



# FY26 Cultural Tourism Funding Guidelines

**Orange County Arts & Cultural Affairs**  
Orange County, Florida

Managed and updated by

**UNITED  
ARTS**  
CENTRAL FLORIDA

## Table of Contents

<b>ABOUT .....</b>	<b>4</b>
<i>WHAT IS CULTURAL TOURISM FUNDING .....</i>	<i>4</i>
<i>HOW MUCH MAY WE REQUEST? + MATCH REQUIREMENTS.....</i>	<i>4</i>
<i>NEW &amp; UPDATED FOR 2026 .....</i>	<i>5</i>
<i>TIMELINE FOR CULTURAL TOURISM FUNDING .....</i>	<i>5</i>
<i>WHO TO CONTACT.....</i>	<i>6</i>
<b>ELIGIBILITY + REQUIREMENTS.....</b>	<b>7</b>
<i>WHO CAN APPLY? .....</i>	<i>7</i>
<i>UNALLOWABLE EXPENSES/EXPENDITURES .....</i>	<i>8</i>
<i>ORANGE COUNTY FUNDING MAY NOT BE USED FOR: .....</i>	<i>8</i>
<i>MATCH REQUIREMENTS .....</i>	<i>9</i>
<i>IN-KIND SUPPORT .....</i>	<i>10</i>
<i>WHEN MUST MATCH FUNDS BE SUBMITTED?.....</i>	<i>10</i>
<i>INSURANCE REQUIREMENTS.....</i>	<i>10</i>
<i>FINANCIAL STATEMENTS REQUIREMENTS.....</i>	<i>12</i>
<b>EVALUATION &amp; DECISION PROCESS .....</b>	<b>13</b>
<i>WHAT ARE THE REVIEWERS LOOKING FOR? .....</i>	<i>13</i>
<i>EVALUATION MATRIX - GUIDELINES FOR SCORING .....</i>	<i>16</i>
<i>EVALUATION MATRIX – GUIDELINES FOR SCORING – CONTINUED .....</i>	<i><b>Error! Bookmark not defined.</b></i>
<i>HOW ARE THE APPLICATIONS SCORED?.....</i>	<i>18</i>
<i>MINIMUM SCORES FOR ELIGIBILITY .....</i>	<i>18</i>
<b>LEGAL ITEMS &amp; CONTRACT REQUIREMENTS.....</b>	<b>18</b>
<i>ACKNOWLEDGMENT OF ORANGE COUNTY FUNDING.....</i>	<i>19</i>
<i>RECORDS RETENTION .....</i>	<i>19</i>
<i>CONTRACT .....</i>	<i>19</i>
<i>REPORTING AND PAYMENT SCHEDULE.....</i>	<i>19</i>
<i>CHANGES IN PROJECT SCOPE OR BUDGET.....</i>	<i>20</i>
<i>ENCUMBRANCES AND EXPENDITURES.....</i>	<i>20</i>
<i>EVENT ADMISSION/TICKETS .....</i>	<i>20</i>

<i>EVENT EVALUATION/AUDIENCE RESEARCH/DATA COLLECTION.....</i>	<i>20</i>
<b>ADDITIONAL RESOURCES.....</b>	<b>21</b>
<i>GLOSSARY OF TERMS USED IN GUIDELINES AND APPLICATION .....</i>	<i>21</i>
<i>APPLICATION PREPARATION AND TECHNOLOGY .....</i>	<i>26</i>
<i>APPLICATION TECHNOLOGY .....</i>	<i>27</i>
<i>APPLICATION CONTENTS .....</i>	<i>30</i>
<i>CHECKLIST OF FORMS &amp; REQUIRED DOCUMENTS .....</i>	<i>30</i>

## **ABOUT**

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

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

## **WHAT IS CULTURAL TOURISM FUNDING**

### **OBJECTIVES**

- ✓ Enhance Central Florida's arts and cultural identity
- ✓ Present quality arts and cultural experiences
- ✓ Promote tourism

## **HOW MUCH MAY WE REQUEST? + MATCH REQUIREMENTS**

Request amount is limited to 25-35% of operating budget revenue (cash) from average of three prior completed fiscal years, as submitted on IRS FORM 990 ([See form A](#)). Small, medium, and large requests are limited to a percentage of operating budget revenues, 35%, 30%, and 25% respectively.

