

# GRANT WORKSHOP

Wednesday, December 4, 2019, 4-5:30 PM  
at Orange County Admin Ctr, Marcos Room



## 2020 Cultural Facilities Funding

Presented by





# 2020 Cultural Facilities Funding (CF)

**ORANGE COUNTY**  
**OFFICE OF ARTS & CULTURAL AFFAIRS**  
**CULTURAL FACILITIES FUNDING**  
**FOR 2020**





# 2020 Cultural Facilities Funding (CF)

## ***Advisory Council Mission***

“To elevate the status of Central Florida’s arts and culture to that befitting a world-class community”

## Objectives of Cultural Tourism and Cultural Facilities Funding

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





## 2020 Cultural Facilities Funding (CF)

Total ALL CF funding: \$13,124,532

58 projects awarded over 12 years:  
grants from \$20K-\$500K

Total FY19CF funding: \$1,241,201

7 projects awarded: \$26,186-\$483,095

Pool for FY20 CF funding: \$1,543,000

Types of projects: Equipping, Renovation, Construction, Acquisition; requests of \$20K-\$500K





# 2020 Cultural Facilities Funding (CF)

## ***Requests Funded in 2019***

- **Art & History Museums** - Maitland: Maitland Art Center Courtyard West Garden Enhancements 2019: \$26,186
- **Downtown Arts District: CityArts** at the Rogers Kiene Building: Renovations: \$78,951
- **Girl Scouts of Citrus Council:** Interactive History Center - “Women’s History and Cultural Center”: \$288,585
- **Orlando Ballet:** Harriett’s Orlando Ballet Centre Theatrical Equipment Enhancements: \$483,095
- **Orlando Science Center** Resealing & Weatherization Renovation Project: \$275,192
- **Orlando Shakes:** Lowndes Shakespeare Center Patron Experience Upgrades: \$31,592
- **Pine Castle Historical Society:** Exterior Restoration of the Crawford House Museum and Library at 631 Wilks Avenue: \$57,600

***Total (7): \$1,241,201***





# 2020 Cultural Facilities Funding (CF)

## Timeline

### Thursday, Jan. 30, 2020, 5:00pm – Application Due

- **Thur., Dec 19, 2019, 5pm** Last day for notice of intent to apply
- **Fri., Dec 27, 2019** Nonprofit Search portrait deadline
- **Thurs., Jan 30, 2020, 5pm** Deadline for online application
- **Thurs, Mar 5, 2020, 8:30am** Site visits
- **Thurs., Apr 2, 2020, 8:30am** Review Panel Meeting, Ranking & Funding Recommendations (Orange County Admin. Ctr., Rm. 105)
- **Thurs., Apr 9, 2020, 8am** Advisory Council Approval
- **Tues, April/May TBA 2020** BCC approval (subject to change)
- **June 2020** Contracts
- **July 1, 2020** Program Period Begins
- **June 30, 2021** 1-year Encumbrance Period closes – all revenue and expenses committed
- **July 1, 2020-March 31, 2022** Program funding period (21 months)
- **NOTE: Lobbying blackout period** Jan. 30–BCC approval





# 2020 Cultural Facilities Funding (CF)

## ***Eligibility and Criteria for CF Funding***

- Orange County-based nonprofit museum or government-affiliated auditorium++
- Project located in Orange County
- Undisturbed use of land and building for 7/15/30/40 years\*
- \$1:\$1 Matching funds
- Have a Nonprofit Search portrait, bearing the “Reviewed” stamp
- Complete one year of arts or cultural programming in Orange County, attracting tourists
- Maintenance reserve in budget

++See guidelines for complete eligibility requirements

\*See guidelines for remaining lease/land use requirements for type of project





# 2020 Cultural Facilities Funding (CF)

## ***New and Updated Items for CF 2020***

### ***Application***

- Describe what “open to the public” means to this venue/project (days/hours).
- If proposal is for a new facility, describe the cultural programming that will take place there, who curates/programs, qualifications.
- Explain where the figures in the proposed budget came from (estimates from whom? How was it determined?).
- If project budget will be greater than amount of request and \$1-to-\$1 match, explain how applicant will have all funds required for the proposed project.







