



Oregon Cultural Trust FY2020 Cultural Development Grant Guidelines

*To support activity occurring between
August 1, 2019, and July 31, 2020*

Submission Deadline: 5pm, Friday, April 19, 2019

We envision an Oregon that champions and invests in creative expression and cultural exchange, driving innovation and opportunity for all. The mission of the Cultural Trust is to lead Oregon in cultivating, growing and valuing culture as an integral part of communities. We do this by inspiring Oregonians to invest in a permanent fund that provides annual grants to cultural organizations.

- Cultural Trust Board of Directors

Cultural Development Project Grants

Goals and Requirements

By statute [ORS 359.431] Cultural Development Project Grants must be used to:

- Address significant opportunities to advance, preserve or stabilize cultural resources;
- Invest in the development of new resources;
- Support proposals that have a broad cultural impact beyond the applicant itself; and
- Support proposals from applicants with culture as a priority within the mission of the organization.

Projects should support the Cultural Trust's vision and mission:

- Create an Oregon that champions and invests in creative expression and cultural exchange;
- Help drive innovation and opportunity for all;
- Cultivate, grow and value culture as an integral part of communities;
- Inspire Oregonians to invest in cultural nonprofits;
- Maximize visibility for the role of culture in our lives; and
- Strengthen collaboration and support within the statewide cultural network.

Grant Awards

Award Size

Cultural Development Grants generally range from \$5,000 to \$40,000; the maximum request amount is \$50,000 for activities occurring from August 1, 2019, to July 31, 2020.

The Cultural Trust may not consider applications that exceed the maximum request amount.

The Cultural Trust encourages organizations seeking grants under \$5,000 to contact the County or Tribal Cultural Coalition in their area. Contact information for the Coalitions is available at www.culturaltrust.org/coalitions.

Application Categories

What do Cultural Development Grants fund?

Cultural Development Grants recognize and support significant cultural projects that preserve and enhance Oregon's diverse arts, history, heritage, preservation and humanities efforts.

The Cultural Development Grant program has four distinct categories. **Organizations may submit only one application to one category a year:**

1. **Access:** Projects that make culture broadly available to Oregonians *pg. 8*
2. **Preservation:** Projects that invest in Oregon's cultural heritage by recovering, preserving and sharing historic assets and achievements *pg. 10*
3. **Creativity:** Projects that create and/or present cultural or scholarly work; projects that support the development of artists, cultural experts or scholars who promote culture as a core part of vibrant communities *pg. 12*
4. **Capacity:** Projects that strengthen cultural organizations to increase stability, improve sustainability and/or measure/share cultural impacts *pg. 14*

Application Review Process

How does it work?

Cultural Trust staff review submitted applications for eligibility, completeness and accuracy. Applications that meet program requirements are accepted for further review. Staff will contact and provide an explanation if an organization or project does not meet the eligibility requirements. Eligible applications are organized by project categories and sent to peer review panelists along with instructions.

Applications are reviewed by a panel of professionals with experience in the fields relevant to the Cultural Development program category. Membership on review panels changes every year, so applicants should not assume that panelists have any prior knowledge of their work. Applicants who would like to nominate a panelist for consideration to review applications may do so by filling out the form at <https://culturaltrust.org/grants/how-to-apply/>. Each program category panel will evaluate and score eligible applications.

Each panel is chaired by a non-voting Cultural Trust Board member. The Cultural Trust staff will present funding recommendations based on panel evaluation, number of applications and availability of funds to the Cultural Trust board for final review and action. Applicants will be notified by mail of the Cultural Trust's action in August, 2019.

Application Review Criteria

How are applications scored?

Eligible applications are reviewed and scored by peer review panels based on the following criteria:

1. Quality of project and project design and alignment with selected category;
2. Significance of project;

3. Community impact and public benefit;
4. Project evaluation; and
5. Organization and project management.

Who Can Apply?

