

## **SECTION 1 GRANT APPLICATION**

### **GRANT APPLICATION FORM**

**1.) Applicant:** (Legal name of organization as incorporated in the State of Florida)

City of Ormond Beach

**Address:** (mailing) P.O. Box 277

**City:** Ormond Beach **State:** Florida **Zip Code:** 32175-0277

**Address:** (Applicant's physical address) 22 South Beach Street

**City:** Ormond Beach **State:** Florida **Zip Code:** 32174

**Federal ID #:** 59-6000398

**Florida Not-For-Profit Corporation Charter #** (IF applicable)

**Florida Dept. of Agriculture & Consumer Services Registration #** (IF applicable)

**2.) Resident County Council District of Project:** District 4

**3.) Contact Person:**

**Name:** Loretta Moisio

**Title:** Grants Coordinator

**Telephone #:** 386-676-3315

**E-Mail:** Loretta.Moisio@ormondbeach.org

**4.) Project Title:** MacDonald House Restoration

**5.) Project Location Address:** 38 East Granada Blvd.

**City:** Ormond Beach **State:** Florida **Zip Code:** 32176

**6.) Type of Project:** (Check one – See ECHO project categories)

☐ Renovation

☒ Restoration

☐ New Construction

☐ Acquisition

**7.) ECHO Category:** (Check all that apply – See ECHO categories)

☐ Environmental

☒ Cultural

☒ Historical

☐ Outdoor Recreation

**8.) The project site or facility is:** (Check one)

☒ Owned by Applicant

☐ Leased by the Applicant – length of lease

☐ Applicant has Land/Project Management Agreement – length of Agreement

Lease or Land/Project Management Agreement dates:  
to

**IMPORTANT NOTE: LEASES/AGREEMENTS MUST BE BINDING AND NON-CANCELABLE**

9.) Is the project site/facility mortgaged or will it be? ☐ Yes ☒ No

Current Mortgage: \$

Mortgage at Closing: \$

Mortgage length:

years

Term ending date:

Name and Address of Lien Holder:

Is the facility in a Community Redevelopment District (CRA)? ☒ Yes ☐ No

10.) Type of Organization: (must be "A" or "B" to be eligible)

A.) ☒ Municipal government or a budgeted organization of Volusia County government.

B.) ☐ Not-For-Profit Corporation classified as a 501(c)(3)

11.) Project Funding (Grant Amount Request and Match):

A.) Standard Grant Request (Up to \$400,000.00):

- |      |                              |               |
|------|------------------------------|---------------|
| i.   | Volusia ECHO Program Request | \$ 400,000.00 |
| ii.  | Confirmed Match Funds        | \$ 400,000.00 |
| iii. | Total Project Cost           | \$ 800,000.00 |

12.) Mandatory Workshop was attended by: Loretta Moisio Date: August 23, 2019

**IMPORTANT NOTE: If applying for an Exceptional Grant the form on page 7 must be complete.**

13.) List any prior grants received from ECHO: (include year, project name and amount)

**2005** – Central Park Development - \$205,000; **2006** – Central Park Development: Boardwalk - \$300,000; **2007** – The Casements/Rockefeller Gardens Restoration - \$500,000; **2012** – Skate Park Expansion - \$225,000; **2014** – Environmental Discovery Center Construction - \$400,000; **2018** – Ormond Beach Sports Complex Field Lighting - \$400,000; **2019** – Ormond Beach Sports Complex: Championship Softball Field - \$400,000

## 1.2 MISSION:

1.) Provide the Mission Statement for your organization.

*The future of the City of Ormond Beach depends on a partnership among citizens, businesses, civic organizations, elected officials, and City employees. Working together, we can make Ormond Beach one of the most attractive, stimulating, and progressive cities in the nation.*

*We see Ormond Beach as a community characterized by a high quality of life for all. From our youngest citizens to our oldest, we want to provide significant opportunities for earning, for learning, for leisure and recreation, and for self-expression.*

*We see Ormond Beach as a community of many dimensions. Among these, we see our City as:*

- *A family oriented community, striving to provide a safe and supportive environment in which families of all ages can build on their strengths and their traditions.*
- *A learning community, in which all citizens may participate in life-long opportunities for personal growth and development, especially as they participate in the strong historic, cultural, artistic, and athletic traditions of the area.*
- *An environmentally sensitive community, marked by mature trees, clean water, well-kept neighborhoods, and attractively landscaped thoroughfares.*
- *An economically sound community, boasting a diverse economy and a balanced, controlled, but friendly approach to business and development.*
- *A diverse community, one in which all citizens and all sectors of the City find meaningful opportunities and one in which all are valued for the unique contribution they make.*
- *A responsive community, with a City government that cares and communicates well with the citizenry and provides timely, even-handed, and courteous service to all.*
- *A well-run community, offering high quality basic City services in an effective and efficient manner, and encouraging creative and proactive approaches to government.*

