

ORANGE COUNTY TOURIST DEVELOPMENT TAX GRANT APPLICATION FORM AND INSTRUCTIONS (EVENTS)

INTRODUCTION

The purpose of this document is to allow applicants to seek excess Tourist Development Tax (TDT) funding to attract and promote events held in Orange County, Florida. Please be aware that excess TDT funding for new events and projects is **NOT** always available due to pre-existing funding commitments and changing TDT collections from year to year. ***Interested groups should check <https://netapps.ocfl.net/arctdtgrants/> to confirm that excess TDT funding is currently available before submitting an application.*** This application is an evaluation tool only, and despite availability of funds at any given time, the County is not obligated to fund any event or events at any time.

The Orange County Board of County Commissioners (County or Board) in consultation with the Orange County Tourist Development Council (TDC) has goals for the use of TDT for events to: 1) ensure compliance with Florida TDT statutorily allowed uses, 2) support events that enhance the County economy by raising the profile of the community, attracting overnight visitors, and promoting the Orange County economy including the vital tourism industry, and 3) provide partnership funding to events that best use the TDT funding in connection with funding from other partners to deliver the proposed event's economic and/or promotional benefits. This application is a tool to evaluate the likelihood that proposals from event sponsors will be able to best achieve the goals for TDT funded events.

The use of Florida TDT is governed by Section 125.0104 of the Florida Statutes. Also, the related Orange County Tourist Development Plan is in Section 25-140 of the Orange County Code. Events approved for TDT funding that are not currently contemplated in the Tourist Development Plan will require the County to amend the Tourist Development Plan by ordinance.

The County has had a past preference for governmental and non-profit events and sponsorship groups, events with a demonstrated track record and verifiable metrics, sponsorship groups that can make a compelling presentation of the event's ability to help achieve the County goals as set forth above, and events that have a well-defined post-event process to confirm the results. The BCC and/or TDC may request further information or clarifications related to information in the application or for issues that arise during the evaluation. Successful applicants will be required to enter into a funding agreement with the County setting forth the terms, conditions, timelines, and deliverables associated with receiving TDT funding from Orange County. A funding process can take several months or more so please plan accordingly.

This application is for any event seeking excess TDT funds that may become available from time to time. The County also has an existing Tourist Development Plan priority to budget TDT funds annually for events and facilities promoting Cultural Tourism in Orange County. The Cultural Tourism funding for events is through a separate competitive process and application process and events sponsors can learn more about the Orange County Cultural Tourism process at: <http://orangecountyfl.net/CultureParks/FundingOpportunities.aspx>

Conventions, trade shows, and meetings are contracted through the Orange County Convention Center (OCCC) staff, or through **Visit Orlando** which is the local destination marketing organization.

For consideration by the Orange County Board and the Orange County TDC, please ensure that the below sections are completed in their entirety:

Section 1 PRELIMINARY INFORMATION	
Company/Organization	
Address	
City	
State	
Zip Code	
E-mail Address	
Authorized Agent Name	
Authorized Agent Title	
Contact Person Name	
Contact Person Title	
Work Phone	()
Home Phone/Cell Phone	() FAX ()
Event/Project Website	www.
Do any employees of your organization work in any capacity for Orange County government? (Any unresolved conflict of interest or conflict not reported in advance may result in termination of funding). Learn more about ethics at http://www.ethics.state.fl.us/ and at http://www.orangecountyfl.net/Portals/0/resource%20library/vendor%20services/Vendor%20Ethics%20Policy.pdf . Learn about the County lobbying ordinance at: http://www.orangecountyfl.net/OpenGovernment/LobbingAtOrangeCo unt unty.aspx	COPY

