



**City of Dallas**

# **Cultural Organizations Program (COP)**

**Information Session  
FY 2023 – 2024**

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City of Dallas

# Presentation Overview



- About the Office of Arts & Culture (OAC)
- Purpose of the Cultural Organizations Program (COP)
- Application logistics and scoring
- Application tips
- Next steps



# About the Office of Arts & Culture (OAC)



- **Vision**

- An equitable, diverse and connected community, whose residents and visitors thrive through meaningful arts and cultural experiences in every neighborhood across Dallas

- **Mission**

- Our mission is to support and grow a sustainable ecosystem that ensures all residents and visitors have opportunities to experience arts and culture throughout the city.
- The Office of Arts and Culture (OAC) works to enhance the vitality of the city and the quality of life for all Dallas residents by creating an equitable environment wherein artists as well as arts and cultural organizations thrive; people of all ages enjoy opportunities for creative expression; and all celebrate our multicultural heritage.



# About the Office of Arts & Culture (OAC)



- **Cultural Equity**

- In Dallas, we envision a city of people whose success and well-being are not pre-determined by their race, age, disability, sexual orientation, gender, social status, zip code, or citizen status. We recognize that artistic and cultural expression are fundamental to the development of our identity, as individuals and as a community at large. We assert the right for all people to have access to arts and cultural experiences throughout Dallas.
- We recognize the historical legacies of racism, overt bias, and injustice that shape our present reality.
- The OAC will serve as a convener and connector to catalyze equity in the policies and practices of its partners across the Dallas arts ecosystem.



# Purpose: Cultural Organizations Program



- The Cultural Organizations Program (COP) is the organizational support program of the OAC. COP:
  - Provides year-round support for selected organizations over \$100K in revenue
  - Funds organizations from the City of Dallas General Fund and the Hotel Occupancy Tax
  - Supports 48 cultural organizations in FY 2022 – 23
- 2024 funding will support **October 1, 2023 – September 30, 2024** programs



# COP Eligibility



To be COP-eligible, organizations must:

- Hold **501(c)(3)** Non-Profit Public Charity designation from at least three years prior (as of April 12, 2020 or earlier) and be in good standing with the IRS
- Have a three-year operational history as an **arts or cultural organization**
- Employ a minimum of **one paid part-time Director/Manager staff member**
- Hold an administrative **office in the City of Dallas** (no P.O. Box)
- Have a **minimum operational budget of \$100,000** based on prior year's actual revenue
- Complete the required **financial reporting** per organization budget size (see slide 23)
- Host programming and operations primarily **within the City of Dallas** (minimum of 50% of programming must be in Dallas)
- Post a Board-approved **Equity, Diversity, and Inclusion Policy** on organization's website
- Have a Board-approved **Safe Workplace Policy**



# New Applicants: Welcome!



- We consider those submitting a COP application for the first time **OR** who have applied for COP in the past but have not yet been funded as “new applicants”
- New applicants should contact OAC staff ([OACFundingPrograms@dallas.gov](mailto:OACFundingPrograms@dallas.gov)) **in advance of application deadline**
- Be prepared to submit:
  - 501(c)(3) IRS letter of determination
  - Most recent Form 990 (Form 990 EZ) showing revenues over \$100,000





# Overview: FY 2023 – 24 COP Application



- **PLEASE READ THE GUIDELINES!**
- Online application can be found on the COP page: [dallasculture.org](https://dallasculture.org)
- Application Steps:
  - Main Application
    - Org info, Mission, History, Planned annual programming, etc.
  - Financial Summary and Projection Matrix\*
  - Organization Diversity
  - Events Listing
  - Supplemental Materials
  - Certification Statement

*\*Note: change from last year. We will no longer accept the SMU DataArts Cultural Data Profile.*





