

# 2018 Operating Support Grants

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*United Arts of Central Florida*

## General Info

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### Organization Name\*

*Character Limit: 100*

### Contacts for Email List\*

Please type names AND emails (example: Mary Smith, msmith@arts.org; Ellen Taylor, etaylor@arts.org) of all individuals who should be included on email communications from United Arts regarding this grant (now and throughout the year) as well as other opportunities. Include yourself, if applicable.

*Character Limit: 500*

### Fiscal Year End Date\*

Enter the month in which your fiscal year ends. For example, an organization whose fiscal year is the calendar year would select December; an organization whose fiscal year is Oct - Sept would select September.

#### Choices

January  
February  
March  
April  
May  
June  
July  
August  
September  
October  
November  
December

### Office Location (County/City)\*

#### Choices

Lake / Clermont  
Lake / Eustis  
Lake / Groveland  
Lake / Leesburg  
Lake / Mount Dora  
Lake / Tavares  
Lake / Other  
Orange / Apopka  
Orange / Eatonville

Orange / Lake Buena Vista  
 Orange / Maitland  
 Orange / Ocoee  
 Orange / Orlando  
 Orange / Windermere  
 Orange / Winter Garden  
 Orange / Winter Park  
 Orange / Other  
 Osceola / Celebration  
 Osceola / Kissimmee  
 Osceola / St. Cloud  
 Osceola / Other  
 Seminole / Altamonte Springs  
 Seminole / Casselberry  
 Seminole / Lake Mary  
 Seminole / Longwood  
 Seminole / Oviedo  
 Seminole / Sanford  
 Seminole / Winter Park (Seminole)  
 Seminole / Winter Springs  
 Seminole / Other  
 Other (only eligible for mini-grant or Cultural Tourism)

## *Eligibility*

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New applicants: before filling out this application, you must provide 3 years of financial statements and a list of recent programming (3 years) to [Mary@UnitedArts.cc](mailto:Mary@UnitedArts.cc). Questions? Call Mary Giraulo, grants manager, at 407.790.7844.

### **Eligibility Requirements\***

- Nonprofit 501(c)3 corporation, in good standing with State of FL & the IRS;
- Completed 3 years of operations, providing cultural programming;
- Principal office located, and provide programming in, Lake, Orange, Osceola or Seminole counties;
- Arts/cultural primary mission;
- Over \$25,000 three-year average cash operating revenue;
- Local governing board (may include members who reside outside Central Florida) that meets at least quarterly and operates under a set of bylaws;
- In good standing with United Arts grants/contracts;
- Must provide equal access and opportunity in employment and services and may not discriminate on the basis of race, color, ethnicity, religion, gender, ancestry, national origin, geography, age, varying abilities, pregnancy, sexual orientation, gender identity, marital status, familial status, citizenship status, or socioeconomic status.
- Organizations not meeting some criteria (or that produce only one event per year) may be eligible for the Mini-Grant instead.

**Choices**

Yes, the applicant organization complies with these requirements

No, the applicant organization is not eligible

**Is your Nonprofit Search portrait up to date?\***

Large Budget and Midsize Budget organizations are required to maintain and update a Reviewed portrait on the Central Florida Foundation's Nonprofit Search, [http://cffound.org/nonprofit\\_search](http://cffound.org/nonprofit_search). The portrait must be Reviewed and up to date by June 15 (for returning applicants), or at the time of Operating Support Grant application (for new applicants). Make sure to go to the Review Changes tab and press "submit"; Foundation staff evaluate the portrait for completeness before issuing the "Reviewed" logo and publishing the portrait. Small Budget organizations are encouraged, but not required to have a portrait.

**Choices**

Yes

No (ineligible for Operating Support Grant)

Small Budget organization (not required to have portrait)

**Financial Fields****Grant Categories\***

3-year average cash revenue on financial statements, not including line item funding from Orange County or City of Orlando, one-time donations of more than 10%, capital, endowment, debt reduction, or in-kind gifts. For repeat applicants, United Arts makes this determination as of the prior year grant application.

**Choices**

Large Budget (Over \$900K)

Midsize Budget (Over \$250K, Under \$900K)

Small Budget (Over \$25K, Under \$250K)

**Maximum Request Amount (Form A)\***

Refer to Form A to determine the maximum request amount, and enter it here.

