



### **Community Event – Funding Program Guidelines**

The Florida State Legislature enacted the Local Option Tourist Development Act ([Section 125.0104, Florida Statutes](#)) in response to the growing need of Florida counties to provide additional revenue sources for Tourist Development in an effort to stimulate the local economy. The Marion County Tourist Development Council (TDC) was created pursuant to Marion County Resolution 04-R-44, as a result of the 2004 passage of the 2% Tourist Development Tax (TDT) and subsequent passage of an additional 2% TDT in 2015, and operates in accordance with Section 125.0104, Florida Statutes and Marion County Code Art. XIII, sections 10-381 through 10-386. The TDT is levied on occupied transient lodging sales, i.e. hotels/motels, campgrounds and other short term rental properties. The Tourist Development Tax Revenues are designated to promote Ocala/Marion County as a preferred visitor destination.

#### **OBJECTIVES OF THE COMMUNITY EVENT FUNDING PROGRAM\*\*\*:**

- Provide more events that will allow the community and visitors alike to enjoy the destination
- Encourage increased local and visitor spending.
- Reinforce existing positive image of Ocala/Marion County.
- Provide added value to the Ocala/Marion County experience.

*\*\*\*One of the main purposes of the events must be to provide community based recreation for locals and visitors to Ocala/Marion County.*

TDT funding of community events and ongoing programs generally should be provided only on a limited term basis, as “seed funding”, not as a perpetual revenue source. This is to encourage organizations to develop their programs in ways that help organizations to become self-sufficient regarding their promotional expenses. In doing so, funding is made available to assist other events and organizations, thereby enhancing the overall community product.

To request funding support as a Community Event, an organization (Applicant) must prepare an application as part of the competitive annual award cycle.

***If an application to fund a festival, event or program (Event/Project) is received outside of the specified cycle and funds are available, the untimely application may be reviewed by the TDC following a supermajority vote (majority plus one) to be considered for funding.***

**ANNUAL APPLICATION TIMELINE\***

Applications Available	Applications Due	Presentation to TDC**
February 1 <sup>st</sup> at 4:00 PM EST	April 15 <sup>th</sup> at 4:00 PM EST	2 <sup>nd</sup> Thursday in May during TDC meeting

\*If any date referenced above falls on a weekend or holiday, items will be due on the business day prior.

\*\*Dates subject to change with notice.

To ensure proper budgeting procedures, the TDC will receive and review submitted applications on an annual basis.

The TDC will then determine the recommended contract award dollar amount and forward that recommendation to the Marion County Board of County Commissioners for approval. Applicant is encouraged to not contact members of the TDC in order to provide a fair and equitable process of consideration of each applicant.

**PROGRAM OVERVIEW**

The number and amount of each Community Event Funding Program award will be dependent upon the availability of funds and specific allocations associated within the annual Tourist Development budget. The maximum award will be no more than 10% of the allocated budget for the Community Event Funding Program based on available revenue. **FY 16-17 budget will be \$50,000 – but this number may change in subsequent years.**

EXAMPLE: 10% of \$50,000 is \$5,000 – therefore \$5,000 is the maximum amount that will be eligible for an individual request.

Awards will be funded on a sliding scale reflective of the point values outlined in the section titled Community Event Funding Program Application. For example, if Applicant requests \$5,000 and scores 45 (averaged) out of 100 points, the maximum amount of funding Applicant will be recommended to receive is \$2,250 (45% of \$5,000).

TDT funding support of a Community Event is reviewed and recommended yearly based on documented performance.

**New/Repeat Events**

*For the purpose of OMCVCB funding programs, a new event is defined as a specific event named in the application that has not been held in Ocala/Marion County during the previous three consecutive years and a repeat event is defined as a specific event named in the application that has been held in Ocala/Marion County at some point during the previous three consecutive years.*

The criteria for the recurring funding of events are, as follows:

New Events: First and second year events. These events will be eligible for the maximum amount of funding associated with the corresponding funding scale.

Repeat Events: Repeat events with a continuous 3-5 funding year history. These events will be eligible for 80% amount of funding associated with the corresponding funding scale.

### **Exceptions**

As with all policies there will be exceptional circumstances. It is to be acknowledged that while it is clearly not possible to legislate for the unknown, it is possible to identify and anticipate the potential for exceptional circumstances and to weigh our response to them. The TDC may recommend to increase funding in extraordinary circumstances. These will be reviewed on a case by case basis for considerations and recommendation to the MCBCB for final approval.