<b>Request Category</b>	<b>Funding Amounts</b>	<b>Minimum Score for Eligibility</b>	<b>Match must be at least ...*</b>	<b>In-Kind Eligibility for Match</b>
Small Request	Up to \$55,000 <sup>□</sup>	70	\$1 dollar to \$1 dollar	50% of the match
Medium Request	\$55,001 to \$100,000 <sup>□</sup>	75	\$1 dollar to \$1 dollar	25% of the match
Large Request	\$100,001 to \$190,000 <sup>□</sup>	80	\$1 dollar to \$1 dollar	No match allowed from in-kind

<sup>□</sup> **NOTE: Must submit Request Calculation Form.**

\*The request amount must be matched \$1: \$1, as budgeted, BUT the 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 the match required at evaluation is scaled to the event's start date, requiring less of the match to be confirmed for a later event.***

## **NEW & UPDATED FOR 2026**

- There is now a section in the online application to enter Board of Director Information. We are moving away from requiring organizations to update their Central Florida Foundation Profile. All required materials for the FY26 Cultural Tourism Funding application will be uploaded or included within the online application.
- Maximum request amount will be generated from 3-year operating revenue averages of the three most recently filed IRS Form 990s. There is a new form to collect this information.
- Max levels for small, medium, and large requests have increased to \$55K, \$100K, and \$190K.
- At least Profit & Loss and Balance Sheet statements are now a required part of the application process.
- Organizations who receive this award MUST post their events on the online UA cultural calendar (ArtsinOrlando.com) with the OCACA Category Tag. Failure to post can delay funding.

## **TIMELINE FOR CULTURAL TOURISM FUNDING**

### **KEY DATES**

- ☐ Application Opens – Friday, May 23, 2025
- ☐ Workshop – Tuesday, June 10, 2025, 11a-12:30p; Register in advance
- ☐ Application Closes – Tuesday, July 15, 2025, 11:59p
- ☐ Panel Materials Released – Wed, Aug. 13, 2025
- ☐ Review Panel Meeting – Thurs, Sept 18, 2025, 8:30-1 at Holden Heights Community Ctr
- ☐ Scores and Rankings Released – Mon, Sept. 22, 2025
- ☐ Advisory Council Meeting – Funding Recommendations Tues, Sept 23, 2025, 8:30a
- ☐ Funding Approved - Board of County Commissioners meeting late October (TBA)
- ☐ Project Period - November 1, 2025, to Feb 28, 2027
- ☐ Event Period - January 1, 2026, to December 31, 2026
- ☐ Funding Available – January – February 2026

### **WORKSHOP: Tues, June 10, 2025, 11a – Registration required:**

<https://us02web.zoom.us/meeting/register/8NGjNLBzTUiT2W2xpxqVQXQ>

First-time applicants and those not funded in the previous cycle must attend the workshop (or schedule review with [Trudy@UnitedArtsCFL.org](mailto:Trudy@UnitedArtsCFL.org)).

For those who are not required to attend a workshop, be sure to read the workshop PowerPoint slide of “What’s New” for any updates.

