Orange County Arts & Cultural Affairs
Orange County, Florida

2022-23 Cultural Tourism Funding Guidelines

Prepared for Orange County Arts and Cultural Affairs,

Funding & Standards Committee, 11/8/21;

Approved by Advisory Council, 2/17/22

ORANGE COUNTY MAYOR

Jerry L. Demings

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Greetings!

As Mayor of Orange County, I have been and continue to be committed to building a world-class community that works for everyone. Through innovation, collaboration and inclusion, we are creating a diverse and thriving arts and cultural community. Arts and culture foster a vibrant economy, quality of life and business climate that are the hallmarks of Metro Orlando. We are proud of the community contributions that have helped shape our region as a great place to live and visit.

Thank you for your interest in the Orange County Cultural Tourism funding process for Fiscal Year 22-23. Orange County's Arts & Cultural Affairs Office and Advisory Council work together to recommend how the county's Tourist Development Tax revenues and general fund dollars should be invested. These funds help elevate the status of arts and culture in Central Florida. The attached application will help guide you in fulfilling the mission of our Arts & Cultural Affairs program.

Throughout the COVID-19 pandemic, arts and culture have continued to be a dedicated, resilient force in our community. We consider this an integral part of how arts and culture connect our residents and visitors. I wish you the very best as you continue to strengthen and expand the scope and quality of exhibitions and performances that transform our county.

Sincerely,

Jerry L. Demings
Orange County Mayor

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About Cultural Tourism Funding

Orange County Arts & Cultural Affairs **MISSION:**

To elevate Central Florida's arts and culture
to that befitting a diverse, world-class community.

OBJECTIVES
- ✓ Enhance the Orlando area's arts and cultural identity
- ✓ Present quality arts and cultural experiences
- ✓ Promote tourism

Who can apply? Eligibility Requirements

Any arts and cultural organization that meets <u>every one</u> of the following eligibility requirements:

1. Cultural nonprofit 501(c)(3) corporation registered and in good standing with the State of Florida and IRS, OR, an American Alliance of Museums (AAM)-accredited museum that meets all other requirements the same as a 501(c)(3); AND current with any open Orange County grants.

2. Completed minimum of one year of providing cultural programming in Orange County that attracts tourists.

3. Produce in ORANGE COUNTY the arts and culture event for which you are applying that is accessible and promoted to the general public. The project occurs within the Project Period of Nov. 1, 2022 to Feb 28, 2024, with actual event(s) that occurs between January 1 to December 31, 2023.

4. The arts and culture activities proposed are not a supplementary event at a non-arts conference, professional meeting, reunion or other similar gathering.

5. Market this project to potential visitors beyond the immediate four-county area of Orange, Osceola, Lake and Seminole counties.

6. Show community support in donations specifically for this project that match the request amount at least dollar-for-dollar.

7. Attend a FY23 Cultural Tourism Funding workshop – mandatory for first-time applicants and applicants that have not been awarded in the previous cycle, or have been identified as required participants.

8. All applicants must have a checking account with a licensed financial institution.

9. All applicants must prepare at least **quarterly financial statements** (Balance Sheet and Profit & Loss Statement) that are reviewed and approved by the board (either signed statements or shown in board minutes to have been approved); within 6 months of fiscal year-end (reviewed or audited financial statements required, based on prior year revenue).

10. Have a <u>current</u> profile on the Central Florida Foundation Nonprofit Search website, bearing the "Reviewed" stamp, and accessible (enter URL for profile on grant request) by the application deadline (Optional for first time applicants in the Small Requests category.)

11. Complete the online application: forms, narrative questions and back-up materials, as uploads or posted to profile.

What is the Timeline for Cultural Tourism Funding?

WORKSHOPS on "How to Apply for Cultural Tourism Funding" –
First-time applicants and returning-but-not-prior-year must attend one workshop. (RSVP: Trudy@UnitedArts.cc)

If repeat applicants do not attend a workshop, be sure to read the workshop PowerPoint slide of "What's New" (pgs 10-16, posted on the United Arts website/Orange County grants page)

- ❒ Thursday, April 28, 2022, 5:30-7:00 p.m., (virtual) register for Webex
- ❒ Wednesday, May 11, 2022, 8:30-10:00 a.m., (in person) 450 E South St, Largo room
- ❒ Tuesday, May 17, 2022, 11:30 a.m.-1:00 p.m., (in person) 450 E South St, Largo room
- ❒ Additional workshops may be scheduled, on request Trudy@UnitedArts.cc

DEADLINES

> ❒ **Tues., June 15, 2022, 5:00 pm** – **Nonprofit Search** profile updates must be submitted to Central Florida Foundation

> ❒ **Thursday, July 7, 2022, 5:00 pm** – **Application deadline;** online at
> https://www.grantinterface.com/Home/Logon
> **NOTE: Last day for staff support is Friday, July 1, 2022, 5:00 p.m.**

OTHER RELATED DATES:

- ❒ **Friday, July 1, 2022 –** Last day for staff assistance/pre-review.
- ❒ **Thursday, July 7, 2022 –** Lobbying blackout period until the Board of County Commissioners' vote (TBD: **October 2022).**
- ❒ **Thursday, August 11, 2022 –** Staff review of eligibility complete; Panelists receive review materials
- ❒ **Thursday, August 18, 2022** – Advisory Council meeting; Review Panel members approved;
- ❒ **Thursday, August 25, 2022 –** Conflict of interest forms due from panelists
- ❒ **Thursday, September 22, 2022** (8:30 am – 1:00 p.m.) – Cultural Tourism Review Panel meeting. At least one representative from each applicant is required to attend. In-person location: To be announced
- ❒ **Friday, September 23, 2022, 5:00 pm – Panelists' final scores and comments are due to** Trudy@UnitedArts.cc
- ❒ **Wednesday, September 28, 2022** – Final score and ranking are released; posted on UnitedArts.cc
- ❒ **Thursday, October 6, 2022 (tentative, TBA)** – Arts & Cultural Affairs Advisory Council votes on Review Panel funding recommendations. Applicants are recommended to attend.
- ❒ **Tuesday, October date TBA, 2022** – Board of County Commissioners approves funding recommendations along with State of the Arts presentation. Council members and applicants are recommended to attend.
- ❒ **November 1, 2022** – Project period begins (for planning, marketing and project expenditures)
- ❒ **November 1, 2022 to Feb 28, 2024 –** Project period (Includes pre- and post-event activities. All grant expenditures must occur within this time period)
- ❒ **December 2022/January 2023 –** First grant payment available (if not sooner)
- ❒ **January 1, 2023, to December 31, 2023** – Event period (must occur on or within this time period)

How Much May We Request? & Match Requirements

Request Category	Funding Amounts	Minimum Score for Eligibility	Match must be *at least …**	In-Kind Eligibility *for Match*
Small Request	Up to $42,000▢	65	$1 dollar to $1 dollar	50% of the match
Medium Request	$42,001 to $77,000▢	70	$1 dollar to $1 dollar	25% of the match
Large Request	$77,001 to $155,000▢	75	$1 dollar to $1 dollar	No match allowed from in-kind

▢ NOTE!: **Request amount is limited to 25-35% of operating budget revenue (cash) from prior completed fiscal year (based on IRS Form 990 figures). Small, medium, and large requests are limited to percentage of operating budget revenues of 35%, 30%, and 25% respectively.** NOTE: **Must submit Request Calculation Form.**

*Request amount must be matched $1:$1, as budgeted, but match is not required to be fully confirmed at the time of application. HOWEVER, each applicant's match score of 1 to 5 points is based on how much is confirmed by the application deadline. The percentage of match required is scaled to the event start date, requiring less match confirmed for later event. See "What Are the Evaluation Guidelines for Scoring?", item Q10 Match.

MATCHING FUNDS DOCUMENTATION

- List all Matching Funds on Application Form B: Matching Funds Summary provided in the "Attachments – for Panel Review" section of the online application and on the United Arts website. (united.arts.cc/grantee-resources/grants). Indicate each cash or in-kind item that is confirmed.
- Provide audit-ready documentation for every cash item listed as "confirmed," such as:
  Grant award letters; contributions, written or emailed pledges to support the project; sponsorship agreements; etc., which include:
  - Donor/Company name and contact information,
  - Amount of the contribution/award,
  - Date of pledge, check, award, appropriation,
  - Date by which the contribution, award or pledge will be paid and
  - **Use or purpose for the funding — must be intended specifically for the project.** If the document indicates general support for the organization and does not specify the project, you must submit accompanying letter from the executive director as in "Applicant Cash" item, below.
  - Must include any restrictions on the funding, such as: third-party approval process, acknowledgement requirements, specific premiums of value such as tickets, advertising space, etc.
- Identify all Matching Fund documentation clearly.
- If there are multiple Matching Fund documents, attach them in the order in which they are listed on Form B, or include a cover listing of all the documents included.
- Group backup documents by categories of cash, pledges and in-kind into a single PDF, if possible, or one PDF per category.
- Do not include items that are not a confirmed pledge, allocation, cash gift at the time of application. A notice of intent to consider support for the project does not qualify as confirmed.
- Do not include admissions or ticket revenue received or anticipated for this project. Prior ticket revenue that is now applicant cash, and meets the requirements stated below may be used as match.

- Applicant Cash – If using applicant cash to support a project, the backup documentation must include:
  - a statement from the applicant organization's executive director or an officer of the Board of Directors indicating: the amount, the availability of that amount to be used specifically for this project, that the amount is free and clear from liens or other use restrictions, and that it has been dedicated specifically to this project, as approved by the applicant organization's executive director or an officer of the Board of Directors;
  - A copy a bank statement showing availability of funds. Applicant's recent financial statements (as submitted with the application) should support the availability of funds from Applicant Cash.
- If any applicant receives both Cultural Tourism Funding and Blockbuster Funds, neither grant funds may be used for match for the other grant.

IN-KIND SUPPORT

Documentation of in-kind support must be included in the project plan narrative (application Questions 1-10), budget (Form A: Project Budget Summary), budget detail (Form C: Marketing Budget) and match (Form B: Matching Funds Summary) forms, as required by request level, in order to reflect the total cost of the project. It is recommended to document all forms of in-kind support for the proposed project, including support used for in-kind match on Form B, as well as in-kind support for the entire project, whether or not used as Matching Funds. For the Large Request level, no in-kind contributions may be used toward Matching Funds. If in-kind contributions are not confirmed at this time, you may reference previous support levels for donors who will be involved with this proposed project in the "Unconfirmed" column.