### **MEETING REQUIREMENTS**

All recipients of the Community Event – Funding Program funds are required to meet at least once (in person or via phone) with representatives from the Ocala/Marion County Visitors and Convention Bureau (OMCVCB) to review marketing plans and coordinate marketing efforts. As part of the cooperative marketing efforts, the Event/Project planner must provide 20 tickets (or other negotiated amount) to the OMCVCB to be used for promotional purposes.

### **EVALUATION METRICS**

Annual applications will be evaluated on these metrics:

- Total attendance;
- Generation of incremental economic activity;
- Marketing exposure for Ocala/Marion County and the Event/Project;
- Event site must be located in Marion County;
- Applicant must be based in Marion County (as confirmed on W-9); and,
- Narrative on how quality will be delivered (i.e. production values - presented, performed, exhibited, etc.)

#### **Examples of eligible exposure:**

- Marketing mediums such as:
  - Newspapers;
  - Mass audience magazines;
  - Social media;
  - Travel journals;
  - Trade magazines;
  - Radio;
  - Television;
  - Website;
  - Visit Florida advertising or promotional co-op opportunity ;
  - Advertising co-ops coordinated by the OMCVCB; and,

- Other opportunities approved at the discretion of the TDC.

### **Matching Funds**

**Regardless of the funding amount awarded for the Event/Project, the award will not exceed Applicant's documented expenditures. Applicant is required to provide matching amounts (either in-kind or monetary) equivalent to 50% of the award amount.**

- In-kind services are defined as goods or services provided to the Event/Project for which Applicant would normally have to pay. The value of the match should be based on the difference of what Applicant would normally have to pay for the goods or services, and what Applicant actually has to pay. Documentation of the value will be required from the contributing entity. Applicant is encouraged to list in-kind donations as demonstration of additional community support. Volunteer time is considered an in-kind service and will be calculated and based upon the [volunteeringinamerica.gov](http://volunteeringinamerica.gov) valuation that has federal oversight by the Office of the Inspector General.
- In-kind media equivalency will be reviewed on a case-by-case basis.
- TDC funds allocated to an Applicant cannot be used as matching funds for another Applicant's project or as matching funds for any other Marion County program.

**Applicant may not receive funding from more than one TDC program for the Event/Project.**

### **REVIEW PROCESS**

The TDC will review each request brought forth by the OMCVCB.

Applicant requesting funding is required to attend and must offer a three (3) minute "update" at the assigned TDC meeting in which the application comes up for review and respond to questions from the TDC. ***Failure of an Event/Project representative to attend the specified TDC meeting will result in the application being removed from the Community Event consideration.***

***Tourist Development Tax funds are intended to supplement, not replace Applicant's Event/Project budget. Applicant must recognize that not every application will be funded either fully or partially. There is a limited amount of money available. This is a highly competitive process and applications will be reviewed and scored on specific criteria.***

- Applicants must notify the OMCVCB and TDC of any changes (i.e. date, venue, event content etc.) to their Event/Project plans in writing at least **150 days prior** to the Event/Project start date. Failure to do this can result in termination of the contract and jeopardize future funding. This is necessary to properly promote programs through various marketing platforms and the OMCVCB website [www.ocalamarion.com](http://www.ocalamarion.com). The TDC/MCBCC would have to vote to accept these changes and maintain or adjust funding accordingly.
- All information provided to the TDC in conjunction with the Community Event - Funding Program Guidelines will become a matter of public record, except for information exempt pursuant to Section 125.0104 (9)(d)(2), Florida Statutes.

- Requests for reimbursement must be signed by Applicant's chief officer.

