GRANT WORKSHOPS

Tuesday, June 6, 2023, 3:00-4:30 p.m.

(on Webex, video)

Thursday, June 8, 2023, 9:30-11 a.m. – in person, Largo Rm Tuesday, June 13, 2023, 6:30 a.m. - 8 p.m. – in person, Marco Rm (in-person workshops at 450 E South St)



How to Apply for 2023-24 Cultural Tourism Funding







ORANGE COUNTY OFFICE OF ARTS & CULTURAL AFFAIRS

CULTURAL TOURISM FUNDING FOR 2023-24

Supported by Tourist Development Tax (TDT) Revenues*

- Office/Council created in Aug 2001, led by Terry Olson, Office of Arts & Cultural Affairs & Advisory Council, with Hayley Owen, Administrative Office Coordinator
- Fiduciary & Grant Management: Trudy Wild, United Arts of Central Florids



Mission

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



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







History of CT Funding

Total ALL CT funding FY03-23: \$43,142,881*

Total past-year FY23 CT funding: \$3,573,626

34 grantees:

- <u>18</u> large awards **\$2,790,000** (from \$100,000 to \$155,000)
- <u>6</u> medium awards \$462,000 (each \$77,000)
- <u>10</u> small awards \$321,626 (from \$8,744 to \$42,000)



Cultural Tourism Summary FY23

- Organizations requested funding: 34
- Organizations recommended for funding: 34
- Total project budgets: \$33,648,935
- TDT investment: \$3,573,626 to these nonprofits;









































































FY23 (PRIOR YEAR) GRANTEES & EVENTS DURATION:

- 4 1- to 7-day events
- 4 1- to 5-week events
- 11 4- to 11-month events
- 17 12 months full-season/year-long events
- √ 18% of all funded events ranged from 1 day to 4 months long.
- √ 82% of all funded events were 4+ months long.





ELIGIBILITY AND CRITERIA FOR FUNDING: PART 1

- 1. A <u>cultural nonprofit 501(c)(3) exempt corporation</u> or an American Alliance of Museums (AAM)-accredited museum registered and in good standing with the State of Florida, IRS, and current with open grants
- Completed one year or more of providing cultural programming in Orange County that could attract tourists
- 3. Produce in Orange County the arts event for which you are applying that is accessible and promoted to the general public,
 - project period for prep & marketing Nov. 1, 2023, and
 - event occurs during Jan. 1 Dec. 31, 2024
- 4. Proposed arts and culture activities may not be a supplementary event at a non-arts conference, professional meeting, reunion, or other similar gathering
 United A



ELIGIBILITY AND CRITERIA FOR FUNDING:

- 5. Market to potential visitors beyond the "local" four-county area of Orange, Osceola, Lake and Seminole counties or 50-mile radius
 - "Tourist" attendance is from <u>outside</u> the 4-county, 50-mile radius
- 6. Match: Show community support in donations SPECIFICALLY FOR THIS PROJECT, that matches the request (\$1 to each \$1 requested)
- 7. Attend workshop (mandatory for first-time applicants) & complete all application requirements by deadline
- 8. All applicants must have a checking account with a licensed financial institution



ELIGIBILITY AND CRITERIA FOR FUNDING:

- 9. Applicant must prepare at least quarterly financial statements (Balance Sheet, and Profit & Loss) that are reviewed by the board; and complete audit and Form 990 financial statements* within 9 months of the fiscal year end
- 10. Have a current profile on the Central Florida Foundation Nonprofit Search website, bearing the "Reviewed" stamp. Updates due by June 16, 2023, 5 p.m. NEW! To ALL Small Requests, it is recommended but not required to have a profile. Small Request applicants who optout of the profile will complete the Board of Directors form.
- Complete the online application: narrative questions, forms, and required materials as uploads
- 12. NEW! All applicants must have a UEI number





WHAT'S NEW IN FY24/REMINDERS AND CHANGES:

- ✓ Reminder: Request amount is limited to 35% (Small) 30% (Medium) and 25% (Large) of operating revenue (cash) from prior year Form 990
 - → Use form "Calculate Request Amount" to determine maximum request amount
- ✓ NEW! Increased the funding caps for each level:
 - Large request: \$\frac{155,000}{5,000}; \$\frac{160,000}{5,000};
 Medium Request \$\frac{\$77,000}{5,000}; \$\frac{\$80,000}{5,000};
 Small Request \$\frac{\$42,000}{5,000}; \$\frac{\$45,000}{5,000}
- ✓ NEW! Score threshold*: The scoring threshold returns to original minimums for funding eligibility. Score requirements are: 70 for small requests; 75 for medium; 80 for large





New in FY24/Reminders and Changes:

- ✓ NEW! A Unique Entity Identifier (UEI (is required for each applicant.
- Changed Q5 Scoring matrix for this question has added "such as Visit Orlando" in the list of score 5 requirements (changed from including to such as)
- NEW! Q5 Marketing & PR Removed the timeline requirement and added the narrative question, "How are you reaching audiences outside the four (4)-county local area to bring visitors to your event?"
- New!/Reminder: Q7 Outreach & Diversity Diversity means reflective of our community. What actions are you taking / what are you doing to proactively advance diversity, equity and inclusion (including programming, audience, marketing, board & staff).





New in FY24/Reminders and Changes:

- ✓ Reminder: Project Budget Summary this should include ALL related costs for this project Orange County Request + Matching funds + other match (your remaining funding), so that totals reflect the project's total expenses (this matches whatever you propose and include in the narrative)
- ✓ Reminder: Calculate your economic impact Use this tool to create projections for the economic impact of your proposed project: <u>ECONOMIC IMPACT CALCULATOR</u>* customized to Central Florida Region by Americans for the Arts, through United Arts.
 - Project budget CASH
 - + Proposed total IN-PERSON attendance
 - Total Proposed Economic Impact (jobs, revenue, local/state taxes)

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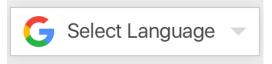


New FY24/Reminders and Changes:

Translation options:

Application

 Using the Google Translate integration 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.



Resources

- Workshop materials and additional support can be found on the United Arts website, UnitedArts.cc
- When viewing resources on a browser, locate the ReachDeck icon (see right image). Once there, select the translate button ().







New FY24/Reminders and Changes:

- ✓ REMINDER! Financial statements must be complete and submitted to United Arts within 9 months after fiscal year close – both audit AND Form 990, or you may not be eligible to apply in the next grant cycle.
- ✓ NOTE: if your financial statements do not end in the year 2022, please provide Profit & Loss and Balance Sheet from a period within 2022 or 2023 (within 4 months of the application date).
- ✓ NEW!: IF financial statements are not completed, filed within 9 months of fiscal year end, applicant will be allowed to apply, but will receive a 0 in Q9
- ✓ REMINDER! If in-person attendance fell short of projections for prior, CTfunded event & would have lowered the score, explain attendance disparity the next application
- REMINDER! Changes from proposal to the funding awarded, must be updated budget and scope of services for the funding agreement. A written request must be submitted before making any significant changes in a project's budget, scope of work event dates, or top artistic or management leadership



New FY24/Reminders and Changes:

- Reminder! Let others know about your events free marketing with online cultural calendar OrlandoAtPlay.com*
 - Applicants are encouraged to list events on OrlandoAtPlay.com
 - Grantees <u>MUST</u> listed funded events on OrlandoAtPlay.com posted at least six months in advance, to get the best lead time in trip planning; NOTE: payments will be withheld for noncompliance.
- Reminder! Guidelines for public comments at review panel meetings and related Council meetings. The guidelines are as follows:
- 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

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New FY24/Reminders and Changes:

- Reminder! If deemed necessary, the council can place conditions on funding.
- ✓ NEW/Reminder! to calculate the value of in-kind contributions of volunteers, you should now use \$31.80 per hour unless another professional rate is provided by the contributing individual. The Independent Sector has updated its value of volunteer time. Link: https://independentsector.org/blog/independent-sector-releases-new-value-of-volunteer-time-of-31-80-per-hour/
- Reminder! Staff will provide pre-screening of narrative questions, budgets, or other application materials in a cursory review, if requested prior to 2 weeks before the application deadline.