*An involved community, one in which citizens throughout the community acknowledge and respect their differences, but recognize that the accomplishment of our objectives will require the full participation of all.*

### **1.3 PROJECT TEAM:**

- 1.) List the names and addresses of the architect, engineer, design consultants and/or general contractor selected. Include the name(s) of the person(s) who have signed form 1.6.**

Joyce Shanahan, City Manager

Kelly McGuire, Finance Director

Shawn Finley, P.E., City Engineer

Steven Spraker, Planning Director

April Martti, Engineering Projects Coordinator

Loretta Moio, Grants Coordinator

Address for all listed above: P.O. Box 277, Ormond Beach, FL 32175-0277

Bonda Garrison, President, Ormond Beach Historical Society

38 East Granada Blvd., Ormond Beach, FL 32176

**2.) List the person(s) who created the section 3.1 budget and their experience with this type of project.**

Shawn Finley, City Engineer, created the budget under section 3.1. Mr. Finley has been with the City for ten years serving first as Civil Engineer, then Deputy City Engineer, and now City Engineer. Mr. Finley has served as project manager for a large number and variety of projects implemented throughout the City. The implementation of all ECHO funded projects has been the responsibility of the City's Engineering Division.

**3.) If a complete list is not available, explain why and when the project team will be selected.**

This project is based on the Bender & Associates Architects Historic Structure Summary Assessment. The first phase recommended improvements to the tower roof and wall renovation, asbestos and lead paint removal, re-nailing east wall siding, and the re-painting of the exterior of the building. The roof of the building was replaced in 2017. In 2018, the City contracted with A.M. Weigel to perform renovation of the southwest wall of the tower identified in need of repair as it was viewed as a worst case scenario. Eighty-nine (89) square feet of the wall was repaired at a cost of \$211.50 per square foot which provided a base cost with which to estimate the work. The completed budget in Section 3 incorporates the cost increase from 2017 to 2019 for the work. As the project has not gone through the City's competitive bidding process, a contractor has not yet been identified. The competitive bidding process is expected to begin in June 2020 and will provide the most up to date costs for the project.

**1.4 MANAGEMENT PROSPECTUS:**

**1.) Include a list of the names of staff dedicated to this project, their responsibilities and the percentage of time each will be spending on the project per week.**

Staff	Responsibilities	Percentage of Weekly Time
Shawn Finley, P.E., City Engineer	Project Management: Bidding, Award, and Construction	15%
Steven Spraker, Planning Director	Project Management: Bidding, Award, and Construction	5%
April Martti, Engineering Projects Coordinator	Project Management: Grant Administration	5%
Robert Carolin, Leisure Services Director	Post Construction Management	5%
Stefan Sibley, Assistant Leisure Services Director	Construction (Owner's Rep.); Post Construction Management	10%

Engineering Inspector (Staff member TBD)	Construction	20%

### **1.5 RESTRICTIVE COVENANTS – NOTICE OF FUTURE REQUIREMENT IF GRANT IS AWARDED**

- 1.) Do you agree to comply with the requirement to file Restrictive Covenants with the Volusia County Clerk of the Court if ECHO Grant is awarded? (A sample of the Restrictive Covenants language is found on page 49 in the ECHO Application Guide)

☒ YES      ☐ NO

- ❖ *If the project of the application is mortgaged or leased property, other than those applying for trails in the County Master Plan or projects on State or Federal land not owned by the applicant, a letter from the Mortgagee or Lessor, stating that they agree to sign the Restrictive Covenants, must be supplied with the application.*
- ❖ *Applicants with projects on State owned land are automatically exempt from this requirement, but are held to the same liquidated damages cited within the Restrictive Covenants through language found in the final ECHO Agreement for which the grantee is held responsible.*

2019/2020 ECHO Grants-in-Aid Standard & Exceptional Grant Application

**1.6 FORM – CERTIFICATION OF INFORMATION AND COMPLIANCE**

I/We certify that all of the information contained within this application and subsequent attachments is true and correct to the best of my/our knowledge, and that the project for which the application is made shall be in compliance with the Americans with Disabilities Act of 1990, and that should a grant be awarded, the organization agrees to comply with the conditions of the grant award agreement including the Restrictive Covenants.

**1. OFFICIAL WITH AUTHORITY TO CONTRACT FOR THE OWNER OF THE PROPERTY**

Signature: Joyce Shanahan

Typed Name: Joyce Shanahan, City Manager

Phone Number: 386-676-3200      Date: November 7, 2019

**2. OFFICIAL WITH AUTHORITY TO CONTRACT FOR THE APPLICANT**

Signature: Joyce Shanahan

Typed Name: Joyce Shanahan, City Manager

Phone Number: 386-676-3200      Date: November 7, 2019

**3. CHIEF FINANCIAL OFFICER FOR THE APPLICANT**

Signature: Kelly McGuire

Typed Name: Kelly McGuire, Finance Director

Phone Number: 386-676-3226      Date: November 7, 2019

**4. NOT FOR PROFITS ONLY – PRESIDENT, BOARD OF DIRECTORS**

Signature: \_\_\_\_\_

Typed Name: Click or tap here to enter text.