## **Record Keeping and Audit**

- A successful Applicant is hereinafter referred to as the “Recipient”.
- Recipient agrees to allow TDC staff access to the Event/Project for the purpose of determining economic impact and return on investment. If tickets are required for the Event/Project, Recipient is required to collect from the ticket purchased either a street address or email address along with the purchaser’s name for the purpose of TDC’s surveying the purchaser about attendance at the Event/Project. Recipient must cooperate with the TDC staff and/or contractors in providing email addresses of ticket buyers and vendors for the purpose of surveying.
- Upon approval of funds, Recipient shall provide media passes for use by OMCVCB staff to attend and cover the Event/Project for marketing and public relations purposes.
- All contracts are subject to programmatic and financial audit by the Marion County Clerk of the Court – Internal Auditor or other County staff or authorized personnel. All programmatic and financial documents that are part of the contract are subject to county inspection and made public record. Recipient shall acknowledge funding by the OMCVCB in all advertising and publicity for the Event/Project. Acknowledgement may be achieved by:
  - Including recognition of the OMCVCB where appropriate on all printed material and Recipient’s web site and referred to in public relations activities. A camera-ready OMCVCB logo shall be provided to Recipient. All printed materials with the logo block must be presented with the reimbursement request.
- **The TDC reserves the right to request additional information beyond that requested in the funding application/guidelines.**

## **REIMBURSEMENT**

Funding shall be provided as reimbursement for approved actual expenditures upon completion of the Event/Program. Proof of payment must be provided. Proof of payment may be submitted in the form of a “paid” vendor credit card receipt or a check. If a check is used, a copy of both the front and back of canceled check must be provided. Written confirmation from vendor that expenditure has been paid in full is necessary if only a copy of the front of the cleared check is provided.

## **Eligible Use of Funds:**

Community Event funds **MAY** be used for:

### **A. Promotional Expense**

#### 1. Eligible Promotional Expenses:

- a. Promotional expenses in conjunction with the Event/Project to increase participation and bring attendees to the Event/Project.
  - b. Advertising and publicity, in compliance with subsection "2" below designed to increase participation, attendance and awareness of the Event/Project:
    - i. Print;
    - ii. Radio;
    - iii. Online Media;
    - iv. Television Advertisements;
    - v. Outdoor Signage/Banners;
    - vi. Poster/Flyers/Brochures;
    - vii. Artwork/Graphic Design;
    - viii. Media Events;
    - ix. Direct Mail or Event/Project Banners; and,
    - x. Printing Collateral.
2. Ocala/Marion County VCB logo block and name inclusive shall be included on all digital and printed material associated with the Event/Project and shall list Ocala/Marion County VCB as a sponsor of the Event/Project including t-shirts, Event/Project merchandise, and or give away items.

### **B. Operational Expense**

Operational expenses are allowable only when they logically and defensibly can be attributed purely to the development/production of the Event/Project and specifically targets and promotes out-of-town visitors to Marion County.

1. Bid Fee (Must be considered an authorized use as determined by the Florida State Statute 125.0104)
2. Facility fees for events that take place at publicly owned and operated facilities and/or events that take place at facilities that are operated by not-for-profit organizations and open to the public.
3. Additional necessary operational expenses as approved per Section 125.0104, Florida Statutes.

## **INELIGIBLE USES OF FUNDS**

### **FUNDS MAY NOT BE USED FOR:**

1. Prize money, scholarships, awards, plaques, trophies, certificates;
2. T-shirts that do not include the Ocala/Marion County Visitors and Convention Bureau logo block;
3. Any and all travel expenses. (Includes, but is not limited to, car rental fees, airline tickets, hotels, food, luggage fees, etc.);
4. Private entertainment, food, beverages, or any type of concession;
5. Annual operating expenditures not directly related to the Event/Project;
6. Legal, medical, security, engineering, accounting, auditing, planning, feasibility studies or other consulting services;
7. Employee salaries;
8. Rental Items: tents, barricades, toilets, etc.;
9. Real property or capital improvements to facilities;
10. Tangible personal property including but not limited to office furnishings or equipment;
11. Interest or reduction of deficits and loans;
12. Expenses incurred or obligated prior to before or after the grant Event/Project period;
13. Advertising and promotional materials distributed at the Event/Project site or after the Event/Project;
14. Receptions or social functions other than those specifically designed for pre-event media promotional purposes;
15. Sales tax;
16. Website design not specific to the Event/Project; and,
17. Ongoing or annual facility maintenance.

**Applicant may not receive funding from more than one TDC program for the Event/Project.**



## Community Event Funding Program Score Sheet

To enhance the eligibility for funds, please be sure to include the following:

### TOURISM DEVELOPMENT EVALUATION PORTION – MAX 50 POINTS

- Anticipated number of attendees & how will it be measured?
  - A minimum of 500 attendees is required to be eligible for funding.
- Anticipated economic impact?
- Has venue/facility been secured? If so, please list.
- Is site located within Marion County? If no, the Event/Project is not eligible for funding.
- Targeted audience (demographics).
- Has a comprehensive marketing plan for the Event/Project been submitted?
- Time of year for the Event/Project. (Certain Events/Projects are more desirable at different times of the year.)
- Describe how your Event/Project is unique to the area.