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DATES TO REMEMBER:

- Nonprofit Search profile deadline: Friday, June 23, 2023, 5 pm
 ALL profile input due to Central Florida Foundation
- Last day to submit for staff assistance/pre-review: Fri, June 23, 2023
- Application deadline: Sunday, July 16, 2023, 11:59 pm
 (NOTE: also deadline for meeting with panel members and lobbying)
- Review Panel meeting: (working date) Thurs, Sept. 21, 2023, 8:30-1:00pm (MANDATORY); location TBA – live/in-person
- Approvals:
 - A. Arts & Cultural Affairs Council (funding recommendations) Thurs., Oct 2023 TBA
 - B. Board of County Commissioners meeting (final approval) Tues., Oct 2023 TBA
- Contracts issued after board approval, date TBA
- Project period November 1, 2023 to February 28, 2025 (16 months)
- Event cannot begin before Jan. 1, 2024 and must complete by Dec. 31, 2024
- First payment (50%) available Dec. 2023/Jan. 2024



REQUEST LEVELS:

- Request limited to 35% (Small) 30% (Medium) and 25% (Large) of operating revenue (cash) from prior year Form 990)
- Use form: Calculate Request Amount*
- Total funding pool: TBA
- Three categories for requests (only one application to either):
 - Large \$80,001 \$160,000;
 Medium \$45,001 \$80,000;
 Small \$1-\$45,000
 - Request does NOT have to be maximum of that level
 - Amount in each pool TBA; based on percentage of total requests in each pool

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REQUEST LEVELS, CONTINUED - MATCH AND MIN. SCORE:

Large Requests

- Request: More than \$80,000, up to \$160,000
- Match: Cash match equal to amount requested
 - (100% Cash only, 0% In-kind allowed for match; [allowed toward project])
- Minimum score required: 80

Medium Requests

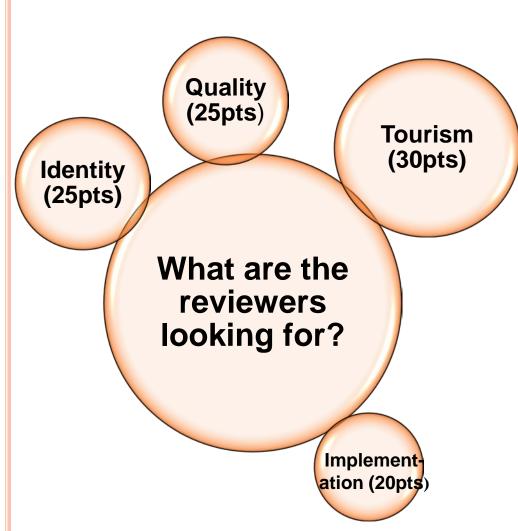
- Request: More than \$45,000, up to \$80,000
- Match: Cash and In-kind equal to amount requested
 - (75% Cash required; 25% In-kind maximum)
- Minimum score required: 75

Small Requests

- Request: Up to \$45,000
- Match: Cash and In-kind equal to amount requested
 - (50% Cash required; 50% In-kind maximum)
- Minimum score required: 70







- 1. Identity (Q1&2): project (innovation and uniqueness) & response (international/national attention and peer group)
- 2. **Quality** (Q3&4): product (artistic excellence) & reputation (professional acclaim)
- 3. Tourism (Q5a&b, 6a&b):marketing and PR plan& projected in-person attendance
- 4. Implementation (Q7, 8a&b, Forms, Profile, Financial Statements): outreach & diversity, operational and financial readiness & match





EVALUATION MATRIX

See separate sheet for Evaluation Matrix

Each narrative or forms section has a related section on the Evaluation Matrix

Example: Q10 The Match

The matrix will indicate how many points are awarded in total, with a score of 1-5 (5 as highest), and the multiplier (1 for match)

The matrix lists examples of the content valuation to receive a score of 5, or less requirements for a score of 4, average for a 3, less than average for 2, and barely there would score a 1.