### **DEADLINE: Tuesday, July 15, 2025, 11:59 pm – Application deadline; online at**

<https://www.grantinterface.com/Home/Logon>

## ALL DATES:

- ☐ **Friday, May 23, 2025 – Grant application opens**
- ☐ **Friday, June 27, 2025** – Last day for staff assistance – general questions.
- ☐ **Monday, June 23, 2025** – Last day to submit draft application for full narrative staff pre-review.
- ☐ **June 30-July 4** – United Arts staff will not be in the office this week and will have limited access to the grant system, or for assistance, with exception for technical issues
- ☐ **Monday, July 7, 2025** – Last day to request single question, form, or financial statements for staff review
- ☐ **Friday, July 12, 2025, 3 pm** - Last day for staff to answer questions
- ☐ **Tuesday, July 15, 2025 – Application due by 11:59 p.m.** No exceptions. The lobbying blackout period begins; active until the Board of County Commissioners vote on the program funding.
- ☐ **Wednesday, August 13, 2025** – Staff review of eligibility complete; Panelists receive review materials; Advisory Council meeting; Review Panel members approved.
- ☐ **Thursday, September 18, 2025 (8:30 am – 1:30 pm) – Cultural Tourism Review Panel meeting** at Holden Heights Community Center. At least one representative of each applicant is required to attend. In-person. Location: To be announced
- ☐ **Friday, September 19, 2025, 12 noon – Panelists’ final scores and comments are due via online portal;** Questions: [Trudy@UnitedArtsCFL.org](mailto:Trudy@UnitedArtsCFL.org)
- ☐ **Monday, September 22, 2025** – Final score and ranking are released; posted on UnitedArtsCFL.org.
- ☐ **Tuesday, September 23, 2025** – Arts & Cultural Affairs Advisory Council votes on Review Panel funding recommendations. Applicants are highly encouraged to attend.
- ☐ **Tuesday, October 28, 2025 (To be confirmed)** – Board of County Commissioners approves funding recommendations. Council members and applicants are encouraged to attend.
- ☐ **November 1, 2025, to Feb 28, 2027** – Project period for planning, marketing and project expenditures; Includes pre- and post-event activities. All grant expenditures must occur within this period)
- ☐ **January 2026 - February 2026** – First grant payment available- Exact payout date is dependent on arrival of funding.
- ☐ **January 1, 2026, to December 31, 2026** – Event period (must occur on or within this period)

## WHO TO CONTACT

### Questions Regarding the Program and Eligibility

**Vicki Landon**

Orange County Arts & Cultural Affairs  
450 E. South St. Suite 345, Orlando, FL 32801 | office  
P.O. Box 1393, Orlando, FL 32802-1393 | mailing  
[www.ocfl.net](http://www.ocfl.net)

407.836.5540

[Vicki.Landon@ocfl.net](mailto:Vicki.Landon@ocfl.net)

**Meghan Dawson**

Administrative Office Coordinator  
Orange County Arts & Cultural Affairs

407.836.0913

[Meghan.Dawson@ocfl.net](mailto:Meghan.Dawson@ocfl.net)

**Questions Regarding the Program, Eligibility or Grant System Technology**

**Trudy Wild**

Director, Public Grants & Advocacy  
United Arts of Central Florida  
3025 Edgewater Drive Orlando, FL 32804

321.972.9837 Direct

407.628.0333 x223

[Trudy@UnitedArtsCFL.org](mailto:Trudy@UnitedArtsCFL.org)

**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://unitedartscfl.org/grants/orange-county-grants-cultural-tourism-funding/>

**ELIGIBILITY + REQUIREMENTS**

**WHO CAN APPLY?**

**Arts and cultural organizations must meet all the following eligibility requirements:**

1. Cultural nonprofit 501(c)(3) corporation registered and in good standing with the State of Florida and the IRS, **OR** an American Alliance of Museums (AAM)-accredited museum that meets all other requirements the same as a 501(c)(3); **AND** are current/in compliance with any open Orange County grants.
2. An organization must be a 501c3 for at least three years at the time of application date to apply for Cultural Tourism
3. Successfully delivered an event or series of events in Orange County within the last five years, drawing significant tourist interest and enhancing the region's cultural appeal.
4. The arts and culture event for which you are applying will take place in ORANGE COUNTY and will be accessible and promoted to the public.
  - The project occurs within the Project Period of Nov. 1, 2025, to Feb 28, 2027, with actual event(s) that occurs between January 1 to December 31, 2026.
  - 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 to potential visitors beyond the immediate four-county area of Orange, Osceola, Lake, and Seminole counties.
6. Show community support through donations, specifically for this project, that match the requested amount at least dollar-for-dollar (1:1 Cash Match)
7. Attend a Cultural Tourism Funding workshop. This is mandatory for first-time applicants and applicants that have not been awarded in the previous cycle.
8. Have a checking account with a licensed financial institution.
9. Currently 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); and provide year-end financial statements within nine (9) months of fiscal year-end (whichever level of financial statements are required, based on the revenue on the most recently completed IRS Form 990).
10. File an annual IRS Form 990 (also acceptable: 990-EZ, 990-N with additional financial statements or documentation of annual revenue).
11. Have a UEI number.

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.

