a variation of the melody.
- 8th group: Writes connective material between the melody and its variation.
- 9th group: Adds percussion.
- 10th group: Adds more percussion (maybe) and gives it a title.

Classroom dates:

- Classroom visits during music class: October 7 to November 1
- Composition: Late October to November 15.
- Orchestra part preparation: November 15 to December 2
- Coaching of high school percussionists: 3 classes on January 9 and 16.
- Coaching of high school string orchestra: 1 classes on January 9 and 16.

Concert date is tentatively planned for the end of April (after state testing), or possibly in the end of January.

## **10. How will you ensure that Prescott will benefit from Acker funding?**

Prescott benefits when our local youth experience authentic learning and enrichment opportunities that support creation and enjoyment of art and classroom learning. In addition to introducing third graders in PUSD to the new experience of learning to play a recorder, the creative learning that takes place in a collaborative environment adds to the students' social skills and emotional expression. All the students, whether they continue playing the recorder or not, will have developed important skills of responsibility, determination, resilience, confidence, and courage to try new things. Introducing young students to music provides confidence in their own abilities that is not measured by a letter grade, but by the expression of deeper feelings. Children nurtured in such a manner become capable and motivated adults who care and support their communities, like Prescott.

## **11. What steps did you follow in determining a need for this program?**

Arizona Philharmonic places a large emphasis on developing and maintaining relationships with local schools, such as schools in the Prescott Unified School District. AZ Phil's outreach committee regularly meets with Erin Johnson, PUSD Music Department Chair, and Amy Van Winkle, PUSD Community Theater Events Manager, to assess student needs and how AZ Phil can meet those needs in meaningful ways.

Arizona Philharmonic has a passion for supporting students and creating opportunities to experience, compose, and perform music. Meetings for a new educational outreach program for PUSD students began in late fall of 2023 with AZ Phil's Executive Director, outreach committee, and members of PUSD. After a series of brainstorming sessions and meetings with PUSD elementary school general music teachers, the idea for the Composition Outreach Program was created. This unique project was designed by input from PUSD elementary music teachers on the objectives, budget, and implementation, to make this project as meaningful and impactful as possible.

## **12. Evaluation: What methods will you use to evaluate the success of this project?**

There will be several measurable objectives that will help evaluate the success of this outreach project: student participation and accuracy during the project, student musical growth, and musical impact within

the grade level from the perspective of the classroom music teachers.

The first objective is 100% student participation in the classroom, both in playing their recorder and in contributing their ideas for the composing aspect of the project. Careful observation of the student's level of engagement will be implemented, and working to make sure any non-engaged student is called upon and encouraged or accommodated as needed by the workshop facilitators and the classroom music teacher. The workshop facilitators will work closely with the classroom music teacher to insure student collaboration and participation.

The second objective is for each student to have basic, beginner proficiency on the recorder. This objective's achievement will be measured by the ability to improve with regular instruction and perform their part accurately in the concert. Both the workshop facilitators and classroom music teacher will work together to observe and measure.

At the conclusion of the project, classroom teachers will be given the opportunity to share their thoughts on the project's impact and implementation, either known or anonymously. This important feedback will be kept confidential but will be used and discussed with PUSD leaders to refine or change this project for future use.

## REQUIRED DOCUMENTS

**Note:** The following material is to be submitted with all grant applications. No material will be accepted after the grant deadlines and incomplete applications and material will not be considered.

**Is the funding request for less than or more than \$5,000?**

More than \$5,000

**File Upload: 501(c)(3) or statement on letterhead stating the organization is either a municipality, public school, or Indian Tribe**



AZ Phil 501c3 IRS.pdf

**File Upload: A one-page balance sheet**



AZ\_Philharmonic\_Balance\_S... .pdf

**File Upload: The first two pages of the most recent Corporate Tax Return (IRS Form 990), or in the event that organization is exempt, please provide an IRS 990-N E-filing receipt or proper documentation**



990 FY22 - First 2 Pages.pdf

## Organization Information

**Project Director Name:**

Abby Coffey

**Email Address:**

[REDACTED]

**Mailing Address:**

406 Arena Drive  
Prescott, AZ, 86301

**Daytime Phone:**

[REDACTED]

**Signature of Project Director**



**Authorizing Official Name:**

Abby Coffey

**Authorizing Official Title:**

Executive Director

**Email Address:**

[REDACTED]

**Address:**

406 Arena Drive  
Prescott, AZ, 86301

**Daytime Phone:**

[REDACTED]

**Signature of Authorizing Official**



## Project Budget:

### Funding from Earned Income and Support (Contributed Income):

	Amount \$
1. Admissions	0
2. Contracted Services	0
3. Other Revenue	0
4. Corporate Sponsors	0
5. Foundations Grants	1500
6. Private Contributions	0
7. Governmental Support (Identify source)	0
a) Federal-	0
b) State-	0
c) City of County-	2800
8. Applicant Cash	1200

**Total Existing Funding: (lines 1 through 8 above)**

5500

**Grant Amount Requested:**

9831

**Total Funding:**

15331

**Expenses:**

	Amount \$
<b>9. Personnel / Staff (include salary and benefits)</b>	1200
a) Administration	0
b) Artistic	5881
c) Technical / Production	0
<b>10. Outside Fees and Services (provide details)</b>	2800
a) Artistic	3000
b) Development	0
<b>11. Product Expenses</b>	2450
<b>12. Rental Expenses</b>	0
<b>13. Promotion</b>	0
<b>14. Other Operating Expenses</b>	0

**Total Project Cost: (lines 9 thru 14)** 15331

**Note: "Total Funding" should equal "Total Project Cost"**

**Upload any additional documentation needed here:**

 Excerpt from 2022 3rd Grad... .mp3

 Photos from a 2022 3rd Grad... .zip



Department of the Treasury  
Internal Revenue Service  
Tax Exempt and Government Entities  
P.O. Box 2508  
Cincinnati, OH 45201

ARIZONA PHILHARMONIC INC  
C/O HENRY FLURRY EXECUTIVE DIRECTOR  
406 ARENA DRIVE  
PRESCOTT, AZ 86301-5367

Date:  
06/15/2021  
Employer ID number:  
83-4652802  
Person to contact:  
Name: Faith Cummins  
ID number: 31534  
Telephone: [REDACTED]  
Accounting period ending:  
June 30  
Public charity status:  
170(b)(1)(A)(vi)  
Form 990 / 990-EZ / 990-N required:  
Yes  
Effective date of exemption:  
April 8, 2019  
Contribution deductibility:  
Yes  
Addendum applies:  
No  
DLN:  
26053411008841

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

We sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,

*Stephen A. Martin*

Stephen A. Martin  
Director, Exempt Organizations  
Rulings and Agreements

# AZ Philharmonic

## Balance Sheet

As of March 14, 2024

	Total
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
1020 ██████ - AZPhil EIN	25,713.26
1040 Petty Cash	526.00
1045 Cash for Venue	250.00
Total Bank Accounts	\$ 26,489.26
Accounts Receivable	
1200 Accounts Receivable	0.00
Total Accounts Receivable	\$ 0.00
Other Current Assets	
1400 Undeposited Funds	450.00
1600 Prepaid Expenses	0.00
Inventory Asset	117.95
Total Other Current Assets	\$ 567.95
Total Current Assets	\$ 27,057.21
<b>TOTAL ASSETS</b>	<b>\$ 27,057.21</b>
<b>LIABILITIES</b>	
Liabilities	
Current Liabilities	
Accounts Payable	
2200 Accounts Payable	237.50
Total Accounts Payable	\$ 237.50
Credit	
1030 ██████ - Credit Line	14,405.62
Total Credit	\$ 14,405.62
Other Current Liabilities	
2500 Reimbursements	0.00
2600 Accrued Liabilities	-4.76
2700 Deferred Revenue	0.00
Total Other Current Liabilities	-\$ 4.76
Total Current Liabilities	\$ 14,638.36
Total Liabilities	\$ 14,638.36
<b>TOTAL LIABILITIES</b>	<b>\$ 14,638.36</b>

Thursday, Mar 14, 2024 11:57:32 PM GMT-7 - Accrual Basis

# AZ Philharmonic

## Balance Sheet

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Thursday, Mar 14, 2024 11:57:32 PM GMT-7 - Accrual Basis

May 1, 2024

Dear Acker Grant Review Committee,

Thank you for your time and consideration of Arizona Philharmonic's revised Acker Grant request amount and budget. With additional discussion and reevaluation of our organization, we have created an updated budget for your review that better reflects the needs of the program and abilities of the organization.