# COP Timeline



Date	Event				
March 9, 2023	FY 2022-23 COP Online Application Opens				
March 24 – April 6, 2023	Application Support Open: information sessions and office hours				
April 12, 2023	FY 2022-23 COP Application Closes at 11:59 PM				
April 14 – May 15, 2023	Virtual Panel Review Period				
May 16 – May 22, 2023	Web-meeting Question and Answer session				
	Tier 1: May 16 \$100,000 - \$249,999	Tier 2: May 17 \$250,000 - \$499,999	Tier 3: May 18 \$500,000 - \$999,999	Tier 4: May 19 \$1,000,000 - \$4,999,999	Tier 5: May 22 \$5,000,000+
June – September 2023	COP Application Review/Funding Levels – Allocations Committee; COP funding recommendations made by the Arts & Culture Advisory Commission				
October 2023	COP funding recommendations approved by City Council; initiation of COP contract execution				
January 1, 2024	COP orgs eligible to receive first payment (50%)*				
April 15, 2024	COP orgs eligible to receive second payment (40%)*				
October 15, 2024	FY 2022-23 COP Final Monthly Reports Due				
October 31, 2024	FY 2022-23 COP Final Report Due				

\*COP orgs eligible to receive final payment (10%) after FY 2023-24 Final Report, Final Monthly Report, and most recent fiscal year's financial reports are submitted, if compliance and insurance requirements are met.



# Review Panel & Selection Process



- COP applications are evaluated by OAC staff and Panel Review
- Panel Review
- 10-minute presentational video submitted with the application in lieu of in-person presentations
  - Organizations must be represented by principal individuals in video submission and Q&A session (e.g. Executive Director, Board President, etc.)
- 10-minute Q&A session via a web-meeting
  - Scheduled days per tier for Q&A session in timeline presented previously, a shorter 30-minute timeslot will be made available to applicants at least a week in advance of the Q&A session.

## Tier Q&A Session Dates

- Tier 1 (May 16): \$100,000 – \$249,999
- Tier 2 (May 17): \$250,000 - \$499,999
- Tier 3 (May 18): \$500,000 – \$999,999
- Tier 4 (May 19): \$1,000,000 – \$4,999,999
- Tier 5 (May 22): \$5,000,000+



# Review Panel & Selection Process (cont'd)



**June – September, 2023**



# Changes for FY 2024



## What's new?

- FY 2023 – 24 applicants do **not** need to complete the SMU DataArts Cultural Data Profile (CDP)
  - Instead, applicants may complete the same Projection Matrix used in FY 2021 – 22 applications and before
- Applicants in the smallest budget size are now eligible for increased funding (up to 30% of annual revenue)
  - Tier 1 from 2022-23 was \$100K - \$500K; this tier has been split into 2 groups (NEW Tier 1: \$100K - \$249K; NEW Tier 2 \$250K - \$500K)

## What's the same?

- All eligibility requirements remain the same from previous years
- Applicants must still submit a video to present for panel review by the April 12th deadline, and attend a virtual Q&A session on their assigned date, May 16 – 22, 2023
- Please note that applicants will still give VIRTUAL Q&A's, even though review panels may meet in person (TBD)



# Scoring I: Review Panel (70 pts)



## Review Panel: 70 Points

### **Public Benefit 35 points**

The applicant defines its community in relation to its mission and provides programming that serves its identified audiences and promotes sustainability in the arts and culture sector of the City of Dallas.

### **Access & Impact 20 points**

The applicant eliminates barriers and increases equitable access and inclusivity through mission-driven community/neighborhood programming, outreach, and involvement.

### **Organizational Capacity 15 points**

The evaluation of the organization's ability to successfully plan for and manage its proposed services and audience.



# Tips for Panel Scoring



- **Be specific** – “public benefit” can mean different things to different panelists
  - Measurable statistics are helpful, especially in the Goals section. Panelists often ask, “How is [Applicant] measuring success?”
  - Marketing plans, community outreach, and other logistics for how you will reach your audience are always welcome
  - Emphasize health, social, emotional, financial, etc. benefits that your organization’s art brings to the community
- **Demonstrate prior success**
  - Show how your organization has impacted your community (as specifically as possible)
  - Submit supplemental materials that enhance your application; case stories, photos, and video welcome!
- **Proofread**
  - Fully answer each question asked, including how the funding will be used
  - More is **not** necessarily more! Many panelists comment on the focus of great applications
  - It goes without saying, but we hear about typos from our panelists!



