



**2019/2020 GRANTS-IN-AID
STANDARD & EXCEPTIONAL GRANT APPLICATION**

TIPS & FORMAT

- ❖ Read the instructions thoroughly in the ECHO Application Guide for specific information on what is required in each section of this application. The ECHO Application Guide may be downloaded from the ECHO web page at <http://www.volusia.org/services/community-services/echo>.
- ❖ The ECHO staff may be contacted at 386-736-5955 for questions or requests.
- ❖ Answer everything in a clear and concise manner keeping in mind that the staff and the Grant Panel will not be familiar with the site or the project.
- ❖ Answer questions on the grant form inserting lines as needed.
- ❖ Insert attachments only when requested.
- ❖ Narrative answers must be in a type size of 12 point.
- ❖ Applicants must maintain the format and sequential order of SECTIONS and subject titles as presented in this application.
- ❖ Number the pages consecutively throughout the application regardless of the section.
- ❖ Respond to every question on the application. Do not write N/A; explain why the question does not apply.
- ❖ Do not include letters of support or a cover letter in your application.
- ❖ Contact the staff at 386-736-5955 if you need help with any of the questions.

SECTION 1 GRANT APPLICATION

GRANT APPLICATION FORM

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

Southeast Volusia Historical Society, Inc.

Address: (mailing) PO Box 968

City: New Smyrna Beach **State:** FL **Zip Code:** 32170

Address: (Applicant's physical address) 120 Sams Avenue

City: New Smyrna Beach **State:** FL **Zip Code:** 32168

Federal ID #: 59-2451690

Florida Not-For-Profit Corporation Charter # (IF applicable) 764802

Florida Dept. of Agriculture & Consumer Services Registration # (IF applicable) CH15210

2.) Resident County Council District of Project: District 3

3.) Contact Person:

Name: Greg Holbrook

Title: Executive Director

Telephone #: (386) 478-0052

E-Mail: nsmofhistory@gmail.com

4.) Project Title: New Smyrna Museum of History Renovation

5.) Project Location Address: 120 Sams Avenue

City: New Smyrna Beach

State: FL

Zip Code: 32168

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: Not Applicable
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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: \$0 **Mortgage at Closing:** \$0

Mortgage length: 0 years **Term ending date:** NA

Name and Address of Lien Holder: NA

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 | \$ 100,000 |
| ii. | Confirmed Match Funds | \$ 100,000 |
| iii. | Total Project Cost | \$ 200,000 |

12.) Mandatory Workshop was attended by: Greg Holbrook **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)

None. The Southeast Volusia Historical Society has not applied for or received any ECHO grants.

1.2 MISSION:

1.) Provide the Mission Statement for your organization.

The Southeast Volusia Historical Society (SVHS) was organized in 1982 with a mission to collect, archive, display, and make available to the public artifacts related to the Southeast Volusia County area. Through its operation of the New Smyrna Museum of History, the SVHS promotes interest in, and knowledge of, local history and culture from ancient time to the present and encourages the preservation of historical sites within Southeast Volusia County.

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.**

Architect: Gerard J. Pendergast, PLC; 221 Canal Street, New Smyrna Beach, FL 32168

General Contractor: Curtis Hodges; 620 S. Riverside Drive, New Smyrna Beach, FL 32168

Project Manager: Mark Rakowski; 120 Sams Avenue, New Smyrna Beach, FL 32168

Authorizing Official: Greg Holbrook; 120 Sams Avenue, New Smyrna Beach, FL 32168

Treasurer of the Board: Drury Mays; 120 Sams Avenue, New Smyrna Beach, FL 32168

President, Board of Directors: Gary Swanson; 120 Sams Avenue, New Smyrna Beach, FL 32168

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

The budget was prepared by Mark H. Rakowski, AICP, in conjunction with Curtis Hodges, Construction Manager, based on experience and general knowledge of the construction and development field. Mr. Rakowski has over 33 years of experience in the land development field including grant writing and construction management. He has been responsible for dozens of grant applications that included budgets for construction projects. Mr. Hodges has been a leading central Florida roofing contractor since 1978. Hodges Brothers, Inc. is a family-owned business specializing in residential, commercial, and industrial new construction roofing, replacement roofing and restorations.

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

The project team listed in 1.3(1) is complete.

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.**

Mr. Greg Holbrook, Executive Director, will be responsible for administering the grant and ensuring the terms of the grant contract are met, including grant related reports. He will serve as liaison with ECHO staff. Greg is the only paid employee at the Museum. He will dedicate 5% of his 32-hour workweek to the project.

Mr. Mark Rakowski, Land Planning Consultant and Board member, will serve as Project Manager. His responsibilities are to oversee the design, engineering and permitting of the project; he will serve as liaison between the Museum and the architect, general contractor, and vendors. He will work with the general contractor to ensure quality control, scheduling, and completeness through to final inspection. A minimum of 4-5 hours of Mr. Rakowski's time will be spent on this project each month. If more time is

needed, it will be contributed as volunteer time. He serves on the Grant Committee and the Endowment Trust Committee, is a certified community planner and a realtor.