**Executive Board or Board of Directors meeting when this grant application was reviewed and approved.**

Meeting Date: Click or tap here to enter text. Phone Number: Click or tap here to enter text.

## **SECTION 2: PROJECT DESCRIPTION**

### **2.1 PROJECT ASSESSMENT**

- 1.) Provide a narrative explaining how your project will meet the goals set by *Resolution 2000-156* “to enhance the quality of life for its residents by providing environmental, cultural, historical and outdoor recreational opportunities”. (State your goals in bold type; Describe how this project will impact the community and enhance the quality of life for its citizens; Use real numerical data and insert documents/contract agreements which back up your narrative)**

County Resolution 2000-156 seeks to “preserve significant archaeological and historic resources” and provide “access to destinations and experiences associated with past events, peoples, and places within the County of Volusia.” As a family oriented community, Ormond Beach consistently works to meet the needs of all its citizens. **Preserving precious historical resources** in Ormond Beach and **providing access to the history of the area** for all of Volusia County to enjoy makes this project a perfect match to the goals of Resolution 2000-156.

The Ormond Beach Historical Society (OBHS) is dedicated to sharing the rich and diverse history and culture of Ormond Beach and surrounding area by highlighting the resources that define the City’s character. Its programs engage people directly with this history and it presents diverse program offerings at its four facilities: The MacDonald House Museum and Welcome Center (1903), the Historic Anderson-Price Memorial Building (1916), the Three Chimneys Archaeology Site (c. 1763) and the Ormond Hotel Cupola (1888). During the most recent year, that has included:

- Membership – 375 memberships representing 519 members
- Visitors to MacDonald House Museum and Welcome Center – 2974
- Total persons reached with programs – 8106
- Children’s Programs – 12 with 287 children reached including 2 ECHO Ranger Programs
- Visitors at the Hotel Ormond Cupola – 582
- Local 2-hour Historical Bus Tours – 24 with 343 guests
- Launched *Florida Stories-Ormond Beach* walking tour in partnership with FL Humanities Council
- Presented the following historical events:
  - Starry, Starry Night with Ormond Memorial Art Museum & Gardens and The Casements
  - Old Florida Plantation Tour in partnership with Tomoka State Park
  - Hillside Cemetery Tour
  - Pilgrims Rest Cemetery Tour
  - Three special exhibits at the MacDonald House
  - Ormond Library window with history of Ormond Beach
  - 13th season of OB Speakers Series on FL history with 1050 attendees:
    - 6 in partnership with FL Humanities Council
    - 4 funded by OBHS
  - Participated in Museum of Arts & Sciences’ History Con
  - Judged Hinson Middle School & Volusia County Schools’ History Fairs

- Conducted 6 fundraisers, including its 12<sup>th</sup> Annual Holiday Tour of Homes (many historic) with over 600 people attending
- Presented Membership and Volunteer Appreciation Party
- Published bi-weekly *History Happenings* e-newsletter to list of 1354
- Erected roof over Three Chimneys Archaeological Site Distillery Chimney ruins to prevent further deterioration
- Continued renovations of Historic Anderson-Price Memorial Building including new audio/visual system and new A/C (in the past 8 years over \$180,000 in renovations has been accomplished)
- All made possible with a staff of four part-time employees (30 hr./wk. Executive Director; 5 hr./wk. office clerk; 4 hr./wk. bookkeeper; 10 hr./wk. Anderson-Price custodian) and over 185 volunteers

Today, OBHS does not have a permanent facility open to the public during normal business hours with sufficient space to adequately tell the story of Ormond Beach's history. Currently, OBHS utilizes approximately 250 square feet of the first floor of the MacDonald House to interpret that history, mount changing exhibits, and conduct programs. Its other three facilities are only open during programs or events, or in the case of the Hotel Ormond Cupola, for limited hours weekly. Through this project, first to stabilize and restore the exterior of the MacDonald House, and later to restore the interior three floors into the Ormond Beach Museum of History (Museum), the available exhibit space would increase by more than 2800 square feet. Completion of this project would provide Volusia County residents and visitors ready access to explore the unique and important stories of Ormond Beach's past and interpret its impact on the present and future. The new facility would employ state-of-the-art museum and display concepts as well as historic artifacts designed to engage the public.