In the budget revision, you will see the total amount of existing funding for the program is \$0, opposed to the original amount of \$5,500. This change accurately reflects the inability of Arizona Philharmonic to dedicate operational funds of the organization to outreach programs at this time. Currently, Arizona Philharmonic relies on grants and community support to offer these important programs, in addition to the generous in-kind donations of staff time and resources.

In the expense section of the budget, you will notice a decrease in the total cost of the program. The original budget indicated a total cost of \$15,331. The revised budget reflects the accurate amount of \$12,962. This decrease is due to the in-kind donations of Arizona Philharmonic and Prescott Unified School District staff time and resources for grant writing, administration, venue rental, lighting, sounds, and production costs and labor. Notable changes between the original and revised budgets are listed below.

- 9B: Teaching Artists to facilitate the entire program for 77 hours of work at \$55 per hour (\$4,235)
- 10A: Cost of Arizona Philharmonic orchestra service (\$3,827 for a full orchestra) to offer a side-by-side performance opportunity to PUSD high school musicians
- 11: Cost of recorders for 300 PUSD students (two per student, with one for school use and one for home use) for a cost of \$2,100
- 14: Approximate cost of busses to transport students to and from the culminating performance event at Ruth Street Theater (\$2,800)

Existing funding for this program is \$0. The total program cost is \$12,962 to impact approximately 300 3rd grade students and 50 high school students within PUSD. The total grant request amount is \$12,962.

Thank you for the opportunity to submit a budget revision that better reflects the needs of the Composition Collaboration program offered by Arizona Philharmonic to students in PUSD schools. I look forward to the opportunity to present this proposal and participate in the following Q&A session on May 30th.

Sincerely,



Abby Coffey  
Executive Director, Arizona Philharmonic

**PROJECT BUDGET FOR:**

Arizona Philharmonic  
(Organization Name)

<b>FUNDING</b>	
<b>Earned Income</b>	
1. Admissions	\$0
2. Contracted Services	\$0
3. Other Revenue	\$0
<b>Support: (Contributed Income)</b>	
4. Corporate Sponsors	\$0
5. Foundations Grants	\$0
6. Private Contributions	\$0
7. Governmental Support (Identify source)	\$0
a) Federal:	\$0
b) State:	\$0
c) City or County:	\$0
8. Applicant Cash	\$0
<b>Total Existing Funding: (lines 1 thru 8)</b>	<b>\$0</b>
Grant Amount Requested:	\$12,962
<b>TOTAL FUNDING:</b>	
<b>EXPENSES:</b>	
9. Personnel / Staff (include salary and benefits)	\$4235
a) Administration	\$0
b) Artistic	\$4235
c) Technical / Production	\$0
10. Outside Fees and Services (provide details)	\$3827
a) Artistic	\$3827
b) Development	\$0
11. Product Expenses	\$2100
12. Rental Expenses	\$0
13. Promotion	\$0
14. Other Operating Expenses	\$2800
<b>Total Project Cost: (lines 9 thru 14)</b>	<b>\$12,962</b>
Note: "Total Funding" should equal "Total Project Cost"	\$12,962



## ACKER TRUST GRANT GUIDELINES & APPLICATION

1. Application materials are now available for Fiscal Year 2025 (July 1, 2024, to June 30, 2025). Applications may be obtained through the city website at [www.prescott-az.gov](http://www.prescott-az.gov) Please call Sarah Siep at 928-777-1437 with questions.

2. Deadline for all application materials for Fiscal Year 2025 will be 5:00 P.M. on Friday, March 15, 2024. Incomplete applications, including missing attachments, will not be considered. Completed applications may be filed online, via email at [city.clerk@prescott-az.gov](mailto:city.clerk@prescott-az.gov) or returned to this address:

CITY OF PRESCOTT- CITY CLERK'S OFFICE  
RE: ACKER TRUST GRANT APPLICATIONS  
201 N MONTEZUMA STREET, SUITE 302  
PRESCOTT, AZ 86301

3. It is considered desirable that applying agencies identify where non-Acker funds are available or are being sought. Acker Trust may fund a project in part, or in its entirety, at the discretion of the Board. Those organizations which have established a history of successful activities will be given a higher priority.

4. To be eligible, **ALL** agencies wishing to apply must be incorporated in the State of Arizona and recognized as a nonprofit 501(c)(3) by the IRS prior to application deadline of March 15, 2024. The 501(c)(3) cannot be pending. Include a copy of your IRS 501(c)(3) letter of nonprofit status determination.

5. To be considered for a grant, the application must include the following items:

Funding requests for less than \$5,000:

- A completed City of Prescott Acker Trust Fund Application
- A copy of IRS 501(c)3 letter of nonprofit status
- A project budget for the funds being requested (use attached form).
- A one-page balance sheet. Additional documents may be requested.

Funding requests for more than \$5,000:

- A completed City of Prescott Acker Trust Fund Application
- A copy of IRS 501(c)3 letter of nonprofit status
- A project budget for the funds being requested (use attached form)
- A one-page balance sheet. Additional documents may be requested
- Most recent Corporate Tax Return (IRS Form 990)- first two pages. If your organization is exempt from this requirement, please provide an IRS 990-N E-filing receipt or proper documentation

6. The City of Prescott's Civic Enhancement Committee requires an evaluation and financial report within 60 days after the completion of each funded project. Organizations not in compliance with this requirement may not be considered for future funding.

**7. Only funding requests meeting the criteria set by the August 7, 1959, Court Decree which settled Mr. Acker's estate will be considered. (See attached).**

8. It is mandatory that the applicants appear at a Civic Enhancement Committee meeting when applications are being considered, for a five-minute oral presentation to the Committee. Organizations not represented at this meeting will not be considered. It is the responsibility of the applicant organization to confirm the presentation date by contacting the City Clerk's Office at 777-1437 or the address listed in

Item 2 (an approximate timetable is attached).

9. All materials (posters, flyers, programs, etc.) pertaining to funded projects must list the City of Prescott's Acker Trust as a funding source. The acknowledgement of the City of Prescott's Acker Trust should be obvious to all who read the materials. Recipient organizations should also endeavor to ensure that news accounts contain acknowledgement of City of Prescott's Acker Trust support.

10. Should funds, for any reason, not be utilized as requested and stated in the application for the Acker Trust Grant, those funds must be returned to the City of Prescott's Acker Trust Board within 60 days.

### Criteria for Application and use of

## CITY OF PRESCOTT'S ACKER TRUST ASSETS

### J.S. Acker Will

The Superior Court Decree of Distribution dated August 7, 1959, which settled the Estate of J.S. Acker and established what is now known as the Acker Trust, is the controlling legal document for conduct of the Trust. It states the Trust is for *"purposes of improving and perpetually maintaining parks and for the purpose of promoting music, all for the use and benefit of the public."*

Some further guidance as to Mr. Acker's intent can be found in his Will of March 25, 1949. After describing two tracts of land, he left specifically for parks, Mr. Acker states, *"I give to the City of Prescott... for the use of our people, the children in particular."*

Paragraph six of his Will states: *"All the residue of my estate, after payments as above set forth, together with expenses incident thereto and administrators fees, / give to the City of Prescott, to be used for parks and for promotion of music particularly for children."*

His instructions to his Administrators further state, *"As funds are realized from the Estate, you can apportion and spend such moneys for the improvement of said parks and for the promotion of music in the City Schools or otherwise in advancement of musical culture in the community."*

Opinions of three past City Attorneys indicate that funds are restricted to use by residents of the City of Prescott. Funds for parks are limited to capital expenditures and maintenance of those items purchased with Acker Trust funds, while funds for promotion of music are not limited to capital expenditures.

## TIMELINE FOR APPLICANTS

### Acker Grant Fiscal Year 2025

DATE:	ACTION:
February 1, 2024 – March 15, 2024	<b>Applications Available</b> and can be completed through the City of Prescott Website: <a href="http://www.prescott-az.gov">www.prescott-az.gov</a> or downloaded from the above link and forwarded to the City Clerk's Office as listed in Item 2 of these instructions. Or call Sarah Siep at 777-1437 for additional information.
March 15, 2024	<b>Application Deadline</b>
Early May 2024	<b>Presentation &amp; Distribution Determination Meeting</b> - Applicants must present their proposal to the Civic Enhancement Committee (Date & Location to be determined); Committee will review and determine distribution recommendations for Council's approval.
No Later than May 30, 2024	Committee Recommendation letters will be sent to applicants through the City Clerk's Office.
June 25, 2024	City Council reviews Civic Enhancement Committee recommendations and vote.
June 26, 2024	Council approval letters will be sent to applicants from the City Clerk's Office.