Mr. Drury Mays, Treasurer and Board member, will review all project expenditures and purchases, process payment of all invoices, reconcile investment and bank statements, prepare financial statements and reports, and ensure that all accepted financial practices are met for accountability, reporting, and control. Mr. Mays also serves on the Grant Committee of the Board of Directors and is a member of the Endowment Trust Committee.

Mr. Tom Wright, Attorney and Board member, will be responsible for ensuring the administration of and adherence to all conditions of contractual agreements related to the project. Mr. Wright serves on the Grant Committee of the Board of Directors.

The Board of Directors is responsible for approval of and adherence to all conditions of contractual agreements. The Board has established a Grant Committee of Board members to meet weekly during the project period to assist with project oversight and ensure that the interests of the Museum are maintained in all design and construction decision making. The Grant Committee will work in cooperation with the Executive Director. A representative of the committee will give regular project progress reports at board meetings.

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.*

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: Greg Holbrook

Typed Name: Greg Holbrook

Phone Number: (386) 478-0052 Date: November 12, 2019

2. OFFICIAL WITH AUTHORITY TO CONTRACT FOR THE APPLICANT

Signature: Greg L. Holbrook

Typed Name: Greg Holbrook

Phone Number: (386) 478-0052 Date: November 12, 2019

3. CHIEF FINANCIAL OFFICER FOR THE APPLICANT

Signature: Drury Mays

Typed Name: Drury Mays, Treasurer

Phone Number: (386) 478-0052 Date: November 12, 2019

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

Signature: Gary E. Swanson

Typed Name: Gary Swanson

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

Meeting Date: October 14, 2019 **Phone Number:** (386) 478-0052

1.7 EXCEPTIONAL GRANT REQUESTS ONLY:

Maximum grant request is \$1,800,000.00 with distribution of up to \$600,000.00 for 3 consecutive years. The required match is 4:1. The time frame to complete construction is two years following the date of the last year funds are provided.

ANNUAL AMOUNT REQUESTED/MATCHED

	<u>ECHO Request</u>		<u>4:1 Match</u>
Grant Year #1	\$ 0	\$ 0	
Grant Year #2	\$ 0	\$ 0	
Grant Year #3	\$ 0	\$ 0	
TOTAL EXCEPTIONAL PROJECT:	\$ 0	\$ 0	

The Exceptional Project Applicant: ☐ Agrees ☐ Does not agree - to accept a grant award of \$400,000.00 for one year if an Exceptional Project Grant amount is not approved by the ECHO Grant Review Panel or the Volusia County Council.

Signature: _____
(Official with applicant signature authority)

Typed Name: NA

Title: NA

Phone Number: NA

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)**

The Southeast Volusia Historical Society operates the New Smyrna Museum of History in a 94-year-old building designated by the National Register of Historic Places as a contributing building to the New Smyrna Beach Historic District (April 16, 1990) and by the City of New Smyrna Beach as a local landmark historic building (March 10, 2004). Documentation of historic designations is included. The building sits on the site of the first public school in New Smyrna Beach and the building itself once housed the Post Office and later was used as offices by the City of New Smyrna Beach Utilities Commission. None of the renovations planned for this building will affect its historic landmark status. Indeed, the proposed improvements will enhance the historical representation of the building façade on the outside as well as increase accessibility to the public on the inside.

The proposed renovation of the New Smyrna Museum of History supports the following goals outlined in Volusia County Resolution 2000-156:

“ . . . encourages the preservation of significant archaeological or historic resources and the development, enhancement, and promotion of heritage tourism opportunities, experiences, and resources . . .

. . . fosters public memory and community identity by promoting and providing access to destinations and experiences associated with past events, peoples and places . . .

. . . encourages people to spend time in downtowns”

The SVHS offers numerous programs that promote interest in historical studies and historical sites, provide education for local residents and visitors about the broad history of the area, and encourage people to congregate for mutual benefit. Through exhibits, videos, interactive computer programs and a collection of artifacts, visitors to the NSMH learn about the Turnbull Settlement, the history of east coast surfing, and local British Colonial archaeological findings, and can use the museum’s rich collection of books, photos and papers to do historical research. The museum houses the Grange-Moore Archaeology Laboratory, a repository for Volusia County archaeological finds; museum volunteers participate in local digs and help monitor sites and findings; and university students serve as archaeology interns. Children’s programs engage the next generation of historians, provide a destination for youth-focused community groups, and supplement school curricula. Educational events for all ages, downtown walking and boat

tours, speakers and demonstrations spur continued interest in the area and promote heritage tourism. The SVHS participates in the Volusia County ECHO Rangers program that encourages families to engage in *Environmental, Cultural, Historical and Outdoor Recreational* opportunities and experiences. Special events like A Night at the Museum, the Annual Holiday Event, Pancakes in the Park, and historic marker dedications, are highly anticipated opportunities for the public to gather in downtown New Smyrna Beach to experience the museum.