# 2020 Cultural Facilities Funding (CF)

## ***New and Updated Items for CF 2020***

### ***Financial Statements***

- Applicants must prepare required financial statements within 6 months of the organization's fiscal year end and submit them with portrait updates, or by application deadline.
- Failure to provide all requirements by deadline will result in ineligibility for that funding cycle.





# 2020 Cultural Facilities Funding (CF)

## ***Reminders:***

### ***Matching Funds (Must Be for Specific Project)***

- \$1 match required for every \$1 requested
- At least 50% must be from cash, government appropriations, or grant award notices
- Up to 50% may be from pledges, and in-kind
- 100% of matched request amount must be confirmed at time of application

### ***Other Requirements to Plan Ahead***

- Lease/ownership
- Board minutes approving project & strategic plan
- Design/drawing
- Feasibility study (for construction or acquisition)





# 2020 Cultural Facilities Funding (CF)

**CENTRAL FLORIDA  
FOUNDATION**

## Nonprofit Search – Portrait

- [cffound.org/nonprofit\\_search](http://cffound.org/nonprofit_search)

[Sign In](#) | [Create Account](#)



**HISTORICAL SOCIETY  
OF CENTRAL FLORIDA**

Last Updated: 7/20/2017 3:54:48 PM


**Historical Society of Central Florida**  
65 East Central Boulevard  
Orlando FL 32801

[SUMMARY](#) [STATEMENTS](#) [IMPACT](#) [PROGRAMS](#) [GOVERNANCE](#) [MANAGEMENT](#) [FINANCIALS](#)

[DISASTER PROGRAMS](#)

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**Contact Information**

Address	65 East Central Boulevard Orlando, FL 32801
Phone	(407) 836-8500 
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Email	<a href="mailto:Michael.Perkins@ocfl.net">Michael.Perkins@ocfl.net</a>

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**Web and Social Media**

Web Site	<a href="http://www.thehistorycenter.org">http://www.thehistorycenter.org</a>
Donate with a credit card	<a href="http://www.thehistorycenter.org">http://www.thehistorycenter.org</a>
Facebook	



# 2020 Cultural Facilities Funding (CF)

Concept  
(40 Points)

Facility  
(30 pts.)

Mgmt. &  
Budget  
(30 pts.)

**What are  
the  
reviewers  
looking for?**

**Concept:** Need (20 pts.), Vision (15 pts.), Inspire Excellence (5 pts.)

**Facility:** Process/Design/ & Plan (15 pts.), Quality (15 pts.)

**Management & Budget:**  
*Operational Readiness (10 pts.),  
Financial Readiness – forms &  
financial position (15 pts.), Care &  
Stewardship (5 pts.)*

Total: 100 points

Green = technical panel review



		Concept (40 points)			Facility ( 30 points)		Management & Budget (30 pts)		
Score 1 (lowest) to 5 (highest) Points		NEED (20 pts) Q 1  (multiplier = 4)	VISION (15 pts) Q2  (multiplier = 3)	INSPIRE EXCELLENCE (5pts) Q3  (multiplier = 1)	PROCESS/DESIGN/ & PLANNING (15 pts) Q4  (multiplier = 3)	QUALITY (15 pts) Q5  (multiplier = 3)	OPERATIONAL READINESS (10 pts) Q6  (multiplier = 2)	FINANCIAL READINESS (Forms & Fin. Position) (15 pts) Q7  (multiplier = 3 )	CARE & STEWARDSHIP (5 pts) Q8  (multiplier =1)
	5	Excellent	This fulfills a great need in our community and will make a sizeable difference in the impression of Central Florida as an international Cultural destination.	This will greatly further the mission of our organization and bring us to a new level of success	Artists and audiences from around the world are greatly inspired here	Extremely inclusive and well thought-out process of planning and design; project team design & planning	Will last and serve very well for years.	Extremely strong board, project team, and staff with nearly all logistic details confirmed. Irrefutable preparation for project implementation.	Extremely solid project budget, organizational financial condition.
4	Above Average	Fulfills need and will make a regional impact	Will further our mission to some extent	Better than average reputation with	Good planning, process, and design.	Above average quality and	Better than average board and staff with a majority of logistic details confirmed. Ability to manage the event based on past events	Above average project budget, organizational financial condition.	Above average history and plan for care and maintenance.
3	Average	This will make some improvement in our community offerings.	Allows us to continue at the same level or a little better.				Average board and staff with a good amount of logistic details confirmed. Ability to manage the event based on past	Average project budget, organizational financial condition	Average history and plan for care and maintenance.
2	Below Average	Some of this is already available in our community.	This would be nice to have.				Board and staff and less than desired amount of logistic details confirmed. Ability to manage the event based on past events.	Below average project budget, organizational financial condition.	Below average history and plan for care and maintenance.
1	Poor	Not needed in our community at all.	Won't really affect ability to carry out mission or is undefined.	This is an unappealing place for artists and audiences.	Unsatisfactory planning or lack of planning/design.	Temporary solution.	Ability to complete the project is questionable.	Ability to complete the project on budget is questionable.	Poor history and plan for care and maintenance.

