GRANT WORKSHOP

Thursday, May 30, 2024, 9:30-11:15 a.m.

(on Zoom, video)

(webinar will be recorded and posted on the United Arts website))



How to Apply for 2024-25 Cultural Tourism Funding







ORANGE COUNTY OFFICE OF ARTS & CULTURAL AFFAIRS

CULTURAL TOURISM FUNDING FOR 2024-25

Supported by Tourist Development Tax (TDT) Revenues*

- Office/Council created in Aug 2001, now led by Vicki Landon, Office of Arts & Cultural Affairs & Advisory Council, with Nanette Naylor, Administrative Office Coordinator
- Fiduciary & Grant Management: United Arts of Central Florida, Trudy Wild.



Mission

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

Intended Outcomes

- 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: \$47,604,596*

Total past-year FY24 CT funding: \$3,999,149

40 grantees:

- **15** Small awards **\$504,149** (from \$0 to \$45,000)
- **5** Medium awards **\$400,000** (from \$45,001 to \$80,000)
- **20** Large awards **\$3,095,000** (from \$80,001 to \$160,000)



FY24 Cultural Tourism Funding

- Organizations requested funding: 41; new: 7
- Organizations recommended for funding: 40
- Total project budgets: \$43,617,470



























ORLANDO BALLET









snap.

GLOBAL PEACE





Holocaust







































FY24 (PRIOR YEAR) GRANTEES & EVENTS DURATION:

- 1- to 7-day events 4
- 4 1- to 5-week events
- o 11 4- to 11-month events
- 12 months full-season/year-long events 17
- ✓ 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

- 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
- 2. 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, 2024 April 15, 2026, and
 - event occurs during Jan. 1 Dec. 31, 2025
- 4. Proposed arts and culture activities may not be a supplementary event at a non-arts conference, professional meeting, reunion, or other similar gathering



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 IRS 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 so that you can provide the updated profile URL with your application by July 14, 2024, 11:59 p.m. → ALL Small Requests applicants may opt-out of the profile and complete the Board of Directors form instead.
- 11. Complete the online application: narrative questions, forms, and required materials as uploads
- 12. → All applicants must have a UEI number





WHAT'S NEW IN FY25/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 Maximum Request Amount" to determine maximum request amount and financial statement requirements for your request
- ✓ NEW! Increased the funding caps for each level:
 - Large request: \$160,000; \$175,000
 Medium Request \$80,000; \$90,000
 Small Request \$45,000; \$50,000
- Reminder Score threshold*: The scoring threshold returned to original minimums for funding eligibility. Score requirements are: 70 for small requests; 75 for medium; 80 for large



New in FY25/Reminders and Changes:

- Reminder A Unique Entity Identifier (UEI) is required for each applicant.
- Reminder 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)
- Reminder 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?"
- 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 FY25/Reminders and Changes:

- NEW: Project Budget Summary NOT required to present a balanced budget (same amount of income and expense)
 If you prepare a budget with more income than expenses (a net gain) or more expenses than income, showing a loss, you must explain why you present the budget in this way and what you will do with or about the gain/loss.
- Reminder 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)







New in FY25/Reminders and Changes:

- ✓ NEW AEP6/Reminder: ECONOMIC IMPACT CALCULATOR* AEP6, customized to Central Florida Region by Americans for the Arts, through United Arts.
 - Use this tool to create projections for the economic impact for a proposed project (for one event, or for your whole season):
- ✓ ✓ Organization or Project operating budget cash
 - + Proposed total IN-PERSON attendance
 - = Total Proposed Economic Impact (total expenditures, jobs household income, local/ state/federal taxes)

	•							
	AEP6 CA	AEP6 CALCULATOR FOR THE CENTRAL FLORIDA REGION This calculator has been customized for use by nonprofit arts and culture organizations located in the Central Florida Region on behalf of United Arts of Central Florida.						
	Your Organ	ur Organization's Total Operating Expenses: \$ Total Attendance to Your Organization's In-Person Events:						
	CALCULA	ATE ▶		RES	ET 🕨		PRINT ▶	
	TOTAL EC	TOTAL ECONOMIC IMPACT						
,	ARTS&	Total Expenditures	Jobs	Household Income	Local Government Revenue	State Government Revenue	Federal Gov Tax Revenue	
	Organization(s):							
	Audiences:							
	Total:							







New FY25/Reminders and Changes:

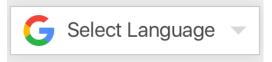
Translation options:

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, UnitedArtsCFL.org
- When viewing resources on a browser, locate the ReachDeck icon (see right image). Once there, select the translate button (\mathfrak{F}_{Λ}).