Funding:	Funds will be dispersed upon completion of grantee's program. A request letter must be submitted.
Note:	Dates are approximate and it is the applicant's responsibility to confirm deadlines and presentation dates, which are applicable to them.

## CITY OF PRESCOTT ACKER TRUST FUND

FY 2025 GRANT APPLICATION (July 1, 2024 to June 30, 2025)

**Name of Organization** One Stage Family Theatre

**Mailing Address** [REDACTED]  
Prescott, Az, 86303

**Person to Contact** Tamee Niekamp

**Daytime Phone Number** [REDACTED]

### 1. Provide a one sentence description of the project for which Acker funds are being sought:

One Stage Family Theatre will provide a summer theatre camp for local children and produce a family production of "Willy Wonka and the Chocolate Factory."

**2. Funding Request Amount: \$** 12000

### 3. Brief History and Background of your Organization (300 words or less):

One Stage Family Theatre is a non-profit community theatre program that produces both children and family shows. Begun in 2016, One Stage has proudly performed many shows including hundreds of local children.

### 4. Primary goals and objectives:

Our primary goal and objective is to be an all-inclusive community theatre that provides a safe place for both families and local children to grow and express themselves through the arts.

**5. How many Prescott schoolchildren do you anticipate your program will serve?** 110

### 6. Organization Profile Describe your organization and how it serves the community:

One Stage Family Theatre is an all-inclusive community theatre program that emphasizes involvement of families and children, regardless of experience or ability. Our children shows include all who audition.

### 7. Previous Funding (If your organization received previous funding from the Acker Fund, please describe the project. What project goals were achieved? Who were the participants? What was the total in attendance? (Summarize how the funds received assisted the organization.)

In previous years, this grant has covered production costs for our various children's shows and has allowed us to provide scholarships for local youth to be able to perform in our shows. Last year, we performed "Oliver," and our cast included over 40 local children as well as families. Over 800 people were in attendance to see the show performed.

### 8. Describe the project to take place with the assistance of Acker Trust Funds.

One Stage Family Theatre will be providing two programs with the Acker Trust Funds. The first will be a summer theatre camp for children in 2nd-12th grade. The second will be a family production of "Willy Wonka and the Chocolate Factory."

### 9. What activities will take place? What age groups will be targeted?

In our summer camps, children in grades 2nd-12th will be participating in staging and performing a children's musical. Children will be participating in all of the process, including auditions, blocking, acting, and creating sets. In "Willy Wonka and the Chocolate Factory," children ages 8 and up will be performing in front of a live audience.

### 10. How will you ensure that Prescott will benefit from Acker funding?

Prescott benefits in two ways. First, we provide a safe environment for local families and children to perform; and second, we provide a live show for Prescott citizens to enjoy. Our last show included over 50 participants with an audience of over 1000 people.

### 11. What steps did you follow in determining a need for this program?

The Prescott area has expressed a need for safe all-inclusive programs for our youth and families and we have centered our projects to meet that goal.

### 12. Evaluation: What methods will you use to evaluate the success of this project?

Our number one way of gauging success is audience attendance and participation. In addition, we also get numerous messages through social media regarding our impact on both our performers and the community.

## REQUIRED DOCUMENTS

**Note:** The following material is to be submitted with all grant applications. No material will be accepted after the grant deadlines and incomplete applications and material will not be considered.

**Is the funding request for less than or more than \$5,000?**

More than \$5,000

**File Upload: 501(c)(3) or statement on letterhead stating the organization is either a municipality, public school, or Indian Tribe**



fw9.pdf

**File Upload: A one-page balance sheet**



[Original size] Gold And White....pdf

## Organization Information

**Project Director Name:**

Tamee Niekamp

**Email Address:**



**Mailing Address:**



Prescott , Arizona, 86303

**Daytime Phone:**



**Signature of Project Director**

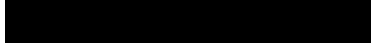
**Authorizing Official Name:**

Tamee Niekamp

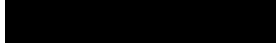
**Authorizing Official Title:**

CEO

**Email Address:**



**Address:**



Prescott, Arizona, 86303

**Daytime Phone:**



**Signature of Authorizing Official**

## Project Budget:

### Funding from Earned Income and Support (Contributed Income):

	Amount \$
1. Admissions	0
2. Contracted Services	0
3. Other Revenue	0
4. Corporate Sponsors	0
5. Foundations Grants	0
6. Private Contributions	0
7. Governmental Support (Identify source)	0
a) Federal-	0
b) State-	0
c) City of County-	0
8. Applicant Cash	0

**Total Existing Funding: (lines 1 through 8 above)** 0

**Grant Amount Requested:** 12000

**Total Funding:** 12000

### Expenses:

	Amount \$
9. Personnel / Staff (include salary and benefits)	0
a) Administration	0
b) Artistic	0
c) Technical / Production	3000

	Amount \$
<b>10. Outside Fees and Services (provide details)</b>	0
<b>a) Artistic</b>	0
<b>b) Development</b>	3500
<b>11. Product Expenses</b>	2000
<b>12. Rental Expenses</b>	1500
<b>13. Promotion</b>	2000
<b>14. Other Operating Expenses</b>	0

**Total Project Cost: (lines 9 thru 14)**      12000

**Note: "Total Funding" should equal "Total Project Cost"**



By signing the filled-out form, you:

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, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting*, later, for further information.

**Note:** If you are a U.S. person and 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 under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 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 section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

**Foreign person.** If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*).

**Nonresident alien who becomes a resident alien.** Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

**Example.** Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

## Backup Withholding

**What is backup withholding?** Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

**Payments you receive will be subject to backup withholding if:**

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the instructions for Part II for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships*, earlier.

## What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

## Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

## Penalties

**Failure to furnish TIN.** If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

**Civil penalty for false information with respect to withholding.** If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

**Criminal penalty for falsifying information.** Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

**Misuse of TINs.** If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

## Specific Instructions

### Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

**Note: ITIN applicant:** Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or “doing business as” (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity’s name as shown on the entity’s tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a “disregarded entity.” See Regulations section 301.7701-2(c)(2)(iii). Enter the owner’s name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner’s name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity’s name on line 2, “Business name/disregarded entity name.” If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

### Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

### Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

### Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

#### Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys’ fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 <sup>1</sup>	Generally, exempt payees 1 through 5 <sup>2</sup>
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

<sup>1</sup> See Form 1099-MISC, Miscellaneous Income, and its instructions.

<sup>2</sup> However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

**Exemption from FATCA reporting code.** The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

**Note:** You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

### Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

### Line 6

Enter your city, state, and ZIP code.

## Part I. Taxpayer Identification Number (TIN)

**Enter your TIN in the appropriate box.** If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

**Note:** See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

**How to get a TIN.** If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at [www.SSA.gov](http://www.SSA.gov). You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at [www.irs.gov/Businesses](http://www.irs.gov/Businesses) and clicking on Employer Identification Number (EIN) under Starting a Business. Go to [www.irs.gov/Forms](http://www.irs.gov/Forms) to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to [www.irs.gov/OrderForms](http://www.irs.gov/OrderForms) to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

**Note:** Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

**Caution:** A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

## Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

**Signature requirements.** Complete the certification as indicated in items 1 through 5 below.

**1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983.**

You must give your correct TIN, but you do not have to sign the certification.

**2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983.**

You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

**3. Real estate transactions.**

You must sign the certification. You may cross out item 2 of the certification.

**4. Other payments.** You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

**5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions.** You must give your correct TIN, but you do not have to sign the certification.

**What Name and Number To Give the Requester**

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account <sup>1</sup>
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor <sup>2</sup>
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee <sup>1</sup>
b. So-called trust account that is not a legal or valid trust under state law	The actual owner <sup>1</sup>
6. Sole proprietorship or disregarded entity owned by an individual	The owner <sup>3</sup>
7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor*
For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity <sup>4</sup>
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee

For this type of account:	Give name and EIN of:
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

<sup>1</sup> List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

<sup>2</sup> Circle the minor's name and furnish the minor's SSN.

<sup>3</sup> You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

<sup>4</sup> List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships*, earlier.