Section 2 EVENT / PROJECT INFORMATION	
Event/Project Name	
Event/Project Location	
Sponsoring Organization/Name	
Event/Project Description	
Event Date Begins (MM/DD/YY)	
Event Date Ends (MM/DD/YY)	
Is this a non-profit organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Tax Code Status	
Is this organization tax exempt?	<input type="checkbox"/> Yes <input type="checkbox"/> No
What is your Federal ID# as it appears on Form W-9?	
If your delegates are exempt from paying hotel occupancy tax, please explain.	
THIS SECTION TO BE COMPLETED BY COUNTY STAFF Category New Event Recurring Event Signature Event	<input type="checkbox"/> Professional Sporting Event <input type="checkbox"/> Amateur Sports Event <input type="checkbox"/> Special Event <input type="checkbox"/> Equestrian Center Event <input type="checkbox"/> Festival <input type="checkbox"/> Other <input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> YES Number of Years: <input type="checkbox"/> NO <input type="checkbox"/> YES Number of Years: <input type="checkbox"/> NO
Event History Please provide the past five (5) years number of room nights attributable to this convention, conference, program or event including: 1) City event held 2) Date/month/year of event 3) Hotel(s) 4) Number of room nights for each 5) Number of Attendees For sporting events: 6) Number of athletes/participants? 7) Attendee/participant expected length of stay 8) Please provide room night and attendance calculation methodologies and confirmation in the form of surveys, audits, room contracts or receipts, ticket sales or other verification methods.	1) 2) 3) 4) 5) 6) 7) 8)
What are your target audiences?	
What is your projected attendance (include local participants, non-local participants and guests? "Local" defined as Florida Counties:	

Orange, Osceola, Lake, Polk, Brevard, Seminole, Volusia	
Attendee Origin (Local, Non-local In-State / Out of State) Percentage	Local: _____% Non-Local In-State: _____% Out of State: _____%
Do contracts include hotel room night rebates? If yes, amount of rebate per room night.	<input type="checkbox"/> YES \$ <input type="checkbox"/> NO
Minimum number of room nights you can guarantee to bring to Orange County?	
How do you intend to provide a valid estimated count of attendance and room nights at this year's event? Consider verification methods set forth in response #8 under Event History above.	
Total participants/attendees/athletes expected for this event	
Total amount of grant funding being requested from the County TDT for this event	\$
Intended Use of Funds (Please see attached "TDT Application Additional Information and Clarifications sheet") Note: Please remember to attach itemized expenditures to be funded by this grant. If funding is for advertising, detail the media and/or publication(s) which will be used. Attach a complete pro forma budget for the event including a listing of all anticipated funding sources and expenditures. Will you be partnering for promotion with Visit Orlando or another local agency or group?	
List <u>ALL</u> other <u>actual</u> or <u>potential</u> city/county/state/federal funding sources for this event including: Visit Orlando Visit Florida Central FL Sports Commission Parks & Recreation Department, Department of Cultural Affairs, Orange County Cultural Tourism Etc. <u>Failure to disclose other funding sources may result in</u>	

<u>denying future TDT funding of events.</u>	
List all other non-governmental contributors, sponsors, and sources of funding for this event other than government funding provided above and the TDT from Orange County. <u>Failure to disclose other funding sources may result in denying future TDT funding of events.</u>	
What additional sources of funding have you sought or do you intend to seek outside of those listed above? <u>Failure to disclose other funding sources may result in denying future TDT funding of events.</u>	
List past Florida TDT funding (to include each year with Florida County, amount requested, amount granted, amount spent, and purpose).	
If your event generates a revenue surplus, would you be willing to return all or a portion of the TDT funding to the County? Please explain your answer.	<input type="checkbox"/> Yes <input type="checkbox"/> No

Section 3 PROJECT/EVENT DETAILS	
In this space, please give details on your project or event so the Tourist Development Council can evaluate the economic impact on the county. Include in your narrative projected numbers of attendees, hotel rooms needed, and other beneficial tourism metrics..	
What are your marketing, media, and advertising plans (local, regional, national, and/or international)? Will you be partnering for marketing, media, and advertising with Visit Orlando or another local agency or group?	Visit Orlando / Experience Kissimmee / Orlando North CVB Approval: <input type="checkbox"/> YES \$ <input type="checkbox"/> NO

Please provide a full Security Plan (pro forma) as it relates to the need for private security or public/law enforcement availability	
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Section 4 PROJECT BUDGET RECAP		
Applicants can use other forms of Budget they may already have from accredited sources, so long as the information below is provided at a minimum		
Tourist Development Tax Request	\$	
Contributors, sponsors and other funding sources (include in-kind) <u>Failure to disclose other funding may result in denying future TDT funding of events.</u>		\$
		\$
		\$
		\$
		\$
		\$
TOTAL CONTRIBUTOR/SPONSOR FUNDS	\$	
Other income sources (i.e. registration fees, ticket sales, concessions, vendor sales)	Room Night Rebates	\$
		\$
		\$
		\$
		\$
		\$
TOTAL OTHER INCOME	\$	
TOTAL INCOME	\$	