Eligibility Requirements

The Cultural Trust seeks to support a wide range of cultural organizations and projects, making investments across the state. ORS 359.400 defines a “cultural organization” as one that is “organized primarily for the purpose of producing, promoting or presenting the arts, history, heritage and humanities to the public or organized primarily for identifying, documenting, interpreting and preserving cultural resources.” **Organizations using a fiscal sponsorship are not eligible to apply.**

At the time of the application deadline, all applicant organizations must:

- Have active registration with the State of Oregon for corporate, non-profit status **and**
- Provide services that take place within the state of Oregon **and**
- Have current IRS 501(c)(3) federal tax-exempt status **or**
- Be a cultural entity within a federally recognized Indian Tribe based in Oregon **or**
- Be an institutions of higher learning (universities and colleges) that have a significant cultural department.

Applicants must have current registration on the Cultural Trust’s website as an eligible cultural nonprofit. Instructions are available at the following link <http://culturaltrust.org/resources/faq/>.

*Recipients of Cultural Development grants in two consecutive fiscal years are **not eligible** to apply for funds in the following fiscal year. As a result, organizations awarded a grant in both FY2018 and FY2019 are **not eligible** to apply for FY2020 funds and must wait until the FY2021 grant cycle.*

The Cultural Trust has final determination on eligibility. Applications found ineligible will be withdrawn from consideration. The Cultural Trust may review eligibility at any time and request more information as necessary.

Matching Requirement

One to One (1:1) Award Match

ORS 359.431 requires that Cultural Development Grant awards be matched at least 1:1 with earned, contributed or eligible in-kind support. For example:

Trust Grant Request	Cash Match	In-Kind Match	Total Project Budget
\$5,000	\$3,500	\$1,500	\$10,000

In-kind contributions are any non-cash contributions of time, services or property donated by individuals or organizations other than the applicant organization (third-party).

In-kind contributions may include:

- Goods (computers, software, furniture and office equipment for use by your organizations or for special events),
- Services (meeting space, photocopy and mail services, administrative/financial support), or
- Expertise (legal, tax or business advice, marketing and website development, strategic planning).

Examples of in-kind contributions:

- A consultant regularly charges \$1,000 but gives you a reduced rate of \$600. The full value is \$1,000 but \$600 is a fee and \$400 is an in-kind donation.
- The local newspaper regularly charges \$350 for an ad but they are giving it you for free. The in-kind donation is \$350.
- Volunteer time should be calculated using: <http://independentsector.org/resource/the-value-of-volunteer-time/>

In-kind contributions must be in alignment with Standard Accounting Principles to be considered. Staff time is not considered an eligible in-kind contribution.

The most competitive applications indicate cash matches committed by other funders or contributors. Questions about what qualifies as a match? Contact Trust Manager Aili Schreiner at aili.schreiner@oregon.gov or (503) 986-0089.

Applications that do not have at least a 1:1 match will be found ineligible and will not be considered for funding.

What We Don't Fund

The following are not eligible for Cultural Trust funding:

- Indirect costs not directly associated with the implementation of the project. Indirect costs are activities or services not directly related to the project such as operational expenses and salaries for staff not involved with the project. Direct costs are activities or services that support the specific project, e.g., salaries for project management, materials, marketing, etc.;
- Scholarships or tuition assistance for college, university or other formal degree bearing courses of study;
- Projects that have been substantially completed by August 1, 2018, the start date of the grant period;
- Requests to offset previous project expenses and or deficits; and
- Events whose primary focus is to raise funds for a non-cultural cause.

Applications from institutions of higher learning (universities and colleges) must be for projects and activities that focus on, benefit and are open to the general public, who must form the significant portion of the total audience.

TO APPLY

Submission Deadline

5pm Friday, April 19, 2019

All applications must be submitted through our online portal:

<https://oregon4biz.force.com/OAC/s/login/> no later than 5 pm on April 19, 2019, to receive consideration for funding. The Cultural Trust is not responsible for late applications and cannot guarantee processing of applications submitted after the published deadline. Incomplete applications (i.e. applications containing incorrect budget information, missing required documentation, etc.) will be deemed ineligible and will not be accepted.

Additional Materials

Required application materials

Applicants will be asked to include the following with their application submission:

- Board of Director's roster with names and affiliations;
- Proof of IRS 501(c)(3) or tribal tax-exempt status (for first-time applicants only); and
- Board-approved financial statement from the most recently completed fiscal year, which includes a statement of revenues and expenses (operating statement) and a statement of assets and liabilities (balance sheet) as of March 31, 2019;
- Letters of commitment from relevant organizations if project is collaborative or coordinated with other organizations.