## Scoring II: Administrative



- OAC Staff Administrative Scoring – 30 Points
  - Contract Compliance & Financial Viability (10 pts)
  - Organization Program Management (10 pts)
  - Adherence to Cultural Policy Diversity Criteria (10 pts)





# Contract Compliance & Financial Viability (10 pts)



## Returning Applicants

- 4 Points: Monthly Reports
  - 4 = 10-12 reports submitted on time
  - 2 = 7 to 9 reports submitted on time
  - 0 = 6 or fewer reports submitted on time
- 2 Points: Financial Report submitted by deadline
  - 2 = Financial report submitted on time
  - 0 = Financial Report submitted after deadline

## New Applicants

- 6 points: Prior Contract Compliance\*
  - 6 = Recommended for funding and maintained contract compliance
  - 0 = Not recommended for funding or did not maintain contract compliance

\*For ArtsActivate or CAP for FY 2020 – 2021 and after. If in a successful contract, COP acceptance will be contingent upon successful completion of that contract



# Contract Compliance & Financial Viability (cont'd)



## All Applicants

- 2 Points: Fundraising Expense Percentage
  - 2 = Ratio less than 20%
  - 1 = Ratio between 20% and 40%
  - 0 = Ratio more than 40%
- 2 Points: Average Days Cash on Hand\*
  - 2 = 60 days or more cash on hand
  - 1 = 30-59 days cash on hand
  - 0 = less than 30 days cash on hand

\*Details on calculations are in the Guidelines



# Organization Program Management (10 pts)



- 4 Points: Projection Matrix
  - 4 = Applicant has completed the Projection Matrix, including 3 years of financials, attendee, and event data
  - 2 = Applicant has completed at least one year of history in the Projection Matrix
  - 0 = Applicant has not completed or did not submit a Projection Matrix
- Returning applicants can select their name from the drop-down menu; previously entered estimates and actuals will auto-populate.
- All organizations should complete the financial summaries for all three years to receive full points

**FT 2023-24 COP Organization Projection Matrix**

Complete steps 1-3. All entries will be in green cells. Do not change blue or white cells.

1. Select "New Applicant" or your organization's name if you have received COP funding. **NEW APPLICANT**

2. Organization Events and Attendance Summaries

Below, you will need to enter data for the number of events and attendance separately by in-person and virtual events. Event and attendance figures should be for the City of Salt Lake fiscal year. **RETURNING APPLICANTS:** If you are an organization that has funded through COP during FT 2021-22 and/or FT 2022-23, event and attendance figures should auto-populate. Please review and make any necessary updates. Then, add your estimates for FT 2023-24 in the "Next Fiscal Year" column. **NEW APPLICANTS:** Please fill in estimates for all categories, based on your historical and current activities.

	Last Fiscal Year City FY 2021-22 (October 1, 2021 - September 30, 2022) Data should reflect activity submitted in Monthly Reports from 2021-2022. (If not auto-populated, please provide.)	Current Fiscal Year City FY 2022-23 (March 1, 2023 - September 30, 2023) Data should reflect activity submitted in organization's COP 2022-2023 application. (If not auto-populated, please provide.)	Next Fiscal Year City FY 2023-24 (October 1, 2023 - September 30, 2024) Applicant Forecast Please provide your best estimate for scope of activities in 2023-2024.	Notes: Please include any notes you may have regarding events, attendance, or
<b>Number of Events (In-Person)</b>				
Comp	-	-	-	
Char/Membership	-	-	-	
Exhibit - Permanent	-	-	-	
Exhibit - Temporary	-	-	-	
Fair/Festival	-	-	-	
Performance/Presentation	-	-	-	
Recreation	-	-	-	
Tour	-	-	-	
Workshop	-	-	-	
Other	-	-	-	
Total In-Person Events	-	-	-	
<b>Number of Events (Virtual)</b>				
Total Virtual Events	-	-	-	
<b>Attendance (In-Person)</b>				
Comp	-	-	-	
Char/Membership	-	-	-	
Exhibit - Permanent	-	-	-	
Exhibit - Temporary	-	-	-	
Fair/Festival	-	-	-	
Performance/Presentation	-	-	-	
Recreation	-	-	-	
Tour	-	-	-	
Workshop	-	-	-	
Other	-	-	-	
Total In-Person Attendance	-	-	-	
<b>Attendance (Virtual)</b>				
Total Virtual Attendance	-	-	-	
<b>3. Organization Financial Summaries</b>				
Please calculate figures for each year or organization's fiscal year.				
	Organization's FY 2021-22 Last fiscal year	Organization's FY 2022-23 Current fiscal year	FY 2023-24 Next fiscal year	
<b>Revenue</b>				
Individual Contributions	-	-	-	
Membership Fees	-	-	-	
Corporate, Government, or Foundation Contributions	-	-	-	
Fundraising Events	-	-	-	
Course & Revenue from In-Person Events (Ticket Sales, etc.)	-	-	-	
Course & Revenue from Virtual Events	-	-	-	
Other Revenue	-	-	-	
Total Revenue	-	-	-	
<b>Expenses</b>				
Programmatic Expenses	-	-	-	
Management/Admin Expenses	-	-	-	
Marketing Expenses	-	-	-	
Fundraising Expenses	-	-	-	
Other Expenses	-	-	-	