## **UNALLOWABLE EXPENSES/EXPENDITURES**

### **ORANGE COUNTY FUNDING MAY NOT BE USED FOR:**

- ☐ General operating or administrative costs not specifically identified with the project
- ☐ Out-of-county staff travel
- ☐ Mortgage payments
- ☐ Past-due debts, contingencies, fines and penalties, interest
- ☐ Space rental, improvement or maintenance not specifically identified with the project
- ☐ Private entertainment, food and beverages, including alcohol
- ☐ Lobbying expenses or political activities
- ☐ Advertising which does not mention the specific project activities or omits required logos
- ☐ Activities that are restricted to an organization's membership or other private or exclusive participation
- ☐ Prizes or awards
- ☐ Contributions and donations
- ☐ Endowment contributions
- ☐ Any other expenses not specifically identified with the project



## **MATCH REQUIREMENTS**

1. 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. Indicate each cash or in-kind item that is confirmed. Group the backup documents by categories of cash, pledges and in-kind into a single PDF, if possible, or one PDF per category.
2. 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 must contain:
  - a. Donor/Company name and contact information,
  - b. Amount of the contribution/award,
  - c. Date of pledge, check, award, appropriation,
  - d. Date by which the contribution, award or pledge will be paid and
  - e. **Use or purpose for the funding — must be intended specifically for the project.**
  - f. 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.
3. Identify all Matching Fund documentation clearly.
4. 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 being submitted.
5. Do not include items that are not a confirmed pledge, allocation, or cash gift at the time of application. A notice of intent to consider support for the project does not qualify as confirmed.
6. 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 a match.
7. **Applicant Cash** – If using applicant cash to support a project, the backup documentation must include:
  - a. 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 equivalent, or the Chair (President) or Treasurer on the Board of Directors;
  - b. A copy of a bank statement showing availability of funds. Applicants’ recent financial statements (as submitted with the application) should support the availability of funds from Applicant Cash.
8. 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 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, 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 it is used as Matching Funds or not.

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 Appendix Four for further details.
- Use \$33.49 per hour for Florida’s rate unless another professional rate is provided by the contributing individual. The Independent Sector has updated the value of its volunteer time. [State-by-state Link](#)

## **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.

NOTE: An application may be submitted without confirmed Matching Funds, or with less than 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 at the time of application, 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.

## **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.

1. Certificate will show the following types and limits of coverage:

- **Commercial General Liability**, at least \$1,000,000 (United Arts and Orange County, Florida must be listed as *Additional Insureds* regarding Commercial General Liability) per written grant agreement.
  - **Business Automobile Liability**, including Hired and Non-owned vehicles, at least \$500,000; either separate policy or endorsement to the Commercial General Liability policy.
  - **Workers' Compensation** and Employer's Liability, as required by State of Florida law.
  - **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.
2. Certificate will show both United Arts of Central Florida and Orange County, Florida must be listed as **Additional Insured** with regard to at least the Commercial General Liability, per the terms of the agreement.
  3. United Arts of Central Florida will be listed as **Certificate Holder**. Address: 3025 Edgewater Drive, Orlando, FL 32804. Email: [Outreach@UnitedArtsCFL.org](mailto:Outreach@UnitedArtsCFL.org).

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. Requests for reduction or waiver do not ensure approval or exemption from requirements. For questions about the requirements or request for exceptions, contact [Trudy@UnitedArtsCFL.org](mailto:Trudy@UnitedArtsCFL.org).

## RESTRICTIONS

1. **One application per organization** – The office of Arts & Cultural Affairs 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 (see Match Requirements, page 9).
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, from the time of the application due date, until the Board of County Commissioners' final vote on approval of awards for this grant cycle.

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 the required reports or met all the administrative requirements for previously awarded grants. Compliance concerns must be resolved 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. The applicant will need to certify that no grant funding is/will be used for the following items:

## **FINANCIAL STATEMENTS REQUIREMENTS**

**Financial statements** are required to submit an application and must be uploaded to the application. **Applicants must prepare and file the required full-year financial statements within nine (9) months of the organization's fiscal year end** and submit them with the profile updates, and by the application deadline. These include:

1. Audit or other Financial Statements for the most recent completed fiscal year, **filed within nine months of the close of the fiscal year** (see chart below; requirements based on operating budget); AND
2. IRS Form 990 tax reporting, **filed within nine 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 2025.**