Provide audit-ready documentation for every in-kind item listed as "confirmed," such as:
- Pro-bono value statements (from the providing source); statement of contributed item and value; volunteer hours (statement includes name, contact, service to be provided, number of hours, rate and total value of service(s), etc. As with all matching funds, the contribution or donation must be specifically for the project. See Glossary Four for details.

When Must Match Funds be Submitted?

Submit Form B: Matching Funds Summary and required documentation of confirmed match items by the application deadline. Only items supported by audit-ready backup documentation will be considered for the applicant's Question 10: Matching Funds score.

The score is based on the percentage of confirmed match, and scaled to the start date of applicant's proposed event. Score is set by staff review; review panel does not review match backup materials, unless requested.

NOTE: An application may be submitted without confirmed Matching Funds, or with less that their entire request amount, however, the match score is based on the amount of match confirmed, and the start date of the event. The more that is confirmed, the higher the score.

- If awarded a grant, at least half or 50% of the matching funds must be committed before the first disbursement can be made.
- At the time of the second disbursement for the grant award, the grantee must have 100% of their award amount confirmed.
- By the final payment, the entire matching funds must be paid to the grantee and fully documented as paid in full.

What Is the Grant Period?

After Orange County Board of County Commissioners reviews and approves the Cultural Tourism Funding award recommendations in October 2022, the award agreements will be prepared for release on Nov. 1, 2022, as approved funding goes through processing in Orange County, during November 2022. See below for allowable Project Period and Event Start and End Dates.

2022-23 Cultural Tourism Funding – Grant Period		
Project Period Dates (must be within) November 1, 2022 – February 29, 2024		
Your Project Period Start date*: _____ & End date: _____		
Planning Pre-Event (Project period may begin up to 60 days prior to event start date)	**Event Dates** within Jan 1, 2023–Dec 31, 2023	**Wrap-Up** (Project period must end within 60 days after event close or Feb 29, 2024, whichever is soonest)
	Your Event Start _____ & End date _____	

* **Earliest Project start date: Nov 1, 2022.** No payments of grant funds prior to project start date.

****Earliest Event start date: January 1, 2023.** No funded public event activities may occur prior to this date.

What Is Required in the Application?

1 **Project Basic Information --**
> Name of the organization applying for funding (legal name, and d/b/a, if different)
> Mission of the organization
> **Amount of the request: $_____**
> Project Name (100-character limit*)
> Project Description (600 characters)
> Project period: start and end dates | Event: start and end dates | Location of the project or event (must be in Orange County)
> Website for the organization or event   Nonprofit Search profile URL
> Fiscal Year/ Total Operating Budget Revenue (Cash + In-kind)
> Contact(s): for Email list, and of Board Chair & Primary Grant contact

2 **Detailed Project Narrative** – Answer the eight narrative response questions in online application (preset character-count limit for each).

3 **Nonprofit Search Profile "Reviewed"** – Prepare or update at Central Florida Foundation. (Optional for first-time, small request applications.)

* Character-count limits include spaces.

4 **Forms & Attachments** – See "Checklist of Forms & Required Documents."

1) Budget information for this project/event: budget summary (Form A), itemized marketing budget (Form C) and in-kind support (Forms A and C).

2) Matching Funds – cash and in-kind (Form B), and backup documentation for all confirmed Matching Funds.

3) Applicant organization's financial statements, all posted to Nonprofit Search – audit or other financial statements for most recent *completed* fiscal year; tax reporting (Form 990) within six months of fiscal-year close; and *current* balance-sheet and profit & loss statements from a period ended in 2022, if posted year-end financial statements are older than six months**.** (See "Glossary Part Two: Application Preparation & Technology" for details on financials requirements.)

4) OrlandoAtPlay.com – PDF of posted event, at least six months in advance of event date

5) Support materials (optional)-- limit of 10 pages, plus one optional index page. *Any additional pages will be deleted*.

What Are the Reviewers Looking for?

Ninety percent (90%) of the reviewers' score will come from the applicant's responses to the application narrative Questions 1-8, in each of the following sections of the online application, and the Marketing Budget (Form C).

The remaining 10% is scored from the Budget Summary (Form A) and Matching Funds Summary (Form B), financial statements and financial overview, the percentage of confirmed matching funds, and the Nonprofit Search profile.

The narrative sections below are scored by the review panel using the two-page evaluation matrix found under the heading, "What Are the Evaluation Guidelines for Scoring?"

✓ **Narrative Section I: Enhance Orlando Area's Arts & Cultural Identity** *(IDENTITY) – 25 points*

- IDENTITY: Project – Innovation and uniqueness (15 points)

    – *Question 1: How will this event be exciting, unique or innovative?*

- IDENTITY: Response – International/national attention and associations/peer group standing/leadership/number of entries/applications (10 points)

    – *Question 2: How will this event be of interest to colleagues in your field from across the world?*

✓ **Narrative Section II: Present Quality Arts & Cultural Experiences** *(QUALITY) – 25 points*

- QUALITY: Product – Artistic excellence (15 points)
    – *Question 3: What elements of this and past events will assure the highest artistic excellence? (Provide the source and year of a quote, if citing references.)*

- QUALITY: Reputation – Feedback/professional and critical acclaim (10 points)
  – *Question 4: Give evidence of your organization's high reputation and history of positive critical acclaim.*

✓ Narrative Section III: Promote Tourism *(TOURISM) – 30 points*

- TOURISM – Marketing and public relations (20 points)

  – *Question 5 A: Articulate your marketing and public relations plan – specify methods, mediums and materials.*

  – *Question 5 B: Detail timeline of entire event including marketing and public relations milestones within timeline of entire event.*

- TOURISM – Projected **in-person** attendance
  – *Question 6 A: Projected <u>total</u> attendance: _____* (5 points)
  – *Question 6 B: Projected <u>tourist</u> attendance (segment of the total attendance who are from outside the four-county area): _____ *(5 points)
  - o *To support both 6A & 6B, explain your basis for calculating the proposed figures.*

  - o **Variance explanation -- Scores for projected total and/or tourist attendance may be affected by a prior-year shortfall. If actual total and/or tourist attendance from applicant's most recent Cultural Tourism Funding final report fell short of projections to the extent that applicant's attendance score or scores would have been lower, describe what caused the shortfall, and how it relates (or not) to the current proposal.**

✓ Narrative Section IV: Successful Implementation *(IMPLEMENTATION) – 20 points*
- IMPLEMENTATION – Outreach & Diversity (5 points)
  – *Question 7: Diversity means reflective of our community. What actions are you taking to proactively advance diversity, equity and inclusion (including programming, audience, board & staff)*.

- IMPLEMENTATION – Operational Readiness (5 points)
  – *Question 8 A: Describe the composition and strengths of your board and project team.*

  – *Question 8 B: List major logistical milestones and the status of each. (Not only completed items.)*

- IMPLEMENTATION – Financial Readiness (5 points)
  – *Question 9: **Forms, Profile, Financial Statements***
  – **Optional Explanatory Notes** *(Panel will receive a Financial Analysis of working capital, request percentage to budget and percentage allocations on Form 990.) List type and amount of any federal stimulus funding received during the past year (PPP 2ⁿᵈ rounds, EIDL, SVOG, etc.), and note if PPP has been forgiven, or remains a loan (at the time of application).*

- IMPLEMENTATION – Match (5 points)

  – *Question 10: **MATCH form & documents*** (Scored by staff)

Evaluation Matrix - Guidelines for Scoring

Rate in full point scores only.

<div align="center">

Identity (25 Points)   **Quality (25 Points)**

</div>

Score		Innovation & Uniqueness	Attention/Standing	Artistic Excellence	Feedback/ Critical Acclaim
		IDENTITY: Project Q 1	**IDENTITY: Response Q2**	**QUALITY: Product Q3**	**QUALITY: Reputation Q4**
Points possible		15 (multiplier = 3)	10 (multiplier = 2)	15 (multiplier = 3)	10 (multiplier = 2)
5	Excellent	Breaks new ground and/or is different from what has been done elsewhere or involves taking great risk artistically.	Exceptional interest in and respect for this event from colleagues around the world. Highest recognitions from peer group association. Taking a lead in the field.	Exceptional elements of artistic excellence resulting in a world-class event.	Exceptionally positive reputation in regional, national, and international press and extremely high admiration expressed by critics, peers and audience.
4	Above Average	Stands out creatively from the standard experiences of visitors and residents to similar events.	Significant interest and respect for this event from colleagues around the country. Recognized and involved in leadership with regional/national/international peer networks.	Impressive elements of artistic excellence resulting in a high-quality event.	Has a positive reputation with critics, peers and audience from outside the area.
3	Average	Makes you stop, look and think. Is on the quality level of other similar experiences here or in the state.	Belongs to and participates in regional or national peer networks. Colleagues in other parts of the state are aware of the organization and the event.	Quality elements of artistic excellence resulting in a satisfactory event.	Is respected in our community with positive comments from critics, peers or audience.
2	Below Average	There are other similar experiences locally and this does not stand out.	Maintains membership in at least one industry network. Others in the state are only vaguely familiar with the organization and the event.	Less than satisfactory elements of artistic excellence resulting in a less than average event.	Has not received many positive comments from local press or peers.
1	Poor	There are more than enough similar experiences available locally and nationally that it is unlikely anyone would see this event unless they had a personal stake in it in some way.	Does not belong or participate in any peer or industry networks. Neither this organization nor this event is known outside the immediate area.	Unsatisfactory elements of artistic excellence resulting in an uninspired event.	Is not well respected or admired outside its own circle.