## **2.2 PROJECT DESCRIPTION**

### **1.) Describe project and construction timeline.**

In 2016, the City contracted with Bender & Associates Architects to perform a Historic Structure Summary Assessment (Assessment) (Complete Assessment can be found at: <https://fl-ormondbeach2.civicplus.com/248/Studies>) that was completed in March 2017. The Assessment recommended a series of renovations to the building to ensure the historic integrity of the structure remains intact. This project begins the multi-phase scope of work recommended in the Assessment and seeks to work with a variety of community partners to ensure the restoration of the MacDonald House. As recommended by the Assessment, the first phase would consist of renovation of the siding maintaining its historical aesthetics to include any needed structural repairs to exterior walls resulting in the building being stabilized and weather tight. In 2018, the City contracted with A.M. Weigel to perform renovation of the southwest wall of the tower identified in need of repair since it was viewed as a worst case scenario. This resulted in 89 square feet of the wall being repaired at a cost of \$211.50 per square foot. This ratio was applied to the exterior building wall square footage to estimate cost. The project will seek a variety of funding sources to assist with the renovation. The ECHO grant for \$400,000 is sought using cash, land value, and previously spent cash as match. Brief History of the MacDonald House: The MacDonald House, which was constructed in 1903, is a three story structure located at 38 East Granada Boulevard in Ormond Beach and constructed for Margaret A. Stout, a native of Scotland. At the time, she worked at the Ormond Hotel which was across the street from the MacDonald House. She was friends with John Anderson and Joseph D. Price who were the co-



founders and managers of the Ormond Hotel. The home appears to have been used as a seasonal residence of Ms. Stout as well as an investment. The home was designed and constructed by Sumner H. Gove who was a prolific Daytona Beach architect, builder and contractor. He moved to Daytona Beach in 1883 from Connecticut hoping the climate would improve his wife's asthma symptoms. Mr. Gove had a major influence on the early character of Daytona Beach as he was responsible for much of its development. In Daytona Beach, Mr. Gove built the original Clarendon Hotel, an addition to the Ormond Hotel, the Ormond Beach Yacht Club building as well as the first Port Orange and Seabreeze bridges across the Halifax River with several of his buildings listed on the National Register of Historic Places. At various times, the home was operated as a boarding house and a portion of the first floor as a notions shop, a gift shop and a library. After Ms. Stout's death in 1933, the home passed to her siblings, Emma and John Stout, who, around 1940, sold it to Elizabeth and William MacDonald who owned the adjacent Billy's Tap Room. The home was owned by the MacDonald's until 1964. The home had various owners until the City of Ormond Beach purchased the historic structure in 1977 and along with community partners performed partial restoration and rehabilitation of the building. For this project, the contract bidding and awarding process would occur between June 2020 and September 2020 with construction anticipated to begin in October 2020 and completed by September 2021. (The complete timeline is included on **page 12.**)

**2.) Document how construction design and operational strategies use "green"/sustainable standards: (give specific examples for this project – a statement agreeing to follow local guidelines is not acceptable)**

- a. Provide a narrative explaining how the project was designed with the environment in mind. What steps have you taken or will you take to reduce/recycle/reuse: (see examples of recycled products in the ECHO Application Guide)**
  - i. The construction phase?** The restoration of a historic building such as the MacDonald House is a perfect example of reuse and recycle. Every effort will be taken in the design and construction of this project to utilize as much of the existing structure as possible. The restoration of this property will be monitored on a daily basis and any opportunities to use existing structural elements will be taken. The improvements made to the MacDonald House will improve the energy efficiency of the structure and minimize the effect of this property on the environment.
  - ii. The operational phase?** OBHS seeks to follow the U.S. Green Building Council's Leadership in Energy & Environmental Design (LEED) recommendations for design standards. This will include: insulation in internal walls; lighting-motion detectors, florescent/LED lighting, programmable lighting system; HVAC – programmable temperature control; ceiling fans; low VOC carpeting; paint-water based acrylic; Energy Star rated approved products; low water toilets; and, annual energy audit by Florida Power & Light.

**3.) What is the projected date for this project to be completed and accessible to the public?**

The first floor exhibits and welcome center will remain open to the public during restoration of the siding which is expected to be completed in September 2021.

#### **4.) Describe any additional phases planned for this project.**

The Historic Structure Summary Assessment recommended additional phases that would renovate all three floors of the interior of the structure. The Ormond Beach Historical Society is obtaining cost estimates for interior renovations to expand the use of the historic structure. Once cost estimates have been obtained, the process of obtaining grant funding will begin.