\*Note: The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

**Secure Your Tax Records From Identity Theft**

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

**Protect yourself from suspicious emails or phishing schemes.**

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to [phishing@irs.gov](mailto:phishing@irs.gov). You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at [spam@uce.gov](mailto:spam@uce.gov) or report them at [www.ftc.gov/complaint](http://www.ftc.gov/complaint). You can contact the FTC at [www.ftc.gov/idtheft](http://www.ftc.gov/idtheft) or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see [www.IdentityTheft.gov](http://www.IdentityTheft.gov) and Pub. 5027.

Visit [www.irs.gov/IdentityTheft](http://www.irs.gov/IdentityTheft) to learn more about identity theft and how to reduce your risk.

## Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.





Saturday, March 2, 2024

## ACKER TRUST GRANT GUIDELINES & APPLICATION

1. Application materials are now available for Fiscal Year 2025 (July 1, 2024, to June 30, 2025). Applications may be obtained through the city website at [www.prescott-az.gov](http://www.prescott-az.gov) Please call Sarah Siep at 928-777-1437 with questions.

2. Deadline for all application materials for Fiscal Year 2025 will be 5:00 P.M. on Friday, March 15, 2024. Incomplete applications, including missing attachments, will not be considered. Completed applications may be filed online, via email at [city.clerk@prescott-az.gov](mailto:city.clerk@prescott-az.gov) or returned to this address:

CITY OF PRESCOTT- CITY CLERK'S OFFICE  
RE: ACKER TRUST GRANT APPLICATIONS  
201 N MONTEZUMA STREET, SUITE 302  
PRESCOTT, AZ 86301

3. It is considered desirable that applying agencies identify where non-Acker funds are available or are being sought. Acker Trust may fund a project in part, or in its entirety, at the discretion of the Board. Those organizations which have established a history of successful activities will be given a higher priority.

4. To be eligible, **ALL** agencies wishing to apply must be incorporated in the State of Arizona and recognized as a nonprofit 501(c)(3) by the IRS prior to application deadline of March 15, 2024. The 501(c)(3) cannot be pending. Include a copy of your IRS 501(c)(3) letter of nonprofit status determination.

5. To be considered for a grant, the application must include the following items:

Funding requests for less than \$5,000:

- A completed City of Prescott Acker Trust Fund Application
- A copy of IRS 501(c)3 letter of nonprofit status
- A project budget for the funds being requested (use attached form).
- A one-page balance sheet. Additional documents may be requested.

Funding requests for more than \$5,000:

- A completed City of Prescott Acker Trust Fund Application
- A copy of IRS 501(c)3 letter of nonprofit status
- A project budget for the funds being requested (use attached form)
- A one-page balance sheet. Additional documents may be requested
- Most recent Corporate Tax Return (IRS Form 990)- first two pages. If your organization is exempt from this requirement, please provide an IRS 990-N E-filing receipt or proper documentation

6. The City of Prescott's Civic Enhancement Committee requires an evaluation and financial report within 60 days after the completion of each funded project. Organizations not in compliance with this requirement may not be considered for future funding.

**7. Only funding requests meeting the criteria set by the August 7, 1959, Court Decree which settled Mr. Acker's estate will be considered. (See attached).**

8. It is mandatory that the applicants appear at a Civic Enhancement Committee meeting when applications are being considered, for a five-minute oral presentation to the Committee. Organizations not represented at this meeting will not be considered. It is the responsibility of the applicant organization to confirm the presentation date by contacting the City Clerk's Office at 777-1437 or the address listed in

Item 2 (an approximate timetable is attached).

9. All materials (posters, flyers, programs, etc.) pertaining to funded projects must list the City of Prescott's Acker Trust as a funding source. The acknowledgement of the City of Prescott's Acker Trust should be obvious to all who read the materials. Recipient organizations should also endeavor to ensure that news accounts contain acknowledgement of City of Prescott's Acker Trust support.

10. Should funds, for any reason, not be utilized as requested and stated in the application for the Acker Trust Grant, those funds must be returned to the City of Prescott's Acker Trust Board within 60 days.

### Criteria for Application and use of

## CITY OF PRESCOTT'S ACKER TRUST ASSETS

### J.S. Acker Will

The Superior Court Decree of Distribution dated August 7, 1959, which settled the Estate of J.S. Acker and established what is now known as the Acker Trust, is the controlling legal document for conduct of the Trust. It states the Trust is for *"purposes of improving and perpetually maintaining parks and for the purpose of promoting music, all for the use and benefit of the public."*

Some further guidance as to Mr. Acker's intent can be found in his Will of March 25, 1949. After describing two tracts of land, he left specifically for parks, Mr. Acker states, *"I give to the City of Prescott... for the use of our people, the children in particular."*

Paragraph six of his Will states: *"All the residue of my estate, after payments as above set forth, together with expenses incident thereto and administrators fees, / give to the City of Prescott, to be used for parks and for promotion of music particularly for children."*

His instructions to his Administrators further state, *"As funds are realized from the Estate, you can apportion and spend such moneys for the improvement of said parks and for the promotion of music in the City Schools or otherwise in advancement of musical culture in the community."*

Opinions of three past City Attorneys indicate that funds are restricted to use by residents of the City of Prescott. Funds for parks are limited to capital expenditures and maintenance of those items purchased with Acker Trust funds, while funds for promotion of music are not limited to capital expenditures.

## TIMELINE FOR APPLICANTS

### Acker Grant Fiscal Year 2025

DATE:	ACTION:
February 1, 2024 – March 15, 2024	<b>Applications Available</b> and can be completed through the City of Prescott Website: <a href="http://www.prescott-az.gov">www.prescott-az.gov</a> or downloaded from the above link and forwarded to the City Clerk's Office as listed in Item 2 of these instructions. Or call Sarah Siep at 777-1437 for additional information.
March 15, 2024	<b>Application Deadline</b>
Early May 2024	<b>Presentation &amp; Distribution Determination Meeting</b> - Applicants must present their proposal to the Civic Enhancement Committee (Date & Location to be determined); Committee will review and determine distribution recommendations for Council's approval.
No Later than May 30, 2024	Committee Recommendation letters will be sent to applicants through the City Clerk's Office.
June 25, 2024	City Council reviews Civic Enhancement Committee recommendations and vote.
June 26, 2024	Council approval letters will be sent to applicants from the City Clerk's Office.

Funding:	Funds will be dispersed upon completion of grantee's program. A request letter must be submitted.
Note:	Dates are approximate and it is the applicant's responsibility to confirm deadlines and presentation dates, which are applicable to them.

## CITY OF PRESCOTT ACKER TRUST FUND

FY 2025 GRANT APPLICATION (July 1, 2024 to June 30, 2025)

**Name of Organization** Prescott POPS Symphony Orchestra - Music Memory Concert

**Mailing Address** P O Box 10231  
Prescott, AZ, 86301

**Person to Contact** Brenda Olsen

**Daytime Phone Number** [REDACTED]

### 1. Provide a one sentence description of the project for which Acker funds are being sought:

The advancement of musical culture in the community, particularly for children through the Prescott POPS Symphony Orchestra Music Memory program and Concert.

**2. Funding Request Amount: \$** 10994.35

### 3. Brief History and Background of your Organization (300 words or less):

The Prescott POPS Symphony Orchestra was founded in 1992 to provide local musicians the opportunity to perform orchestral music for the community of Prescott. Our mission is to educate, enrich and entertain our local community and provide advancement of musical culture in the community as well as provide music education in our local schools and promote music particularly for children and families.

### 4. Primary goals and objectives:

Our goals are the introduction of music and an Orchestra experience for school children by bringing them to the beautiful Performing Arts Center on the Yavapai College Campus. The Music Memory Concert enables school children the opportunity to attend an Orchestra performance that they might not otherwise be able to attend or even ever be exposed to. Our classroom presentations expands the students education with the additional real experience of attending an Orchestra performance. The Music Memory program supports the music education classes and extracurricular music programs in our local schools. Goals and objectives: Live music experience of an Orchestra performance, introduction to a Concert Experience, advancement of musical culture in our community and encouragement of children with the promotion of music in our local schools.

**5. How many Prescott schoolchildren do you anticipate your program will serve?** Music Memory Concert invites 2200 students.