### PROGRAM INFORMATION EVALUATION PORTION – MAX 25 POINTS

- How does the Event/Project support Applicant's mission?
- Include the Event/Project budget.
- Describe how funds would be used.
- Describe how Applicant evaluates the outcome of the Event/Project.
- Is this a multi-day or single day Event/Project?
- Is this a ticketed Event/Project?

### FINANCIAL INFORMATION EVALUATION PORTION – MAX 25 POINTS

- Has Applicant received funding in the past (from any of the TDC funding programs)? If yes, include the Event Funding Program name, amount, name of event and year received.
- Community Support – List any city, county, TDC, or other cash contributions from public entities for the Event/Project. (Include amount and source.)
- List any in-kind support from the community that has been committed for the Event/Project. (ie: donated facilities, volunteer/staff support, city/county services, etc.)
- Outline any sponsorship support that has been secured for the Event/Project.



To request funding support under the Community Event – Funding Program (the “Program”), an application must be prepared as part of the competitive annual award cycle for your upcoming event (the “Event/Project”). In order for the Event/Project to be considered for a maximum award, please review the attached documents closely.

#### **APPLICATION GENERAL INSTRUCTIONS**

The application **must be completely filled out**. Not Applicable or N/A should be marked if needed.

#### **Copies of the following items should be attached to your application:**

- List of Applicant’s current Officers and/or Board members (if available);
- Applicant’s W-9 tax form for post Event/Project payment; and,
- Overall marketing plan for the Event/Project

**Please note:** All final paper work as outlined in the application must be submitted to the OMCVCB **within 60 days of the conclusion of the Event/Project**. The request for reimbursement will be considered incomplete until all of the required forms are submitted to the OMCVCB.

**OCALA/MARION COUNTY VISITORS AND CONVENTION BUREAU  
COMMUNITY EVENT FUNDING REQUEST APPLICATION**

**I. General Information**

1. Name of Applicant:
2. Name of Event/Project:
3. Contact person:
4. Contact person e-mail:
5. Complete address of Applicant:  
    Phone:  
    Cell:  
    Fax:
6. Applicant's Chief Contact/Director:  
    Title:  
    Address if different from above:  
    Phone:  
    Cell:  
    Fax:
7. Has Applicant ever received funding from the TDC? Yes      No  
    If yes – list years and amounts
8. Amount Applicant is requesting for the Event/Project: \$
9. Intended use of funds:  

(Refer to pages 6 and 7 – Eligible and Ineligible Uses of Funds)

**II. Details about Applicant:**

### III. Schedule of Event/Project:

### IV. Event/Project Specific Information

1. Event/Project name:
2. Type of event or project:
3. Dates of Event/Project:
4. Location of Event/Project:
5. Number of days:  
Hours:
6. Projected number of attendees:
  - a. Geographic Reach (choose one):
    - Primarily Local Attendees
    - Balanced
    - Primarily Out of Town Attendees
7. Average Ticket Price (if applicable)
8. Event/Project promoter (if other than Applicant):  
Name of promoter:  
Company name:  
Address:  
Phone and fax:
9. Provide the previous year's event or project information, (if applicable):  
Previous Event/Project:  
Date:  
Location:  
Total Room Nights:  
Contact Name/Phone:  
Funding amount awarded:  
Economic Impact (If available):



### EVENT/PROJECT EXPENSES

Provide an itemized summary indicating the intended use of TDC funds at the bottom of this page. Please be as detailed as possible, including intended publications, promotional materials, etc. and the dollar amount that will be expended (tentatively) for each category. This is the total amount of the funds you have requested. Use additional sheets if necessary.