The Ormond Beach Historical Society, with 519 members, is the only nonprofit organization in Ormond Beach that shares the City's rich and unique history. Its vision is to expand and enhance its ability to tell that story by developing the **Ormond Beach Museum of History and Welcome Center** (Museum) at the historic MacDonald House. The Museum's prominent position on Granada Boulevard, halfway between the Ormond Memorial Art Museum and Gardens, The Casements and the Ormond Hotel Cupola, would complete Ormond Beach's walkable Museum Row and become a destination attracting both residents and visitors to the downtown beachside area. Coordinated programming between the three museums, Ormond Main Street, and the Chamber of Commerce would further solidify this area as a premier Ormond Beach destination adding to the economic prosperity of the downtown and beachside as recommended in the 2019 Ormond Beach Downtown Master Plan Update (Complete Master Plan Update can be found at: <https://fl-ormondbeach2.civicplus.com/248/Studies>).

In the process of developing the Museum into a viable 21<sup>st</sup> century cultural attraction in Volusia County, it would also be preserving an important early 20<sup>th</sup> century Queen Anne style building. The MacDonald House is a wood frame structure constructed in 1903, and is one of only three Queen Anne buildings still remaining in Ormond Beach. It is distinguished by a square tower with a castellated parapet, set diagonally at its northeast corner with Victorian details. It is on the City's Historic Landmarks List (**pages 77-79**) and is National Register of Historic Places eligible and the application for that designation is currently being developed and it is anticipated that listing will be achieved in early 2020.

Multiple phases will be needed to realize the vision of both celebrating the history of Ormond Beach and further contributing to economic development in the City:

##### **Fall 2019:**

- ECHO grant submitted for assistance with exterior renovation and stabilization as recommended by the 2017 Bender and Associates' Historic Structure Summary Assessment.

##### **Fall 2019 - 2020:**

- OBHS would propose a long-term (40 yr.) lease agreement with the City for the first, second and third floors of the MacDonald House.
- OBHS continues its capital fundraising campaign to solicit corporate and individual funding to provide matching funds needed for grant applications for the interior leasehold improvements.

- OBHS hires architectural firm to work with its Museum Committee to develop plans for interior space and exhibits on all three floors.

**Fall 2020 – 2021:**

- If a long-term lease is approved, OBHS would apply for an ECHO grant as well as any applicable state and federal grants to begin rehabilitation of the interior three floors into ADA and code compliant permanent and rotating exhibits and office space.
- Physical restoration of the exterior is completed and construction of interior improvements begins.

**Fall 2021 - 2023:**

- OBHS opens the second and third floors of the MacDonald House to the public as exhibit floors, with the new Ormond Beach Museum of History focusing on graphically telling the story of Ormond Beach with both permanent and rotating exhibits. The opening would coincide with the 120<sup>th</sup> anniversary of the construction of the MacDonald House in 1903. While some historically significant artifacts will be displayed, OBHS intends to employ the latest museum technology, including interactive displays and cell phone apps to maximize its ability to convey the long, diverse, and multifaceted history of Ormond Beach in a professional manner within limited space.
- The OBHS, within the MacDonald House, has served as the official Welcome Center of the City of Ormond Beach since 1997 along with providing first floor historical exhibits. In 2018, OBHS and the City entered into a 5 year operation and maintenance agreement (**pages 84-94**) for OBHS to continue to provide this service. Throughout all phases of the project, OBHS will continue to operate the Welcome Center and maintain and enhance the historical exhibits. Every year, over 2900 visitors, as well as existing and potential new residents, are introduced to the riches Ormond Beach has to offer.

In addition to OBHS activities, the MacDonald House is home to the Ormond Beach Tennis Center which serves the residents and visitors of Ormond Beach and is an important amenity to the community. Throughout the project phases, the Tennis Center will continue to occupy a portion of the first floor, unless Tennis Center management and the City agree to a different arrangement.

Description	PSC-7	LM	Mar-Jun 2020	Jul-Sep 2020	Oct-Jan 2020-21	Feb-Mar 2021	Apr-Jun 2021	Jul-Sep 2021	Oct 2021
General Requirements		40,000.00	40,000.00						
ECHO Temp Sign			500.00						
Architectural/ Consultant Services, Final Construction Drawings		22,000.00		22,000.00					
Restoration	44,726.61	38,000.00		588,273.39					
Final ECHO Sign								4,500.00	

**2.3 Drawings: (Drawings are required by all applicants. Drawings must fold to an 8 ½ X 11 size to fit securely and neatly in the application booklet. Drawings must be to scale with a bar scale and include a legend)**

- ☒ Street locator map
- ☒ Site Plan
- ☒ Preliminary and schematic drawings
- ☒ Design and development documents
- ☒ Construction documents
- ☒ Any other drawings which may be helpful in understanding the project scope/features

## SECTION 3: BUDGET DETAIL/MATCHING FUNDS

**3.1 PROJECT BUDGET DETAIL CHART:** Fill out budget chart provided, adding rows as needed. Place match monies in column corresponding to appropriate “Match Code”: Explanations of match codes can be found in the guidelines on pg. 24.