### 6. Organization Profile Describe your organization and how it serves the community:

The Prescott POPS Symphony Orchestra will provide six Concerts for our 2024-2025 Season at the Performing Arts Center on the Yavapai College Campus. In addition to our Season Performances, we also have youth initiatives. Every year we provide the Music Memory Concerts offered to all Yavapai County Schools, as well as home schooled students. In 2021 we founded the Prescott Youth Orchestra, which serves 46-52 students for each Fall and Spring Semester. Our other POPS Symphony youth service is a Music Camp serving over 50 students since our initial camp in 2021. We also provide Grants to local schools for instrument repairs and other music opportunities and needs selected by their music teachers. Since the pandemic, we have diligently and with deliberation expanded our student outreach and offerings to children through our Youth Orchestra and Music Camp. Our musicians provide coaching on a volunteer

basis. We do have a paid Conductor and paid Artistic Director. The on-going success and growth of our organization, along with the assistance of the community, has enabled us to expand our student and community music cultural growth.

**7. Previous Funding (If your organization received previous funding from the Acker Fund, please describe the project. What project goals were achieved? Who were the participants? What was the total in attendance? (Summarize how the funds received assisted the organization.)**

The Acker Trust has supported our organization in the past with an award in 2016 for student stipends for music performance and in 2018, an award of \$3000 for outreach to schools and to give families in Prescott who have limited financial resources a chance for their children to participate in vocal and instrumental programs.

**8. Describe the project to take place with the assistance of Acker Trust Funds.**

The project we are requesting assistance with is our annual Music Memory Concert. We invite 2200 students from the Yavapai County to participate without cost to them. We perform two concerts in the beautiful Performing Arts Center as well as provide a Student Book in preparation for the concerts. Some schools have Music Teachers that can present the pre-concert education. For schools that do not have music teachers, our musicians attend the classes and present the pre-concert music education to them. Our emphasis is on an "Orchestra" to promote music culture for their current enrichment and the hope they will want to become musicians themselves one day to continue our unique "Prescott" music environment. Concert date is May 9, 2024, but the program activities are virtually year around due to planning, operation activities, promotion, school contacts and board and committee work.

**9. What activities will take place? What age groups will be targeted?**

Depending on the school's administration choices, our activity is for elementary school children in 3rd, 4th, 5th and sometimes 6th grade. The activities are pre-concert classroom education either provided by their Music Teacher, if they have one. If there is no Music Teacher, our musicians present the pre-concert education material. Then on Concert Day, they attend the Music Memory Concert at the Jim and Linda Lee Performing Arts Center on the Yavapia College Campus. It is a school field trip that the teachers look forward to each year.

**10. How will you ensure that Prescott will benefit from Acker funding?**

It is assured that Prescott will benefit from the Acker Trust funding by furthering our community music culture and providing music education to our communities school children.

**11. What steps did you follow in determining a need for this program?**

Our community has provided the Music Memory program since 1947. Our music teachers contact us about the program, school administrators and their transportation departments participate, and we can see that the students music and life are enhanced by the live Orchestra pre-concert activity and the Concert especially.

**12. Evaluation: What methods will you use to evaluate the success of this project?**

The success of this project in reflected in its longevity and enthusiastic participation of educators, students and families.

**REQUIRED DOCUMENTS**

**Note:** The following material is to be submitted with all grant applications. No material will be accepted after the grant deadlines and incomplete applications and material will not be considered.

**Is the funding request for less than or more than \$5,000?**

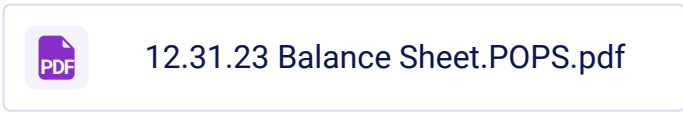
More than \$5,000

**File Upload: 501(c)(3) or statement on letterhead stating the organization is either a municipality, public school, or Indian Tribe**



501(c)(3) Letter DC 02 1998 ... .pdf

**File Upload: A one-page balance sheet**



**File Upload: The first two pages of the most recent Corporate Tax Return (IRS Form 990), or in the event that organization is exempt, please provide an IRS 990-N E-filing receipt or proper documentation**



## Organization Information

**Project Director Name:** Joseph Place

**Email Address:** [REDACTED]

**Mailing Address:** P O Box 10231  
Prescott, AZ, 86301

**Daytime Phone:** [REDACTED]

**Signature of Project Director**  


**Authorizing Official Name:** Brenda Olsen

**Authorizing Official Title:** Secretary

**Email Address:** [REDACTED]

**Address:** [REDACTED]  
Prescott, AZ, 86301

**Daytime Phone:** [REDACTED]

**Signature of Authorizing Official**  


## Project Budget:

**Funding from Earned Income and Support (Contributed Income):**

	Amount \$
1. Admissions	0
2. Contracted Services	3000.00
3. Other Revenue	0
4. Corporate Sponsors	0



501(c)(3)

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

DEPARTMENT OF THE TREASURY

Date: MAY 02 2002

PRESCOTT SUMMER POPS SYMPHONY  
C/O TARA SHOLLE  
[REDACTED]  
PRESCOTT, AZ 86301-0000

Employer Identification Number:  
86-0700475  
DLN:  
17053075764082  
Contact Person:  
DOUGLAS D DEPPEN ID# 31325  
Contact Telephone Number:  
[REDACTED]  
Our Letter Dated:  
November 5, 1998  
Addendum Applies:  
No

Dear Applicant:

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

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(2).

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(2) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(2) organization.

You are required to make your annual information return, Form 990 or Form 990-EZ, available for public inspection for three years after the later of the due date of the return or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and your exemption letter. Copies of these documents are also required to be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 557, Tax-Exempt Status for Your Organization, or you may call our toll free number shown above.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Letter 1050 (DO/CG)

Legal 501(c)(3)  
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PRESCOTT SUMMER POPS SYMPHONY

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

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

Sincerely yours,

*Steven J. Miller*  
Steven J. Miller  
Director, Exempt Organizations

Letter 1050 (DO/CG)

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

DEPARTMENT OF THE TREASURY

Date: **DEC 02 1998**

PRESCOTT SUMMER POPS SYMPHONY  
C/O TARA SHOLLE  
[REDACTED]  
PRESCOTT, AZ 86301

Employer Identification Number:  
86-0700475  
DLN:  
17053188002038  
Contact Person:  
D. A. DOWNING  
Contact Telephone Number:  
[REDACTED]  
Accounting Period Ending:  
December 31  
Foundation Status Classification:  
509(a)(2)  
Advance Ruling Period Begins:  
May 6, 1997  
Advance Ruling Period Ends:  
December 31, 2001  
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

Letter 1045 (DO/CG)

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PRESCOTT SUMMER POPS SYMPHONY

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 notice. In addition, if you lose your status as a publicly supported organization, and a grantor or contributor was responsible for, or was aware of, the act or failure to act, that resulted in your loss of such status, that person may not rely on this determination from the date of the act or failure to act. Also, if a grantor or contributor learned that we had given notice that you would be removed from classification as a publicly supported organization, then that person may not rely on this determination as of the date he or she acquired such knowledge.

If you change your sources of support, your purposes, character, or method of operation, please let us know so we can consider the effect of the change on your exempt status and foundation status. If you amend your organizational document or bylaws, please send us a copy of the amended document or bylaws. Also, let us know all changes in your name or address.

As of January 1, 1984, you are liable for social security taxes under the Federal Insurance Contributions Act on amounts of \$100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the private foundation excise taxes under Chapter 42 of the Internal Revenue Code. However, you are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please let us know.

Donors may deduct contributions to you as provided in section 170 of the Internal Revenue Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Donors may deduct contributions to you only to the extent that their contributions are gifts, with no consideration received. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as deductible contributions, depending on the circumstances. Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, gives guidelines regarding when taxpayers may deduct payments for admission to, or other participation in, fundraising activities for charity.

You are not required to file Form 990, Return of Organization Exempt From Income Tax, if your gross receipts each year are normally \$25,000 or less. If you receive a Form 990 package in the mail, simply attach the label provided, check the box in the heading to indicate that your annual gross receipts are normally \$25,000 or less, and sign the return. Because you will be treated as a public charity for return filing purposes during your entire advance ruling period, you should file Form 990 for each year in your advance ruling period that you exceed the \$25,000 filing threshold even if your sources of support do not satisfy the public support test specified in the heading of this letter.

Letter 1045 (DO/CG)

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PRESCOTT SUMMER POPS SYMPHONY

If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. A penalty of \$20 a day is charged when a return is filed late, unless there is reasonable cause for the delay. However, the maximum penalty charged cannot exceed \$10,000 or 5 percent of your gross receipts for the year, whichever is less. For organizations with gross receipts exceeding \$1,000,000 in any year, the penalty is \$100 per day per return, unless there is reasonable cause for the delay. The maximum penalty for an organization with gross receipts exceeding \$1,000,000 shall not exceed \$50,000. This penalty may also be charged if a return is not complete. So, please be sure your return is complete before you file it.