(continued)

Evaluation Matrix – Guidelines for Scoring – continued

Tourism (30 Points) | Implementation (20 Points)

Projected Attendance

Score	Points possible	Marketing & Public Relations Q5 a&b	Total Attendance & How you arrived at numbers Q6 a	Tourist Attendance Q6 b	Outreach & Diversity Q7	Operational Readiness Q8 a&b	Financial Readiness Q9/(Forms)	Match Q10/(Form & Backup Doc)
		20 (multiplier = 4)	**5 (multiplier = 1)**	**5 (multiplier = 1)**	**5 (multiplier = 1)**	**5 (multiplier =1)**	**5 (multiplier =1)**	**5 (multiplier=1)** (Score set by staff)
5	Excellent	Exceptional marketing and P.R. plan that will attract regional, national and international attention to the event. Fully participating in OrlandoAtPlay.com, Nonprofit Search, as well as Visit Orlando and other resources and cross-promoting with other organizations.	Total attendance minimum of: 30K (large request), 20K (medium) 10K (small) The basis for projection is clearly explained; well supported by marketing plan and past accomplishments.	With minimum of: 5K (large request), 3,333 (medium) or 1,667 (small), of total attendance are tourists.	Exceptional plan for advancing diversity, equity and inclusion reaching a broad spectrum of the community.	Extremely strong and diverse board and project team, with nearly all logistic details confirmed.	Extremely solid project budget, organizational financial condition, and ability to manage the event based on past events.	At least 100% match confirmed Jan-Feb event start. (Mar-May 80%; June-Aug 60%; After Aug 40%)
4	Above Average	Strong marketing and P.R. plan that attracts attention outside of the state. Participates in some of the collaborative community resources and cross-promotes.	Attendance minimum of: 20K (large request), 10K (medium) 5K (small) Basis for projection is clearly explained; supported by marketing plan.	With minimum of: 3,333 (large request), 1,667 (medium), or 833 (small), of total attendance are tourists.	Above average plan for advancing diversity, equity and inclusion, reaching a broad spectrum of the community.	Better than average diverse board and team, with most logistic details confirmed.	Above average project budget, organizational financial condition, and ability to manage the event based on past events.	At least 90% of match confirmed Jan-Feb event start. (Mar-May 75%; June-Aug 55%; After Aug 35%)
3	Average	Adequate marketing and P.R. plan for attracting attention from outside the four-County area. Participates in the community collaborative resource programs.	Attendance minimum of: 10K (large request), 5K (medium), 2.5K (small) Basis for projection given; supported by marketing plan.	With minimum of: 1,667 (large request), 833 (medium), or 416 (small) of total attendance are tourists.	Average plan for advancing diversity, equity and inclusion, reaching a broad spectrum of the community.	Average board and team, with a good number of logistic details confirmed.	Average project budget, organizational financial condition, and ability to manage the event based on past events.	At least 75% of match confirmed Jan-Feb event start. (Mar-May 55%; June-Aug 45%; After Aug 30%)
2	Below Average	Marketing and P.R. plan is not sufficient to attract attention outside the area.	Attendance minimum of: 2K (large request), 1K (medium), 500 (small) Basis for projection given; not well supported.	With minimum of: 300 (large request), 150 (medium), or 75 (small) of total attendance are tourists.	Limited plans for advancing diversity, equity and inclusion, reaching a broad spectrum of the community.	Weak board and team and less than desired number of logistic details confirmed.	Below average project budget, organizational financial condition, and ability to manage the event based on past events.	At least 60% of match confirmed Jan-Feb event start. (Mar-May 40%; June-Aug 30%; After Aug 25%)
1	Poor	Inadequate marketing and P.R. plan to speak of.	Attendance of less than: 2K (large request), 1K (medium), 500 (small request), Weak basis for projection.	With less than 300 (large request), 150 (medium), or 75 (small) being tourists.	Lacking plans for advancing diversity, equity and inclusion reaching a broad spectrum of the community.	The ability to complete the project is questionable.	Ability to complete the project on budget is questionable.	Less than 60% match is confirmed Jan-Feb event start. (Mar-May 40%; June-Aug 30%; After Aug 25%).

How Are the Applications Scored?

Each reviewer scores each evaluation item on a 1 – 5 scale (whole numbers only; no decimals). Some items are worth more than 5 points. Those initial 1 – 5 scores are then calculated by the appropriate multiplier to determine the reviewer's final score for that item. The total of all items within the four evaluation sections equals a potential high score of 100 points.

Preliminary scores are set by grants administration staff review for Q6A, Projected Total Attendance; Q6B, Projected Tourist Attendance; and Q10, Matching Funds. Panelists have discretion to adjust Q6A and Q6B scores up or down based on applicant's response to Q6, Basis for Projected Attendance – Explain; and/or Q6, ACTUAL Total or Tourist Attendance for Prior Completed Project – Reason for Shortfall.

The Review Panel members complete their individual preliminary review and initial scoring before the Review Panel Meeting in September. At that meeting, each applicant has one minute to introduce their attendees and give a recent update before panel members ask questions of the applicant and also make comments about the proposal. IF an applicant is asked to respond, a one-minute limit is set, to allow time for panel discussion, unless a Review Panel member wants further clarification. A countdown timer for a 1-minute introduction and an 8-minute discussion will be either embedded in an overhead screen or called out clearly. Following the meeting, each Review Panel member finalizes their scores, and sends final scores to staff, who confirm the addition on the score sheets, remove the highest and lowest panelists' scores on each proposal and calculate the average score. A funding priority ranking then is issued, based on the final scores.

Public comments related to the eligibility and scoring of the applicant should be sent to the Office of Arts and Cultural Affairs 72 hours before a posted meeting, and the applicant will have 48 hours to respond. Those comments and responses will be provided to the Advisory Council.

What Score Ensures Full Funding?

Within each Request Level (Large, Medium or Small Request), full funding is awarded to applicants beginning at the top of the funding priority ranking, provided applicants have reached a minimal score. Based on the order of the ranking, the funding goes to as many applicants as possible. If there are not enough funds left in that Request Level to fully fund the next request, the next applicant on the list is offered partial funding, pending a revised application to address the amount available.

Every request is evaluated on the same basis, regardless of request level, and according to the published requirements and evaluation matrix. The resulting final total score determines an applicant's eligibility for funding consideration.

Minimum scores for eligibility: NEW! Minimum requirement for funding eligibility has been reduced for this 2022-23 Cultural Tourism Funding cycle only, due to the significant economic and programming impacts of the COVID-19 pandemic; score thresholds have been lowered to 65 for Small, 70 for Medium, and -75 for Large requests (previously 70-75-80 for S-M-L) for an applicant to be eligible for funding consideration in that request level. *Evaluation matrix remains unadjusted relative to scoring*.

NOTE: Any Applicant that awarded funding, but has not listed funded events on OrlandoAtPlay.com will not receive their grant disbursement. Events are to be posted at least six months in advance, in order to get the best lead time and exposure for potential tourists planning a vacation.

NOTE: The Advisory Council can recommend conditions on funding if deemed necessary.

Who Can We Contact?

Questions Regarding the Program and Eligibility

Terry Olson   407.836.5540
Orange County Arts & Cultural Affairs   Terry.Olson@ocfl.net
P.O. Box 1393
Orlando, FL 32802-1393
www.ocfl.net

Hayley Owen, Administrative Office Coordinator   407.836.0913
Orange County Arts & Cultural Affairs   Hayley.Owen@ocfl.net

Questions Regarding the Program, Eligibility or Grant System Technology

Trudy Wild   321.972.9837 Direct
Director, Public Grants & Advocacy   407.628.0333 x223
United Arts of Central Florida   Trudy@UnitedArts.cc
216 Pasadena Place
Orlando, FL 32803

United Arts' Website for Information and Application

Translation options: **Use the Google Translate** **option** on the application portal will translate questions to Spanish, Haitian Creole, Vietnamese, Portuguese and more. Simply click on the icon (see right image) and select your preferred language.

https://unitedarts.cc/grantee-resources/orange-county-grants/ – scroll down to "Apply for funding from Orange County Arts & Cultural Affairs," then to Cultural Tourism Funding.

For Information About Nonprofit Search & Profiles

Sandi Vidal   407.872.3050, extension 121
Vice President, Community Strategies & Initiatives   svidal@cffound.org
Central Florida Foundation
800 North Magnolia Ave., Suite 1700
Orlando, FL 32803
OR
Alissa Mahadeo   407.872.3050, extension 113
Community Investment Manager   amahadeo@cffound.org

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GLOSSARY PART ONE | Legal Items & Contract Requirements

Which State Statute Regulates the Use of the Funds?

FLORIDA STATUTE CHAPTER 125
To receive Cultural Tourism Program Funding an event must qualify under the following section of Florida Statute Chapter 125:

> To promote[1] and advertise tourism[2] in the State of Florida, nationally and internationally; however, if tax revenues are expended for an activity, service, venue, or event, the activity, service, venue, or event shall have as one of its main purposes the attraction of tourists as evidenced by the promotion of the activity, service, venue, or event to tourists.

What are the Requirements for an Applicant if Funded?

ACKNOWLEDGMENT of Orange County Arts & Cultural Affairs funding
The contract will require acknowledgment (designated logos and verbiage) of Orange County Government to be included in publications and printed materials for funded projects, as follows:

> "This project [or project name] is funded in part by Orange County Government through the Arts & Cultural Affairs Program."

The office of Orange County Arts & Cultural Affairs' "leaper" logo is available on UnitedArts.cc, Orange County "Leaper" Logo. For other formats, contact Trudy@UnitedArts.cc.

RECORDS RETENTION

Each grantee shall maintain an accounting system that provides for a complete record of the use of all grant and matching funds. Grant funds must be tracked and recorded separately from other revenue sources.

1. Grantees shall maintain records for a period of five (5) years from the final payment and shall make such records available for inspection during normal business hours at the request of Orange County, the Orange County Comptroller, United Arts, or any designee of the County.

CONTRACT

If a grant is awarded, recipients shall enter into a contractual grant award agreement with Orange County through its fiscal agent, United Arts of Central Florida, which specifies the applicant's responsibilities. By acceptance of Cultural Tourism Funding, the applicant shall comply with the administrative and accounting requirements set forth in the Grant Award Agreement, which include but are not limited to:

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[1] Promotion: Chapter 125.0140 (2) (b) – For purposes of this section: "Promotion" means marketing or advertising designed to increase tourist-related business activities.

[2] Tourist: Chapter 125.0140 (2) (b) – For purposes of this section: "Tourist" means a person who participates in trade or recreational activities outside the county of his or her permanent residence or who rents or leases transient accommodations as described in paragraph (3)(a).

REPORTING AND PAYMENT SCHEDULE

All grant recipients are required to submit reports periodically, as requested, with a final report due 45 days after completion of the project period. Details of report requirements will be listed in the online award agreement.

Payments are made upon request for disbursement, with required reporting, pending receipt of the funding from Orange County. Scheduled payments are:
- 1st Request, 50% of funding;
- 2nd/Interim Report, 40% of funding;
- Final Report, 10% of funding.