**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:

<b>Unrestricted operating revenue</b> (most recently completed fiscal year)	<b>Type of Financial Statements (F/S) Required For the Most Recently Completed Fiscal Year</b>		
\$600,000 or greater	Independent certified audit; <i>No compilation reports</i>		If the audit is from <i>Sept. 30, 2024, or prior</i> , you must <b>also provide recent (from period ending in 2025) board-approved financial statements.</b>

Between \$250,001 and \$600,000	Independent certified audit, <i>No compilation reports</i> . OR	Reviewed financial statements (F/S), AND	If audit or reviewed F/S are from <i>Sept. 30, 2024, or prior</i> , you must <b>also provide recent (period ended in 2025) board-approved financial statements.</b>
Less than \$250,000	Independent certified audit, OR	Reviewed financial statements <sup>a</sup> , OR Compiled financial statements	Self-reported financial statements for the most recently completed fiscal year (signed by organization's treasurer or accountant); AND if older than 6 months, <b>provide recent financial statements, period ended in 2025.</b>

## **EVALUATION & DECISION PROCESS**

### **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, and the percentage of confirmed matching funds.

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: How will you reach audiences outside the four (4)-county local area to bring visitors to your event?**
- TOURISM – Projected in-person attendance
  - **Question 6 A: Projected total attendance: \_\_\_\_\_ \* (5 points)**
  - **Question 6 B: Projected tourist attendance (segment of the total attendance who are from outside the four-county area): \_\_\_\_\_ \*(5 points)**
    - **To support both 6A & 6B, explain your basis for calculating the proposed figures.**
    - **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 – Community Outreach & Impact (5 points)
  - **Question 7: Outreach does not equal impact. What actions are you taking to proactively reach and impact a broad spectrum of the community? (including programming, audience, board & staff).**
- IMPLEMENTATION – Operational Readiness (5 points)
  - **Question 8 A: Describe the composition and strengths of your board and project team. (Incl. Field of expertise and professional affiliations)**
  - **Question 8 B: List the project's 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** - 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:** Panel members will receive a Financial Assessment that may include working capital, request percentage to budget, asset to debt ratio, and percentage allocations on IRS Form 990.)

- IMPLEMENTATION – Match (5 points)
  - **Question 10: MATCH form & documents** (Scored by staff)

## EVALUATION MATRIX - GUIDELINES FOR SCORING

Rate in full point scores only.

Score Points possible		Identity (25 Points)		Quality (25 Points)	
		Innovation & Uniqueness	Attention/Standing	Artistic Excellence	Feedback/Critical Acclaim
		IDENTITY: Project Q 1	IDENTITY: Response Q2	QUALITY: Product Q3	QUALITY: Reputation Q4
		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 to 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.



## EVALUATION MATRIX – GUIDELINES FOR SCORING – CONTINUED

		Tourism (30 Points)			Implementation (20 Points)			
		Marketing & Public Relations Q5 a&b	Total Attendance & How you arrived at numbers Q6 a	Tourist Attendance Q6 b	Community Outreach & Impact 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	Excellent	Exceptional marketing and P.R. plan that will attract regional, national and international attention. Fully participating in UA Calendar, regional marketing such 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 and reaching a broad spectrum of the community.	Extremely strong 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 and reaching a broad spectrum of the community.	Better than average 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 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 and 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 <u>less than</u> : 2K (large request),1K (medium), 500 (small request), Weak basis for projection.	With <u>less than</u> 300 (large request),150 (medium),or 75 (small) being tourists.	Lacking plans for advancing and reaching a broad spectrum of the community.	The ability to complete the project is questionable.	Ability to complete the project on budget is questionable.	<u>Less than</u> 60% match is confirmed Jan-Feb event start.(Mar-May 40%;June-Aug 30%; After Aug 2%).

## **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 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.

Following the Review Panel meeting, each Review Panel member finalizes their scores, and sends final scores to staff, who confirms the addition on the score sheets, removes the highest and lowest panelists' scores on each proposal and calculates the average score. A funding priority ranking then is issued, based on the final scores.

## **MINIMUM SCORES FOR ELIGIBILITY**

The minimum requirement for funding will remain 70 for Small, 75 for Medium, and 80 for large requests for an applicant to be eligible for funding consideration in that request level.