The goals of the proposed project are as follows:

1) INCREASE MUSEUM BUILDING ACCESSIBILITY – The goal is to maximize use of the nearly 6,500 square foot historic landmark building at 120 Sams Avenue in New Smyrna Beach. It was converted to a museum in 2000 and renovated to meet all accessibility requirements including adding an elevator to the second floor. However, the second floor has been closed to the public and all public activities have been restricted to the first floor since 2016 when Hurricane Matthew destroyed the elevator. The ECHO grant will provide funding to replace the elevator with one that can withstand hurricane force winds. This will bring the building into ADA compliance and allow the museum to reopen the second floor to the public. Currently, the fully accessible first floor offers 1,500 feet of exhibit space and 2,950 square feet for offices, a gift shop, storage, restrooms and archeology lab space. With this grant, an additional 2,500 square feet on the second floor will be fully accessible for use by the general public, employees, and volunteers, regardless of their physical capabilities. This represents a 28% increase in space utilization.

2) EXPAND USER ACCESS TO MUSEUM COLLECTIONS – The goal is to allow every member, visitor, and volunteer full access to all of the museum's collections and resources. The majority (approximately 70%) of New Smyrna Museum of History visitors and volunteers are seniors, many of whom have mobility issues or concerns. The proposed project will make the museum more user friendly and ADA compliant. It will allow the public to have easy, safe access to the second floor which houses unique and important archives, collections and historical research resources as well as a community meeting room. The Sheldon Research Library (SRL), named for the local pioneer Sheldon family, is on the second floor. The SRL features a large collection of books, photos, and papers relevant to New Smyrna Beach and southeast Volusia County including a vast collection of the New Smyrna Beach News Observer on permanent loan to the museum. The SRL is recognized as a valuable academic resource and has been used by university faculty and students as well as state and national park personnel.

Currently, the research library is open by appointment and takes research requests through email and over the phone for those who are not local or who have limited mobility. Full accessibility to these resources will allow the SVHS to promote these resources more broadly. It is anticipated that the upstairs community meeting room will be used at least 18 times a year once the elevator has been installed. This represents a 100% increase in use over the last two years without a functioning elevator.

3) INCREASE USE OF THE COMMUNITY MEETING ROOM – Access to the second floor will enable the museum to reopen its community meeting room. The City of New Smyrna Beach deeded the building to

the SVHS in 1999 to be used as a historical museum and agreed to pay the monthly utility bills in exchange for allowing community groups to use the upstairs conference room for various functions and meetings at no charge. These programs have been limited without an elevator to the second floor.

The second floor meeting space can accommodate seating for up to 50 people. The room can be set up with tables, or with chairs only, for different sized groups. It is free to non-profit groups, community organizations, social clubs, and others. Prior to the hurricane, the room was used regularly by groups such as the Men's Garden Club, Friends of Canaveral Board of Directors, and the Coast Guard Auxiliary. Once the elevator is reinstalled, the community room will be widely promoted to museum members and the community. It is anticipated that each year, 6 groups will reserve the space 50 times (combined) and approximately 750 visitors will use it (duplicated).

4) IMPLEMENT SUSTAINABILITY MEASURES – The SVHS has implemented a number of building design elements and operational strategies that both reduce the impact of the museum on the environment and reduce environmental impact on the objects, artifacts, photographs and archival materials that are housed there. The Museum is undergoing a facility-wide transition from fluorescent to LED lighting. This will reduce electricity usage and UV light deterioration on objects and displays. All fixtures are slated to be updated or retrofitted for LED lighting by the end of FY 2021. Recently, the SVHS replaced the roof with one made of reflective material that lowers the temperature inside the building and replaced two air conditioning units with humidity-reduction units that meet museum standards for collection preservation.

The next step in reducing the carbon footprint of the Museum is part of this ECHO request. Six large windows on the north side of the building will be replaced with UV-rated, high impact glass. This will ensure a safer environment for museum exhibits and collections and will enhance long-term building preservation.

2.2 PROJECT DESCRIPTION

1.) Describe project and construction timeline.

The proposed project will accomplish three major elements of renovation on the historic landmark building at 120 Sams Avenue: 1) Install an elevator, 2) Replace six windows and 3) Stucco and paint the north side of the building to match the rest of the exterior. The renovations are designed to improve the functionality and appearance of the building without impacting its historic designation.