*Character Limit: 20*

**Field A. Total Earned Income (Form B, Column 1)\***

*Character Limit: 20*

**Field B. Total Contributed Income (no gov't) (Form B, Column 1)\***

*Character Limit: 20*

**Field C. Total Government Income (Form B, Column 1)\***

*Character Limit: 20*

**Field D. Total Other Income (Form B, Column 1)\***

*Character Limit: 20*

**Field H. Total Cash Expenses (Form B, Column 1)\***

*Character Limit: 20*

## *Narrative*

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Panelists will consider last year's panel comments, the narrative questions below, any relevant attachments, observations of artistic events & exhibitions, and the site visit to determine scores and funding. It is highly recommended to consult last year's panel comments when formulating the narrative, in case there are any points that need to be addressed.

**Organization Programs Summary\***

Starting with the organization name, write a brief description of the applicant organization / programs, targeted for the general public or someone who has never heard of the organization. Do not use first person ("we"/"our"). This description will be used in the press release if awarded.

*Character Limit: 300*

**Artistic (or Historic/Scientific) Merit (40%)\***

Describe the artistic merit (or historic/scientific merit) of your organization. Please note that artistic merit does not refer to community need. Questions below on OrlandoAtPlay.com and Major Productions/Exhibitions will also be considered.

*Panel evaluation criteria for this section:*

- artistic product perceived as high quality by audience, peers and critical reviews
- innovation and creativity in programming and artist selection
- vision, creativity, professionalism and leadership of artistic staff
- programming appropriate to the mission of the applicant organization

*See the panel rubric from the guidelines for more detailed information on scoring.*

*Character Limit: 2000*

**OrlandoAtPlay.com organization page\***

Go to [www.OrlandoAtPlay.com](http://www.OrlandoAtPlay.com), click on Local Guides in the center, then Organizations. Select your organization, and insert the web address here. This will allow panelists to view upcoming and past events or exhibitions for your organization. (New applicants should contact [Mary@UnitedArts.cc](mailto:Mary@UnitedArts.cc) about providing a list of past events or exhibitions, if these have not been posted on [www.OrlandoAtPlay.com](http://www.OrlandoAtPlay.com) in the past.)

*Character Limit: 2000*

## Major Productions/Exhibitions 2017-2018\*

Include short descriptions for your major productions or exhibitions for the 2017-2018 season (for organizations that do not produce either, describe your key programs).

*Character Limit: 1500*

## Management & Fiscal Responsibility (35%)\*

Describe your organization's staff/board management and fiscal practices. Questions below on term limits, cash reserve and endowment will also be considered.

*Panel evaluation criteria for this section:*

- effectiveness and efficiency of organization
- professionalism of administrative staff
- effective board/staff interaction
- presentation of a clear and realistic budget
- organizational stability
- demonstrated evidence of strong or developing financial support from the community
- existence and quality of strategic plan for the organization

*See the panel rubric from the guidelines for more detailed information on scoring.*

*Character Limit: 2000*

## Term Limits\*

Do your bylaws establish term limits for board members (a maximum length of time or maximum number of terms that a board member can serve, before having to roll off for some length of time)? If not, explain how your organization maintains healthy board turnover and continued contribution and engagement for those remaining on the board. *Examples may include: removing any members that miss three meetings in a row, meeting with members on an annual basis to evaluate their contribution, staying on the board as a nonvoting member for the time it takes to cycle back on, etc.*

*Character Limit: 500*

## Separation of Powers

If any staff serve on the board as an officer, explain how the organization maintains a healthy separation of powers.

*Character Limit: 500*

## Cash Reserve Explanation

If you have more than 6 months of cash reserves (covering more than 6 months of expenses), explain the plan for usage and why you need grant funds. If your organization has chosen not to have an endowment, explain the organization's strategy for long-term financial planning.

*Character Limit: 250*

### Endowment - Permanently Restricted only

Input current amount of endowment. "Board designated" funds should not be included here, only permanently restricted endowment funds.

*Character Limit: 50*

### Endowment - Board Designated

If any.

*Character Limit: 50*

### Outreach & Education (25%)\*

Describe your organization's community outreach, education programs, marketing and audience development. Questions below on diversity and accessibility will also be considered.