Match
Q10/(Form &
Backup Doc)

5 (multiplier=1)
(Score set by staff)

At least 100%
match confirmed
Jan-Feb event start.
(Mar-May 80%:
June
After

At least 100%
At least 100%
Mar-May 80%:
June
Mar-May 80%:
June
Mar-May 75%;
June-Aug 55%;
June-Aug 55%;

After Aug 35%)

At least 100%
match confirmed
Jan-Feb event start.
(Mar-May 80%;
June-Aug 60%;
After Aug 40%)





QUESTIONS FOR THE NARRATIVE:

Section 1: Enhance Orlando Area's Arts & Cultural Identity (25 points)

- 1. (Project)/Q1 Innovation & Uniqueness (15 points): How will this event be exciting, unique or innovative?
- 2. (Response)/Q2 Attention/Standing (10 points): How will this event will be of interest to colleagues in your field from across the world?





QUESTIONS FOR THE NARRATIVE:

Section 2: Present Quality Arts & Cultural Experiences (25 points)

(Product)/Q3 Artistic Excellence (15 points):
What elements of this and past events will assure the highest artistic excellence?

4. (Reputation)/Q4 Feedback & Critical Acclaim (10 points): Give evidence of your organization's high reputation and history of positive critical acclaim.





QUESTIONS FOR THE NARRATIVE:

Section 3: Promote <u>Tourism</u> (30 points)

- 5. Q5 Marketing & Public Relations (20 points)
 - A) Articulate your <u>marketing and public relations plan</u>—specify methods, mediums and materials; AND "How will you reach audiences outside the four (4)-county local are to bring visitors to your event?
 - B) NOT REQUIRED: Detail <u>timeline of entire event</u>, including marketing and PR milestones within timeline of entire event.
- 6. Q6 Projected Total (5 points) & Tourist Attendance (5 points)
 - A) Projected total: _____ AND B) Projected tourists (in-person; from outside the four-county area): _____.
 - Explain your basis for calculating the proposed figures.
 - Variance explanation if actual attendance did not meet projection.





QUESTIONS FOR THE NARRATIVE:

Section 4: Implementation (20 points)

- 7. Q7 Outreach & Diversity (5 points):
 - Diversity means reflective of our community. What actions are you taking /what are you doing to proactively advance diversity, equity and inclusion (including programming, audience, marketing, board & staff).
- 8. Q8 Operational Readiness (5 points):
 - A) Describe the composition and strengths of your board and project team; AND B) What major logistical details for the event are confirmed?
- 9. **Q9 Financial Readiness (5 points):** (forms, profile, financial statements)
- 10. Q10 Match Percent of Match Confirmed (5 points): (form, documents)





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How to Apply:

- Online application with United Arts:
 <u>www.UnitedArts.cc/grantee-resources/grants/</u>
- Application System Instructional Videos
 How to Create an Account
 How to Apply

ONCE YOU APPLY (& UNTIL THE FINAL APPROVAL BY BCC):

- No lobbying of Review Panel, Council members, or BCC
- You MAY invite them to public events, send e-news,
 press, etc., but no private appeals or meetings



Nonprofit search – Profile due 6/23/23

REMINDER: Small request category may opt-out of the profile and instead complete the Board of Directors form



New: https://www.nonprofit-search.org/createAProfile

Update existing: https://cff.civicore.com/index.php?action=userLogin





REVIEW PANEL:

Applicants are required to attend

REMINDER! During Review Panel meeting, applicant intro/update and responses will be limited to <u>one minute</u> unless panel requests further clarification

- Scores are compiled, on the average after high and low panelists score are removed.
- Resulting ranking in each request level will be considered by the full Council for funding recommendations.
- Full funding from the top score down; even though eligible scoring, the lowest scores may not be funded
- Final decision is with Board of County Commissioners in Oct.