CHANGES IN PROJECT SCOPE OR BUDGET

Grant recipients must submit a written request asking permission to make any changes of more than 20% in the scope of the budget, or in the scope of the program or project, project dates, or changes in top artistic or management leadership, which deviate from the awarded project, as contained in the contract. Notice must be made in advance of the next report, due to the potential change affecting match and, therefore, a limit on the award amount. No changes can be made without **prior** written approval from the Orange County Arts & Cultural Affairs Office. A Change Request form is available from United Arts for this purpose.

ENCUMBRANCES AND EXPENDITURES

Grant recipients must encumber (contract for) and expend (pay out) all County dollars and matching funds related to the project prior to December 31, 2023. County funds may not be encumbered or expended prior to the acceptance of the Grant Award Agreement by all parties, and no expenditures prior to Nov. 1, 2022 will be allowed. County funds may not be used to reimburse the grantee for any activity that occurs prior to the contract having been executed.

EVENT ADMISSION/TICKETS

The grantee will provide at least four tickets to the office of Orange County Arts & Cultural Affairs for funded projects/events, commensurate with what is provided to other funding sources at the same award level. Exceptions would be: a) if all tickets are taken by paying customers, then no complimentary tickets need be provided; b) if there is a hard cost per each attendee (i.e., meal cost, etc.), and free tickets would not be provided to other sponsors at that funding level, then tickets need only be made available at cost.

EVENT EVALUATION/AUDIENCE RESEARCH/DATA COLLECTION

All organizations receiving Cultural Tourism Funding must conduct audience research and event evaluation, as directed by Orange County Arts & Cultural Affairs or through United Arts, throughout the end of the survey collection period for AEP6 (events May 1, 2022, to April 30, 2023), in conjunction our participation in the Arts & Economic Prosperity (AEP6) study. United Arts will work with each organization to prepare an audience research plan, but **it is the responsibility of each funded organization to gather data on attendance, spending, and hotel room nights booked due to their organization's event.**

The project results will be compiled and reported to the Arts and Cultural Affairs Advisory Council in an annual report of the measurable outcomes of the events, including statistics relevant to out-of-county visitors and economic impact.

Applicants may want to prepare their own projection for the event's economic impact by using the Central Florida–customized economic impact calculator is available at:
http://www.americansforthearts.org/sites/default/files/aep5/calculators/CentralFloridaRegion/calculator.html

INSURANCE REQUIREMENTS

All applicant organizations that receive Cultural Tourism Funding will be required to provide a Certificate of Insurance listing United Arts as the Certificate Holder (except as noted below), proving current coverage before the first disbursement can be made.

Certificate will show the following types and limits of coverage:
- **Commercial General Liability**, at least $1,000,000 (United Arts and Orange County Board of County Commissioners must be listed as *Additional Insureds* with regard to Commercial General Liability) per written grant agreement;
- **Business Automobile Liability**, including Hired and Non-owned vehicles, at least $500,000; either separate policy or as endorsement to the Commercial General Liability policy;
- **Workers' Compensation** and Employer's Liability, as required by State of Florida law;
- **NEW! While no longer required, Commercial Crime Insurance** or Third-Party Fidelity Bond, including coverage for Employee Dishonesty, equal to or greater than sixty-five percent (65%) of the amount of the Orange County Cultural Tourism Funding, is still recommended as best practice.

United Arts of Central Florida will be listed as Certificate Holder. Address: 216 Pasadena Place, Orlando, FL 32803. Email: egranting@UnitedArts.cc

Compliance requirements, types and limits of coverage will be detailed in the Grant Award Agreement. *The required insurance coverage and limits must remain in effect and current throughout the entire project period as stated in the terms of the award agreement.*

For those organizations with an operating budget of less than $100,000, and that do not maintain policies that meet the limits of coverage listed above, a written request may be submitted for reduction or waiver or option to use an event rider. Request for reduction or waiver does not ensure approval or exemption from requirements. For questions about the requirements or request for exceptions, contact Trudy@UnitedArts.cc.

RESTRICTIONS

1. **One application per organization** – The office of Arts & Cultural Affairs Advisory shall not accept two or more applications under a single application deadline, for the same organization, project, site, or phase.

2. **Match restriction** – Funds used as match for one Arts & Cultural Affairs grant may not be used as match for other Arts & Cultural Affairs grants or other Orange County grants. Proposed event admissions revenue may not be used for match, but previous year reserve from admissions revenue can be used as applicant cash.

3. **Lobbying restriction for applicants** – Orange County practices "Government in the Sunshine" requirements per State of Florida. A lobbying blackout period shall commence upon submission of application until the Board of County Commissioners approves the funding recommendation of the Arts & Cultural Affairs Council. Applicants can proceed as normal with public mailings, or public invitations, and Council members or Commissioners may attend public functions or events. No private discussions, invitations or meetings will be allowed with Orange County Arts & Cultural Affairs Advisory Council members or Board of County Commissioners during this blackout period, of July 7, 2022 until the Board of County Commissioners' vote, which is currently anticipated to be in October 2022.

4. **Administrative Compliance Policy** – Applications will not be accepted from applicants that have overdue reports on prior grants. Funding will be withheld if the applicant has not submitted required reports or met all of the administrative requirements for previously awarded grants. Compliance concerns must be resolved

in order to request payment or for an application to be considered for funding in any Arts & Cultural Affairs program. Grant review panels will be advised of grantee compliance to help evaluate administrative ability.

5. **Restrictions of uses for proposed project funding --** Orange County Cultural Tourism Funding may not be spent on Unallowable Expenses/Expenditures, as listed below. Applicant will need to certify that no grant funding is/will be used for the following items:

UNALLOWABLE EXPENSES/EXPENDITURES – Orange County funding may not be used for:

1. General operating or administrative costs not specifically identified with the project

2. Out-of-county staff travel

3. Mortgage payments

4. Past-due debts, contingencies, fines and penalties, interest

5. Space rental, improvement or maintenance not specifically identified with the project

6. Private entertainment, food and beverages, including alcohol

7. Lobbying expenses or political activities

8. Advertising which does not mention the specific project activities or omits required logos

9. Activities that are restricted to an organization's membership or other private or exclusive participation

10. Prizes or awards

11. Contributions and donations

12. Endowment contributions

13. Any other expenses not specifically identified with the project

GLOSSARY PART TWO | Application Preparation & Technology

Please note the following requirements:
- The application and all required forms and attachments must be completed in English or Spanish language by the application deadline.

WHAT YOU'LL NEED
- An e-mail address
- Internet access to the online application and downloadable forms
- The documents on the Checklist of Required Forms & Attachments (page 30, at the end of these guidelines) prepared and saved on your computer or disk/CD/other media. Maximum size for all attachments is listed on the application online, where each required document will be uploaded.

Financial statements are required to submit an application, and *must be posted to Nonprofit Search**. **Applicants must prepare and file the required full-year financial statements within six months of the organization's fiscal year end** and submit them with the profile updates, or by the application deadline. These include:
1) Audit or other Financial Statements for the most recent completed fiscal year, **filed within six months of the close of the fiscal year** (see chart below; requirements based on operating budget); AND
2) Form 990 tax reporting, **filed within six months of the close of the fiscal year**; AND
3) Recent (within the past six months) board-approved balance sheet and profit & loss statements, *if* the posted year-end financial statements are more than six months old; must be from a period ended in 2022.

Please note that changes in an organization's revenue may affect financial reporting requirements, according to the applicant's operating budget (unrestricted operating revenue) for the most recently completed fiscal year as follows:

Unrestricted operating revenue (most recently completed fiscal year)	Type of Financial Statements (F/S) Required For the Most Recently Completed Fiscal Year		
$600,000 or greater	Independent certified audit; *No compilation reports*		If audit is from *Dec. 31, 2021, or prior,* you must **also provide recent (from period ended in 2022) board-approved financial statements.**
Between $250,001 and $600,000	Independent certified audit, *No compilation reports*. OR	Reviewed financial statements (F/S)□, AND	If audit or reviewed F/S are from *Dec. 31, 2021, or prior*, you must **also provide recent (period ended in 2022) board-approved financial statements.**
Less than $250,000	Independent certified audit, OR	Reviewed financial statements□, OR Compiled financial statements	Self-reported financial statements for the most recent completed fiscal year (signed by organization's treasurer or accountant); AND if older than 6 months, **provide recent financial statements, period ended in 2022**.
□NOTE: Financial documents must be uploaded to the Nonprofit Search profile, except the most recent financial statements.			

NOTE: Panelists require complete applications and timely financial reporting in order to assess applications. **Failure to provide all requirements by the application deadline will result in the applicant's ineligibility for that funding cycle.**

Applicants may include an explanation of the organization's financial status by answering Q9: Explanatory Notes on Finances or Governance. in the online application. NOTE! This is also required of applicants that received PPP (1 or 2), EIDL, or SVOG or other one-time revenue (or liability) from federal stimulus assistance for COVID/economic recovery.

Technology – Online Application

Application Tips

- **Website**: Go to https://unitedarts.cc/grantee-resources/orange-county-grant — to "Apply for funding from Orange County Arts & Cultural Affairs," then scroll to Cultural Tourism Funding) to download the guidelines and forms ("save as") and start the online application.
- **Account access**: If you have applied for ANY grant program through United Arts in the past, you can request your password from the website. If you are a new user, create a new profile. United Arts staff can link your profile to past grants if a report is pending.
- **Application preparation:**
  o Read these guidelines thoroughly. Start early. Save application often while working on it.
  o Workshop attendance is mandatory to be eligible for this funding IF you are a first-time applicant, or IF you had problems with prior-year grant preparation. See United Arts website for updates on available workshops.
  o IF you were an applicant who was unable to achieve the minimum eligibility score in their funding request category, it is recommended that you attend a one-on-on assistance meeting in addition to the workshop.
  o **Prepare or update the organization's Nonprofit Search profile at Central Florida Foundation —profile due date is June 15 (a month ahead of application deadline)**, and it is the responsibility of each applicant to be sure it is current and has "Reviewed" status by the CT application deadline.
  o **Be sure your organization's 501c3 status and solicitation of contributions registration are current.**
    - Most organizations must submit the solicitation registration annually with the Florida Department of Agriculture & Consumer Services (exempt are: nonprofit libraries, art galleries, performing arts centers that provide educational programs to 50,000+ school children per year, and museums open to the public). Apply at https://www.freshfromflorida.com/Business-Services/Solicitation-of-Contributions.
  o Prepare application narrative responses, using the evaluation matrix as a guide.
    - Narrative responses may not exceed the character limits shown on each response in the online application. You may wish to use a Narrative Template to prepare the responses in a Word doc, to work to the size limits before you copy and paste into the program. The size limits in Word do not correlate exactly to the online application count. The online application system counts every letter, number, space and bullet as a character.
  o Proofread! Ask others to read your application. You can ask for a *brief* courtesy review by United Arts up to two weeks before the deadline.
  o Gather the documents to upload with application, or to post online with the Central Florida Foundation Nonprofit Search, as required. For a complete list of required items, consult the "Checklist of Required Forms & Attachments" at the end of these guidelines or the "Attachments – for Panel Review" and "Attachments – for Staff Review" sections of the online application.
  o Accepted formats for uploaded items: Adobe Acrobat (PDF), GIF, HTML, JPEG, Microsoft Word, Microsoft Excel, Microsoft PowerPoint, Rich Text Format (RTF), or Tagged Image File Format (TIFF).
  o **NOTE: Mac users** have had file corruption problems in using the online application system; be sure your documents are legible as previewed in the "Application Packet" link at the top of the application.
  o There is a maximum size for uploaded forms and other documents; most are 1-3 megabytes. Each upload to the online application will only accept ONE (1) document, but multiple pages may be combined into one document.