Installation of a commercial elevator will bring the building into conformity with Section 504 of the Rehabilitation Act of 1973 and with all applicable laws of the State of Florida. This includes Florida Statutes, Chapter 553, Building Construction Standards related to accessibility for handicapped persons, which formally incorporates the accessibility requirements of the Americans with Disabilities Act of 1990. The previous elevator was housed in a plexiglass shell that extended several feet out from the north side of the building on property owned by the SVHS. In 2016, hurricane-force winds made short work of the plexiglass and what was left of the

elevator had to be removed.

A local company, Residential Elevator Service, has provided specifications and pricing for a commercial platform lift to meet the needs of the Museum. The new elevator will be stronger, more stable, and able to withstand hurricane-force winds. The block structure housing the elevator will sit on an 8' x 8' concrete slab and will be sealed and waterproofed where it connects to the existing building. The elevator shaft will be 6'3" x 6'3" and 22' high. The inside of the elevator shaft will be finished with rigid insulation, drywall and paint. Two windows on the street-facing side will allow light into the structure. To ensure that it blends with the museum façade, it will be stucco-ed and capped with a Spanish barrel tile, hip roof.

The elevator, a vertical wheelchair lift, will meet all electrical and wiring safety and functionality standards and will have lighted controls with a key switch. The elevator will have a stationary ramp with anti-skid power coat and both lower landing and top landing gates with mechanical interlocks that release only when the platform is at the appropriate landing. It will move at a maximum speed of 10 feet per minute with a 750 lb. weight limit.

Six windows on the north side of the building will be replaced with energy efficient, high impact glass. The current 35" x 48" non-standard, aluminum windows were installed in the 1960s. The window frames are damaged, the sills slant in the wrong direction, and water leakage is causing inside sills and walls to peel, crack, and warp. The six windows will be replaced with double insulated, fixed impact glass, framed with a "period" look to fit in with the age of the building. The panes will be tinted with metal-free, corrosion resistant film that reduces heat, glare and harmful UV rays. The new windows also will reduce sound and increase security of the building and its historical collections. Damage on the inside of the windows will be repaired.

Once the elevator has been installed and the windows have been replaced, the entire north side of the building will receive a stucco treatment that will match the stucco on the front of the building. This will enhance the historic look of the building, especially the "street view". The stucco will cover scars, marks and impressions from previous renovations where windows and doors were enclosed, reduced or removed. Mismatched stucco patterns will be corrected with a uniform stucco application that will greatly improve the aesthetics of the building.

To complete the project, the area on the north side of the Museum building will be landscaped with low-maintenance grass, shrubs and trees. It will be regraded to create a slight swale to improve drainage and prevent water back-up.

The timeline for the project is 9 months, beginning with permitting applications and construction bids in May 2020. Construction of the elevator, replacement of the windows and stuccoing of the north wall of the Museum will be completed by the end of December 2020. The final steps are landscaping and inspections which will be completed by the end of January 2021. Full access to the public will be available by February 1, 2021.

Description	PSC/IK	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan
General Reqs.	\$39,500									
Arch. Services	\$12,000	\$3,000								
Temp. ECHO sign		\$500								
Install Elevator			\$86,600							
Install Windows							\$11,800			
Stucco Building								\$36,200		
Exterior Finishes									\$6,900	
Landscaping										\$2,500
Perm. ECHO sign										\$1,000

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?** As mentioned in 2.1, the SVHS has conscientiously endeavored to both reduce the impact of the museum on the environment and reduce the environmental impact on its historical collections. The roof has been replaced with one made of reflective material that lowers the temperature inside the building and two air conditioning units were installed with humidity-reduction capabilities that meet museum standards for collection preservation. **Environmental elements and sustainability standards** have been incorporated into the proposed project’s construction material, equipment, and finishes including stucco and paint. The elevator shaft will have windows to allow natural light into the space, the elevator itself will be energy-star approved with motion-sensor fluorescent/LED lights. Outdoor paints, sealants, and stucco will be weather resistant; indoor finishes will have low VOC emissions.
- ii. The operational phase?** **Green operational strategies and practices** will reduce environmental impact after the project is complete. Landscaping on the north side of the building will be xeriscaping with drought-tolerant, heat-resistant native plants. This will promote water conservation and require little to no maintenance. The museum will continue to look for ways to be more energy efficient and to recycle and reuse materials throughout its facility and daily operations

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

All three elements of the project will be completed and the second floor of the ADA compliant museum will be physically open to the public by February 1, 2021.