IF AWARDED:

- Contract (with United Arts)
- Insurance requirements (for duration of project)
 - Commercial General Liability \$1,000,000
 - Business Automobile Liability \$500,000
 - Workers' Compensation and Employer's Liability \$100,000 as required by State of Florida
 - NEW! While no longer required this year, Employee Dishonesty/Commercial Crime Insurance – equal to or greater than 65% of the amount of award, is still considered best practice.
- Reminder: United Arts is at: 216 Pasadena Place, Orlando, FL 32803 please update COI; include egranting@UnitedArts.cc for email
- File ACH enrollment form with United Arts to set up electronic payment processing for all grant payments

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IF AWARDED:

Proper acknowledgement to Orange County Arts & Cultural Affairs

Use this:



Not this:



"This project is funded in part by Orange County Government through the Arts & Cultural Affairs Program."

- REMINDER: OrlandoAtPlay.com list events 6 months+ prior to event
 Indicate Category: OCACA to code events
- Submit photos/captions for Orlando Arts magazine to Cindy@UnitedArts.cc
- Complimentary tickets (2 each) to Terry Olson and Trudy Wild
- Invite Arts and Cultural Affairs Advisory Council to events





PAYMENT REQUIREMENTS:

- Pay Request for each disbursement
- Change Request Form for event dates, scope, budget, and artistic or management leadership changes from proposed project (<u>prior</u> to pay report)
 - Payment 1, <u>50% of award</u>: (Dec 2023/Jan 2024 timing)
 - Due 45 days after BCC approval/contract issued (unless late start date)
 - Submit project updates, at least 50% of match confirm & insurance
 - Payment 2, <u>40% of award</u>:
 - Due 3 weeks before event starts or halfway through longer project (duration of 2 months or longer)
 - Submit interim report, at least 100% of match confirm, updates/status report, budget, expenditures
 - Payment 3, 10% of award: (Reimbursement; occurs after event)
 - Due 45 days after close of event and last day of project period; Submit final report; proof of match received, grant & match expenditures, all attendance, marketing, recognition, reports, etc.



TIPS FOR "A-STUDENT" GRANT WRITING

- Write to the questions and the Matrix for scoring
- 2. Correct any typos and grammar; get fresh eyes
- Don't overwhelm limit use of acronyms, lengthy statistics, long blocks of type
- 4. DO use brief headers, break up paragraphs, bullets or dash
- In Q3 & 4 Avoid generalized statements and unidentified quotes; if using a quote, identify the source & year of the quote, or add a descriptive reference. If it's too old don't use it.
- Show how this project will attract tourists
- Review high-scoring grants
- 8. Allow enough time; plan ahead.
- 9. Ask for help!





Grant Access, Forms & Tools

- ✓ How to navigate the Grant Portal
- ✓ Unique Entity ID
- ✓ To start an account or a new grant application Log-on to Foundant https://www.grantinterface.com/Home/Logon?urlkey=unitedarts
- ✓ How to copy a previous application
- ✓ Calculate your economic impact using the Americans for the Arts Calculator
- ✓ For meeting calendar, grant links & more Link to the United Arts website for Orange County Arts & Cultural Affairs grants page Link: https://unitedarts.cc/grantee-resources/orange-county-teniled Arts



Workshops & Other Resources

The Awesome Foundation

The Awesome Foundation is a global community advancing the interest of awesome in the universe, \$1,000 at a time. Eligible to an individual or a group. Ongoing; awarded monthly. (*'---- On the last time)

Easy application can be accessed here or contact Mr. Terry Olson at Orange County Arts & Cultural Affairs: Terry.Olson@ocfl.net, 407.836.5040.