NOTE: Any Applicant awarded funding but has not listed funded events on the Arts & Culture Calendar ([calendar.unitedartscfl.org](http://calendar.unitedartscfl.org)) will not receive their grant disbursement. Events must be posted at least six months in advance, to get the best lead time and exposure for potential tourists planning a vacation.

## **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<sup>1</sup> and advertise tourism<sup>2</sup> 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 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 also available on [UnitedArtsCFL.org](#), linked in the grant program information card and if needed in other formats, contact [Trudy@UnitedArtsCFL.org](mailto:Trudy@UnitedArtsCFL.org).

## **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.

- 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.

## **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:

- 1<sup>st</sup> Request, 50% of funding;
- 2<sup>nd</sup>/Interim Report, 40% of funding;
- Final Report, 10% of funding (final payment is in reimbursement only after project and expenses are complete).

## **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 the 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, 2026. 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, 2025, 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. 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 & 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 of their events' economic impact by using the Central Florida—customized economic impact calculator for AEP6 is available at:

<https://aep6.americansforthearts.org/aep6-calculator?partner=united-arts-of-central-florida>

## **ADDITIONAL RESOURCES**

### **GLOSSARY OF TERMS USED IN GUIDELINES AND 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). 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 Project Grant 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 be within the calendar year 2025. Events may not begin before January 1, 2026, nor include event performances, expenditures or attendance after December 31, 2026.

***Dates: Project Period Start and End Dates*** - planning dates prior to event, and event wrap-up following event. Must be within November 1, 2025, and February 28, 2027; end date may be no later than two months after event end date):

***Start Date*** (for planning, promotions, etc. – earliest start date November 1, 2025)

***End Date*** (final wrap-up completed – no later than February 28, 2027, 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** - REMINDER! All statements must be issued within nine months of the organization's fiscal year close. They may be an audit, reviewed, and 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 a 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 2025.

**Foundation Support (Cash Revenues)** - cash support derived from grants given for this project (other than this grant request) by a 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 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 rates 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 23, 2024, report from the Independent Sector, applicants may use the new value of Volunteer Time at \$33.49 Per Hour to calculate in-kind contributions, unless another professional rate is provided by the contributing individual.*

<https://independentsector.org/resource/value-of-volunteer-time/>

**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.

**Arts Calendar** – <https://calendar.unitedartscfl.org/> or ArtsInOrlando.com - The United Arts online cultural calendar, supported in part by Orange County Arts & Cultural Affairs. It is required to post funded events on this site at least six (6) months in advance of the event to provide time for potential visitors to learn about the event when making plans to come to Central Florida.

**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 revenue – 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, except for 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 be recused 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.

## **APPLICATION PREPARATION AND 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
- Account for the United Arts Grant Portal
  - <https://www.grantinterface.com/Home/Logon?urlkey=unitedarts>
- Internet access to access the online application and download forms
- The documents on the Checklist of Required Forms & Attachments prepared and saved in a digital format. The 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 uploaded to the application*. **Applicants must prepare and file the required full-year financial statements within nine (9) months of the organization’s fiscal year end** and submit them with the profile updates, and by the application deadline. These include:

- 1) Audit or other Financial Statements for the most recent completed fiscal year (Budget and P&L) **filed within nine months of the close of the fiscal year** (see chart below; requirements based on operating budget); AND
- 2) IRS Form 990 tax reporting, **filed within nine 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 ending in 2025.**

**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		
<b>\$600,001 or greater</b>	Independent certified audit; <i>No compilation reports</i>		If the audit is from <i>Sept. 30, 2024, or prior</i> , you must <b>also provide recent (from period ended in 2025) board-approved financial statements.</b>
<b>Between \$250,001 and \$600,000</b>	Independent certified audit, <i>No compilation reports.</i> OR	Reviewed financial statements (F/S) <sup>□</sup>	If audit or reviewed F/S are from <i>Sept. 30, 2024, or prior</i> , you must <b>also provide recent (period ended in 2025) board-approved financial statements.</b>
<b>Less than \$250,000</b>	Independent certified audit, OR	Reviewed financial statements <sup>□</sup> , 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, <b>provide recent financial statements, period ended in 2025.</b>

## **APPLICATION TECHNOLOGY**

### **Application Tips**

- **Website:** Go to <https://unitedartscfl.org/grants/orange-county-grants-cultural-tourism-funding/> — to “Apply for Funding” and start the online application.
- **Account access:** If you have applied for ANY grant program through United Arts in the past, you can access the grant portal logon here:

<https://www.grantinterface.com/Home/Logon?urlkey=unitedarts>. If you have forgotten your password, you can request it 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:**

- Read the guidelines thoroughly. Start early. Save application often while working on it.
- 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 the United Arts website for updates on available workshops.
- 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-one assistance meeting in addition to the workshop.
  - **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>.
- 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 character counts 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.
- 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.
- Gather the documents to upload with application 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.
- 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).
- **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.
- Each upload to the online application will only accept ONE (1) document, but multiple pages may be combined into one document.