New FY25/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.
 - ✓ NEW: Submit Management letter with audit and applicant organization's response to the management letter
- ✓ REMINDER! IF financial statements are not completed and filed within 9 months of fiscal year-end, applicant will be allowed to apply, but will receive a "0" score in Q9/Financial Readiness, and all required items must be provided with the funding agreement, before any funding can be provided
- ✓ NEW: if your financial statements end in the year 2023, provide Profit & Loss and Balance Sheet from a period within 2024 (reporting within 6 months of the application date).
- REMINDER! If in-person attendance fell short of projections for prior, CT-funded event & would have lowered the score, explain attendance disparity the next application.
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New FY25/Reminders and Changes:

- Reminder! Let others know about your events free marketing with online cultural calendar Arts & Culture Calendar (previously OrlandoAtPlay.com)*
 - Applicants are encouraged to list events on Arts & Culture Calendar
 - Grantees <u>MUST</u> list funded events on Arts & Culture Calendar posted at least six months in advance, to get the best lead time in trip planning; NOTE: payments will be withheld for noncompliance.
 - NEW: Contact Samantha Farrington, Samantha@UnitedArtsCFL.org
- 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.





New FY25/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 \$31.61 per hour for Florida's rate unless another professional rate is provided by the contributing individual. The Independent Sector has updated its value of volunteer time. <u>State-by-state Link</u>
- Reminder! Staff will provide pre-screening of narrative questions, budgets, or other application materials in a cursory review, if requested prior to 1 week before the application deadline, by July 7.







DATES TO REMEMBER:

- Application open: Thursday, May 30, 2024
- Application deadline: Sunday, July 14, 2024, 11:59 pm
- Workshop: How to Apply for FY25 Cultural Tourism Funding Thurs., May 30, 2024,
 9:30 a.m. 11:15 a.m.
- Last date to submit application components for staff review via email is July 7
 (Note: Staff will not be in the office between July 1-5 and will have limited access to the system, with exception for technical issues)
- Staff will be available to answer questions until Friday, July 12, 2024 @ 3 pm
- Advisory Council Review Panel: September 2024, 8:30 am-1:30 pm (date and location to be confirmed)
- Board of County Commissioners' Approval and notification of award: October, 2024 (date to be confirmed)
- Funding period/Program Dates are Nov 1, 2024, to Apr 15, 2026, with events must occur between Jan 1 to Dec 31, 2025
- Final Report: April 15, 2026, or 45 days after the applicant's selected project period ends

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REQUEST LEVELS:

- Request limited to 35% (Small) 30% (Medium) and 25% (Large) of operating revenue (cash) from prior year Form 990)
- Use form: Calculate Maximum Request Amount*
- Total funding pool: \$4,750,000
- Three categories for requests (<u>only one</u> application to either):
- Amount in each pool TBA; based on percentage of total requests in each pool





REQUEST LEVELS, CONTINUED - MATCH AND MIN. SCORE:

Large Requests - \$175,000 (previously \$160,000)

Minimum score: 80/100 (no change)

Medium Requests - \$90,000 (previously \$80,000)

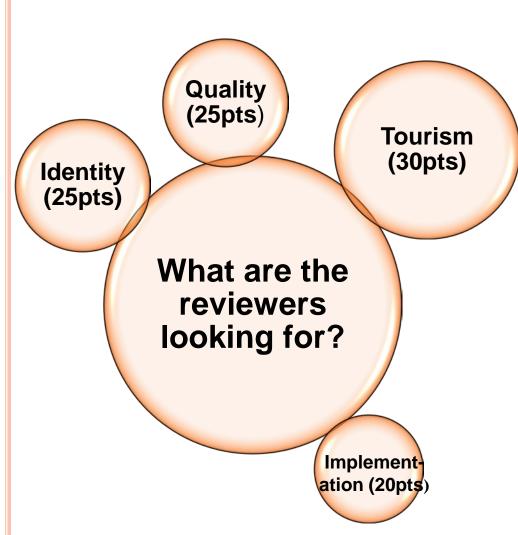
Minimum score: 75/100 (no change)

Small Requests - \$50,000 (previously \$45,000)

- Minimum score: 70/100 (no change)
 - Request does NOT have to be maximum of that level
 - Amount in each pool TBA; based on percentage of total requests in each pool







- 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%) After At least 10% of match confirmed Jan-Feb event start. (Mar-May 75%) June-Aug 55%: After Aug 35%)

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







UESTIONS FOR THE NARRATIVE:

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

- (Project)/Q1 Innovation & Uniqueness (15 points): How will this event be exciting, unique or innovative?
- (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): 3. What elements of this and past events will assure the highest artistic excellence?