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

Once the goals of this grant application have been achieved (Phase I), the SVHS board will turn its attention to **Phase II, maximizing the layout and design of the space within the building**. The goal of

Phase II will be to offer permanent and temporary museum exhibits that make visitors feel like they are part of history and provide a unique way to learn and experience. This will require a realignment of exhibit space to create interest, flow and focus. Moving administrative offices and research space upstairs will allow the museum to break larger exhibits into smaller sections, use walls more creatively and lay out exhibits in ways that tell a story as visitors move from one section to another. Signs and graphics will enhance historical exhibits while new interactive displays immerse visitors in a different time period. The entrance to the Museum and the gift shop will be reconfigured to better accommodate retail inventory and display space and enhance the Museum's ability to generate revenue. Moveable walls, new flooring, and specialized lighting will provide opportunities for green design and increased sustainability. **The SVHS intends to submit a grant to ECHO in 2020 requesting funds for Phase II.**

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	\$4,500	\$0	\$0	\$0	\$4,500	\$0	\$4,500
Contractor Fees	\$0	\$0	\$30,000	\$0	\$30,000	\$0	\$30,000
Project Manager Fees	\$0	\$0	\$5,000	\$0	\$5,000	\$0	\$5,000
Subtotal	\$4,500	\$0	\$35,000	\$0	\$39,500	\$0	\$39,500
Architectural Services:							
Consultant Services	\$0	\$0	\$3,000	\$0	\$3,000	\$0	\$3,000
Final Construction Drawings	\$0	\$0	\$12,000	\$0	\$12,000	\$0	\$12,000
Subtotal	\$0	\$0	\$15,000	\$0	\$15,000	\$0	\$15,000
Site Construction:							
Earthwork- Excavation, remove excess dirt and debris; regrade easement to improve drainage	\$3,700	\$0	\$0	\$0	\$3,700	\$0	\$3,700
Permit Fees	\$1500	\$0	\$0	\$0	\$1,500	\$1,500	\$3,000

CHART 3.1: CONSTRUCTION PHASE EXPENDITURES							
<i>ADD ROWS AS NEEDED</i>	UC +	LM +	In-Kind	PSC	= Match	ECHO	Total
Electrical - Dedicated telephone service and wiring connections, lighting and electrical power service for elevator	\$1,500	\$0	\$0	\$0	\$1,500	\$500	\$2,000
Concrete - Footers and concrete slab for elevator	\$2,800	\$0	\$0	\$0	\$2,800	\$2,000	\$4,800
Concrete - 3 block walls, 6'3" x 22' high, for elevator shaft; steel-reinforced, poured, bolted into wall with epoxied dowels embedded 4" into exterior wall	\$0	\$0	\$0	\$0	\$0	\$17,200	\$17,200
Finishes - Elevator shaft interior wall studs, insulation, fire-retardant drywall	\$0	\$0	\$0	\$0	\$0	\$6,300	\$6,300
Construction - Hip roof framing for elevator shaft with prefabricated roof trusses, plywood; barrel tile roof labor and materials	\$0	\$0	\$0	\$0	\$0	\$11,600	\$11,600
Conveying System - Vertical wheelchair lift	\$0	\$0	\$0	\$0	\$0	\$29,100	\$29,100
Windows - 2 in elevator shaft, 6 on north side of building; fixed	\$11,300	\$0	\$0	\$0	\$11,300	\$2,500	\$13,800

CHART 3.1: CONSTRUCTION PHASE EXPENDITURES							
<i>ADD ROWS AS NEEDED</i>	UC +	LM +	In-Kind	PSC	= Match	ECHO	Total
impact glass, tinted, double insulated with bronze frame; repair exterior window frames							
Masonry - Stucco texture on elevator and north side of building to match front of building; remove and reinstall existing eave drip along roofline	\$0	\$0	\$0	\$0	\$0	\$21,900	\$21,900
Paint - Exterior of building	\$17,000	\$0	\$0	\$0	\$17,000	\$1,000	\$18,000
Finishes - replace gutter and exterior lights; drywall, caulk and paint inside sills of windows; window coverings	\$2,200	\$0	\$0	\$0	\$2,200	\$5,400	\$7,600
Landscaping	\$2,500	\$0	\$0	\$0	\$2,500	\$1,000	\$3,500
Subtotal	\$42,500	\$0	\$0	\$0	\$42,500	\$100,000	\$142,500
ECHO Signage:							
Temporary	\$500	\$0	\$0	\$0	\$500		\$500
Permanent	\$2,500	\$0	\$0	\$0	\$2,500		\$2,500
Subtotal	\$3,000	\$0	\$0	\$0	\$3,000	\$0	\$3,000
PROJECT TOTALS	\$50,000	\$0	\$50,000	\$0	\$100,000	\$100,000	\$200,000

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

On October 14, 2019, the Board of Directors of the Southeast Volusia Historical Society passed a resolution to submit a grant application to ECHO for building renovation and to provide cash match as required. The November 2019 bank statement for the SVHS checking account shows that \$50,000 in matching funds is currently available.

ii. ☐ Copy of signed resolution including pledged dollar amount, project name and dates the funds will be available – NOT APPLICABLE

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). – NOT APPLICABLE

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.

The following in-kind services/donations were provided to the SEVHS/New Smyrna Museum of History project **prior to submission** of this ECHO application.