**Q4, for 5 points:  
Extremely inclusive and well thought-out process of planning and design; project team; design & planning**



# 2020 Cultural Facilities Funding (CF)

## ***The Online Parts of the Application***

- Nonprofit Search portrait – “Reviewed” status  
(at Central Florida Foundation’s website)
- Application online – “The narrative”  
Need computer with Internet access to:
  - <http://unitedarts.cc/grantee-resources/grants/>
  - E-mail to set up access to your account
- Forms & required documents – 1) access form links online, 2) scan documents or PDF, 3) upload to the application
- Supplemental materials (optional; not required)





# 2020 Cultural Facilities Funding (CF)

## *The Online Application Narrative Questions* *Section 1: Concept (40 points)*

- **NEED** (20 points)
  - Why is the project important to your community?
  - The consequence of not doing it, or the opportunities for advancement by completing it.
  
- **VISION** (15 points)
  - What is the Vision?
  - Why is the project important to your mission?
  
- **INSPIRE EXCELLENCE** (5 points)
  - Testimonials of patrons, critics
  - How will the project enable further or enhance the artistic excellence of your program?





# 2020 Cultural Facilities Funding (CF)

## ***The Online Application Narrative Questions*** ***Section 2: Facility (30 points)***

### **○ PROCESS, DESIGN & PLANNING (15 points)**

- Design planning and project scope to address environmental features and sustainability?
  - How might renovation or technology affect facility's building system?
  - Does equipping include number of units needed and a vendor contract for maintenance fees, equipment upgrades and contract period?
- Provide a timeline of project milestones
- Upload plan/drawings of project

### **○ QUALITY (15 points)**

- Show the lifetime estimates of materials for your physical solution, relating to your need and vision.
- Provide expertise of vendor (s)







# 2020 Cultural Facilities Funding (CF)

## ***The Online Application Narrative Questions Section 3: Management & Budget (30 points)***

- **OPERATIONAL READINESS** (10 points)
  - Board, project team, and staff strengths
  - Address the project plans & preparation that is complete and confirmed
  
- **FINANCIAL READINESS** (15 points)
  - Form A: Certification from Professionals
  - Form B: Project Budget – Summary (5% contingency recommended)
  - Form C: Matching Funds & documentation
  - Form D: Forecast 5-year Operating budget
  - Requirements: Financial statements
  
- **CARE & STEWARDSHIP** (5 points)
  - Care and maintenance plan and resources to maximize useful life





# 2020 Cultural Facilities Funding (CF)

## ***Cultural Facilities Review Panel***

- **Mandatory attendance for applicants\*:**
  - **Date: Thurs., April 2, 2020, 8:30am**
  - **Location: Orange County Administration Center,  
201 South Rosalind Ave, Orlando, FL (Room 105)**

\*Suggested representatives would be:  
ED, Board Chair or other board member, building/construction contractor,  
architect or designer, grant writer