*Panel evaluation criteria for this section:*

- evidence of a commitment to diversity in staffing, artist selection and board recruitment
  - 5 points for board racial/ethnic diversity – with defined targets increasing over time
- increased awareness, access and inclusivity in the experience of art and creativity for diverse communities
  - 2 points for strong target marketing efforts to racially/ethnically diverse communities and collateral/website that reflects the racial/ethnic diversity of the community
- programs marketed locally, regionally, nationally and/or internationally
- efforts to reach and educate new audiences
- programs attract visitors as well as residents
- activities have local, regional, national or international impact
- accessibility efforts

*See the panel rubric from the guidelines for more detailed information on scoring.*

*Character Limit: 2000*

Successful target marketing requires more than just obtaining a diverse contact list to send your press releases to, placing generalized collateral in diverse locations without physical representation, and running one-off ads through diverse media outlets only when you have a program featuring someone from that culture. Successful target marketing requires

1. in-depth research to learn and fully understand your target audience,
2. adjusting your marketing message, materials, and even the leadership, staff, and programming of your organization to better reflect your target audience and that audience's values and, lastly,

3. it requires a long-term plan and buy-in from your entire organization to continuously engage with your target audience, to show your commitment to establish and foster genuine relationships with those who make up that target audience.

For more information, see [www.UnitedArts.cc/diversity](http://www.UnitedArts.cc/diversity).

### **Target Marketing to Racially/Ethnically Diverse Communities\***

Explain your organization's specific efforts in target marketing to diverse communities. Describe any results in increased diversity in the audience. **1 point for strong target marketing efforts** (see explanation above).

*Character Limit: 1000*

### **Marketing Materials that Reflect the Racial/Ethnic Diversity of the Community**

**(1 point)** If your organization has marketing materials (brochures, flyers) that reflect the racial/ethnic diversity of the community, upload here. If files are too big, email to [EGranting@UnitedArts.cc](mailto:EGranting@UnitedArts.cc) with subject line "OS-diverse marketing materials." Your website and social media will also be evaluated by United Arts marketing staff.

*File Size Limit: 2 MB*

### **Programming Designed for Racially/Ethnically Diverse Communities**

If your organization has presented programming in the past season (or if you have selected programming for the coming season) that features a diverse culture, describe here. *Note: make sure to market all programming to diverse audiences, not just special programming.*

*Character Limit: 750*

### **Accessibility (Part 1)\***

Does the applicant have policies and procedures (including a complaint process) that address non-discrimination on the basis of disability? (If no, please explain.)

*Character Limit: 150*

### **Accessibility (Part 2)\***

Describe the applicant's plans to ensure that the proposed activities will be accessible and welcoming to all audiences. Also describe ongoing accessibility efforts, including (a) communications access such as sign language interpreters, audio description, Braille labels, and use of accessibility symbols on marketing materials, as well as (b) physical access such as ramps, elevators, wheelchair seating, and accessible restroom and parking facilities. Resources for planning accessibility efforts can be found here: [Full Checklist](#) and [Brief Checklist](#).

*Character Limit: 500*

### **Other Diversity & Inclusion Efforts (optional)**

Specific questions are included above for racial/ethnic diversity and accessibility for people with varying abilities to better evaluate efforts in these areas. However, applicants are welcome to describe here any other efforts towards diversity & inclusion.

*Character Limit: 500*

## ***Attachments - for Panel Review***

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Some documents may not upload correctly, but errors will NOT show on this screen. To check for errors or make sure that all pages were included, scroll to the top and click on Application Packet to download a PDF of your entire application.

Each attachment has a maximum file size. To reduce the file size of large attachments, you can use the “Fax to File” option located at the top of the screen (black menu bar).

Form A, Maximum Request Calculation, will be uploaded in the next section.

### **Form B - 3-Year Financial Comparison\***

Submit in Excel, not PDF.

*File Size Limit: 1 MB*

### **Form B-2 - Footnotes for 3-Year Financial Comparison\***

Submit in Word, not PDF.

*File Size Limit: 2 MB*

### **Form C - Statistics\***

Submit in Excel, not PDF. Must include complete data for the year ending in 2016. You can upload the form from the most recent final report IF it includes complete data for the year ending in 2016.

*File Size Limit: 1 MB*

### **Form C-2 - Footnotes for Statistics\***

Submit in Word, not PDF. Must include complete data for the year ending in 2016. You can upload the form from the most recent final report IF it includes complete data for the year ending in 2016.