Applications:

https://bit.ly/AwesomeOrlando





Workshops & Other Resources

Blockbuster Fund

To encourage marquee-type arts and cultural blockbuster events in Orange County, Florida, that result in regional, statewide and national attendance. Eligible: individual or organization. Ongoing program, as funds are available.

For information about proposals for Blockbuster projects in Orange County, see guidelines here or contact Mr. Terry Olson at Orange County Arts & Cultural Affairs: Terry.Olson@ocfl.net 407.836.5040.





Cultural Facilities Funding

(Note: The Cultural Facilities program had been suspended due to budget/Covid-19; will be fully restored and opening with the FY24 program, fall of 2023)

Eligibility: Nonprofit museum- and/or government-leased or owned entities in Orange County, for acquisition, construction, renovation or equipping of cultural museums or auditoriums.

Request Amount: Max: \$500,000; \$1:\$1 match, long-term lease/ownership and other requirements

Late December/January: Letter of Intent and application deadline July 1, 2024- Mar 31, 2026: Grant period of 21 months.





Venue Subsidy for Arts & Culture

To subsidize short-term venue rental costs and related costs charged by the venue only (not staff, artists, long-term leases...)

Eligibility: Cultural organizations that are renting space at a venue in Orange County for an exhibition or performance.

Request Amount: Max: \$50,000 or no more than 50% of rental costs; \$1:\$1 match; Application deadline: TBD-mid-Sept

Grant period: Venue rentals must occur within October 1, 2023, through September 30, 2024.

✓ Venue listing: https://unitedarts.wpenginepowered.com/wp-content/uploads/2023/05/Venue-List-Post-Orange.pdf





WORKSHOPS & OTHER RESOURCES



Cindy@UnitedArts.cc 407.970.2831

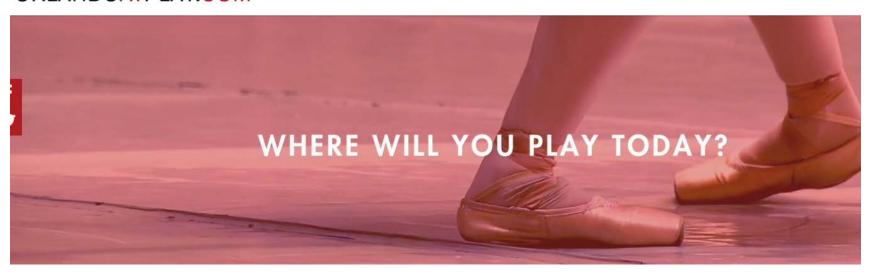




Workshops & Other Resources



WHAT TO DO - LOCAL GUIDES - STUDENTS - OPPORTUNITIES -



Free promotion of your Events | Camps | Job postings | Board opportunities Free weekly newsletter to 7000+ subscribers | MUST post events 6 months ahead for Cultural Tourism

<u>Laura@UnitedArts.cc</u> 407.628.0333, x236





Workshops & Other Resources

More information



- ✓ <u>Sign up</u> to receive future Update emails from Mr. Terry Olson.https://app.e2ma.net/app2/audience/signup/1828410/1782637.594125677/
- ✓ Winding down! Last date for AEP6 data collection is

 June 23; Americans for the Arts' Arts & Economic

 Prosperity Study all grantees are required to

 participate: Organization & Audience surveys United Arts

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CONTACTS FOR ASSISTANCE

Cultural Tourism: Trudy Wild

- Review previous applications
- Discuss eligibility of organization or project
- Request samples of high scoring responses
- Review or work on proposed application, by appointment at our outreach office/computer workstation, 222 Pasadena Place, Orlando, FL 32803

321.972.9837 Direct 407.628.0333, x223 Trudy@UnitedArts.cc or, Luke Noles 407.636.5121 Direct 407.628.0333, x222 Luke@UnitedArts.cc



OrlandoAtPlay.com: Laura Coley

321.422.0934 Direct 407.628.0333, x236 Peyton@UnitedArts.cc