# 2020 Cultural Facilities Funding (CF)

## ***Cultural Facilities Review Panel***

### **○ Consists of at least 5 council members and *3-4 industry experts:***

- Karen Climer – Funding & Standards Committee Chair/Review Panel Chair, (At Large, MMRB)
- Cecelia Bonifay, Advisory Council Chair – (United Arts)
- Jeffrey Moore, Dean, UCF - (University of Central FL)
- Keith Smith – Partners CU/Disney (D1 – Comm. Betsy VanderLey)
- Frank Santos – CFO, Rosen Hotels (Tourist Development Council)
- *Jorge Cedeno\* – Industry Expert (Facilities Management, Orange County)*
- *Jeffrey Ault\* – Industry Expert (Facility Designer)*
- *Cynthia Cardona\* – Industry Expert /Facility Grantee*
- *Brian J. Morris\* – Industry Expert (Construction Management)*

**\*Non-Council members/Industry experts**





# 2020 Cultural Facilities Funding (CF)

## ***Cultural Facilities Review Panel***

### **○ Scores determine the ranking and funding**

- Each panelist votes, unless conflict of interest
- High and low panelists' scores are removed; all remaining are averaged
- A minimum average score of 80 is required to be eligible for funding
- Ranking from highest to lowest score; the funding pool is awarded to the highest score, with full funding, until the pool can no longer fund a full grant request
- The Advisory Council will review and approve the Review Panel ranking and fund distribution, and determine allocation of remaining dollars





# 2020 Cultural Facilities Funding (CF)

## ***If Awarded***

- Mandatory contract meeting (with United Arts)
- Insurance requirements must be met/maintained
- Plan for acknowledgement to Orange County Arts & Cultural Affairs
- Identify or establish separate bank account for TDT grant tracking
- File ACH enrollment form for electronic payment processing
- Reports required (*Current Form 990 and audit*)
- Payments: 25%, up to 65%, and 10% (funding may not be available until July/August 2020)





# 2020 Cultural Facilities Funding (CF)

## ***Insurance Requirements***

- Commercial General Liability: \$1,000,000
- General Automobile Liability: \$500,000
- Workers' Compensation and Employer's Liability: \$100,000 as required by State of Florida
- Employee Dishonesty/Crime Insurance: equal to or greater than 65% of the award (SUBJECT TO COMBINED VALUE OF ALL OPEN Orange County Arts & Cultural Affairs and United Arts GRANTS)
- Plus:
  - Payment and Performance Bonds
  - Equipment Floater/Installation Risk



## PAYMENT:

- ✓ Pay Request required for each disbursement
- ✓ Change Request Form required for dates, scope, budget, or leadership changes from proposed project (prior to pay report)
  - **Payment 1, 25% of award:**
    - Due 45 days after BCC approval/contract issued
    - Submit project updates, 100% of match confirmed & insurance/bonds, bank account
  - **Payment 2, 65% of award:**
    - Due halfway through project (or to be adjusted to project timeline/payment needs)
    - Submit interim report, at least 100% of match confirmed, updates/status report, budget, expenditures/receipts
  - **Payment 3, 10% of award:**
    - Due 45 days after completion of project and last day of project period; Submit final report; proof of match received/paid, grant & match expenditures, all recognition, reports, photos (3), etc.
    - Final payment is paid in reimbursement; after all is complete.



# 2020 Cultural Facilities Funding (CF)

## ***Grant-Writing Tips***

- **Clear!** Talk to your audience (panel). Address what is requested (specific answers to narrative, include all requirements).
- **Concise!** Character counts; be succinct, not verbose. Don't overwhelm with quantity.
- **Compelling!** You're the experts at what you do. Make your case. Make it compelling. Why should this project be funded? How does it help Orange County achieve the goals of the Advisory Council and this funding program?







# 2020 Cultural Facilities Funding (CF)

## ***Grant-Writing Tips***

- Portrait updated – board, financial statements
- Check spelling throughout & arithmetic on forms
- Present balanced budget
- Don't bold everything; Use capitals and exclamation points sparingly!!!
- Use subheads to highlight topics; use bullets to list points
- Align columns of decimals or dollars
- Proofread! Have someone else read entire grant
- Check uploads: All items included? Does the complete PDF appear as you want panel to see it?
- Submit application well in advance of the deadline.





# 2020 Cultural Facilities Funding (CF)

PLEASE CONTACT TRUDY WILD FOR ASSISTANCE.

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**407.628.0333 x223**

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