<b>TOTAL EXPENSES - Please list all projected expenses, not including TDC Funds.</b>	<b>Expense Amount</b>
<b>Expense Type</b>	
<b>TOTAL EXPENSES</b>	\$

<b>Intended Use of Tourist Development Tax Funds</b>	<b>Amount</b>
<b>TOTAL EVENT/PROJECT EXPENSES</b>	\$

**Eligible Use of Funds:**

Community Event funds **MAY** be used for:

**A. Promotional Expense**

## 1. Eligible Promotional Expenses:

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    - vii. Artwork/Graphic Design;
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    - x. Printing Collateral.
2. Ocala/Marion County VCB logo block and name inclusive shall be included on all digital and printed material associated with the Event/Project and shall list Ocala/Marion County VCB as a sponsor of the Event/Project including t-shirts, Event/Project merchandise, and or give away items.

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## **INELIGIBLE USES OF FUNDS**

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4. Private entertainment, food, beverages, or any type of concession;
5. Annual operating expenditures not directly related to the Event/Project;
6. Legal, medical, security, engineering, accounting, auditing, planning, feasibility studies or other consulting services;
7. Employee salaries;
8. Rental Items: tents, barricades, toilets, etc.;
9. Real property or capital improvements to facilities;
10. Tangible personal property including but not limited to office furnishings or equipment;
11. Interest or reduction of deficits and loans;
12. Expenses incurred or obligated prior to before or after the grant Event/Project period;
13. Advertising and promotional materials distributed at the Event/Project site or after the Event/Project;
14. Receptions or social functions other than those specifically designed for pre-event media promotional purposes;
15. Sales tax;
16. Website design not specific to the Event/Project; and
17. Ongoing or annual facility maintenance.



## ACKNOWLEDGEMENT OF REQUIREMENTS FOR FUNDING

\_\_\_\_\_ (initial acknowledgment) The funding request is within the limits as outlined in the Program Overview. (Page 2)

\_\_\_\_\_ (initial acknowledgment) Applicant understands that the Event/Project must have 500+ attendees to be eligible for funding.

\_\_\_\_\_ (initial acknowledgment) The funds Applicant receives will ONLY be used in accordance with the eligible and ineligible uses of funds. (See Application pages 6-7.)

\_\_\_\_\_ (initial acknowledgment) Applicant has included a list of the organization's current Officers and/or Board members (if applicable) with its application.

\_\_\_\_\_ (initial acknowledgment) Applicant understands and certifies that Applicant has its principal place of business located in Marion County (as confirmed on W-9).

\_\_\_\_\_ (initial acknowledgment) Applicant's W-9 tax form is included with its application.

\_\_\_\_\_ (initial acknowledgment) Applicant has included a marketing plan for the Event/Project.

\_\_\_\_\_ (initial acknowledgment) As an authorized representative of Applicant, the person submitting this documentation acknowledges that he/she is also the person required to execute the contract and prepare the post event analysis for this Event/Project, as well as receive payment.

\_\_\_\_\_ (initial acknowledgement) Applicant acknowledges that any material made or received by Marion County in connection with Applicant's request for Program funding is a public record and subject to public inspection unless there is a legislatively created exemption that makes it confidential and not subject to disclosure. Applicant acknowledges that it cannot dictate to Marion County what material is open to public inspection or the circumstances under which material is deemed confidential.

\_\_\_\_\_ (initial acknowledgement) Applicant understands that as a requirement to receiving funding, Applicant will execute a release to permit Marion County to photo and/or record the Event/Project and Applicant must make Event/Project invitees aware of this and make the signing of a release a requirement to participate in the Event/Project.

\_\_\_\_\_ (initial acknowledgement) Applicant understands that all funds it receives are subject to audit by the Marion County Clerk of the Court – Internal Auditor or other representative as Marion County may designate.

**CERTIFICATION OF APPLICANT**

Applicant has reviewed this Application for Funds from the Tourist Development Council. Applicant is in full agreement with the information contained herein. To the best of Applicant’s knowledge, the information contained in this Application and its attachments is accurate and complete.

\_\_\_\_\_  
Applicant

\_\_\_\_\_  
Date

By: \_\_\_\_\_  
(Signature)

Its: \_\_\_\_\_  
(Title)

State: \_\_\_\_\_ County: \_\_\_\_\_

Before me this day personally appeared \_\_\_\_\_ (name) as \_\_\_\_\_ (title) of APPLICANT to me well known or produced identification \_\_\_\_\_ (type of ID) and who executed the foregoing instrument, and who acknowledged that he/she did so freely and voluntarily for the uses and purposes herein expressed.

Witness my hand and seal (date)

My Commission expires (date)

Signature of Notary