

Name of Organization: The Sierra Classic Theatre Company

Contact Name & Title __Allison McDonell Page

Mailing Address/City/Zip PO box 543 Mammoth Lakes, CA 93546

Telephone Number __323-646-5055

Email Address thesierraclassictheatere@gmail.com

Website

www.sierraclassictheatre.com

Type of Organization (i.e. non-profit, for-profit/Commercial, Government, HOA, etc.) non-profit

Tax ID # 77-0526504

Name of Event Summer Shakespeare in the Woods

Event Type (performing arts, educational, recreation event) Performing arts

Event Date(s) and Times Aug 8,2014-Aug17,2014

Event Location(s) Sams Woodsite

Will this event be conducted if Measure U funds are not awarded? Yes No

Funding Category:

- Recreational (special event)
- Arts & Culture
- Mobility

Funding Request: \$ 6000

Funding Percentage of event's operating budget: % 100

Purpose of requested funds:improvement of production, increased target audience

- Please specify how Measure U funds will be utilized:

Operations: \$ 2000 _____
 Marketing: \$ 1000 _____
 Entertainment: \$ _____
 Supplies/Materials: \$ _____
 Facility lease/equipment: \$ 3000 _____
 Other: \$ _____

1. Identify how your event aligns with Measure U priorities established by the Town?

Check all that apply and cite examples in a concise manner.

- Economic stimulus / sustainability
- High Impact
- Ready to go / Implementation
- Leverage
- Exists in current plans and studies

Examples: _____

2. Have any public funds (including Measure R & U, general fund) been previously committed, or are presently committed to this event?

Yes No If yes, please specify: \$ _____

3. Please check all that applies for your event:

Traffic control required (MLPD, cones, barricades, signage, etc.)

- Equipment / vehicle staging on-site or off-site
- Use of Town of Mammoth Lakes streets or right-of-ways
- On street and/or on venue parking
- Police, Fire or other municipal agency participation
- Over 250 attendees at one time
- Sales events, sidewalk sales, parking lot sales
- Tents and/or semi-permanent structures utilized
- Serving of food or alcohol
- 12-24 hour event duration with single or multiple event sites
- Adjacent to residential property
- Use of amplified music and/or entertainment
- Waste / recycling collection
- Wildlife management

4. How many years has this event been conducted? 15

- 1-3 years
 4- 6 years
 7+ years

5. Submit a proposed Event Budget and Business Plan that includes:

- Identification of event organizer (applicant) and organizing (delivery) committee or team
- List organizer's event/business experience, qualifications and recently hosted events
- One page Executive Summary
- Operational plan (event schedule/days/times/location(s), site plan, survey plan, and trash management plan, etc.)
- Staffing plan / Volunteer plan
- Marketing/advertising/social media plan
- Emergency operations plan (not just call 911)
- Proposed event budget and previous year's actual event budget (see template)
- Identify all funding sources (Grants, Fundraising, Sponsorships, In-kind, Ticket Sales, donations, etc.)

PART 2 – ORGANIZATION INFORMATION

1. What is the organization's Mission Statement? To provide high quality, low or no cost productions to the greater eastern Sierra Community. To continue positive growth with increasing numbers of attendees with the eventual goal of producing a summer time, month long ,world-class Shakespearian festival on par with Ashland

2. Please identify the event goals and tell us how you would define success for this event.

a) , coordinate stage rental with previous production, Bloozapaloosa

b) Increase advertising in order to increase audience size to 500

c) _Create a more professional production

d) _____

Define success for your event: __As above

__Increase audience to 500 attendees and create a more professional production

3. Identify all principal organizations and stakeholders involved in this event and their responsibilities (if applicable).

4. Provide your organizations summary budget for the current Fiscal Year (QuickBooks format is preferred). Please include:
 - a. Income
 - b. Expenses
 - c. In-Kind Donations (volunteers, equipment, etc.)

5. Financial Documentation
 - a. Provide the organizations most recent IRS 990 or a copy of IRS 501 (c) 3 letter

6. Feasibility Study
 - a. All applicants requesting \$25,000 or more from Measure U for event funding are required to complete Part 2a of the application form.

PART 2a

For any clarification regarding the questions or degree of detail that needs to be provided, please contact Town Staff.

1. Competitive Supply Analysis

- A. Provide a review of both direct and indirect competition and the strengths and weaknesses of the competition (SWOT) – identification of where the proposed project fits within the marketplace.

2. Identification of Market Opportunity

- A. Identify the long-term opportunity that the project/program presents.

3. Describe the targeted users of your project/program (include the number of participants).

4. Projected Multi-Year Demand Analysis

- A. Provide the projected demand with assumptions.

5. Projected Multi-Year Revenue Projections

- A. Projected revenue with pricing assumptions.

Project Executive Summary

Sierra Classic Theatre seeks to provide a quality Outdoor Summer Shakespeare production with 500 locals and visitors attending per night, for 6 nights, the second two weekends in August at Sam's Woodsite. We will attempt to coordinate with the Turners to use the Bloozsapolooza stage which will already be set up. With additional funding we will be able to rent the space, stage chairs, and costumes for an enhanced theater experience that will be able to sustain audiences of 500 plus; thus providing a quality theatrical experience for 3000 people. In addition advertising will be increased, an area in which we are in dire need of improvement. Free Summer Shakespeare has come to be expected by visitors to town from around the country and even the world. SCT has shown that we can provide a quality, semi-professional and well-attended event without the help of additional funds. Now we need your help in order to be even better and take the initial steps toward our vision of bringing a world-class Shakespeare festival to our alpine hamlet. Jazz Jubilee started as a simple vision to bring quality jazz music to the Eastern Sierra and has grown to a massive multi-day event. Bluesapolooza began with a few bands and barely enough suds to catch a buzz. Look what they have become as the awesome event that they annually present brings tens of thousands to Mammoth to celebrate music and libations. We at Sierra Classic Theatre believe that our vision will improve our community, profit our businesses and provide yet another reason to come to our great town.