- Gerard J. Pendergast, Architect, provided \$12,000 in architectural services at fair market value prior to the ECHO due date. This includes schematic drawing, design development, and final construction drawings. Documentation is attached.

ii. ☒ Future in-kind donations must have notarized letter from donor describing items/services and value of such.

The following in-kind services will be donated to the SEVHS/New Smyrna Museum of History project **after grant award**:

- Curtis Hodges, General Contractor, will provide construction management services estimated at \$30,000 fair market value at no cost to the proposed project. A notarized letter from Mr. Hodges is provided.

- Mark Rakowski, Project Manager, will provide \$5,000 in services. This is equivalent to 40 hours at his current billing rate of \$125. A notarized letter is provided.
 - Gerard J. Pendergast, Architect, will provide \$3,000 in architectural services at fair market value after the grant award. This will include consultation with the project manager and general contractor as well as updates or changes to drawings as needed. A notarized letter from Mr. Pendergast is provided.
- 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. -- NOT APPLICABLE**

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 – NOT APPLICABLE**
- ii. ☐ **Copy of appraisal (property appraisal assessment or recent outside appraisal) – NOT APPLICABLE**

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.**

This project will provide the SVHS with opportunities to enhance its programs for the community, enable more community organizations to use the Museum space, and increase access to historical documents and artifacts for both personal and academic historical research. Additional programming will be possible when the second floor is reopened to the public. More community groups will use the Museum for meetings and social gatherings. Access to the second floor also will increase opportunities for volunteers to serve the Museum. When the Sheldon Research Library and other Museum archives can be reached by elevator, volunteers who have mobility issues will be able to review, catalog, and preserve artifacts and resources and help visitors with research questions.

The SVHS anticipates that membership, individual and group visits, and attendance at programs and special events will increase approximately 5% per year once the project is completed.

Additional staff will not be required as a result of this project.

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

BUSINESS PLAN

SOUTHEAST VOLUSIA HISTORICAL SOCIETY

VISION

The Southeast Volusia Historical Society will be the primary resource for historical knowledge, archaeological preservation, and cultural interest about Southeast Volusia County.

Goals

- Make the New Smyrna Museum of History known and open to the widest number of people possible.
- Serve as a catalyst for sustained interest in local history and culture.
- Enhance, preserve, interpret and display the Museum's collection of artifacts and historical documents.
- Preserve and maintain the museum building while providing safe and memorable experiences for visitors.
- Increase attendance and membership of new and diverse audiences.
- Operate in a financially sound manner through wise investing, sound stewardship, and expanded revenue sources.

STRATEGIES

- Improve visibility and accessibility through programming, special events, and online marketing.
- Continue to inventory, research ownership, and catalog all elements of the Museum's collection.

- Develop new exhibits that can be easily interchanged and/or used for outdoor event displays.
- Increase operational efficiencies and enhance resource and space utilization by applying for an ECHO grant.
- Create partnerships with environmental, cultural, heritage and other non-profit organizations to enhance programming and expand audiences.
- Increase profitability of fundraisers, gift shop sales, special events, and annual memberships.

ACTION PLAN

- February – March 2019 Hire grant writing consultant to research funding sources and opportunities for the Museum.
- April – June 2019 Convene SVHS Grant Committee to discuss needs for the Museum and strategize funding opportunities identified through funding source research.
- July 2019 – December 2019 Prepare ECHO grant application to address urgent and important need for new elevator and replacement windows.
- April 2020 – January 2021 Upon award of ECHO grant and Notice to Proceed, complete architectural designs and construction drawings, apply for permits, complete project according to the approved budget and timeline.
- February 2021 – Grand opening of the Museum elevator.

FEASIBILITY STATEMENT

NEW SMYRNA MUSEUM OF HISTORY RENOVATION PROJECT (PHASE I)

BACKGROUND

The Southeast Volusia Historical Society was established in July 1982 by a group of local citizens to “promote a formal means by which individuals interested in historical studies in Southeast Volusia may congregate for mutual benefit.” The SVHS uses the New Smyrna Museum of History as its vehicle for educating locals and visitors, both children and adults, about the broad history of the southeast Volusia County area. The Museum is open Tuesday through Saturday and is staffed by unpaid, docent volunteers. Visitors are welcomed with no admission fee charged. The City of New Smyrna Beach donated the property located at 120 Sams Avenue to the SVHS in 1999 with the condition that it be used as a museum and that a community room be made available for public use. At that time, the 94-year old historic building was restored with support from the Florida Department of State and the City of New Smyrna Beach. Renovations, including an elevator to the second floor, brought the building into compliance with ADA requirements. In 2016 Hurricane Matthew destroyed the elevator, causing the Museum to close the 2nd floor to the public. This has limited public access to historical resources and artifacts and discontinued free use of the community meeting room.