Section 5 EXPENSES		
Applicants can use other forms of Budget they may already have from accredited sources, so long as the information below is provided at a minimum		
Please list ALL event expenses and indicate which items will utilize TDT funds		=\$
		=\$
		=\$
		=\$
		=\$
		=\$
TOTAL EXPENSES	\$	

For consideration by the County and TDC, please ensure that the following items are attached to this application:

- Articles of Incorporation (except government entities);
- Tax ID or IRS letter of non-profit tax-exempt status
- TDT Final or Interim Report (for previous TDT grantees only);
- Written authorization for AUTHORIZED AGENT to act on behalf of Applicant;
- Organizational outline, including but not limited to names and addresses of each board member and corporate officer (except government entities);
- Sponsorship package;
- Complete project event budget;
- Three support documents (letter of recommendation, programs, brochures, media articles, etc.); and
- All written agreements involving media, hotels/motels and venue contracts/leases.
- Please provide any applicable financial feasibility and pro forma documentation for this project/event

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**Section 6
CERTIFICATIONS**

I have reviewed this GRANT APPLICATION hereby submitted to Orange County. I am in full agreement with the information contained in this application and its attachments as accurate and complete. I further acknowledge my understanding that the County in making a grant for special promotions or other purposes does not assume any liability or responsibility for the ultimate financial profitability of the event for which the grant is awarded. The County, unless otherwise specifically stated, is only a financial contributor to the event and not a promoter or co-sponsor, and will not guarantee or be responsible or liable for any debts or financial liability incurred for or arising from such event. All third parties are hereby put on notice that the County will not be responsible for payment of any costs or debts for the event that are not paid by the grant applicant.

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I understand the above guidelines and agree to comply with them. I understand full receipt of grant funding is based upon the organization's compliance with all regulations.

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Authorized Agent

Title

Authorized Agent Signature

Additional Information and Clarification

Grant Impact, Support & Bidding:

1. Events generating more local exposure, more in non-local economic impact and more bed nights, better meet some goals for TDT funding and may be more favorably evaluated than events that do not. .
2. Event applicants may be required to give a presentation to Tourist Development Council at a regularly scheduled TDC meeting and also may be required to present to the Board as well. Please contact the Convention Center staff or the TDC liaison for a meeting schedule.
3. The applicant is required to list other financial support in addition to the requested TDT grant.. Events that bring higher levels of partnership funding to leverage any TDT funding better meet the goals for TDT funding and may be more favorably evaluated than events that do not.
4. Securing events by a bid remains the standard; however created or contracted events may be eligible.

The following requirements must be met in order to disburse funds:

1) The Grantee will expend funds in accordance with allowable expense items as indicated in the funding agreement:

Allowable Expenses:

- a. Promotion, marketing & programming
- b. Paid advertising & media buys
- c. Production & technical expenses; officials
- d. Site fees, venue rentals, costs (contract help)
- e. Rentals, insurance, rights fees, bid fees, sanction fees, non-monetary awards
- f. General and administrative expenses and other expenses when specifically authorized and set forth in the funding agreement

Generally Disallowable Expenses:

- a. Building, renovating and/or remodeling
- b. Permanent equipment purchases
- c. Debts incurred prior to the grant
- d. Programs which solicit advertising
- e. Hospitality or social functions including meals or banquets

2) A successful grantee will be funded for and must demonstrate in the Post Event Report the proven payment of invoices that meet the allowable expenses in the funding agreement. Proof of payment includes:

- a) A copy of the invoice billed to the Grantee;
- b) Canceled Grantee checks, (front & back), and dated within the grant period, except for pre-paid bid fees; or proof of electronic funds transfers.
- c) Inter-governmental transfers, dated within the grant period, and which details the payment number, payee, the event date, and/or the invoice
- d) Verification of any other terms, conditions, and deliverables set forth in a funding agreement associated with TDT funding for the event

3) The following requirements must be met after the event:

The Grantee will complete an accounting of the event's financial activity within 180 days after the completion of the event and provide documentation evidencing the direct impact of the event by completing and submitting a **Post Event Report** to the County and the TDC.