# Organization Program Management (cont'd)



- 4 Points: Organization Employee Pay

- Organization provides at a minimum, a living wage to all full and part time employees as aligned with the City of Dallas living wage range of **\$17.82** per hour.

Points	Tiers 1-3	Tier 4	Tier 5
4		\$17.82 or more	\$17.82 or more
3		\$15.00 - \$17.81	\$15.00 - \$17.81
2		\$12.50 - \$14.99	\$12.50 - \$14.99
0		\$12.49 or less	\$12.49 or less

- Note: Amounts change each year, based on the MIT Living Wage Calculator



## Organization Program Management (cont'd)



- 2 Points: Organization Board Governance
  - 2 = 90% - 100% board participation in “give or get” policy
  - 1 = 75% - 89% board participation in “give or get” policy
  - 0 = Less than 75% board participation in “give or get” policy



## Adherence to Cultural Policy Diversity Criteria (10 points)



- Board Diversity (5 points)

- Per the City of Dallas Cultural Policy, the following goals have been put in place for cultural organizations to demonstrate a commitment to diverse board representation:

Points	Tier 1-2	Tier 3	Tier 4	Tier 5
5	10% or more	10% or more	20% or more	30% or more
3	3% - 9%	3% - 9%	6% - 19%	10% - 29%
0	2% or less	2% or less	5% or less	9% or less

- Staff Diversity (5 points)

- OAC mirrors staff goals based on board diversity goals. Staff is considered payroll staff, not contracted labor. Because organizations in Tier 1 and 2 do not have significant numbers of staff, they are exempt from staff diversity goals:

Points	Tier 1-2	Tier 3	Tier 4	Tier 5
5		10% or more	20% or more	30% or more
3		3% - 9%	6% - 19%	10% - 29%
0		2% or less	5% or less	9% or less



# Other COP Application Tips



- Update your contact information and save “dallas.gov” as a safe sender in your email
- Upload your video or provide the link early; reach out to OAC staff with technical problems prior to the deadline
- Remember that our panels are new every year; even though your organizations have historically been funded, they may be new to panelists
- Proofread
- Questions? Reach out early and often!





# After Funding: COP Compliance



- COP contracts require compliance for the entirety of the contract period: October 1, 2023 – September 30, 2024
- Financial reports
  - \$100,000 - \$199,999: Form 990-EZ, Form 990, or Financial Audit
  - \$200,000 - \$499,999: Form 990 or Financial Audit
  - \$500,000 or more: Financial Audit
- Monthly Events & Attendance Reports
- Final Report
- Business Inclusion and Development
- Minority and Women-Owned Business Enterprises (MWBE)
- Insurance Requirements
- Logo and Credit Line
- Complimentary Tickets
- Permits and permissions
- Commission Liaison Board Meetings





**City of Dallas**

**Thank you!**

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