The briefing will begin momentarily

African American Cultural Center | Inc.

gatekeeper for urban generations

Department of Environment and Planning
Commissioner Daniel Castle, AICP

LiveWell Erie

Department of
Environment and Planning
Commissioner Daniel Castle, AICP

Erie County
2026 Cultural Funding Applicant Briefing

February 26, 2025 | 6:00pm | Roycroft Campus Power House

February 27, 2025 | 6:00pm | BECPL Central Library Collection Gallery Conference Room

Presentation will be recorded. Recording will be available on Erie County's YouTube page.

LiveWell Erie

Agenda

1. Welcome & Announcements

   Thomas E. Baines, ESQ. Deputy Commissioner of Planning and Economic Development, Erie County Dept. of Environment & Planning

2. Application and Changes
   - 2025 Summary & 2026 Overview

     Matthew Clohessy, Chair, Erie County Arts & Cultural Advisory Board
   - Live Demo

     Mariely Ortiz, Senior Planner, Dept. of Environment & Planning

3. Closing & Questions

Arts Services INC

Arts Services can help!

ASI can provide general grant preparation guidance and best practices.

Please contact them early in the process if you want assistance.

Contact:

Andrea Nero, PhD

(716) 833-3004 x511

Andrea@asiwny.org

Holly Grant

(716) 833-3004 x512

holly@asiwny.org

www.asiwny.org

Erie County Cultural Plan

In final editing process.

Presentation expected Spring/Summer 2025

Community Priorities:

Connections for Youth

Initiatives directly related to youth; encompass schools and arts education

Creative County

Enhancing the perception of the region as a hub for arts and culture

Communications Support

Improving marketing, visibility, and facilitating effective communication through various media and outreach efforts.

Arts Grants & Support Systems

Initiatives focused on improving grant processes and exploring new funding mechanisms and sources

Cultural Hub

Proposed entity for coordination, support, and advocacy the arts and culture sector to enhance the region's cultural landscape.

2025 Summary

114 Arts & Cultural Orgs awarded

$8,176,446 in funding

Mean	**$72,000** *(up from $69,000)*
Median	**$10,000**
Mode	**$3,500** *(up from $3,000)*

Legislative Add-Ons (in Community/Neighborhood Development Fund):
+$515,813 to 35 organizations = **$8,692,259**

Funding Cycle

Application Release & Submission

- Usually released in February
- Applicant Briefing scheduled after release
- Contracts for the current year are mailed out
- Organizations create accounts, complete, and submit their application in spring
- DEP staff reviews submissions for completeness

Important Dates

LEVEL 1 DUE
April 16, 2025

LEVEL 2 & 3 DUE
April 23, 2025

Application Review

- DEP & EACAB distribute applications to reviewers
- Reviewers:
  - Assess completeness of application
  - May request additional detail and information from grantseekers
  - Subcommittees discuss applications, reviews, and feedback
  - Complete Review Forms, and offer valuable feedback
- DEP & EACAB meet to discuss the applications and the general process

Funding Recommendations

- DEP collates all Reviews
- DEP assigns percentage of funding increase by organization according to review results, while keeping a maximum total increase percentage for all grants as a whole (a percentage provided by the Budget Office)
- Recommendations are added to the Department's budget request and forwarded to the County Executive and Budget Offices
- DEP sends Feedback letters to applicants

Budget Process

- County Executive makes changes to recommendations in accordance with funds expected to be available, and the needs and duties of the County. Publishes "Proposed Budget" in October.
- Legislature reviews Proposed Budget, holds Budget Hearings, and makes changes to the Budget in November
- Legislature approves the changed budget, which becomes the Adopted Budget in December
- DEP & EACAB review Adopted Budget and prepare for new cycle

EACAB & DEP Staff

The application review process engages the 15 member EACAB along with DEP Planners