You are not required to file federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T, Exempt Organization Business Income Tax Return. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You are required to make your annual return available for public inspection for three years after the return is due. You are also required to make available a copy of your exemption application, any supporting documents, and this exemption letter. Failure to make these documents available for public inspection may subject you to a penalty of \$20 per day for each day there is a failure to comply (up to a maximum of \$10,000 in the case of an annual return).

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, we will assign a number to you and advise you of it. Please place that number on all returns you file and in all correspondence with the Internal Revenue Service.

This determination is based on evidence that your funds are dedicated to the purposes listed in section 501(c)(3) of the Code. To assure your continued exemption, you should keep records to show that funds are spent only for those purposes. If you distribute funds to other organizations, your records should show whether they are exempt under section 501(c)(3). In cases where the recipient organization is not exempt under section 501(c)(3), you must have evidence that the funds will remain dedicated to the required purposes and that the recipient will use the funds for those purposes.

If you distribute funds to individuals, you should keep case histories showing the recipients' names, addresses, purposes of awards, manner of selection, and relationship (if any) to members, officers, trustees or donors of funds to you, so that you can substantiate upon request by the Internal Revenue Service any and all distributions you made to individuals. (Revenue Ruling 56-304, C.B. 1956-2, page 306.)

Letter 1045 (DO/CG)

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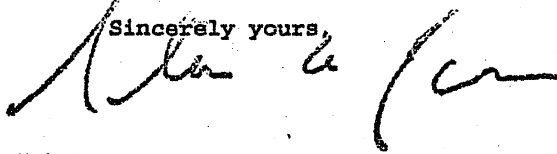
PRESCOTT SUMMER POPS SYMPHONY

If we said in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help us resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,



District Director

Enclosure(s):  
Form 872-C

Letter 1045 (DO/CG)

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## Prescott Symphony Orchestra, Inc.

## Balance Sheet

01/08/24

As of December 31, 2023

Cash Basis

	Dec 31, 23	Dec 31, 22	% Change
<b>ASSETS</b>			
<b>Current Assets</b>			
<b>Checking/Savings</b>			
██████████ Checking acct	10,201.38	12,721.31	-19.8%
██████████ Money Market	788.83	63,706.37	-98.8%
██████████ Operating	28,059.33	0.00	100.0%
██████████ MM	10,583.41	0.00	100.0%
Paypal	1,251.08	7,205.94	-82.6%
<b>Total Checking/Savings</b>	<b>50,884.03</b>	<b>83,633.62</b>	<b>-39.2%</b>
<b>Other Current Assets</b>			
Undeposited Funds-1	0.00	1,822.00	-100.0%
<b>Total Other Current Assets</b>	<b>0.00</b>	<b>1,822.00</b>	<b>-100.0%</b>
<b>Total Current Assets</b>	<b>50,884.03</b>	<b>85,455.62</b>	<b>-40.5%</b>
<b>TOTAL ASSETS</b>	<b>50,884.03</b>	<b>85,455.62</b>	<b>-40.5%</b>
<b>LIABILITIES &amp; EQUITY</b>			
<b>Liabilities</b>			
<b>Long Term Liabilities</b>			
Prescott Strings Funds	0.00	673.30	-100.0%
<b>Total Long Term Liabilities</b>	<b>0.00</b>	<b>673.30</b>	<b>-100.0%</b>
<b>Total Liabilities</b>	<b>0.00</b>	<b>673.30</b>	<b>-100.0%</b>
<b>Equity</b>			
Restrictied Net Assets	3,000.00	3,000.00	0.0%
Unrestricted Net Assets	81,282.32	66,712.83	21.8%
Net Income	-33,398.29	15,069.49	-321.6%
<b>Total Equity</b>	<b>50,884.03</b>	<b>84,782.32</b>	<b>-40.0%</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>50,884.03</b>	<b>85,455.62</b>	<b>-40.5%</b>

# Return of Organization Exempt From Income Tax

OMB No. 1545-0047

## 2022

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

**A** For the **2022** calendar year, or tax year beginning , **2022**, and ending , **20**

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization <b>PRESCOTT SYMPHONY ORCHESTRA</b> Doing business as Number and street (or P.O. box if mail is not delivered to street address) Room/suite <b>PO BOX 10231</b> City or town, state or province, country, and ZIP or foreign postal code <b>PRESCOTT, AZ 86304</b>	<b>D</b> Employer identification number <b>86-0700475</b> <b>E</b> Telephone number [REDACTED]
<b>F</b> Name and address of principal officer: <b>Dean Holbrook</b> <b>Same as C above</b>		<b>G</b> Gross receipts \$ <b>238,448</b> <b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions <b>H(c)</b> Group exemption number
<b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		
<b>J</b> Website: <b>www.prescottpops.com</b>		
<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other		<b>L</b> Year of formation: <b>1998</b> <b>M</b> State of legal domicile: <b>AZ</b>

### Part I Summary

	<b>1</b> Briefly describe the organization's mission or most significant activities: <b>PROVIDE ORCHESTRAL MUSIC IN THE COMMUNITY AND MUSIC EDUCATION ENRICHMENT FOR YOUTH</b>		
Activities & Governance	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	<b>11</b>
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	<b>11</b>
	<b>5</b> Total number of individuals employed in calendar year 2022 (Part V, line 2a)	<b>5</b>	<b>0</b>
	<b>6</b> Total number of volunteers (estimate if necessary)	<b>6</b>	<b>23</b>
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	<b>0</b>
	<b>b</b> Net unrelated business taxable income from Form 990-T, Part I, line 11	<b>7b</b>	<b>0</b>
Revenue		Prior Year	Current Year
	<b>8</b> Contributions and grants (Part VIII, line 1h)	48,190	52,859
	<b>9</b> Program service revenue (Part VIII, line 2g)	18,562	185,576
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	31	13
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	1,325	0
	<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	68,108	238,448
Expenses	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)		4,715
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)		0
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	25,250	7,597
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)	36,415	0
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25)	12,882	
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	41,266	211,908
	<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	102,931	224,220
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	(34,823)	14,228	
Net Assets or Fund Balances		Beginning of Current Year	End of Year
	<b>20</b> Total assets (Part X, line 16)	69,713	85,456
	<b>21</b> Total liabilities (Part X, line 26)	(180)	1,335
<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	69,893	84,121	

### Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	<b>Tara L Sholle</b>	
	Signature of officer	Date
	<b>Tara L Sholle, Treasurer</b>	
	Type or print name and title	

<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name	Firm's EIN			
	Firm's address	Phone no.			

May the IRS discuss this return with the preparer shown above? See instructions  Yes  No

For Paperwork Reduction Act Notice, see the separate instructions.

**Part III Statement of Program Service Accomplishments**

Check if Schedule O contains a response or note to any line in this Part III

1 Briefly describe the organization's mission:

**PROVIDE ORCHESTRAL MUSIC IN THE COMMUNITY AND MUSIC EDUCATION ENRICHMENT FOR YOUTH**

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?  Yes  No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?  Yes  No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ 207,079 including grants of \$ 4,500 ) (Revenue \$ 182,996 )

**Five community concerts, Youth Orchestra workshops and performances**

4b (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4c (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4d Other program services (Describe on Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses **207,079**

DEADLINE EXTENDED TO  
APRIL 12, 2024

FILED WITH  
CITY CLERK

Received date:

Date 4-12-24 Hr. 2: PM

Sign. [Signature]

CITY OF PRESCOTT  
ACKER TRUST FUND

FY 2025 GRANT APPLICATION (July 1, 2024 to June 30, 2025)

Name of Organization Prescott Western Heritage Foundation, Inc.

Mailing Address [Redacted]

City, State, ZIP Prescott, AZ 86302

Person to Contact Brenda Cusick

Daytime Phone # [Redacted]

Email Address [Redacted]

1. Provide a one sentence description of the project for which Acker funds are being sought:

To add music to our children's programming.

2. Funding request: \$ \$1,000.<sup>00</sup>

3. Brief History and Background of your Organization (300 words or less):  
(You may attach a separate page)

see attached

4. Primary goals and objectives:

see attached

5. How many Prescott schoolchildren do you anticipate your program will serve?

200-300 (field trips), 7K-10K visitors (kids)

6. Organization Profile (Describe your organization and how it serves the community):

Preserving + educating people about the city's Western heritage.