*File Size Limit: 2 MB*

### **Strategic Plan\***

Must project 2-5 years forward. Include measurable benchmarks and status.

*File Size Limit: 2 MB*

### **Staff Bios - Artistic & Administrative (only if no Nonprofit Search portrait)**

Only permitted for small budget organizations that do not submit the Nonprofit Search portrait. 250 words max per bio.

*Character Limit: 7500*



### **Board List - Names & Affiliations (only if no Nonprofit Search portrait)**

Only permitted for small budget organizations that do not submit the Nonprofit Search portrait. All other organizations must update their board names and affiliations on the Central Florida Foundation's Nonprofit Search, [http://cffound.org/nonprofit\\_search](http://cffound.org/nonprofit_search).

*Character Limit: 1500*

### **Deficit Reduction Plan (if applicable)**

Plan to reduce the deficit or address significant operating losses. Must be formally approved by your board. Required if Unrestricted Net Assets on the balance sheet are negative for two years in a row; also encouraged for significant deficits on Form B.

*File Size Limit: 1 MB*

### **Support Materials (optional)**

10 pages max (optional index can be an additional page). Support materials may include critical reviews (highly recommended - up to 5 allowed), flyers or programs, patron surveys, etc. You can use the Fax to File tool to combine documents if needed. You can also submit a compilation of quotes or excerpts to save space.

*File Size Limit: 5 MB*

### **Support Materials - Video (if any)**

Optional: provide a link to up to 3 minutes of video. If you have more than one link, you can include a list of links in the support materials document uploaded above.

*Character Limit: 2000*

### **Nonprofit Search Portrait\***

Attach your updated Nonprofit Search portrait here. Go to [http://cffound.org/nonprofit\\_search](http://cffound.org/nonprofit_search) (do not log in), find your organization in the search, and click the link in the upper right-hand corner to "Download Full Portrait," which will create a PDF that you can save to your computer then upload here. *Make sure that your most recent changes are shown on the PDF - if not, you need to press Submit so the Central Florida Foundation could review and publish the changes.*

Small Budget organizations are not required to have a portrait and can type "small budget" in the space below.

*Character Limit: 15 | File Size Limit: 1 MB*

### **Nonprofit Search Portrait Link\***

Paste your Nonprofit Search portrait link here. This will allow panelists to view the latest updated portrait throughout the 2017-2018 season. If you are a small budget organization and do not have a Nonprofit Search portrait, paste your organization website here.

*Character Limit: 2000*

## Attachments - for Staff & Finance Review

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### Form A - Maximum Request Calculation\*

Submit in Excel, not PDF.

*File Size Limit: 1 MB*

### FYE2016 Financial Statements - Supporting Form B, Column 1\*

**\*\*\*Submit FYE2016 financials via the Nonprofit Search portrait or send to EGranting@UnitedArts.cc with subject line Financials.\*\*\***

MUST BE FYE 2016, as reported on Form B, Column 1. Total income/expenses must match Form B, Column 1 or be explained in a footnote. No drafts are accepted - final version required.

Financial statements that present two years side by side for comparison are preferred.

NOTE:

- Large Budget applicants must provide an audit;
- Midsize Budget applicants: if 3-year average revenue (FY14, FY15, FY16) is over \$500K, must provide a review; if less, must provide a compilation;
- Small Budget applicants must provide financial statements (BOTH balance sheet and profit & loss statement; make sure the net income line matches) or IRS Form 990 or 990-EZ. Form 990-N does not have sufficient detail.

#### Choices

Uploaded to Nonprofit Search portrait, and pressed Submit

Sent to EGranting@UnitedArts.cc, with subject line Financials

### FYE2017 Financial Statements - Supporting Form B, Column 2 - Full Statements or Balance Sheet\*

MUST be FY2017. Upload the monthly year-to-date financial statements (balance sheet or full document) most recently approved by your board.

- If your most recent board-approved financials are more than two months old, then upload those plus draft financials that are more recent.
- Make sure that the net income on the balance sheet equals the net income line at the bottom of the profit & loss statement.
- Financial statements that present two years side by side for comparison - the current year and the prior year - are preferred. A budget column would also be appreciated.