BOARD

Lila Balali

Gina Burkhardt

Matthew Clohessy, Chair

Jennifer Colwell

Mary Craig

Jason Daniels

Russell Davidson

Michael de Freitas

Kathryn Franco

Patricia Johnson

Susan Kirkpatrick

Carolyn Morris-Hunt

Williams Pierce

Glenn Spencer

Davida Tolbert

STAFF

Thomas Baines, Dty Commissioner

Sarah Gatti, Principal Planner

Tim German, Planner

Dave Hall, Senior Planner

Mariely Ortiz Senior Planner

Briana Zuchowski, Assistant Planner

Colette McDonald, Planner

EACAB & DEP Staff review

- Do NOT evaluate art or the programming content (but may comment on it)
- Annual check-ups of organizations in the areas of:
  - Governance
  - Management and planning
  - Fiscal health
  - Community impact
  - Alignment of programming with mission
  - Recognition of Erie County
  - Demonstrated ability to be equitable, diverse, and inclusive in their work
- Independent reviews lead to stronger, more competitive, sustainable organizations
- Provide feedback to organizations that underscore both strengths and weaknesses, and where improvement is advised. (Note: feedback process may change)

Scoring

- Financial Health
  - Data
  - Narrative Responses
  - Attachments B thru D
- Governance
  - Data
  - Narrative Responses
  - Attachments F thru H
- Management & Planning
  - Data
  - Narrative Responses
  - Attachment I
  - Prior Grantees
    - Funding Acknowledgement
    - Feedback Response

- -

- Services & Programs
  - Data
  - Narrative Responses
- Reach & Impact (inc. Diversity)
  - Data
  - Narrative Responses

- -

- Bonus - e.g., above and beyond efforts, more diligence or preparedness than expected for organization size, etc. Prima from "Additional Info" section.
- Deductions - e.g., late, incomplete, unresponsive, etc.

Score	Descriptor	Additional Guidance on Strengths/Weaknesses
9	Exceptional	Exceptionally strong (model and standard for field or discipline with essentially no weaknesses)
8	Outstanding	Extremely strong with negligible weaknesses
7	Excellent	Very strong with some minor weaknesses
6	Very Good	Strong with numerous minor weaknesses
5	Good	Strong but with at least one moderate weakness
4	Satisfactory	Strong but at least one major weakness
3	Fair	Some strengths but with some moderate weaknesses
2	Marginal	Some strengths but with at least one major weakness
1	Poor	A few strengths and a few major weaknesses
0	Concerning	Very few strengths and numerous major weaknesses

Tips/Best Practices

- Don’t be repetitive
- Stick to the answer appropriate to the question
- Be consistent (don’t contradict yourself)
- Help us see your vision for 2026
- Please submit legible documents (if you need assistance – please see our Resource document on the website)
- Submit MOST RECENT ADOPTED/SUBMITTED documents requested (e.g., tax filings, etc.)
- Submit FINAL (not draft) documents (if in the process of updating – submit most recently adopted document, and include ADDITIONAL INFORMATION on updating status)
- Review recording of this briefing on Erie County’s YouTube page for FAQs
- Review the directions carefully

2026 Changes - Application

- Clarification/rephrasing of some questions
- Funds must be used for organization's OWN expenses
- ACCUMULATED Surplus or Deficit:
  - **990-N ("postcard"):** Check your **Management Prepared Financial Statements** for "Net Assets" or "Fund Balance". If you cannot find this, you may need to produce a Balance Sheet (such a document should also be submitted as part of Attachment B)
  - **990-EZ line 21:** "Net assets or fund balances at end of year. Combine lines 18 through 20"
  - **990 line 22:** "Net assets or fund balances. Subtract line 21 from line 20"
- New question about accessibility efforts
- All levels to complete Programs table (removed redundant narrative question from lower level/s)
- Program guide (erie.gov/cultural under "Resources" and "How to Apply")