Assistance

Applicant Resources

Assistance with technical requirements and application scope is available from Cultural Trust staff prior to the application deadline. Additional assistance is provided at statewide application information workshops (Conversations with Funders & Partners) held in February and March 2019 (check www.culturaltrust.org for dates and locations). To schedule time for a pre-application project/draft application review, send a request to Aili.Schreiner@oregon.gov or call (503) 986-0089. Applicants may also seek feedback after funding decisions have been made.

We strongly urge you to request assistance **before March 31, 2019**, to ensure you have adequate time to incorporate feedback.

FINAL REPORTS

Final Report Deadline:

5 pm Friday, September 5, 2020

Information is required from award recipients at the conclusion of the funding period. To help the Cultural Trust report on the results of public funding, entities receiving awards must complete a final report. Final reports must be submitted within thirty (30) days of the completion of the funding period. All awardees are subject to periodic monitoring by the Cultural Trust and must retain fiscal records for

a period of three (3) years following completion of the funding period. Award recipients that have been previously funded by the Cultural Trust must fulfill outstanding final reporting requirements before new funds will be distributed.

The following questions and data will be collected on the Final Report. Please track this information during the funding period:

1. Did you achieve the goals of your project? Describe how your successes were measured, and how any set-backs were handled. Include in your answer any changes to your project/activities that occurred during the grant period.
2. Using specifics, describe who participated in your project and the individuals who benefited from your project (numbers, age, geographic distribution, etc.). How did this project impact your organization and your community?
3. Did your project provide educational opportunities? Please describe what these were, who benefitted and how, include number of people served
4. Provide a detailed list of in-kind contributions (include estimated value and description).
5. What was the total value and source of project contributions (include descriptions).

Be prepared to document project locations (see template) and attach all promotional materials produced for your project that credit your grant award from the Oregon Cultural Trust.

Final report data will not be evaluated by the Cultural Trust review panels and does not affect current or future applications. This information will be used by the Cultural Trust for reporting and is required with the final report for funded applications. If you have questions, please contact the Oregon Cultural Trust at cultural.trust@oregon.gov or call (503) 986-0088.

Appeal Process

The Oregon Cultural Trust recognizes that procedural errors may occur in the application process. The Cultural Trust is committed to acknowledging errors and rectifying the effects. Appeals may not be made on the basis of an applicant's disagreement with an assessment of how the application met the review criteria, the judgment of a review panel or the amount of the award.

Applicants considering an appeal should contact Cultural Trust Manager Aili Schreiner, by phone at (503) 986-0089 or email Aili.Schreiner@oregon.gov, for advice and guidance. Letters of appeal must be submitted to the Cultural Trust's Executive Director within 30 days of the panel meeting. Appeals are reviewed and acted on by the Cultural Trust Board. Appeals may result in an approval of an award or an increase in the award amount if the applicant can satisfactorily document that the application was misrepresented or improperly reviewed through no fault of the applicant. If the appeal is supported by the Cultural Trust's Board, funds will be awarded only if they are available.

Applicants not meeting one or more of the eligibility requirements as determined by staff are encouraged to discuss the decision with staff. Appeals concerning eligibility determination may be made. Letters of appeal must be submitted to the Cultural Trust's Executive Director within 15 days from the decision. All decisions made by the Cultural Trust are final.

Pending Status

Occasionally the Cultural Trust may put a grant on pending status if a project is preliminarily awarded. Cultural Trust staff will contact the applicant on pending status and discuss the information that is needed in order to review and act.

Americans with Disabilities Act Statement of Non-discrimination

Any entity that provides services to the public must certify that it complies with the Americans with Disabilities Act of 1990, 42, USC Sec. 12101, et seq. and agrees not to discriminate on the basis of race, creed, religion, color, sex, marital status, political opinion, familial status, national origin, age, gender, sexual orientation, military status, gender identity, source of income or disability status. The Cultural Trust provides assistance to Oregon cultural groups on issues of access. Contact the Oregon Cultural Trust at (503) 986-0082 or kat.bell@oregon.gov for information or assistance. TDD assistance is available at (800) 735-2900. Applicants will certify their compliance within the application.