Project Concept Plan/ Business Plan

This project is an expansion of the current summer "Shakespeare in the Woods" event. Sierra Classic Theatre intends to grow this event until it becomes a world-renowned Shakespeare Festival epicenter like the one in Ashland, Oregon. Eventually, we will have a resident theater company as well as visiting companies. We will have classes and camps and provide a full-blown Shakespeare Festival that would continue all summer long. The festival would use the venues throughout town and increase tourism as well as the cultural clout of the town. Measure U funds will help determine our short and long term possibilities and time line.

With the initial Measure U funds we will rent our stage, space, chairs, costumes and pay for advertising. SCT has grown a company and theatergoers have come to expect great things. Since I have been involved we have not been able to expand as we are all volunteers and all put in incredible amounts of time as it stands. Our expenses (storage, insurance, and fees) have also increased. In order to expand this event and other events, we will need to hire an event director, as well as making sure our costs are reimbursed. In the past we have lost money, and occasionally make money. We would like to make sure we can always at least break even.

Budget:

\$3500: Entire budget for past Shakespeare shows. This includes director, rights, stage manager, marketing, set and costumes.

This number reflects the generosity of Sam Walker, giving us the Sam's Woodsite for free; the generosity of Ken and Flossie Coulter for giving us use of their chairs, for free; the generosity of Sean Turner for the use of his electricity and tents. As Sam Walker suggested, he could be charging. Last year there was complication with the chairs due to a mountain event. If these people start charging, this amount could quickly grow to over \$6000. We would likely not be able to have the event or would have to start charging for tickets.

Additional costs to come this year:

\$2000: space and stage rental

\$1000: advertising

\$ 1000: costume rental

\$ 2000: equipment rental

Ticket donations (Profit): Because it's "donation only" we can only expect \$2000 to \$3000 (the highest amount we have had in the past.)

This is an addition \$4900 cost to produce the show. This is all with minimal advertising. We could certainly spend more on that front.

Yearly SCT expenses: (We typically can cover these costs with the profits from our fall Murder Mystery but we do not typically make enough money to cover the costs of Shakespeare, especially if the costs go up.)

\$1850 for insurance

\$2460 for storage

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

DEPARTMENT OF THE TREASURY

Date: OCT 10 2003

SIERRA CLASSIC THEATRE INC
PO BOX 543
MAMMOTH LAKES, CA 93546

Employer Identification Number:
77-0526504
DLN:
17053267047033
Contact Person:
DALE T SCHABER ID# 31175
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
July 31
Form 990 Required:
Yes
Addendum Applies:
No

Dear Applicant:

Based on information 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).

We have further determined that you are not a private foundation within the meaning of section 509(a) of the Code, because you are an organization described in section 509(a)(2).

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

As of January 1, 1984, you are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration 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).

Since you are not a private foundation, you are not subject to the excise taxes under Chapter 42 of the Code. However, if you are involved in an excess benefit transaction, that transaction might be subject to the excise taxes of section 4958. Additionally, you are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please contact your key district office.

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

Letter 947 (DO/CG)

SIERRA CLASSIC THEATRE INC

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.

Donors may deduct contributions to you as provided in section 170 of the 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 Code sections 2055, 2106, and 2522.

Contribution deductions are allowable to donors 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. See Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, which sets forth guidelines regarding the deductibility, as charitable contributions, of payments made by taxpayers for admission to or other participation in fundraising activities for charity.

In the heading of this letter we have indicated whether you must file Form 990, Return of Organization Exempt From Income Tax. If Yes is indicated, you are required to file Form 990 only if your gross receipts each year are normally more than \$25,000. However, if you receive a Form 990 package in the mail, please file the return even if you do not exceed the gross receipts test. If you are not required to file, 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.

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 be sure your return is complete before you file it.

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.

Letter 947 (DO/CG)

SIERRA CLASSIC THEATRE INC

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

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

Because this letter could help 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,



Lois G. Lerner
Director, Exempt Organizations
Rulings and Agreements

From: "Sam Walker" <mammothbrew@earthlink.net>
Subject: RE: Summer Shakespeare in the woods
Date: March 22, 2012 8:24:15 AM PDT
To: "Allison McDonell" <almcdon@earthlink.net>

Allison: I Have no problem your using the site. I did not hear directly, but heard there were some problems with clean up last year. Please contact Jazz Jubilee and Bloozapalosa and make sure everything is OK. Sam

Sam Walker
760 914-2484 Cell
mammothbrew@earthlink.net
Mammoth
PO Box 7465
Mammoth Lakes, Ca. 93546
Orcas
PO Box 393
Orcas, Wa. 98280

From: Allison McDonell [mailto:almcdon@earthlink.net]
Sent: Thursday, March 22, 2012 8:04 AM
To: mammothbrew@earthlink.net
Subject: Summer Shakespeare in the woods

Hi Sam,

This is Allison McDonell Page who directed Shakespeare at Sam's woods last summer and the summer before for Sierra Classic Theatre. I know Sam's woods is for sale and I hear you might not be offering it for events. We were thinking about doing the show again between jazz jubilee and Blues a palooza, those two weeks of July. Let me know if you think this would be okay or if you would like us to use another venue. Thank you so much.

Best,

Allison

Allison McDonell Page
The Snowcreek Property Company
Cell: 323 648 5055
Allison@snowcreekproperty.com
Lic.# 01884937