2026 Changes - Application

- Financial Statements: should include:
  - Statement of Activities (aka Income Statement),
  - Statement of Financial Position (aka Balance Sheet),
  - Statement of Functional Expenses, and
  - Statement of Cash Flow
- Technical assistance appointments – DATES/TIMES/LOCATIONS
  - Aid with computer application
  - Applicant MUST bring word doc versions with all responses prepared
  - Applicant must have all attachments digitized
  - Sign up after briefing or contact Mariely at mariely.ortiz@erie.gov or 716-858-1916

Request Structure

LEVEL	MAX . GRANT REQUEST	MAX. % OF ACTUAL OPERATING EXPENSES
1	≤$50,000	≤20%
2	>$50,000 up to $200,000	≤20%
3	>$200,000	Funding requests exceeding 20% of your Actual Operating Expenses are discouraged and will be scored lower

- An organization may complete and submit a lower level application, as long as the percentage and grant amount are within the thresholds as listed above, i.e., maximum actual operating expenses may be waived for small grant amounts

Eligibility

- Located and provide services in Erie County
- Be a 501(c)(3) organization with tax exempt status (at least 1 year)
  - Must be registered with the NYS Charities Bureau (if exempt, organization must know exempt status)
  - Must be able to provide a copy of a SUBMITTED IRS tax filing*
- Have at least **ONE** of the following descriptions of a Cultural Organization as a **PRIMARY** mission of the organization**:
  - An organization that operates on a countywide or recognizable community level, which by the nature of its cultural activities and/or collections, is unique, distinctive, and of significant quality
  - An organization that provides visitors with access to programs and displays of the performing, visual, literary and media arts, and/or to exhibits and collections, which preserve and interpret our cultural, natural and scientific heritage
  - An organization that particularly serves the cultural needs of significant segments of the County population, thereby contributing to the quality of life in Buffalo and Erie County

**Acceptable tax filings include 990, 990-EZ, and 990-N. 990-PF and other non-profit tax filings are inconsistent with the purpose and eligibility requirements.*

***Organizations such as social and/or multi-service, educational, athletic, after-school, or religious organizations for which cultural activity is not a primary purpose are not eligible.*

Application Levels

erie.gov/cultural/application

LEVEL 1	LEVEL 2	LEVEL 3
Your organization meets Eligibility criteria		
• Grant request is not more than $50,000 • Request does not exceed 20% of most recent FY Actual Operating Expenses	• Grant request is more than $50,000 but not more than $200,000 • Request does not exceed 20% of most recent FY Actual Operating Expenses	• Grant request is more than $200,000 • Funding requests exceeding 20% of most recent FY Actual Operating Expenses are discouraged and will be scored lower
ITEMS REQUIRED		
Application Level 1	Application Level 2	Application Level 3
A. Examples of Recognition of County Funding *(N/A for NEW applicants)*	A. Examples of Recognition of County Funding	A. Examples of Recognition of County Funding
B. Management Prepared or CPA Compiled Financial Statements	B. Independent CPA Reviewed Financial Statements*	B. Independent CPA Audited Financial Statements**
C. Financial Worksheet - Level 1	C. Financial Worksheet - Level 2	C. Financial Worksheet - Level 3
D. Tax Filing	D. Tax Filing	D. Tax Filing
F. Bylaws	F. Bylaws	F. Bylaws
G. Conflict of Interest Policy with completed Disclosure forms for all board and Key Persons	G. Conflict of Interest Policy with completed Disclosure forms for all board and Key Persons	G. Conflict of Interest Policy with completed Disclosure forms for all board and Key Persons
H. Whistleblower Policy	H. Whistleblower Policy	H. Whistleblower Policy
N/A	I. Strategic Plan	I. Strategic Plan

**NOTE: NYS changed the maximum threshold for CPA Review from $750K to $1M for Fiscal Years Starting after 7/1/21*

***NOTE: NYS changed the minimum threshold for CPA Audit from $750K to $1M for Fiscal Years Starting after 7/1/21*

Applicable to all levels

- Grants are for General Operating Support, limited to current operating expenses including salaries, program costs, fringe benefits, rents, utilities, office supplies, and equipment. Grant funds may NOT be used for or applied toward any capital project or improvement, nor as a set-off against accounts receivable. No funds received shall be used for any service provided or activity performed outside Erie County. The organization shall NOT delegate any duties or assign any of its rights under the grant. The funds are for the organization's own, direct operational expenses and shall not be re-granted or otherwise used for other purposes.