- o To combine multiple documents, . scan them into a PDF, or use the online grant feature called Fax to File (in the sidebar of the application). ***Be sure these are still legible in reduced size.***
- o Reduce file size by re-scanning at lower resolution or contact United Arts for help. You can also make an appointment to use computers or scanner (limited access).
- o Each file remains with its upload, so files may be named and uploaded in any order. There is no required file naming format.
- o Be sure your organization name appears on all forms or other documents.
- o Presentation tips:
  - ✓ **Clear, succinct narrative**. Address each portion of the questions asked, to the highest degree possible. Use subheads or bulleted lists where possible.
  - ✓ **Proofread your documents**. Have someone who is not familiar with your organization read the application.
  - ✓ **Preview the application** and uploads to view how they will look to the review panel: View the "Application Packet" (link at top of the application) to check that your narrative is formatted correctly, and your uploaded documents will be viewed by the panel. Possible errors include: "print area" in Excel may not be set correctly; unusual file types may cause errors; zipped folders are *not allowed*; when pasting from Word, automatic paragraph breaks disappear; etc. Check for duplicate or blank pages; forms that spread across multiple pages; crooked or partially missing faxed pages; legible resolution on match and support documents; etc.
- o **Submit early!** Leave extra time at the end in case you have questions or computer trouble. Missing documents or fields will prevent you from submitting the application. *Do NOT wait until the last hour before the deadline to finalize and submit this application.*
- o Print out or save the final online application and keep a digital or hard copy of all attachments for your records.
- *Contact and project information for all grantees may be made available to the press or public records requests, and Orange County Arts & Cultural Affairs may use quotes or pictures from applications or reports in publicity.*

  No exceptions to the deadline. If you are not ready to submit by the 5:00 pm deadline, you may apply for this program in the next annual cycle.

High-scoring applications: Prior-year grant applications can be viewed at United Arts on weekdays before July 1, by appointment only.

Tutorials for grants application system:
- To view a tutorial on "How to create a new account": https://www.youtube.com/watch?v=etScRJXC2bE
- To view a "How to Apply" video: https://www.youtube.com/watch?v=_oPa0E3V7uU

For assistance or pre-screening by staff, if you are having trouble or application questions?...
☑ Staff will provide pre-screening of narrative questions, budgets or other application materials in a cursory review, if requested **prior to the final week before the deadline**.
☑ If you encounter any problems with forms or uploads or think something may be in error, please notify Trudy Wild: Trudy@UnitedArts.cc, 407.628.0333 x223, or direct at 321.972.9837. You may save others from similar problems if we can address the problem early.

Thank you!

GLOSSARY PART THREE | Nonprofit Search Profile

The Nonprofit Search Website - https://cff.civicore.com/index.php?action=userLogin

Nonprofit Search is an online resource about Central Florida nonprofit organizations created by GuideStar and introduced by the Central Florida Foundation as the Nonprofit Search. Nonprofit Search provides donors with the knowledge and resources needed to make effective giving decisions, and to support the strengths and needs of the local nonprofit sector. (Note: Central Florida Foundation has converted its platform for Nonprofit Search/Profiles from GuideStar to Civicore.)

Each organization's Nonprofit Search profile includes comprehensive information on management, governance, programs and finance that is provided by the nonprofit organization and validated by Central Florida Foundation staff annually. The Central Florida Foundation and certain other funders are requiring nonprofits to have a Nonprofit Search profile to qualify for grants. Organizations can use their profile as a marketing and fundraising tool and direct individuals how to give their time, talent and treasure.

Nonprofit Search Profile Requirements

A complete Nonprofit Search profile, with "Reviewed" status by the Central Florida Foundation, is required for the Cultural Tourism Funding application. NEW! **The profile is optional for first-time applicants in the Small Request category, who will fill out the Board of Directors form instead.** Reviewed is not a recommendation or stamp of approval, but rather indicates the information is complete and up to date.

JUNE 15 -- DEADLINE to submit the Nonprofit Search profile for review by Central Florida Foundation staff, so that the profile is live to the public, including United Arts staff and the Review Panel members, by the application deadline. This means you will have to submit any missing or outdated items, to be reviewed and posted in ADVANCE of the deadline for the Cultural Tourism Funding application (by 5 p.m.). All profiles must be current and reviewed, or the request will be ineligible.

Why We Require the Profile

Orange County Arts & Cultural Affairs Advisory Council values this resource for donors and for local nonprofits. The Nonprofit Search website supports the transparency of the nonprofit sector. The exercise of developing a profile is not only a self-assessment for your organization but will also allow you to see how your organization compares with best practices in the nonprofit sector. The profile will also become an access point for future donors to learn about your organization.

For efficiency, certain standard items are submitted in Nonprofit Search instead of in the Cultural Tourism Funding online application:

☐ Financial statements (IF the Nonprofit Search submission includes the most recent fiscal year, as stipulated on the online application checklist)
☐ IRS Form 990 (same as above – also must be the most recent fiscal year). The Nonprofit Search profile will pull some fields from the Form 990, for a financial analysis that appears in the profile.
☐ Board member list with officers
☐ Guidestar.org and Solicitation of Contributions registration
☐ 501(c)(3) designation letter & status

How to Participate – For Applicants <u>New to Nonprofit Search</u>

1. Attend an online webinar, offered by Sandi Vidal or Alissa Mahadeo at the Central Florida Foundation. Sandi Vidal can be reached at svidal@cffound.org or 407.872.3050, x121, and Alissa Mahadeo can be reached at amahadeo@cffound.org or 407.872.3050 x 113.
2. Create a profile. NEW! It is recommended, but not required for first-time, Small Request applicants to create a profile on the Nonprofit Search portal at the Central Florida Foundation. Those first-time applicants who opt out of the profile must complete the Board of Directors form. The Central Florida Foundation suggests allowing four weeks to complete the profile. Feedback from other organizations (including some current Cultural Tourism grantees) is that once you gather the information required, it takes about four to eight hours to input.
3. **BY JUNE 15 –** Submit the profile for review by the Central Florida Foundation. The Central Florida Foundation will review your profile within 1-3 days of submission, and let you know if anything is missing.
    - You are not required to have all of the policies and plans the profile asks for, but you must address all questions honestly (you can answer "no" to some questions – it's okay!). None of the plans or policies will be publicly viewable.
    - We encourage you to use all of the opportunities for comments, and to use all of the space allowed. This profile will be viewed by the Cultural Tourism Funding Review Panel, and will help in their deliberations; it will also be visible to the public and will help them understand your organization.
4. If there are missing items, you must submit them to the Central Florida Foundation in advance so that your profile is fully complete by the application deadline, in order to be eligible to apply for the Cultural Tourism Funding program. A complete profile will have a "Reviewed by Central Florida Foundation" logo, and will be visible to the public.
5. Update the Nonprofit Search profile annually, if created, to keep the "Reviewed" logo from the Central Florida Foundation, and to be eligible for future applications for Cultural Tourism Funding. The renewal deadline will be June 15 of each year. Please be sure to add your most recent financials and Form 990. Other items that require a yearly update include (but are not limited to): state solicitations permit, state registration, board member roster and board attendance percentage. Any other changes to status of plans or policies, programs, etc., should be updated to the profile. There may be additional items, so you should give yourself enough time to complete the profile by that annual deadline.

Total estimated time needed, after the orientation webinar:

- **3-4 weeks** for initial submission; must be submitted by June 15
- **1 week** for any changes or additions requested by the Foundation must be completed and reviewed by the application deadline.

Please allow yourself enough time!

How to Participate – <u>Updates for Those with an Existing Profile</u>

Update the Nonprofit Search profile annually, to keep the "Reviewed" logo from the Central Florida Foundation, and to be eligible to apply for Cultural Tourism Funding. The renewal deadline is set by the foundation for 6 months after the end of your fiscal year, to allow for your most recent financials and Form 990 to be completed. Other items that require a yearly update include (but are not limited to): state solicitations permit, state registration, board member roster, and board attendance percentage. Any other changes to the status of plans or policies, programs, etc., should be updated to the profile. There may be additional items, so you should give yourself enough time to complete the profile by that annual deadline.

GLOSSARY PART FOUR | Terms Used in the Application

Arts and Cultural Affairs Advisory Council - thirteen citizens approved by the Board of County Commissioners to advise them on Orange County's distribution of both general funds and Tourist Development Tax (TDT) funds for arts and culture.

Admissions (Cash Revenues) - revenue derived from the sales of admissions, tickets, subscriptions, memberships, etc., for events attributable or prorated to the project.

Affiliation - relation to your organization, e.g., volunteer, media service, etc.

Applicant Cash (Cash Revenues) - funds from the Applicant's present and/or anticipated resources that the Applicant plans to provide toward the proposed project.

Attendance - see Total Attendance.

Capital Expenses - generally cash disbursed for either an expense, a purchase of an asset

(such as equipment, furniture) or reduction of a liability (such as payment on mortgage or note). *May not be paid from Orange County Cultural Tourism Funding.* May not include deposits on future events. Must be specifically related to the proposed project.

Contracted Services Revenue (Cash Revenues) - revenue derived from fees earned through sale of services (other than this grant request). Includes sale of workshops, etc., to other community organizations, government contracts for specific services, performance or residency fees, tuition, etc.