The Cultural Trust has adopted the following Accessibility Grievance Procedure:

If a person with a disability believes that a facility or program funded by the Oregon Cultural Trust is inaccessible, he or she is encouraged to communicate the grievance to the sponsoring organization. If an acceptable response is not received within two weeks, that individual may contact Oregon Arts Commission Executive Director Brian Rogers at brian.rogers@oregon.gov or 503-986-0088. The Oregon Arts Commission is one of the core statewide partners of the Oregon Cultural Trust.

Each grievance reported to the Oregon Cultural Trust will be handled on a case-by-case basis.

Possible Oregon Cultural Trust actions include:

- Sending staff to assist the organization on issues of accessibility;
- Involving people with disabilities from the local community in an effort to increase the organization's accessibility;
- Requesting return of funds already granted for the current fiscal years; and
- Denying future grant requests.

In all cases, an organization with a pending grievance will be denied funding unless it can demonstrate to the Oregon Cultural Trust that it is working toward compliance with current accessibility standards.

CULTURAL DEVELOPMENT GRANT CATEGORIES

Apply to the category that best aligns with the goals and outcomes of your project. For examples of previous awards by program category visit www.culturaltrust.org/blog. Contact Trust Manager Aili Schreiner at Aili.Schreiner@oregon.gov or (503) 986-0089 with questions regarding program categories.

ACCESS PROJECTS

Funded Access projects make culture broadly available to Oregonians. Past project examples include public exhibits/artworks, new/increased access to cultural programming and outreach to new/underserved communities, among others. Funded Access projects remove barriers for Oregonians to cultural opportunities.

Summary of Project & Request *(300 characters with spaces)*

Provide a summary of your project and request for support. Begin with the words "To support...". For example: *"To support access to theatre performances for hearing impaired audience members by contracting with American Sign Language interpreters."*

Summary of Organization *(1,000 characters with spaces)*

State your organization's mission and briefly summarize your organization's programs and activities.

Diversity, Equity, and Inclusion *(1,000 characters with spaces)*

In what ways (if any) does your organization define and value diversity, equity and inclusion in its work?

Application Questions: 100 total possible points

1. Significance of Project *(1,500 characters with spaces)*
20 points

Explain the significance of the project to your community and your organization. If funded, how will the project remove barriers to cultural opportunities in your community?

2. Quality of Project *(1,500 characters with spaces)*
20 points

Describe the quality of the project- its scope, time, use of costs and link to strategic objectives of your organization.

3. Community Impact and Public Benefit *(2,000 characters with spaces)*
30 points

Describe the change that will result from this project within the project period. How will increased access to cultural opportunities impact your community? Include intended outcomes and who will benefit (include population/geographic scope).

4. Project Evaluation (1,500 characters with spaces)
20 points

Who will measure the project's success and what indicators will they use? Using your project timeline, identify key benchmarks for stated project outputs and outcomes.

5. Organization and Project Management (1,000 characters with spaces)
10 points

Identify the qualifications and effectiveness of professional staff and board to support the organization's mission, programming and services; Ability to plan and evaluate progress; and evidence of effective financial management and health, including maintaining appropriate budgets and the ability to address financial challenges.

Budget Requirements

All applicants must complete the online budget form with project expenses and revenue. Please use the online budget narrative section to provide detailed information on your budget that will clarify items for the review panel.

Budget Narrative (1,000 characters with spaces)

Use the budget narrative section to provide detailed information on your budget. What impact would Trust funding have on the project? Should you receive partial funding from the Cultural Trust or other sources, is the project scalable?

PRESERVATION PROJECTS

Funded Preservation projects invest in Oregon’s cultural heritage by recovering, preserving and sharing historic assets and achievements. Funded Preservation projects include historic restoration/renovation, exhibits, digital and oral preservation/archive work, work with museum collections and historic research/publications, among others.