- 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.***
- Reduce file size by re-scanning at lower resolution or contact United Arts for assistance. You can also make an appointment to use a computer or scanner at United Arts' offices (email or call ahead due to limited access).
- Each file remains with its upload, so files may be named and uploaded in any order.
- Be sure your organization name appears on all forms or other documents.
- 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.
- **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.***
- 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 deadline, you may apply for this program in the next annual cycle.

**High-scoring applications:** Contact United Arts on weekdays before July 1, to get access to prior-year grant applications for example.

**Tutorials for grants application system:**

- To view a tutorial on "How to create a new account" or "How to Apply":  
<https://support.foundant.com/hc/en-us/articles/4479853059991>

## **APPLICATION CONTENTS**

1. Checklist

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

2. 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.

3. Forms

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

- a. Request Calculation Form – Use this form to learn how much your request is, and which funding level you can apply in, based on 3 years of operating revenue (your annual budget). Your request must not exceed 35% of the prior year's operating revenue for small request level, 30% for medium requests and 25% for large requests.

revenue, please contact United Arts.

- b. 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)

- c. Form – Board of Directors

## **CHECKLIST OF FORMS & REQUIRED DOCUMENTS**

- All the following items must be saved 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 FY26 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.		
<b>Items for ONLINE Application Narrative and Forms - Upload</b>		
01	Required	<b>Request Calculation Form – UPLOAD on form provided</b>
02	Required	<b>Online Application &amp; Narrative responses (do not upload; complete this online)</b>
03	Required	<b>Form A - Project Budget Summary – UPLOAD on form provided, in Excel (not PDF)</b>
04	Required	<b>Form B - Matching Funds – UPLOAD on form provided, in Excel (not PDF)</b>
05	Required	<b>Form C - Marketing Budget -- supports Narrative Q5a and Q5B: Marketing &amp; Public Relations plan and timeline; UPLOAD form provided or contact staff for customized format</b>
06	Required	<b>Explanatory Notes</b> for Narrative Q9-- on funds/finances updates relative to deficits, any notes you think will help the reviewers understand the financial status
07	<i>Optional</i>	<b>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 &amp; promotion, brochures, media coverage, reviews, etc. 1-3 uploads available for combined maximum of 10 TOTAL pages, plus 1 optional index/cover.</b>
<b>Links or Attachments for ONLINE Application for Panel or Staff Review</b>		
08	Required*	<b>*Board of Directors form</b>
09	Required to be on OAP	<b>Arts &amp; Culture Calendar (<a href="http://calendar.unitedartscfl.org">calendar.unitedartscfl.org</a>) funded events must be posted at least six months in advance, using the category: OCACA</b>
10	Required	<b>Matching funds backup documentation</b> as listed on Form B – identify clearly or provide index, in these separate groups: a) <u>Cash</u> -- UPLOAD award letter transmittals & canceled checks, donor contributions, paid sponsorship agreements and any other cash/paid documents or applicant cash documents b) <u>Pledges</u> -- UPLOAD confirmation letters, agreements, sponsorship and promissory documents c) <u>In-kind</u> -- 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 <a href="#">Americans for the Arts economic calculator</a> for potential economic impact, jobs, and gov't revenue.
13	Required	<b>Most recently <u>completed or current year-to-date</u>, board-approved financial statements (IF completed-year statements are from 2024):</b> provide balance sheet and profit & loss statement, both with same report end date, in 2025.
14	Required	<b>IRS Form 990 (or Form 990-EZ, or 990-N)</b> - filed within nine months of fiscal-year end
15	On Profile	<b>Financial Statements – most recently <u>completed fiscal year</u></b> (filed within nine months of fiscal-year end)