SERVICES SUMMARY

The proposed renovation project, Phase I of two phases, will install an elevator, replace six aluminum windows, and refinish the north side of the building with stucco that reflects the period and style of the original building. These improvements will ensure ADA compliance, allow the Museum to re-open the second floor to the public, and increase the safety and energy efficiency of the building as well as its ability to withstand hurricane-force winds.

TECHNOLOGY

The elevator will meet all standards for safety and functionality including electrical and wiring requirements. It will move at a maximum speed of 10 feet for minute and will have standard lighted controls for moving up and down as well as a key switch control.

MARKET ENVIRONMENT

The Museum's primary market audience includes residents of Volusia County (population 547,538), visitors from surrounding counties (Flagler, Brevard, Seminole, Orange) and other tourists. The Museum had more than 11,000 admissions in 2018 and 500 members.

Approximately 70% of those who visit and/or volunteer at the Museum are seniors. Most of the children who attend the Museum do so as part of organized school or group field trips. The new elevator will enable seniors, parents with strollers, and others with mobility issues to use the resources on the second floor.

COMPETITION

The New Smyrna Museum of History is one of two history museums in New Smyrna Beach. It is located in the historic district of Canal Street and is listed on Trip Advisor as #2 of 72 things to do in NSB. The Museum's excellent reputation among online review sites is reflected in 80% of its 159 reviewers giving it 5 stars (excellent) and 96% giving it 4+ stars (very good to excellent). The Museum has been awarded a Trip Advisor Certificate of Excellence for five consecutive years. The Museum is looking for opportunities to partner with the other museum, the Black Heritage Museum, on events, special programming and fund-raising.

BUSINESS MODEL

The SVHS, a 501c(3) not-for-profit organization, operates through a combination of philanthropic giving; earned income from memberships and retail sales, fundraisers, government and foundation grants, sponsorships and investment income. Annual memberships can be purchased by anyone and include a range of options and benefits, from an individual membership (\$35) to a benefactor membership (\$500). A lifetime membership can be had for \$2,000. Each level of membership includes benefits such as a subscription to the monthly e-newsletter, invitations to regular programs, tickets for special fundraising events, and/or a discount in the gift shop.

MARKETING STRATEGY

The goal of the SVHS marketing plan is to increase awareness and visibility of the Museum and all that it has to offer. Featured exhibits, programs and services are broadly marketed in print and electronically through email, the Museum website, and social media.

OPERATIONS

The new elevator, replacement windows and refinishing of the north wall of the building will have minimal impact on Museum operations. No additional staff will be required. The project manager will coordinate with the construction manager to minimize disruptions to visitors and their access to exhibits. Some exhibits may be closed for short durations or relocated. Costs related to maintenance of the elevator will be absorbed by the Museum's operating budget.

PERSONNEL

No additional personnel will be needed for the project.

TIMING CONSIDERATIONS

- April – June 2019 Convene SVHS Grant Committee to discuss needs for the Museum and strategize funding opportunities identified through funding source research.
- July 2019 – December 2019 Prepare ECHO grant application to address urgent and important need for new elevator and replacement windows. At the time the application is submitted, architectural drawings will be complete. All matching funding for the project will be in place and the Museum will be ready to begin the project.
- April 2020 – January 2021 Upon award of ECHO grant and Notice to Proceed apply for permits, complete project according to the approved budget and timeline. The project timeline from start to finish is 9 months.
- February 2021 – Grand opening of the Museum elevator.

FINAL RECOMMENDATION

The proposed renovation is a viable capital project for the Museum with little to no risk. The \$200,000 project (\$100,000 ECHO funds and \$100,000 matching funds) will provide many benefits to the organization and its visitors.

MARKETING PLAN

SOUTHEAST VOLUSIA HISTORICAL SOCIETY

MARKETING GOAL

Make the New Smyrna Museum of History exhibits, programs, and events known to the widest number of people possible.

OBJECTIVE

Drive awareness, participation and interaction through targeted use of print, electronic and social media.

STRATEGIES

- Provide print materials free of charge to guests and visitors including Museum brochures, membership materials, flyers, and “rack cards”.
- Use emails to members, a monthly e-newsletter, and the Museum website to drive awareness and interest in upcoming exhibitions, events and programming.
- Use social media (Facebook, Twitter, Trip Advisor, etc.) to increase interactions and obtain feedback from visitors and potential visitors.

The Museum will continue to update existing print material and create new brochures, rack cards, and flyers. Partnerships with other local non-profits provide opportunities to display print materials and distribute them to new audiences.

The use of Constant Contact allows the Museum to send information to members then track information related to those emails – what emails are opened, what subject lines create the most interest, what time of day is best for sending messages, whether hyperlinks are being used, and more. These reports allow the Museum to tailor emails to appeal to recipients and maximize the medium. More than 1,000 people

currently subscribe to the monthly e-newsletter. In 2018 a new and greatly improved website was launched. The new website continues to bring additional visitors to the museum and other programs.