7. Previous Funding (If your organization received previous funding from the Acker Fund, please describe the project. What project goals were achieved? Who were the participants? What was the total in attendance? (Summarize how the funds received assisted the organization.)

N/A

8. Describe the project to take place with the assistance of Acker Trust Funds.

Planning grant to add music to our children's programs.

9. What activities will take place? What age groups will be targeted?  
 1. Adding country + western music to the field trips  
 2. 3rd + 4th graders from Prescott Schools.
10. How will you ensure that Prescott will benefit from Acker funding?  
 This request is specific to school children of Prescott.
11. What steps did you follow in determining a need for this program?  
 Working with 3rd + 4th grade teachers from 2022 to present.
12. Evaluation: What methods will you use to evaluate the success of this project?  
 A. Mid year evaluation (see timeline) with educators  
 B. Review by our BOD midyear + year end.

**Note:** The following material is to be submitted with all grant applications. No material will be accepted after the grant deadlines and incomplete applications and material will not be considered.

**Compliance Checklist:**

**Funding requests for less than \$5,000:**

- Grant Application
- 501(c)(3) or statement on letterhead stating the organization is either a municipality, public school, or Indian Tribe
- Project Budget (use attached format)
- A one-page balance sheet. (Additional documentation may be requested)

**Funding requests for more than \$5,000:**

- Grant application
- 501(c)(3) or statement on letterhead stating the organization is either a municipality, public school, or Indian Tribe
- Project Budget (use attached format)
- A one-page balance sheet. (Additional documentation may be requested)
- The first two pages of the most recent Corporate Tax Return (IRS Form 990), or in the event that organization is exempt, please provide an IRS 990-N E-filing receipt or proper documentation

**ORGANIZATION INFORMATION**

Project Director: Pamela (Pam) Kellogg Merkel

Email Address [REDACTED]

Mailing Address: [REDACTED]

City, State, ZIP Prescott, AZ 86303

Daytime Phone# [REDACTED]

Signature of Project Director Pam Kellogg

Authorizing Official Christa Hoffman Title VP Administration

Email Address [REDACTED]

Address 156 C S. MONTEZUMA, PRESCOTT, AZ 86302

Daytime Phone # CHRISTA # [REDACTED] DENNIS # [REDACTED]

Signature of Authorizing Official Dennis Gallagher  
DENNIS GALLAGHER, CEO + FOUNDER

**PROJECT BUDGET FOR:**

Prescott Western Heritage Foundation, Inc.

Organization Name

<b>FUNDING</b>	
<b>Earned Income</b>	
1. Admissions	
2. Contracted Services	
3. Other Revenue	
<b>Support: (Contributed Income)</b>	
4. Corporate Sponsors	
5. Foundations Grants	
6. Private Contributions	
7. Governmental Support (Identify source)	
a) Federal:	
b) State:	
c) City or County:	
8. Applicant Cash	
<b>Total Existing Funding: (lines 1 thru 8)</b>	
Grant Amount Requested:	\$1,000
<b>TOTAL FUNDING:</b>	
<b>EXPENSES:</b>	
9. Personnel / Staff (include salary and benefits)	0
a) Administration	
b) Artistic	
c) Technical / Production	
10. Outside Fees and Services (provide details)	
a) Artistic	
b) Development	
11. Product Expenses	
12. Rental Expenses	
13. Promotion	
14. Other Operating Expenses	
<b>Total Project Cost: (lines 9 thru 14)</b>	
Note: "Total Funding" should equal "Total Project Cost"	

see attached

## Prescott Western Heritage Foundation – ACKER TRUST Grant Request

### EXECUTIVE SUMMARY:

Please help us enhance our children's field trip program. We host 200-300 school children at our Center on Whiskey Row during the fall and spring school semesters. All children are from the Prescott area. We are seeking funding to add country and western music to this program.

### PROJECT OVERVIEW:

Starting in the fall of 2022 we invited several schools to consider sending their 3<sup>rd</sup> and 4<sup>th</sup> grade classes to a free field trip to enhance the children's education while they study Arizona History. The response was very good and we hosted 5 classes of approximately 30 children (140-150 kids) in our first year.

The current school year (2023-2024) is even more popular, and we expect to host 200-300 children. We provide a very interactive, day long event in partnership with local school teachers to add to their history lessons. We have hosted homeschool groups and charter schools as well.

Our volunteers break the classes into 3 groups: The groups go "round robin" and get to experience our Western Heritage with many hands on experiences in a living history setting. For example:

Group 1 – stays in the Center and hears a brief overview of Prescott's history as the territorial capital by enthusiastic volunteers dressed in period cowboy or Victorian costumes. They are then given a developmentally appropriate tour of several exhibits in our Center.

Group 2 – is taken to the empty lot (corner of McCormick and Montezuma) to see a live demonstration of cowboy roping. The children get to see a volunteer use a lariat – and then they get the chance to try and "rope a steer" (he is made of wood.) Often we also hire a cowboy or a person with a pony or horse.

\*Group 3 – this group is taken by a local historian volunteer (also in Western wear or Victorian costume) – who leads the kids on a walk around our historic Courthouse Plaza. The statues (e.g. – Rough Rider, Cowboy at Rest) and the Courthouse itself are used as visual aids to tell history stories. **THIS IS WHERE WE WOULD LIKE TO ADD MUSIC TO THE PROGRAM.**

### NEEDS ADDRESSED:

1. Education – specifically history / heritage
2. Supporting local schools and homeschoolers
3. Adding more hands on / tactile learning opportunities to the lessons
4. After 2 years of doing this program – we find we need to add an element to our "courthouse" walking lecture/tour. We think MUSIC would be perfect!

**TIMELINE:**

**Summer 2024** – grant / funding received

**Summer 2024** – Project director will gather input from educators on ways to add music into the program. Lesson plans will be updated to include music.

**Late summer 2024** – Project director will schedule volunteers and obtain materials to execute lesson plans we have the volunteers on board – waiting. Detailed plan exists and has been reviewed by BOD). Musical instruments and materials will be purchased.

**Fall 2024** – New lesson plan will be used in the Fall semester field trips at our Center.

**Late fall 2024** – Evaluate and adjust for Spring field trips.

**Winter 2024** – Update lesson plans.

**Spring 2025** – Adjusted lesson plans will be used in the Spring field trips to our Center.

**Late spring 2025** – Evaluate and write reports for BOD and granting bodies.

**Late spring 2025** – Determine if music addition was successful and how to move forward for Fall 2025 and beyond.

**FUNDING / BUDGET NARRATIVE:**

The current field trip program is volunteer based and entirely funded from the PWHF budgets – somewhat on a “shoe string”. But we consider education of the next generation critical to ensuring our Western heritage continues strong in Prescott and as SOON as the pandemic allowed us – we started out on our Children’s Program (the field trip offer to local schools).

This funding request would help us secure matching funds from the Frontier Rotary. We have already received a small grant from Kiwanis and support from YEI and APS.

The funding will help us plan for the 24-25 academic year, work with educators to develop lesson plans, and execute adding Western and Country music to our existing, successful field trips.

We envision purchasing a large set of child friendly musical instruments (e.g. – drums, rattles, etc.) as well as storage so they can be used again.

**The Prescott Western Heritage Foundation has won the following awards:**

2024 – Best Attraction – Prescott AZ

2024 – Best Museum/Culture Destination – Yavapai County

2023 – Non-Profit Organization of the Year – Prescott Chamber of Commerce

**Our Mission:**

To preserve and promote the Prescott area's western heritage through education, art, music, events and projects that enhance its western lifestyle, making Prescott and Yavapai County unique and desirable places to live and visit.