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







UESTIONS FOR THE NARRATIVE:

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

- 5. Q5 Marketing & Public Relations (20 points)
 - A) Articulate your marketing and public relations plan—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 timeline of entire event, 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 **U** projection.





QUESTIONS FOR THE NARRATIVE:

Section 4: Implementation (20 points)

- 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) see reminder about timeliness of reports within 9 months of fiscal year end
- 10. Q10 Match Percent of Match Confirmed (5 points): (form, documents)





How to Apply:

- Online application with United Arts: www.UnitedArtsCFL.org/grants/
- **Application System Instructional Videos** How to Create an Account How to Apply

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

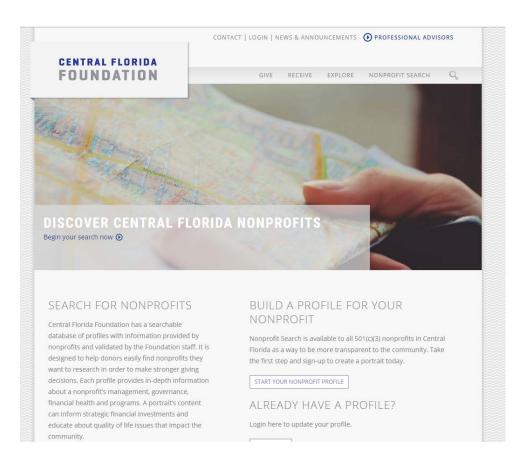
- No lobbying of Review Panel, Council members, or BCC
- You MAY invite them to public events, send e-news, press, etc., but no private appeals or meetings





NONPROFIT SEARCH — **PROFILE DUE WITH APPLICATION**

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 UNITED ARTS







REVIEW PANEL:

Applicants are required to attend

REMINDER! During Review Panel meeting, applicant intro/update and responses will be limited to one minute 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.
- **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





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
 - Reminder While no longer required, 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: 3025 Edgewater Drive, Orlando Fl. 32804 please update COI; include outreach@UnitedArtsCFL.org email
- File ACH enrollment form with United Arts to set up electronic payment processing for all grant payments





IF AWARDED:

Proper acknowledgment 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: calendar.unitedartscfl.org – list events 6 months+ prior to event

Indicate Category: OCACA to code events

- Submit photos/captions for Artistry magazine to Cindy@UnitedArtsCFL.org
- Complimentary tickets (2 each) to Vicki Landon 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 (prior to pay report)
 - **Payment 1, 50% of award**: (Dec 2024/Jan 2025 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, 40% of award:
 - 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.
- 6. Show how this project will attract tourists
- 7. 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 link to the United Arts website for Orange County Arts & Cultural Affairs grants page –

Link: https://unitedartsCFL.org/grants/ (orange boxes are OC grants)



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.







FY25 Cultural Tourism Supplement – DEI Project Grant







FY25 Cultural Tourism Supplement – Sustainability Project Grant





Cultural Facilities Funding

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:\$2,000,000 (previously \$500,000); \$1:\$1 match, long-term lease/ownership and other requirements

Late December/January: Letter of Intent and application deadline July 1, 2025- Mar 31, 2027: 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, 2024, through September 30, 2025.

✓ Venue listing and program details on: https://unitedartscfl.org/grants/orange-county-venue-subsidy-for-arts-and-culture/









ARTISTRY DEADLINES FOR 2024-25

ISSUE	STORY PITCH DEADLINE	CALENDAR DEADLINE
September/October Season Preview	June 21	June 28
November/December Holiday Issue	August 23	September 16
January/February	October 17	November 14
March/April Summer Camps and Florida Film Festival	December 13	January 16
May/June/Summer Issue Fringe Festival Outdoor Art	February 13	March 14

Cindy@UnitedArtscfl.org 407.970.2831









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

calendar.unitedartscfl.org

Samantha Farrington samantha@unitedartscfl.org Direct 407.628.0333 x241





Workshops & Other Resources

More information

Arts and Cultural Affairs UPDATE

Vicki Landon

Orange County Arts & Cultural Affairs
407-836-5540 | office
407-761-1309 | cell
Vicki.Landon@ocfl.net | email

✓ <u>Sign up</u> to receive future Update emails from Arts & Cultural Affairs: https://signup.e2ma.net/signup/1828410/1782637/





CONTACTS FOR ASSISTANCE

Cultural Tourism: Trudy Wild, Director of Public Grants & Advocacy

- 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, 3025 Edgewater Drive, Orlando FL 32804
- Technology issues with Foundant grant portal



321.972.9837 Trudy@UnitedArtsCFL.org