Trip advisor is monitored for comments and suggestions and provides an opportunity to reply to reviews and feedback. This lets visitors know they – and their reviews - are appreciated. Social media accounts are kept fresh and replies are given to visitors' comments, posts and suggestions. The number of Facebook "likes" continues to grow and more than 1,400 people follow the Museum on Facebook. The Museum's Twitter following has grown to 190.

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

No fees will be charged. Admission to the museum is free. This includes access to all exhibits, monthly community lectures, and the Sheldon Research Library for both members and non-members, children and adults. Donations are encouraged in lieu of an admission fee, however, there is no set donation charge. If a visitor is unable to donate they are still welcome to visit, stay as long as they would like, and receive the same courtesies as a visitor who does donate.

4.) Describe Maintenance and Replacement Plan (including fund source and depreciation plan).

Addressing the credibility and stability of its finances is crucial to the achievement of future goals. To this end, the SVHS Board of Directors established an Investment Policy Statement (IPS) in 2016 to define how funds acquired by the SVHS are held for future use. The policy established a Museum Maintenance and Reserve Fund separate from the organization's other financial and investment funds. The IPS gives guidance to the Board's treasurer for holding or disbursing donations in excess of \$1,000 so that the Museum Maintenance and Reserve Fund is adequately funded. The Board receives monthly updates regarding the balance of the fund as part of the monthly financial report. This ensures that funds are available when needed for building maintenance and upgrades. Decisions to spend reserve account funds are made by the Endowment Trust Committee comprised of Board members.

The SVHS does not anticipate additional operating expenses related to this project other than an annual inspection and routine maintenance of the elevator. This expense, approximately \$500 a year, will be absorbed within the Museum's current operating budget so that new revenue or funding will not be needed. The Museum will enter into an annual maintenance contract to ensure the longevity of the system and reduce the need for costly repairs and service calls. The elevator equipment will be depreciated per recognized accounting practices.

Each year, the SVHS conducts fund-raising events to increase its endowment fund, building maintenance fund and specific purpose funds. If repairs or additional expenses occur that are greater than anticipated, the Board will authorize funds from one of these accounts to cover the cost.

4.2 FISCAL STABILITY**1.) Fill out Form 4.2 Business Information.**

4.2 BUSINESS INFORMATION				
Operational funding for this organization <small>Click or tap here to enter text.</small>	Prior Completed FY 17 - 18	Current FY 18 - 19	Projected FY 19 – 20	Next Projected FY 20 - 21
Fundraising, Memberships, Donations, etc.	\$23,935	\$30,568	\$35,000	\$40,000
County Grant(s)/Funds (other than ECHO)	\$9446	\$8,519	\$9,000	\$9,000
Grant(s)/Funds - other (non county)	\$6,300	\$11,300	\$106,300	\$111,300
Cash Donations	\$17,254	\$17,500	\$18,000	\$19,000
TOTALS	\$56,934	\$67,887	\$168,300	\$179,300
Administrative Costs	\$5,229	\$5,700	\$6,000	\$6,250
Program Costs	\$550	\$950	\$1,100	\$1,200
Educational & Educational Outreach Programs	\$250	\$250	\$400	\$500
Contractor Services (for this project)	\$0	\$0	\$0	\$0
Marketing & Advertising	\$2,051	\$1,700	\$1,800	\$1,900
Payroll Total Expense	\$23,077	\$32,295	\$35,500	\$38,000
TOTALS	\$31,228	\$40,895	\$44,800	\$47,850
Number of Full-time Employees	1	1	1	1
Number of Part-time Employees	0	0	0	0
Volunteer Hours	7755	6885	6950	7000
Value of Volunteer Hours (@\$25.43 hr.)	\$197,210	\$175,086	\$176,739	\$178,010
TOTALS	\$259,665	\$256,876	\$266,339	\$273,710

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

The Southeast Volusia Historical Society 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.**

A letter regarding Agreed Upon Procedures is provided on the following pages along with a Month End Financial Statement.

SECTION 5: SUPPORTING DOCUMENTS**NOT FOR PROFIT ONLY:****1.) Attach official IRS letter granting Not-for-Profit 501(c)(3) status in Florida.**

The IRS letter is attached.

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.

The Annual Report is attached

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.**

Proof of ownership of the building and the land is provided through two deeds. The first one is the original fee simple deed for the property from the City of New Smyrna Beach to the SVHS in 1999. The second document is a fee simple deed for the space to the north of the building occupied by the elevator and air conditioning system. This deed was executed in 2001 to clarify access to the north side of the building to maintain the elevator and to provide access to the building for maintenance. A survey of the land was done in 2017 showing both tracts.

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.

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)
- ☒ Restrictive Covenants or Statement agreeing to follow this requirement
- ☒ Other