Corporate Support (Cash Revenues) - cash support derived from contributions given for this project (other than this grant request) by business, corporations and corporate foundations or a proportionate share of such contributions allocated to this project. United Arts of Central Florida Operating Support Grant or Mini Grant Project support are classified as corporate support, and are still subject to the match requirement that all matching funds must be specifically for the proposed project.

Dates: Event Start and End Dates - the opening and closing dates of your event/s. Must occur within November 1, 2022, and February 28, 2024. Event may not begin before January 1, 2023, nor include event performances, expenditures or attendance after December 31, 2023.

Dates: Project Period Start and End Dates - planning dates prior to event, and event wrap-up following event. Must be within November 1, 2022, and February 28, 2024; end date may be no later than two months after event end date):
- Start Date (for planning, promotions, etc. – earliest start date November 1, 2022)
- End Date (final wrap-up completed – no later than February 28, 2024, or 60 days after last event date, whichever comes first)
- Grantees have 45 days after the close of the Project Dates to submit a final report.

Demographics - reflects age, income, race/ethnicity, presence of children in the household, education and gender.

Diverse Audience - primary dimensions are the following: age, ethnicity, gender, physical abilities/qualities, race and sexual orientation. Secondary dimensions include, but are not limited to: educational background, geographic location, income, marital status, military experience, parental status, religious beliefs and work experiences.

Financial Statements - audit, reviewed, compiled or self-reported, board-approved financial statements (subject to requirements based on organization's operating revenue from the most recently completed fiscal year). Self-reported financial statements must include both balance sheet and statement of income and expenses (profit & loss) for the same reporting period, with the same end date, for a period ending in 2022. REMINDER! **All statements must be issued within six months of the organization's fiscal year close.**

Foundation Support (Cash Revenues) - cash support derived from grants given for this project (other than this grant request) by private foundation, or a proportionate share of such grants allocated to this project.

Four-county Area - local area defined as four counties of Orange, Lake, Osceola and Seminole counties; outside of that area is considered out-of-town.

Geographics - reflects where the attendee resides; categories used in research for events:
- local (within four-county Orlando MSA [metropolitan service area])
- out of town (OOT) (Florida residents outside the local area)
- out of state (national, outside the state of Florida)
- out of the country (international)

Government Support-City (Cash Revenues) - cash support derived from grants or appropriations given for this project (other than this grant request) by city government agencies, or a proportionate share of such grants or appropriations allocated to this project.

Government Support-County (Cash Revenues) - cash support derived from grants or appropriations given for this project (other than this grant request) by county governments OTHER THAN ORANGE. Orange County funds may NOT be used to match this grant request but should be noted in budget detail.

Government Support-Federal (Cash Revenues) - cash support derived from grants or appropriations given for this project (other than this grant request) by agencies of the federal government, or a proportionate share of such grants or appropriations allocated to this project.

Government Support-State (Cash Revenues) - cash support derived from grants or appropriations given for this project (other than this grant request) by agencies of the state government and/or multi-state consortia of state agencies, or a proportionate share of such grants or appropriations allocated to this project.

Incremental Visitor - a person who resides outside the Orlando Metropolitan Service Area (Lake, Orange, Osceola and Seminole counties) and attends one or more of the functions at an event, who would not be visiting the area if not for that event taking place. The true tourist, as opposed to one who is already visiting in town.

In-Kind Contributions - *all* non-cash contributions provided to the grantee and other non-federal parties. These contributions may be in the form of charges for real property and non-expendable personal property and the value of goods and services directly benefiting and specifically identifiable to the project. The basis for the valuation of personal services, material, equipment, building and land must be fair market value and be documented. This includes all such goods and services provided to the grantee by a third party in lieu of a cash role.

In calculating the fair-market value of in-kind services, the value of a volunteer's time should be calculated at the Independent Sector's rate of the Volunteer Time per hour, noted below, unless the volunteer is professionally skilled in the work they are providing (such as a photographer donating photography or a CPA providing a pro bono audit). In this case, the wage rate the individual is normally paid (or the amount the company they work for would normally charge) may be indicated. All in-kind services must be documented for final reports and should not be inflated.

> *NOTE: Per April 20, 2021, report from the Independent Sector, applicants may use the new value of Volunteer Time at $28.54 Per Hour to calculate in-kind contributions, unless another professional rate is provided by the contributing individual.* *https://independentsector.org/value-of-volunteer-time-2021/*

Logistical Details - event preparations including securing a venue or space and dates for a project or event, securing a traveling exhibition by contracting with the loaning institution, recruiting or hiring artistic talent, adequate staffing to facilitate project or event, etc.

Matching Contributions - confirmed donations and applicant cash, specifically for this project. $1 to $1 required match; both in-kind and cash match are eligible in small- and medium-level requests. No proposed admissions revenue may be used for matching funds, but prior event ticket revenue that is now in reserve may be used.

Marketing *(Budget – Cash Expenditures)* - all costs for marketing/publicity/promotion specifically identified with the project. Do not include payments to individuals or firms that belong under "Personnel" or "Outside Professional Services." Include costs of newspaper, radio and television advertising; printing and mailing of brochures, fliers, and posters; and space rental when directly connected to promotion, publicity or advertising.

Nonprofit - any corporation registered with the State of Florida as a nonprofit corporation.

Other Revenue (Cash Revenues) - revenue derived from sources other than those listed above. Include catalog sales, advertising space in programs, gift shop income, concessions, parking, investment income, etc.

Other Private Support (Cash Revenues) - cash support derived from cash donations given for this project or a proportionate share of general donations allocated to this project. Do not include corporate, foundation or government contributions and grants. Include contributions from individuals and gross proceeds from fundraising events.

Operating Budget - the amount of an organization's total operating budget <u>revenue</u> – cash and in-kind, for the year of, or in which the majority of, this application's proposed project will occur.

Outreach - describes how a project will improve exposure and involvement of the area's residents and visitors to valuable cultural experiences, and whether the project has a meaningful arts/cultural education component for youth or adults. This may be instructive or interpretive programming in addition to attending the actual artistic experience and may include strategies to reach under-served populations.

Outside Artistic Fees and Services (Budget – Cash Expenditures) - payments to firms or persons for the services of individuals who are not normally considered employees of the applicant, but consultants or employees of other organizations, whose services are specifically identified with the project. Includes artistic directors, directors, conductors, curators, dance masters, composers, choreographers, designers, video artists, filmmakers, painters, poets, authors, sculptors, graphic artists, actors, dancers, singers, musicians, teachers, instructors, etc., serving in non-employee/non-staff capacities.

Outside Other Fees and Services (Budget – Cash Expenditures) - payments to firms or persons for non-artistic services or individuals who are not normally considered employees of the applicant, but consultants or the employees of other organizations, whose services are specifically identified with the project.

Project - the activity for which funding is being sought. This may be one aspect of an event or the entire event. It may be only one phase of a larger undertaking.

Personnel – Administrative (Budget – Cash Expenditures) - payments for salaries, wages, fees and benefits specifically identified with the project, for executive and supervisory administrative staff, program directors, managing directors, business managers, press and agents, fund-raisers; clerical staff such as secretaries, typists, bookkeepers; and supportive personnel such as maintenance and security staff, ushers, and other front-of-the-house and box office personnel.

Personnel – Artistic (Budget – Cash Expenditures) - payments for salaries, wages, fees and benefits specifically identified with the project, for artistic directors, directors, conductors, curators, dance masters, composers, choreographers, designers, video artists, filmmakers, painters, poets, authors, sculptors, graphic artists, actors, dancers, singers, musicians, teachers, instructors, puppeteers, etc.

Personnel -- Technical/Production (Budget – Cash Expenditures) - payments for employee salaries, wages and benefits specifically identified with the project, for technical management and staff such as technical directors; wardrobe, lighting and sound crew; stage managers, stagehands; video and film technicians, exhibit preparators and installers, etc.

Psychographics - segmentation according to lifestyle; including media preferences, buying patterns of attendees (prizm system, acorn, etc.).

Remaining "Operating" Expenses (***Budget – Cash Expenditures)*** - all expenses not entered in other categories and specifically identified with the project. Include scripts and scores, electricity, telephone and utilities, storage, postage, photographic supplies, publication purchases, sets and props, equipment rental, insurance fees, and trucking, shipping and hauling expenses not entered under "Travel."

Review Panel - The Review Panel is comprised of all members of the Orange County Arts and Cultural Affairs Advisory Council, with the exception of the standing commissioner, who will not review or vote, until the Advisory Council's recommendation comes before the Board of County Commissioners. The panel members complete their individual preliminary review and initial scoring before the public Review Panel Meeting in September. At that time, all applicants will be present, for the introduction of their organization representative(s) and/or any pertinent updates since the time of their application. The review panel members may then ask questions or comment to finalize their review and scoring. Any panel member that has a declared conflict with any applicant will recuse from that review, and will not score or comment on that organization's application. The final scores are tabulated by

United Arts, and the resulting ranking, by three decimals of a point, is posted and presented to the Advisory Council for their funding recommendations.

Room Night - rental of one transient lodging room for one night. If 10 visitors to your event each stayed one night in a hotel, they would generate 10 room nights. If they each stayed three nights, they would generate 30 room nights.

Space Rental (Budget – Cash Expenditures) - payments specifically identified with the project for rental of office, rehearsal, theater, hall, gallery and other such spaces.

Travel (Budget – Cash Expenditures) - all costs for travel directly related to the travel of an individual or individuals and specifically identified with the project. For transportation not connected with travel of personnel, see "Remaining Operating Expenses." Includes hotel and other lodging expenses, food, taxis, gratuities, per-diem payments, toll charges, mileage, allowances on personal vehicles, car rental costs, etc. For trucking, shipping or hauling expenses, see "Remaining Operating Expenses."

Total Attendance - the total number of all tickets sold plus all free admissions to all separate functions offered as part of an event or project; the total number of people in attendance, over the duration of the project or event. If guests or participants attend multiple events, each date of attendance is counted; this is not a count of unique attendees.

For example, if there are performances on three nights and a workshop one afternoon and an awards luncheon, the total attendance would be the sum of all the people who came to the first night's performance, plus all the people who came to the second night's performance, plus all the people who came to the third night's performance, plus all the people who attended the workshop, plus all the people who attended the awards luncheon.

Attendance (Total or Tourist) count includes only in-person experiences, not virtual/online access. Virtual participation can be included within the narrative section, but will not count toward the scored attendance sections.

Tourist - a non-local attendee who comes to the project or event from outside the four-county area of Orange, Osceola, Lake or Seminole counties, representing the 50-mile radius of the local area.