CHART 3.1: CONSTRUCTION PHASE EXPENDITURES							
<i>ADD ROWS AS NEEDED</i>	UC +	LM +	In-Kind	PSC	= Match	ECHO	Total
General Requirements:							
Mobilization, Waste Collection, etc.	10,000.00				10,000.00	0.00	10,000.00
Contractor Fees	25,000.00				25,000.00	0.00	25,000.00
Insurance	5,000.00				5,000.00	0.00	5,000.00
Subtotal	40,000.00				40,000.00	0.00	40,000.00
Architectural Services:							
Consultant Services	20,000.00				20,000.00	0.00	20,000.00

Final Construction Drawings	2,000.00				2,000.00	0.00	2,000.00
Subtotal	22,000.00				22,000.00	0.00	22,000.00
Site Construction:							
Equipment Rental (scissor lift/high reach and forklift)					0.00	34,000.00	34,000.00
Siding/Trim/Paint	143,273.29			44,726.71	188,000.00	316,000.00	504,000.00
Carpentry Materials	45,000.00				45,000.00	50,000.00	95,000.00

Subtotal	188,273.29			44,726.71	233,000.00	400,000.00	633,000.00
ECHO Signage:							
Temporary	500.00				500.00		500.00
Permanent	4,500.00				4,500.00		4,500.00
Subtotal	5,000.00				5,000.00	0.00	5,000.00
Land Match		100,000.00			100,000.00		100,000.00
PROJECT TOTALS	255,273.29	100,000.00	0.00	44,726.71	400,000.00	400,000.00	800,000.00



### **3.2 MATCH DOCUMENTATION**

Please see page 26 in the guide for a more in depth explanation of documentation.

**1.) Provide official documentation of Match:**

**a. Unencumbered Cash (UC):**

- i. ☐ Current Bank Statement OR
- ii. ☒ Copy of signed resolution including pledged dollar amount, project name and dates the funds will be available (*Pages 102-103*)

**b. Irrevocable Pledges (UC):**

- i. ☐ Notarized letter stating the pledged amount, the purpose of the pledge and the date the funds will be available (must include an itemized budget if pledge is for services).

**IMPORTANT:** Pledged funds must be in the bank prior to the Grant Review Panel.

**c. In-Kind Services (IK) services/donations must have taken place no more than 7 years prior to the project:**

- i. ☐ Itemized list of products/services to include name of person/organization, description of goods/services, fair market value of in-kind contribution and date goods/services were provided.
- ii. ☐ Future in-kind donations must have notarized letter from donor describing items/services and value of such.
- iii. ☐ Previously provided in-kind service/donations do not require backup in this application, however, official documentation must be available for review upon request.

**d. Previously Spent Cash (PSC)**

- i. ☒ The encumbrances or cash expenditures completed within the seven (7) year period prior to the application. (*Pages 104-125*)

**e. Land Match (LM) (trails of the County's Master Plan, projects on State or Federal land and property donated by the County are not eligible for match):**

- i. ☒ Copy of deed (*Page 126*)
- ii. ☒ Copy of appraisal (property appraisal assessment or recent outside appraisal) (*Pages 127-131*)

## **SECTION 4: OPERATING FORECAST DETAIL**

### **4.1 OPERATING FORECAST NARRATIVE**

- 1.) Compose a narrative explaining the use of the facility/project and related costs. Narrative should include what staff will be needed, what additional maintenance will be required, what new programs will be added, etc.**

Upon completion of all four phases of the project and the opening of the second and third floors of the MacDonald House to the public as exhibit floors, the current 250 square feet of exhibit space will increase to more than 3000 square feet of available exhibit space. This would allow Volusia County residents, as well as visitors, the opportunity to explore the rich history of the area.

The new facility would employ state-of-the-art museum and display concepts designed to engage the public with the new Ormond Beach Museum of History, focusing on vividly telling the story of Ormond Beach with both permanent and rotating exhibits. While some historically significant artifacts will be displayed, OBHS intends to employ the latest museum technology including interactive displays and cell phone apps to maximize access. Exhibits, videos and associated programming will cover Ormond Beach's entire rich history including the first indigenous people; the Spanish and British colonial plantation periods; slavery at the Three Chimneys, the oldest British Sugar Mill and Rum Distillery in what is today the United States; the Seminole and Civil Wars; the post- Civil War New Britain and beachside settlements; the development of modern Ormond Beach including the Hotel Ormond and other remaining landmarks such as the Historic Anderson-Price Memorial Building; the arrival of John D. Rockefeller and other early-20<sup>th</sup> century socialites who wintered here; the Birthplace of Speed; the role of women (MacDonald House was built for a woman!) and African-Americans in early Ormond Beach; World War II along the coast including WWII Watchtower; post – WWII development. The goal is to tell the complete story of area history and the role and impact of all socio-economic and ethnic groups.