**Visit Us:**

Online: [www.VisitWHC.org](http://www.VisitWHC.org)

On Whiskey Row at 156 C South Montezuma in downtown Prescott

**PROJECT BUDGET FOR:**

PRESCOTT WESTERN HERITAGE FOUNDATION, INC. - ENHANCEMENT TO CHILDREN'S FIELD TRIPS PROGRAM

**FUNDING:****Earned Income**

1. Admissions	none
2. Contracted Services	none
3. Other Revenue	none

**Support (Contributed Income)**

4. Corporate Sponsors	\$200	APS printing
5. Foundation Grants	\$1,200	Rotary & Kiwanis
6. Private Contributions	\$1,500	
7. Governmental Support		
a) Federal:		
b) State:		
c) City or County	inkind	Use of empty lot by Chamber
8. Applicant Cash	\$2,000	

**Total Existing Funding: (lines 1-8)**

Grant Amount Requested: \$1,000

**TOTAL FUNDING: \$5,700****EXPENSES:**

9. Personnel / Staff (salary and benefits)	none	Our organization is all volunteer
a) Administration		
b) Artistic		
c) Technical / Production		
10. Outside Fees and Services (provide details)		
a) Artistic	\$500	per diem / supplies
b) Development	\$500	per diem / supplies
11. Product Expenses	\$2,700	Music instruments, outdoor equip.
12. Rental Expenses	\$1,500	Cowboy, horse, pony, storage
13. Promotion	\$200	Printing
14. Other Operating Expenses	\$300	Extra insurance

**TOTAL PROJECT COST: \$5,700**

(Note: Total Funding should equal Total Project Cost)

**Prescott Western Heritage Foundation**  
**Balance Sheet**  
As of February 29, 2024

Accrual Basis

	Feb 29, 24
<b>ASSETS</b>	
Current Assets	
Checking/Savings	
Savings	75,030.18
Savings	17.23
	18,264.24
Total Checking/Savings	93,311.65
Other Current Assets	
12100 · Inventory Asset	19,814.48
Total Other Current Assets	19,814.48
Total Current Assets	113,126.13
Fixed Assets	
Archival System	3,797.26
15000 · Furniture and Equipment	708.06
15500 · Accumulated Depreciation	-3,403.00
Total Fixed Assets	1,102.32
Other Assets	
Petty cash	172.84
Rent Deposit -- Storage Unit	25.00
Total Other Assets	197.84
<b>TOTAL ASSETS</b>	<b>114,426.29</b>
<b>LIABILITIES &amp; EQUITY</b>	
Liabilities	
Current Liabilities	
Accounts Payable	
20000 · Accounts Payable	1,006.12
Total Accounts Payable	1,006.12
Credit Cards	
	2,169.40
	584.92
	1,572.09
Total Credit Cards	4,326.41

**Prescott Western Heritage Foundation**  
**Balance Sheet**  
As of February 29, 2024

Accrual Basis

	<u>Feb 29, 24</u>
Other Current Liabilities	
24200 - Note Payable - [REDACTED] loan	19,398.00
Total Other Current Liabilities	<u>19,398.00</u>
Total Current Liabilities	<u>24,730.53</u>
Total Liabilities	24,730.53
Equity	
31300 - Perm. Restricted Net Assets	15,451.21
32000 - Unrestricted Net Assets	80,757.27
Net Income	<u>-6,512.72</u>
Total Equity	<u>89,695.76</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b><u>114,426.29</u></b>

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

DEPARTMENT OF THE TREASURY

Date: SEP 10 2012

PRESCOTT WESTERN HERITAGE  
FOUNDATION INC  
[REDACTED]  
PRESCOTT, AZ 86304-0773

Employer Identification Number:  
27-3076815  
DLN:  
17053170345032  
Contact Person:  
DEL TRIMBLE ID# 31309  
Contact Telephone Number:  
[REDACTED]  
Accounting Period Ending:  
December 31  
Public Charity Status:  
170(b)(1)(A)(vi)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
May 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.

Letter 947 (DO/CG)

PRESCOTT WESTERN HERITAGE

Sincerely,

A handwritten signature in black ink that reads "Holly O. Paz". The signature is written in a cursive style with a large, prominent "H" and "P".

Holly O. Paz  
Director, Exempt Organizations  
Rulings and Agreements

Enclosure: Publication 4221-PC

# ANNUAL WESTERN HERITAGE BANQUET

*“Continuing the Tradition”*



Taylor English  
2023 Western “Heritage Keeper”  
Scholarship recipient (Rodeo)



Kenzie Kelton  
2023 Western “Heritage Keeper”  
Scholarship recipient (Rodeo)



Jaxton Motenson  
2023 Western “Heritage Keeper”  
Scholarship recipient (Rodeo)

At the annual Western Heritage Banquet, our Foundation recognizes organizations, individuals and/or families who have made significant contributions to the preservation and promotion of one or more segments of Prescott and Yavapai County’s history. Additionally at the banquet, the Foundation awards our Western “Heritage Keeper” scholarships to deserving students.



## WESTERN HERITAGE CENTER

### *Gifting Opportunities*

Please consider gifting to the Prescott Western Heritage Foundation to help sustain the Western Heritage Center on Whiskey Row in downtown Prescott.

**Your generous donation is extremely important to the ongoing success of the Western Heritage Center.**

Through the financial leadership and generosity of major donors, the Western Heritage Center is becoming a successful and sustainable endeavor. Gifts can be unrestricted or can be directed to a specific purpose.

The Western Heritage Center Capital Campaign Committee is happy to speak with you about your specific philanthropic interest. Please contact us via email at:

[pwhfCEO.founder@gmail.com](mailto:pwhfCEO.founder@gmail.com)  
P.O. Box 773 ★ Prescott, AZ 86302  
928.910.2307

The Prescott Western Heritage Foundation, Inc., is a 501(c)3 Corporation.

# PRESCOTT WESTERN HERITAGE FOUNDATION



**CELEBRATE ★ EDUCATE  
PRESERVE ★ PROMOTE**

The mission of the  
**PRESCOTT WESTERN  
HERITAGE FOUNDATION**  
is to preserve and promote  
the Prescott area’s western heritage  
through education, art, music,  
events, and projects that enhance its  
western lifestyle, making Prescott  
and Yavapai County unique and  
desirable places to live and visit.

**VisitWHC.org**

# WHO WE ARE

The Prescott Western Heritage Foundation's vision is to create the largest collaboration of western and historical organizations in Arizona.

Our goal is to make Prescott and Yavapai County the state's premier destination for visiting local museums, historical societies and events which celebrate the Prescott area's unique western heritage and culture. The Foundation is a 501(c)3 charitable, non-profit corporation.

# WHAT WE DO

- ★ Provide Western "Heritage Keeper" Scholarships to deserving students who have a passion and the talent to preserve our heritage.
- ★ Offer an attractive, comprehensive website (VisitWHC.org) which provides specific information about destinations, events and activities related to the Prescott area's history and western heritage.
- ★ Our Educational Outreach Program provides financial support for elementary school projects specifically related to our history and heritage.

# MAJOR OBJECTIVE

Currently, we are seeking support to sustain our Western Heritage Center on historic Whiskey Row in downtown Prescott. The Center showcases all participating, non-profit organizations in Yavapai County, which help preserve, promote and educate residents, visitors and our youth about our history and western heritage. The Western Heritage Center's downtown location raises the awareness of our unique and special history so that it becomes a greater part of our future. To accomplish this ambitious goal, donors can provide support in a variety of ways:

- ★ Major donations will help support the Center by providing funding to assist with the build-out and maintenance of our location on Whiskey Row.
- ★ Other donations will help offset day-to-day operational costs.
- ★ By donating memorabilia, artwork and artifacts representing Yavapai County's history and heritage.
- ★ Provide for Planned Giving or a Legacy Gift which will help ensure the sustainability of the Center.

For details, contact the  
Capital Campaign Committee at:  
[pwhfCEO.founder@gmail.com](mailto:pwhfCEO.founder@gmail.com)  
P. O. Box 773 · Prescott, AZ 86302



Now Open on Whiskey Row  
in Downtown Prescott  
156C S. Montezuma Street  
Prescott, AZ 86303

Visit our website at  
[www.VisitWHC.org](http://www.VisitWHC.org)



TO: MAYOR AND CITY COUNCIL  
AGENDA: May 30 Civic Enhancement Committee Meeting  
DATE: May 30, 2024  
DEPT: City Clerk  
ITEM #: 8.A  
SUBJECT: Consideration of Recommendation(s) for Awards of Acker Trust Grant Program Funds.

## ITEM SUMMARY

Committee members will recommend approval of reviewed and discussed applications for the Acker Trust Grant Program.

## BACKGROUND

In accordance with the will of J.S. Acker, non-profit organizations that promote "... music and parks, especially for the children of Prescott ..." are encouraged to apply. Reference: City of Prescott Acker Trust Grant Program – Arizona

## FINANCIAL IMPACT

None.

## RECOMMENDED ACTION

MOVE to approve recommendation(s) for award of Acker Trust Grant Program funds and forward the same to Council

## ATTACHMENTS

None