Tourist Development Tax - a local option Tourist Development Tax (TDT) on occupied transient lodging sales, i.e., hotels/motels, campgrounds, etc. Currently Orange County collects 6 cents on every dollar of fees on such sales. Three percent of the first 4 cents are set aside for Arts & Cultural Affairs.

Unique Attendance - a person who attends one or more of the functions at an event. For example, a single person might attend all three nights of performances and make it to the workshop and the awards luncheon, but they would still only be ONE unique attendee. Their attendance at the five functions would add five to the total attendance but only one to the number of unique attendees.

World Class - ranking among the foremost in the world; of an international standard of excellence; of the highest order.

GLOSSARY PART FIVE | Application Contents

1. Checklist

> **See Checklist of Required Forms & Attachments on pg 30 for complete list of required items and attachments.**

2. Nonprofit Search Profile

Online profile is current and has "Reviewed" status at Central Florida Foundation.
- New User/Organization
- Update Existing Organization

Once complete/Reviewed, copy URL onto grant application

3. Application Narrative

Online Application Narrative (https://unitedarts.cc/grantee-resources/orange-county-grants/ **);**

Complete responses to the narrative questions, following the evaluation matrix as a guide.

4. Forms

(All required forms are provided via email, United Arts of Central Florida website and/or Dropbox access.)

o **Request Calculation Form** – **Use this form to learn how much your request is, and which funding level you can apply in, based on operating revenue (your annual budget). Your request must not exceed 35% of prior year operating revenue for small request level, 30% for medium requests and 25% for large requests.**

  If your organization had less than $50,000 in revenue please contact United Arts.

o **Form A-C workbook:**

  Form A -- **Project Budget Summary (include In-Kind) – required form**

  Form B – Matching Funds (include In-Kind, as applicable for Request Level) – required form

  Form C – Marketing Budget (use form provided or contact staff for alternate format)

o **Form – Board of Directors** (must be completed by any first-time, Small Request level applicants who opt out of the Nonprofit Search profile; optional for all other applicants)

Checklist of Forms & Required Documents

- All of the following items must be saved on your computer or other media to be attached digitally to your online application. Be sure your organization name is also included on every page of every attachment.
- Application must be complete when submitted. Materials will not be accepted after the Application Deadline.

Item	Required	Documents for 2022-23 Cultural Tourism Funding Request
		Complete the online application, and upload the following items, to the online application, unless indicated that an item must be uploaded directly to Nonprofit Search. NO required file name format or numbering.
Items for ONLINE Application Narrative and Forms - Upload		
01	Required	**Request Calculation Form – UPLOAD on form provided**
02	Required	**Online Application & Narrative** responses **(do not upload; complete this online)**
03	Required	**Form A - Project Budget Summary** – UPLOAD on form provided, in Excel (not PDF)
04	Required	**Form B - Matching Funds** – UPLOAD on form provided, in Excel (not PDF)
05	Required	**Form C - Marketing Budget** -- supports Narrative Q5a and Q5B: Marketing & Public Relations plan and timeline; UPLOAD form provided or contact staff for customized format
06	Required	**Explanatory Notes** for Narrative Q9-- on economic stimulus funds/finances updates relative to PPP (1 or 2), EIDL, SVOG (to indicate one-time revenue or liabilities)
07	*Optional*	**Support Materials** -- UPLOAD letter(s) from collaborative partners, endorsing the project or specific activities. Other documents such as an impressive artist reference, budget support, season schedule, marketing & promotion, brochures, media coverage, reviews, etc. **1-3 uploads available for combined maximum of 10 TOTAL pages, plus 1 optional index/cover.**
Links or Attachments for ONLINE Application for Panel or Staff Review (or on Profile)		
08	Required	**URL for Nonprofit Search** profile – "reviewed" status Optional if the request is from a first-time applicant for a small request (less than $42,000)*
OR	Required*	***Board of Directors form** required for first-time Small Requests without a profile; (optional for others)
09	Required to be on OAP	**OrlandoAtPlay.com (OAP)** funded events must be posted on OAP at least six months in advance
10	Required	**Matching funds backup documentation** as listed on Form B – identify clearly or provide index, in these separate groups: a) Cash -- UPLOAD award letter transmittals & canceled checks, donor contributions, paid sponsorship agreements and any other cash/paid documents or applicant cash documents b) Pledges -- UPLOAD confirmation letters, agreements, sponsorship and promissory documents c) In-kind -- UPLOAD confirmation letters, invoice or commitment discounts, volunteer agreements, value statements and any other in-kind documents
11	Required if first-time CT	Sample of bank account statement with a licensed financial institution (within past four months; redact account numbers; public information.)
12	Resource	United Arts will prepare a report for your proposal's economic impact using the [Americans for the Arts economic calculator](#) for potential economic impact, jobs, and gov't revenue (pg 16)
13	UPLOAD if …	**Most recently completed or current year-to-date, board-approved financial statements** *(IF completed-year statements are from 2021)*: provide balance sheet and profit & loss statement, both with same report end date, in 2022.
14	On Profile	**IRS Form 990 or Form 990-EZ** - filed within six months of fiscal-year end
15	On Profile	**Financial Statements** – **most recently completed fiscal year** from 2021 (filed within six months of fiscal-year end) **(Audit, Review, or Board's Bal Sheet & P&L**; See Glossary Part Two chart, pg 19)

Application Narrative and Forms

(attach here)

FY23 Cultural Tourism Funding - **Form to Calculate Funding Request Amount**

DIRECTIONS:

Applicants may apply under any ONE of the request levels listed below if eligible.

To determine the max request for each level, complete **PART A** of this form. Please note your fiscal year-end and the **operating revenue cash** reported from your most recently completed fiscal year (Form 990).

PART A: **TO BE COMPLETED BY APPLICANT**
1 Organization Name   **Your organization name here**
2 Fiscal Year Ended   00/00/0000
3 Operating Revenue - Cash

REFERENCE: FY23 CT REQUEST LEVELS		
Request Category*	Min. Request	Max Request
Large (25%)	$77,001	$155,000
Medium (30%)	$42,001	$77,000
Small (35%)	$0	$42,000

*Request amount may not be greater than 25% (large), 30% (medium), or 35% (small) of your prior year total operating revenue – cash.

PART B: REQUEST CALCULATIONS - NO INPUTS NEEDED FROM APPLICANT ⬇						
	Operating Revenue (as noted by applicant)	**Request Category Percentage**	**Operating Percentage**	**Eligibility**	**Maximum Request** You may request up to this limit.	**Financial Statements required, based on operating revenue** (Must be completed within six months of the close of your fiscal year)*
Large Request	$ -	25%	$ -	INELIGIBLE	$ -	Audit or Review or Compilation or Balance Sheet & Income/Expense Stmt, & Form 990*
Medium Request	$ -	30%	$ -	INELIGIBLE	$ -	Audit or Review or Compilation or Balance Sheet & Income/Expense Stmt, & Form 990*
Small Request	$ -	35%	$ -	INELIGIBLE	$ -	Audit or Review or Compilation or Balance Sheet & Income/Expense Stmt, & Form 990*

Notes to applicant: *** If fiscal year ended more than six months ago, at the time of application, you must also provide more recent financial statements: balance sheet and income/expense statements, from a period ended in 2022.**

Notes from applicant:
(optional, about status of financial statements, or related note)

Orange County Arts & Cultural Affairs, FY23 Cultural Tourism Funding

Instructions for Application Forms

Read before completing forms:

➔ Prepare Forms A, B & C. Begin with Form A Budget Summary - Enter Org /Project Name and Request Amount items above. All forms will be submitted in Excel.

➔ Complete all highlighted sections.   (Totals and percentages will apply with formulas in locked, white fields.)

Use the forms provided. Do not add or delete any line items (except optional Marketing Budget line item edits to adjust as appropriate to your project.) If you need to add more lines to Match or Marketing, contact Trudy@UnitedArts.cc for a customized form.

(Refer to Guidelines Glossary Part Four for definitions of terms used on this form.)

➔ **Form A Project Budget Summary**

Separate Budget Detail is not required. You may wish to prepare and/or submit a budget detail to plan and monitor your project's expenses, and enter the totals from each category into line items on Form A Project Budget Summary. (If so, insert worksheet after Form A).

Budget & Match: Orange County provides support to United Arts of Central Florida for its project grants, operating support grants and venue subsidy programs; therefore no support from these grants may be used for match for Orange County Cultural Tourism Funding proposals. Project-specific funding from other grants may be used if contributed/granted specifically for this proposal.

Proposed budget must be balanced: Grand Total Project Expenditures (Line C) must equal Total Project Income (Line H). Red highlights will show if minimums are not met.

➔ **Form B Matching Funds Summary**

Enter any cash, pledges or in-kind matching funds toward the $1-for-$1 match of the Request Amount. Add more lines if necessary. <u>See Guidelines and Evaluation Matrix for details (Points for Match are scaled to event start date), based on percentage of **confirmed** contributions (not pending)</u>. Note: 100% Confirmed Match is required for the maximum 5 points, if event begins early in 2022.

Indicate matching funds amount, source, and status (confirmed appropriations, grants, cash and pledges only). Indicate what confirmation/backup documentation will be attached, AND what type of confirmation, such as canceled check, pledge letter, sponsorship agreement, etc.

- **Confirmed** match funds are supported by documentation in the form of a canceled check, signed award/pledge/agreement, letter or email from the funding source, Applicant Cash with BOD/ED statement.

- **Unconfirmed** (or pending) match funds do not count toward the "confirmed match" for evaluation points, and are not required at the time of application.

No updates accepted after application is submitted.

Allowable Match cannot include admissions revenue, contracted services or "other" revenue. See Glossary Four.

Applicant cash can be used as match; it must be supported by a letter/email stating that the board has authorized designation of these funds for the specific proposed project, availability of funds (including that there are no liens or use restrictions), or depending on the amount, that the executive director (or equivalent) may make this financial decision on behalf of the organization.

OPTIONAL: Input any In-kind, if you want to show additional support for the project, beyond the match requirements. Attach with ALL Forms, or to Form B Match upload.)

➔ **Form C Marketing Budget**

Marketing & PR Budget supports Q5 & 6 of narrative. Complete Form C-Marketing Budget. Any budget categories or line items may be edited, added or deleted, as necessary to reflect the project marketing and PR needs. IF you need additional line items, or formatting, contact Trudy@UnitedArts.cc, or use your own customized format.