Upon opening of the Museum, OBHS plans to develop additional programs that currently cannot be presented because of limited space. Examples of these include:

- Docent led Ormond Beach History Highlights Tours of the collection/displays as well as self-guided phone or audio tours
- Student Tours and Family Nights
- Heritage Keeper Korner - where area residents can record oral histories
- Videos to graphically tell the stories in a limited space
- Rotating exhibits to either cover area history not included in the permanent displays, or to more fully explore specific areas or topics, and the relationship of historical events and people to current social issues
- With increased exhibit space, OBHS will also be able to more effectively partner with other area cultural organizations to coordinate programming for maximum effectiveness across multiple venues

With the opening of the Museum, hours are expected to increase from 25 hours a week to 30 or 35. One additional paid staff person is expected to be added and additional volunteer Museum docents will be recruited.

## **2.) Provide Business Plan, Feasibility Study and Marketing Plan.**

The Ormond Beach Historical Society (OBHS) currently markets its facilities and programs through a variety of print, online, and social media, including a dedicated website (OrmondHistory.org), twice-monthly *History Happenings* e-newsletter (1354 subscribers with 50% open rate), posters at area institutions and businesses, flyers, postcards, rack cards, advertisements in local newspapers, Facebook, Instagram, Twitter, and multiple area visitor information (i.e. Daytona Convention & Visitors Bureau, Ormond Chamber of Commerce, Ormond Main Street), and media websites (i.e. Daytona News-Journal, Ormond Magazine, Ormond Observer, Hometown News). With the opening of the Ormond Beach Museum of History at the MacDonald House, new graphics and logos will be developed for print and online advertising. OBHS also plans to expand marketing beyond the local area to include state and national websites and platforms.

Partnerships and collaborations will be an important part of the Museum's plans. Collective partnerships help showcase the Museum as well as add a stronger presence to its programs. These include: **Tomoka State Park** with the presentation of **Old Florida Plantation Tours; Friends of the Hillside Cemetery** and **Pilgrims Rest Cemetery** where re-enactors tell stories in period costume; **ECHO Rangers** program in cooperation with **Volusia County, The Casements** and **Ormond Memorial Art Museum & Gardens; Starry, Starry Night Gallery Walk** utilizing **Museum Row** on Granada Boulevard with **The Casements, Ormond Main Street**, and **Ormond Memorial Art Museum & Gardens** for an evening of art and music; **So Long Summer Sip & Stroll**, a fundraiser presented with **Ormond Main Street** and local downtown restaurants. Festivals and events staged by Ormond Beach civic and cultural organization partners, as well as at all OBHS programs, including its Speaker Series, which attracts over 100 participants at monthly presentations, will present another opportunity to promote the Museum and its programming. In fact, at all of these events, the Museum will be advertised and marketed.

One of the main Museum goals will be to raise awareness of the City's core historical facilities: MacDonald House, Historic Anderson-Price Memorial Building, Three Chimneys Archaeology Site, Hotel Ormond Cupola, Pilgrims Rest Primitive Baptist Church, Historic New Bethel A.M.E. Church, the entire downtown historic district, as well as many others.

The MacDonald House currently serves as the City's Welcome Center and will continue to do so during the renovation and after the completion of the Ormond Beach Museum of History. Not only does the MacDonald House serve as a Welcome Center, it also provides rotating exhibitions (curated from Ormond Beach history), a small theater with videos of Ormond Beach History, and serves as an information center about cultural events in the area for residents and visitors alike. The Welcome Center function will serve as an important component of the marketing plan as a means of drawing out-of-town visitors to both the Ormond Beach Museum of History and to the entire Museum Row.

OBHS plans include a significant grand opening celebration with activities planned throughout the first year to introduce the new facility to both City and County residents. These will include sneak-preview events during construction, grand opening ceremonies and celebrations, special “inside the industry” tours aimed at area cultural organization staffs, teacher tours, and special student tours.

**3.) List a fee schedule or state “No fees will be charged” (schedule should include members, non-members, reduced prices, etc.)**

The Ormond Beach Historical Society is the only private, non-profit organization working to preserve and share the diverse history of Ormond Beach and it offers memberships to its supporters as follows: Individuals \$30; family \$50; small businesses and non-profits \$65; businesses \$100; heritage members \$100; life members \$1,000. These memberships, along with grants, fundraising and donations support annual operations. The fees for current programming vary by activity, but are uniform for all residents of Volusia County.

Members of the Society generally receive a 10% discount on programs. Children's programs (i.e. Dirt Detectives, Christmas at the Anderson-Price, Timucuan Pottery) are either free to all or have a low fee (i.e. \$2). Programs such as the annual Plantation Tours and Cemetery Tours have a uniform fee with discounts for members and children, and the revenue is shared with partner organizations (i.e. Tomoka State Park). The highly successful long running Speaker Series, which provides 8-9 programs on Florida history and culture each year, is free to all residents. Currently, the MacDonald House Welcome Center and Museum is free of charge for residents and visitors. The tentative fee schedule for the new Ormond Beach Museum of History would be: adults \$7.00; seniors (over 65 years) and active duty military \$5.00; children under 18 years free; and, free to OBHS members. The intent is to keep fees as reasonable as possible and any fees charged will be uniform for all Volusia County residents.