Summary of Project & Request (300 characters with spaces)

Provide a summary of your project and request for support. Begin with the words “To support...”. For example: *“To support the design and creation of a sustainable historic lighthouse garden for contextual and educational programing.”*

Summary of Organization (1,000 characters with spaces)

State your organization’s mission and briefly summarize your organization’s programs and activities.

Diversity, Equity, and Inclusion (1,000 characters with spaces)

In what ways (if any) does your organization define and value diversity, equity and inclusion in its work?

Application Questions: 100 total possible points

1. Significance of Project (1,500 characters with spaces)

20 points

Explain the significance of the project to your community and your organization. If funded, how will the project advance cultural heritage by recovering, preserving and sharing historic assets and achievements?

2. Quality of Project (1,500 characters with spaces)

20 points

Describe the quality of the project- its scope, time, use of costs, and link to strategic objectives of the organization. If this is a renovation or construction project, identify the proposed contractor and their qualifications and ability to carry out the project.

3. Community Impact and Public Benefit (2,000 characters with spaces)

30 points

Describe the change that will result from this project within the project period. How will increased investment in cultural heritage impact your community? Include intended outcomes and who will benefit (include population/geographic scope).

4. Project Evaluation (1,500 characters with spaces)

20 points

Who will measure the project’s success and what indicators will they use? Using your project timeline, identify key benchmarks for stated project outputs and outcomes.

5. Organization and Project Management (1,000 characters with spaces)
10 points

Identify the qualifications and effectiveness of professional staff and board to support the organization's mission, programming and services; Ability to plan and evaluate progress; and evidence of effective financial management and health, including maintaining appropriate budgets and the ability to address financial challenges.

Budget Requirements

All applicants must complete the online budget form with project expenses and revenue. Please use the online budget narrative section to provide detailed information on your budget that will clarify items for the review panel.

Budget Narrative (1,000 characters with spaces)

Use the budget narrative section to provide detailed information on your budget. What impact would Trust funding have on the project? Should you receive partial funding from the Cultural Trust or other sources, is the project scalable?

CREATIVITY PROJECTS

Funded Creativity projects create and/or present cultural or scholarly work; they support the development of artists, cultural experts or scholars who promote culture as a core part of vibrant communities. Funded Creativity projects include public exhibits, cultural residencies, cultural programming/productions/performances, commemorative works, scholarly research and publications, and special commissions to support emerging cultural leaders, among others.

Summary of Project & Request (300 characters with spaces)

Provide a summary of your project and request for support. Begin with the words "To support...". For example: "To support the residency of an artist and a humanities expert to develop a commemorative work to celebrate our organization's 30th anniversary."

Summary of Organization (1,000 characters with spaces)

State your organization's mission and briefly summarize your organization's programs and activities.

Diversity, Equity, and Inclusion (1,000 characters with spaces)

In what ways (if any) does your organization define and value diversity, equity and inclusion in its work?

Application Questions: 100 total possible points

1. Significance of Project (1,500 characters with spaces) 20 points

Explain the significance of the project to your community and your organization. If funded, how will the project support the development of artists, cultural experts or scholars who promote culture as a core part of vibrant communities?

2. Quality of Project (1,500 characters with spaces) 20 points

Describe the quality of the project- its scope, time, use of costs and link to strategic objectives of the organization.

3. Community Impact and Public Benefit (2,000 characters with spaces) 30 points

Describe the change that will result from this project within the project period. How will support for the creation/presentation of art/cultural experiences impact your community? Include intended outcomes and who will benefit (include population/geographic scope).

Project Evaluation (1,500 characters with spaces) 20 points

Who will measure the project's success and what indicators will they use? Using your project timeline, identify key benchmarks for stated project outputs and outcomes.

6. Organization and Project Management (1,000 characters with spaces)
10 points

Identify the qualifications and effectiveness of professional staff and board to support the organization's mission, programming and services; Ability to plan and evaluate progress; and Evidence of effective financial management and health, including maintaining appropriate budgets and the ability to address financial challenges.

Budget Requirements

All applicants must complete the online budget form with project expenses and revenue. Please use the online budget narrative section to provide detailed information on your budget that will clarify items for the review panel.

Budget Narrative (1,000 characters with spaces)

Use the budget narrative section to provide detailed information on your budget. What impact would Trust funding have on the project? Should you receive partial funding from the Cultural Trust or other sources, is the project scalable?