*File Size Limit: 2 MB*

### FYE2017 Financial Statements - Supporting Form B, Column 2 - Profit & Loss (if not included above)\*

Or type, "included in previous upload" (if the profit & loss statement was in the same file with the balance sheet above). MUST BE same end date as the balance sheet above. May also be called income/expense statement. Must show year-to-date income & expenses. Financial statements that present two years side by side for comparison are preferred.

*Character Limit: 100 | File Size Limit: 1 MB*

### Shortfall Explanation (if any)

If your most recent year-to-date financial statements show a shortfall, explain the cause of the shortfall and how the organization plans to recover.

*Character Limit: 2000*

### Management Letter / Response (re Audit)

Required for all organizations that have audited financial statements. This is not the cover letter (usually titled the "Independent Auditor's Report"); the management letter is a private letter to your management and board that usually is included separately from the financial statements and details any concerns the auditor may have. Some auditors don't provide management letters; others only issue them if there is a concern. If your auditor did not provide a management letter, explain that below. If your management issued a letter of response, include it in the same file (you can use the Fax to File tool to combine documents if needed).

*Character Limit: 250 | File Size Limit: 1 MB*

### IRS Form 990\*

**\*\*\*Submit 990 via the Nonprofit Search portrait or send to EGranting@UnitedArts.cc with subject line Financials.\*\*\***

Most recent form submitted to the IRS. If you have obtained an extension from the IRS, send the extension letter to EGranting@UnitedArts.cc.

### Choices

Uploaded to Nonprofit Search portrait, and pressed Submit  
Sent to EGranting@UnitedArts.cc, with subject line Financials

Returning applicants only: insurance certificates must be up to date. Send any updates to EGranting@UnitedArts.cc.

## Signature & Contacts

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### Board Chair/President Mailing Address\*

NAME TITLE COMPANY STREET CITY ZIP

If the board chair will have changed by the time of the grant notification letter in December, also include the info for the new board chair under "Major Changes" below.

*Character Limit: 250*

### Board Chair/President Title on Board\*

Include the person's employer title (if any) above; here, indicate whether this person is the Chair, President, etc. of the applicant organization.

*Character Limit: 35*

### **Board Chair/President Phone\***

If the board chair will have changed by the time of the grant notification letter in December, also include the phone number for the new board chair under "Major Changes" below.

*Character Limit: 15*

### **Board Chair/President Email\***

If the board chair will have changed by the time of the grant notification letter in December, also include the email for the new board chair under "Major Changes" below.

*Character Limit: 50*

### **Major Anticipated Contact Changes**

If you anticipate a change in staff or board leadership within the next year, please explain here. If you have any contact information (name, email, phone) for the new leadership, type it below. If an unanticipated change happens, please notify United Arts immediately (whether before or after the grant approval).

*Character Limit: 250*

### **Ticket Contact for Panelists\***

Name/phone/email. Panelists will observe events and exhibitions year-round to prepare for the panel meeting.

- Please allow two free tickets per panelist per year, but you can redirect panelists to rehearsals or other events if necessary.
- Remember to post events and exhibitions on OrlandoAtPlay.com. If you need a new login for Orlando At Play, contact William@UnitedArts.cc.
- Up to 3 direct invitations are encouraged per year, to the panel listserv (LargeBudgetPanel@GoogleGroups.com, MidsizeBudgetPanel@GoogleGroups.com, or SmallBudgetPanel@GoogleGroups.com). You can also add panelists' individual email addresses to your general email list.
- If you have new staff managing the grant, who have not gone through the orientation, contact Mary Giraulo for more information about panel observations at Mary@UnitedArts.cc or 407.790.7844.

*Character Limit: 250*

### **Alternate Contact Name**

If the primary contact for the applicant organization (as designated in the organization profile) will be out of town during September (staff review) or late October / first half of November (panel meetings), designate a contact person here.

*Character Limit: 100*

### **Alternate Contact Phone**

*Character Limit: 15*

**Alternate Contact Email**

*Character Limit: 30*

**Signature of Primary Contact (Type Name)\***

Must be Executive Director (or if none, President). By typing your name here, you certify that the organization is committed to completing the activities proposed in this application in compliance with any applicable laws, and that all materials in this application are true and complete to the best of your knowledge. You also certify that you have read the Operating Support Guidelines and that your programming fits the requirements. Applications not turned in by the deadline or incomplete applications without required attachments will NOT be eligible for review. Note: digital signatures cannot be uploaded in this field; you must type your name.

*Character Limit: 30*