➔ **UPLOAD Instructions:**

Remove Instructions sheet. UPLOAD entire Excel workbook ALL Forms under "Attachments for Panel Review" onto Form A UPLOAD - NOTE: ALL pages will show in application packet; remove unnecessary support pages.

Each confirmed match item listed on Form B must include the proper documentation (uploaded under "Attachments for Staff Review," in three separate uploads for Confirmed Cash, Pledges, and In-kind (In-kind is optional, unless used for match).

➔ **For assistance:**   Contact Trudy@UnitedArts.cc if you need any help or edits made to the form.

FORM A - PROJECT BUDGET SUMMARY

Read all instructions (first tab) before completing forms. Complete orange- & green-highlighted cells; all others will total by formula.		Please refer to your completed FY22 CT Calculate Max Request Form, for the figures in this box.	**Click here if you haven't completed this form.**
Organization Name	Fill in this first: Form A-Org Name	**Request Amount**	*Must request amount!*
Project Name	Then this: Form A-Project Name	**Operating Rev-Cash***	#DIV/0!

EXPENDITURES

	Cash Expenditures						In-Kind Gifts		Total Expenses		
	Orange County Grant Funds		**Match + other Funds Cash**		**TOTAL Cash**						
Personnel – *Administrative*		#DIV/0!		#DIV/0!	$ -	#DIV/0!		#####	$ -	#DIV/0!	
Personnel – *Artistic*		#DIV/0!		#DIV/0!	$ -	#DIV/0!		#####	$ -	#DIV/0!	
Personnel – *Technical/Production*		#DIV/0!		#DIV/0!	$ -	#DIV/0!		#####	$ -	#DIV/0!	
Outside Artistic Fees and Services		#DIV/0!		#DIV/0!	$ -	#DIV/0!		#####	$ -	#DIV/0!	
Outside Other Fees and Services		#DIV/0!		#DIV/0!	$ -	#DIV/0!		#####	$ -	#DIV/0!	
Space Rental		#DIV/0!		#DIV/0!	$ -	#DIV/0!		#####	$ -	#DIV/0!	
Travel		#DIV/0!		#DIV/0!	$ -	#DIV/0!		#####	$ -	#DIV/0!	
Marketing **(Complete FORM C first)**	$ -	#DIV/0!	$ -	#DIV/0!	$ -	#DIV/0!	$ -	#####	$ -	#DIV/0!	*linked to Mktg Form*
Remaining Operating Expenses		#DIV/0!		#DIV/0!	$ -	#DIV/0!		#####	$ -	#DIV/0!	
Capital Expense		#DIV/0!		#DIV/0!	$ -	#DIV/0!		#####	$ -	#DIV/0!	
Subtotals	$ -	**#DIV/0!**	$ -	**#DIV/0!**	$ -	#DIV/0!	$ -	#####	$ -	#DIV/0!	

A. TOTAL CASH EXPENDITURES — *Match cash must equal or exceed 50% of Request* — $ - #DIV/0!

B. TOTAL IN-KIND . . . .> $ - #####

C. GRAND TOTAL EXPENDITURES (A+B) . . . .> $ - #DIV/0!

INCOME

Cash Income

(Not eligible for Orange County Request Match)

Admissions 1)		#####
Contracted Services Revenue 2)		#####
Other Revenue 3)		#####
Subtotal of non-match revenue	$ -	#####

(Match + other project contributions)

Corporate Support 4)		#DIV/0!
Foundation Support 5)		#DIV/0!
Other Private Support 6)		#DIV/0!
United Arts of Central Florida Project-related Funding** 7)		#DIV/0!
Government Support – *Federal* 8)		#DIV/0!
Government Support – *State* 9)		#DIV/0!
Government Support – *County (not Orange)* 10)		#DIV/0!
Government Support – *City* 11)		#DIV/0!
Applicant Cash 12)		#DIV/0!
D. Allowable Cash Match Subtotal (sum of lines 4-12) D	$ -	#DIV/0!
E. Total In-Kind (same as Line B; may exceed match limits). E	$ -	#DIV/0!
F. Subtotal (lines 1, 2, 3, D and E *[Non-match, eligible match & in-kind]*) F	$ -	#DIV/0!
G. Requested from Orange County CT	$ -	#DIV/0! of project
H. TOTAL PROJECT INCOME (must balance; equal line C) H	$ -	**#DIV/0!**

Match Chart and Max Request Amounts

IF request is:	$ -
Minimum Cash for Match	$0
Max In-Kind Allowed for Match	$0
Max Request is (50% of project Total Exp, Line C), up to $155,000*	$ -
*Subject to match requirements above	

* Enter Operating Revenue - Cash from most recently completed fiscal year

**May include Project Grant funding designated specifically for this project. No portion of United Arts Operating Support Grant may be included.

FORM B - MATCHING FUNDS

Organization Name	**Fill in this first: Form A-Org Name**

Request Amount $ -

Enter Request so formulas calculate!

Project Name   **Then this: Form A-Project Name**

NOTE: Request Amount must be entered above for formulas to function. If RED highlight displays, total Match (Cash, Pledges or In-Kind) does not meet stated requirements. NOTE: Match of 100% Confirmed is required for full 5 point score; see Evaluation matrix for requirements, scaled to event start date.

Each "Confirmed" item must include the proper documentation with date, donor name, amount, purpose, and indicate if paid or when it will be paid (Uploaded completed Match Form under "Attachments for Panel Review." Clearly indicate which backup documents relate to each Match item, and upload to "Attachments in Staff Review" in three separate groups for Confirmed Cash, Confirmed Pledges, and In-kind (optional, unless used for match). Cash may include pro-rated portion of State DCA grant, or foundation grants -- IF AWARDED & published. *ALL Match MUST BE 100% Paid-in-Full and documented by the end of the project & for final report/payment.*

CASH MATCH (**includes cash/pledges**). Please group cash(paid) separate from pledges (unpaid).

$ -   **Minimum Match Cash**

Amount Confirmed	Source (Name of Donor/Company) and Status of Contribution or Payment	Type of Document Attached
	Applicant Cash (Statement from Exec Dir or Board, and bank/account statement	

TOTAL $ -   #DIV/0!

OPTIONAL: Input any In-kind below, if you expect to have in-kind support for the project.

IN-KIND MATCH

$ -   **Maximum In-kind Allowed for Match**
*

Amount Confirmed	Service/Source (Name of Donor/Company) and Status of Fulfillment	Type of Document Attached

IN-KIND $ -   #DIV/0!
TOTAL $ -   #DIV/0!

Match score based on % confirmed; (with limits on in-kind for Request Level)

Allowable Match from in-kind is limited, but there is no limit to the in-kind you may use for total project.

MARKETING BUDGET (Supports Narrative: Tourism Section, Q5 & Q6)

Organization Name	Fill in this first: Form A-Org Name	Request Amount	$ -

Enter Request so formulas calculate!

Project Name	Then this: Form A-Project Name

➔ Complete the Orange and Green fields, in line items that apply to your marketing plan; Total columns will calculate by formula.
Use sample categories &/or line items, or create your own in the yellow section, as applicable for your project marketing & PR plan.
NOTE: Totals for Form C-Marketing & PR Budget must tie to the Form A-Budget Summary, on the Marketing Line.
Please notify me if you need to use separate form-- if managed by individual events, for alternate format of marketing budget detail.

➔   To UPLOAD: Remove Instruction sheet & any unnecessary pages. NOTE: ALL workbook tabs/pages will show in application packet.
UPLOAD entire Excel workbook under "Attachments for Panel Review" onto Form A.

Marketing Line Items	Orange County Funds	Match & Other Cash	Total Cash	In-Kind	Total
Print Advertising			$ -		$ -
Print Ads (Newspaper, Magazine)			$ -		$ -
other (describe)			$ -		$ -
other (describe)			$ -		$ -
other (describe)			$ -		$ -
Subtotal Print Advertising	$ -	$ -	$ -	$ -	$ -
Radio/TV			$ -		$ -
other (describe)			$ -		$ -
other (describe)			$ -		$ -
other (describe)			$ -		$ -
Subtotal Radio/TV	$ -	$ -	$ -	$ -	$ -
Internet/Website/Social Media			$ -		$ -
e Media			$ -		$ -
Web hosting			$ -		$ -
Design/prep			$ -		$ -
other (describe)			$ -		$ -
Subtotal Internet/Website/Social Media	$ -	$ -	$ -	$ -	$ -
Promotion/PR Services			$ -		$ -
Outside Marketing Consultants			$ -		$ -
Sponsorship Services			$ -		$ -
Media			$ -		$ -
other (describe)			$ -		$ -
			$ -		$ -
	$ -	$ -	$ -	$ -	$ -
Printing/Mailhouse/Other			$ -		$ -
Program Books			$ -		$ -
Postcards, posters, signage			$ -		$ -
Postage			$ -		$ -
Photography			$ -		$ -
Video			$ -		$ -
other (describe)			$ -		$ -
Subtotal Printing/Mailhouse/Other	$ -	$ -	$ -	$ -	$ -
TOTAL Marketing & PR	$ -	$ -	$ -	$ -	$ -

(Totals carry to Form A Budget Summary)

BOARD OF DIRECTORS FORM

This Board of Directors Information Form must be completed as an alternative for any applicant who does not complete the Nonprofit Search profile. This is allowed for the first-time applicants in the Small Request category only. Otherwise, this form is optional.

Organization Name:

Board Chair:
Company Affiliation:
Term:
Email:

Board Vice-Chair:
Company Affiliation:
Term:
Email:

Board Treasurer:
Company Affiliation:
Term:
Email:

Board Secretary:
Company Affiliation:
Term:
Email:

Governance

Board Term Length (In Years):
Board Term Limit:
Board Meeting Attendance (Average Percentage of Board Members at Meetings):
Does the Organization have Written Board Selection Criteria? Y/N:
Does the Organization have a Written Conflict of Interest Policy? Y/N:
Percentage of Board Members Making Monetary Contributions:
Percentage of Board Members Making In-Kind Contributions:
Does the Board Include Client Representation? Y/N:
Number of Full Board Meetings Annually:

Board of Directors

Name	Company Affiliation	Status (Voting/Non-Voting)

Board Demographics

Put the **number** of board members who identify as each of the following.

Ethnicity

African American/Black:
Asian American/Pacific Islander:
Caucasian:
Hispanic/Latino:
Native American/American Indian:
Multi-Racial:
Other:

Gender

Male:
Female:
Unspecified:

Standing Committees