CAPACITY PROJECTS

Funded Capacity projects strengthen cultural organizations through increased stability, improved sustainability or by measuring/sharing/evaluating community cultural impact. Funded Capacity projects can include organizational or community cultural planning, new investments in organizational capacity (staffing, equipment, marketing, development, online resources, building infrastructure, etc.), and new investments for organizational sustainability, among others.

Summary of Project & Request (300 characters with spaces)

Provide a summary of your project and request for support. Begin with the words "To support...". For example: "To support a planning process to enable our organization to effectively respond to increased demand for our services and activities."

Summary of Organization (1,000 characters with spaces)

State your organization's mission and briefly summarize your organization's programs and activities.

Diversity, Equity, and Inclusion (1,000 characters with spaces)

In what ways (if any) does your organization define and value diversity, equity and inclusion in its work?

Application Questions: Total possible points 100

1. Significance of Project (1,500 characters with spaces)

20 points

Explain the significance of this one-time, strategic investment to your organization. If funded, how will the project build your organization's capacity by increasing stability, improving sustainability, and/or developing a cultural impact process? Is this an investment in your organization's internal capacity, or operational capacity?

2. Quality of Project (1,500 characters with spaces)

20 points

Describe the quality of the project- its scope, time, use of costs, and link to strategic objectives of the organization.

3. Community Impact and Public Benefit (2,000 characters with spaces)

30 points

Describe the change that will result from this project within the project period. How will a strategic investment in your organizational capacity impact your community in the short and long term?

4. Project Evaluation (1,500 characters with spaces)

20 points

Who will measure the project's success and what indicators will they use? Using your project timeline, identify key benchmarks for stated project outputs and outcomes.

5. Organization and Project Management (1,000 characters with spaces)
10 points

Identify the qualifications and effectiveness of professional staff and board to support the organization's mission, programming and services; Ability to plan and evaluate progress; and evidence of effective financial management and health, including maintaining appropriate budgets and the ability to address financial challenges.

Budget Requirements

All applicants must complete the online budget form with project expenses and revenue. Please use the online budget narrative section to provide detailed information on your budget that will clarify items for the review panel.

Budget Narrative (1,000 characters with spaces)

Use the budget narrative section to provide detailed information on your budget. What impact would Trust funding have on the project? Should you receive partial funding from the Cultural Trust or other sources, is the project scalable?



Oregon Cultural Trust

FY2020 Cultural Development Grant Guidelines

*To support activity occurring between
August 1, 2019, and July 31, 2020*

Deadline for Online Applications: 5pm, Friday, April 19, 2019

Instructions for online submission application

- Applications must be submitted no later than **5pm, Friday, April 19, 2019**.
- Cut and paste plain text only into the online forms.
- Add paragraph breaks after pasting text; it helps panelists to read your material. The online character count is activated by typing in the narrative field; pasting alone will not work. We recommend deleting something and adding it back if you want to check characters remaining. Because the character count feature varies from software to software, an answer may be cut off if the count is exceeded.
- To avoid losing data, you must save every page in the online system before moving on to the next.

Upload the following **required** supplemental materials to your online application:

- ✓ Board list including member's affiliations
- ✓ Board-approved financial statement or audit for last completed fiscal year and current balance sheet. Financial statements must include both an Operating Statement and a Balance Sheet.
- ✓ Other supporting material (e.g. strategic plans, press clippings, artist/scholar resumes) floor plans or site plans on 8 1/2" by 11" pages, images, short (no more than 1-2 minute) videos. Panelists value the chance to get to know your project!
- ✓ **First time applicants only:** IRS 501(c)(3) letter or proof of Tribal status (one copy)
- ✓ Applications requesting funds for **collaborative projects** must include letters from participating organizations outlining how they will collaborate in the work.
- ✓ Applications requesting funds to support **activities in, or in partnership with, K-12 schools** must include a letter of support from participating school(s) that indicates their role in activity planning and anticipated participation.

Do not submit any additional supplemental materials by mail.

Contacts for Cultural Development Grants:

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Contact for Online Grant Administration:

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