- PLEASE NOTE THAT FUNDING REQUESTS ARE NOT GUARANTEED. All applications will continue to be reviewed based on their financial management, governance, and programming, with funding distributed in accordance with available funds for the 2026 calendar year

Application – Attachments

LETTER	DOCUMENT	DESCRIPTION	LEVEL
A	Examples	A document with examples of Acknowledgement of County Funding. • Funding Acknowledgement Samples may be a screenshot of your website, digital or physical copies/pictures of posters, event invitations, flyers, newsletters, plaques, links to videos with audio acknowledgement, etc. • All samples should be clear on where they can be found or when/where they were performed. • Save all visuals/links of the examples in one PDF file.	ALL (N/A for New Applicants)

B	Financial Statements	Copy of your organization's Annual/Financial Report for the most recently completed fiscal year.
		• Should include:
		  • Statement of Activities (aka Income Statement),
		  • Statement of Financial Position (aka Balance Sheet),
		  • Statement of Functional Expenses, and
		  • Statement of Cash Flow
		NYS FINANCIAL REPORT by OPERATING BUDGET
		• ≤$250,000 - Annual Report/ Unaudited Report/Annual Budget/Management compiled.
		• >$250,000 - <$1,000,000 - Report w/ CPA Review (FY starting after 7/1/21)
		• ≥$1,000,000 - Report w/ CPA Audit (FY starting after 7/1/21)
			ALL

Application – Attachments

LETTER	DOCUMENT	DESCRIPTION	LEVEL
C	Financial Worksheet	A provided Excel file, identical to prior fillable PDF financial information, detailing revenues and expenses. • Must be downloaded, completed, submitted as a PDF from *erie.gov/cultural* • **Required for each level**	ALL
D	Tax Filing	A copy of your organization's most recently submitted 990, 990-EZ, or 990-N	ALL
F	Bylaws	Copy of your organization's current bylaws	ALL
G	Conflict of Interest Policy with Disclosure forms	Conflict of Interest Policy per NYS Not-For-Profit Corporation Law §715-a, with a blank Declarations/Disclosure form, and copies of signature pages of all current Key Persons' Declarations/Disclosure form. • A template is available at *erie.gov/cultural*	ALL
H	Whistleblower Policy	Upload your organization's Whistleblower Policy per NYS Not-For-Profit Corporation Law §715-B. **NOTE:** An active Whistleblower Policy is required of all applicants regardless of budget size or number of employees • A template is available at *erie.gov/cultural*	ALL

Application – Attachments

LETTER	DOCUMENT	DESCRIPTION	LEVEL
I	Strategic Plan	Copy of your organization's Strategic Plan	2, 3
Z	Optional: Additional Attachment	You may submit an additional attachment with information you'd like to share with the Board, whether providing further details on application questions or on topics not addressed in the application. Narrative and/or images.	ALL

Time for LIVE DEMO

QUESTIONS?

CONTACTS

Mariely Ortiz, Senior Planner	(716) 858-1916 Mariely.Ortiz@erie.gov

NOTE: OOO 4/14 onwards; during these dates please contact:

Colette McDonald, Planner	(716) 858-1572 Colette.McDonald@erie.gov
Briana Zuchowski, Assistant Planner	(716) 858-7432 Briana.Zuchowski@erie.gov
Website	erie.gov/cultural

THANK YOU

Briefing recording will be available on Erie County's YouTube page.