**4.) Describe Maintenance and Replacement Plan (including fund source and depreciation plan).** The City of Ormond Beach Leisure Services Department plans for the maintenance and repair of all City facilities through its annual budgeting process.

#### **4.2 FISCAL STABILITY**

##### **1.) Fill out Form 4.2 Business Information.**

<b>4.2 BUSINESS INFORMATION</b>				
<b>Operational funding for this organization</b>	<b>Prior Completed FY 18 - 19</b>	<b>Current FY 19 - 20</b>	<b>Projected FY 20 – 21</b>	<b>Next Projected FY 21 - 22</b>
<b>Fundraising, Memberships, Donations, etc.</b>	138,071	138,723	239,818	263,799
<b>County Grant(s)/Funds (other than ECHO)</b>	13,993	14,344	14,344	15,778
<b>Grant(s)/Funds - other (non county)</b>	26,644	22,921	22,921	25,213
<b>Cash Donations</b>	1,038	740	740	814
<b>TOTALS</b>	<b>179,746</b>	<b>176,728</b>	<b>277,823</b>	<b>305,604</b>
<b>Administrative Costs</b>	12,143	16,880	12,665	13,932
<b>Program Costs</b>	67,051	55,725	53,051	58,356
<b>Educational &amp; Educational Outreach Programs</b>	16,304	17,900	18,085	19,893
<b>Contractor Services (for this project)</b>	0.00	5,911	0.00	0.00
<b>Marketing &amp; Advertising</b>	7,886	12,306	10,111	11,122
<b>Payroll Total Expense</b>	62,829	73,342	124,042	136,446
<b>TOTALS</b>	<b>166,213</b>	<b>182,064</b>	<b>217,954</b>	<b>239,749</b>
<b>Number of Full-time Employees</b>	1	1	2	2
<b>Number of Part-time Employees</b>	1	2	2	2
<b>Volunteer Hours</b>	8,339	10,504	9,000	10,000
<b>Value of Volunteer Hours (@\$20 / hr.)</b>	166,780	210,080	180,000	200,000
<b>TOTALS</b>	<b>512,739</b>	<b>568,872</b>	<b>675,777</b>	<b>745,353</b>

2.) Has this organization defaulted on any grant in the past five years? If so, please explain.

The City of Ormond Beach has not defaulted on any grants.

#### **4.3 FINANCIAL AUDIT/REVIEW/AGREED UPON PROCEDURES**

1.) Insert the appropriate required documents listed in the Application Guide on page 31 & 32. *(Pages 138-147)*

#### **SECTION 5: SUPPORTING DOCUMENTS**

##### **NOT FOR PROFIT ONLY:**

- 1.) Attach official IRS letter granting Not-for-Profit 501(c)(3) status in Florida. *(OBHS Page 148)*
- 2.) Attach the organization's most recent Uniform Business Report (also referred to as an Annual Report) filed with the State of Florida, Divisions of Corporations.

##### **UNRESTRICTIVE OWNERSHIP OR UNDISTURBED USE OF FACILITY:**

- 1.) Attach unrestricted ownership/undisturbed use documentation unless the project is an acquisition of real property. Insert a letter of intent to sell from the owner for Acquisition Projects. *(Pages 149-177)*

You may provide further information to demonstrate how your program will benefit the citizens of Volusia County. Do not include any information already required in Sections 1 – 4.

**ATTACHMENT CHECKLIST: Please check your application before sending.**

The following items/documentation **must** be included with your application or your application **will not** be scored. All match sources must be secured and proof thereof submitted by the Application Deadline in the Application Review Calendar found [www.volusia.org/services/community-services/echo](http://www.volusia.org/services/community-services/echo).

**APPLICANT**

- ☒ ECHO Application, completed and signed
- ☒ Proof of ownership or copy of lease
- ☒ Mission Statement for Organization
- ☒ Form 1.6 – Certification of Information and Compliance, completed and signed
- ☒ Street Locator Map
- ☒ Site Plan
- ☒ Preliminary & Schematic Drawings
- ☒ Design & Development Documents
- ☒ Construction Documents
- ☒ Official Documentation of Match
- ☒ Business Plan
- ☒ Feasibility Study
- ☒ Marketing Plan
- ☒ Financial Audit Documents (listed in the Application Guide page 30)
- ☒ Not-for-Profits only: IRS Status Letter classifying Organization as a 501(c) (3) - (*For OBHS*)
- ☒ Restrictive Covenants or Statement agreeing to follow this requirement
- ☒ Other