



High Impact Signature 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 Florida State Statute 125.0104 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 HIGH IMPACT SIGNATURE EVENT PROGRAM:

Create a portfolio of activities which:

- **Attract Visitors During Non-Peak Periods** – Priority consideration will be given to Proposals for events that will attract visitors when tourism is relatively slow. These periods may vary slightly by geographic areas of the County, but generally speaking, months of January, February and March are peak tourism. However, all events that meet the criteria of the High Impact Signature Event program will be evaluated and scored/discussed by the TDC for consideration.
- **Encourage Increased Visitor Spending** - Visitor spending supports jobs and generates tax revenues. Events should stimulate additional economic activity rather than displace normal expenditure patterns.
- **Reinforce Existing Positive Images** - Events which set Ocala/Marion County apart from other destinations by focusing attention on the area's unique tourism offerings and marketing the destination. Applicants should focus funding requests on programs and events that are not typically available in a visitor's home community and therefore establish a reason to visit Ocala/Marion County.
- **Provide Added Value to the Ocala/Marion County Visitor Experience** - Value can be defined in two ways. Events may provide "emotional value" by exceeding the anticipated satisfaction level of visitors. Events can also provide "financial value" by providing no-cost or low-cost activities of interest to visitors during otherwise slow times.

Events, performances or programs must be promoted to the public and cannot be unreasonably restrictive through admittance fees, public access or crowd capacity, which limits participation by visitors. *One of the main purposes of the events must be to attract overnight visitors to Ocala/Marion County.*

High Impact Signature Events will be implemented to create more economic prosperity for Marion County by cultivating and inspiring a high level event funding program in conjunction with the Ocala/Marion County Visitors and Convention Bureau's (OMCVCB. Events supported by this funding mechanism through Tourist Development Tax (TDT) will be expected to generate economic impact both directly and indirectly and will be challenged to compete and deliver high brand recognition nationally and internationally for Ocala/Marion County.

The High Impact Signature Event program regionally will support the Marion County Board of County Commissioners' (MCBCC) philosophical position that the OMCVCB role of out-of-area marketing is the priority for TDT funding. Also, TDT funding of special 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 them 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 tourism product.

A High Impact Signature Event is defined as an event attracting national and/or international audiences held over several days, either consecutively or as a collective progression of events that lead to a high caliber annual event. To request funding support as a High Impact Signature Event, a separate application summary form and proposal must be prepared as part of the competitive annual award cycle.

If a Proposal is received outside of the specified cycle and funds are available, it may be reviewed by the TDC following a supermajority vote (majority plus one) to be considered for funding.

ANNUAL APPLICATION TIMELINE*

Letter of Intent Due	Applications Available	Applications Due	TDC Review Period	Presentations to TDC**
August 20 th at 4:00 PM EST	September 1 st at 8:00 AM EST	October 15 th at 4:00 PM EST	November 1 st – 30 th (must be scored and returned to OMCVCB by November 30 th at 4 pm)	2 nd Thursday in January 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 Proposals on an annual basis.

The TDC will then determine the contract award dollar amount and forward that recommendation to the MCBCB for inclusion in the forthcoming fiscal year of the Tourist Development budget for Marion County.

PROGRAM OVERVIEW

The number and amount of each grant award will be dependent upon the availability of funds and specific allocations associated with one penny of TDT collected and audited over the previous year. The maximum award will be no more than 1/8 of the allocated budget for the High Impact Signature Event program.

EXAMPLE: 1/8 or 12.5% of \$400,000 is \$50,000 – therefore \$50,000 is the maximum amount that will be eligible for an individual request.

This gives the opportunity to allow the High Impact Signature Event program to flex with the budget as collections fluctuate.

A priority on funding support will be awarded to events, programs and activities that generate high-value overnight stays with substantial media value and, primarily, occur during non-peak tourism periods. TDT funding support of a High Impact Signature Event is made on a yearly basis based on documented performance.

Awards will be funded on a sliding scale reflective of the point values outlined in the section titled Proposal Requirements. For example if an applicant requests \$50,000 and scores 45 (averaged amongst the TDC members) out of 100 points, the maximum amount of funding they will be recommended to receive is \$22,500 (45% of \$50,000).

EXCEPTIONS

As with all policies there will be exceptional circumstances. The TDC may recommend to increase funding in extraordinary circumstances. These circumstances will be reviewed on a case by case basis for consideration and recommendation to the MCBCC for final approval.

LETTER OF INTENT

Applicants must submit a “Letter of Intent” to the OMCVCB no later than August 20th (outlined in annual application timeline on page 3). The Letter of Intent should briefly describe the program or event and how it meets the criteria described above. The Letter of Intent should describe your organization (please include the size of your operating budget), and the purpose for which funding is being sought. Include the total project costs and the requested grant amount. If a standard sponsorship proposal exists, please submit it with the Letter of Intent.

If an event organizer has already contracted with or secured a room block with any accommodator prior to the submission of the completed funding request application, they will not be able to apply for funding.

The OMCVCB will notify you by email as to whether or not a full proposal will be invited for consideration. OMCVCB staff will conduct a “technical review” to determine if the proposed program or event meets the overall goals and requirements of the High Impact Signature Event program.

Proposals that are determined not to achieve these standards will be rejected as part of the High Impact Signature Event program, but may still be applicable for other grant funding opportunities that will be outlined to applicants based upon individual criteria requirements for VCB programs.

The High Impact Signature Event Application Summary will assist in indicating where a proposal may be able to receive funding should it not qualify for the High Impact Signature Event program.

MEETING REQUIREMENTS

All recipients of High Impact Signature Event program funding are required to meet at least twice per year (in person or via phone) with representatives from the Ocala/Marion County VCB to review marketing plans and coordinate marketing efforts. As part of the cooperative marketing efforts, the event planner must provide 20 tickets (or other negotiated amount) to the OMCVCB to be used for promotional purposes.

PROPOSAL REQUIREMENTS (Proposals are to be independently written documents provided by event organizer requesting funding). These proposals should include the following five (5) sections, as well as any attachments outlined within the requirements:

SECTION I. Program Event Summary, Organizational Information and Program Management.

This Section will be worth up to 10 points

This section must contain a Program Event Summary, as well as, organizational information including: Mission Statement, Economic Impact Information, Financial Request, Financial

History of the event (up to three years if applicable), Board of Directors (if applicable) and Authorized Official Signature Page.

SECTION II. Narrative Statement of Program /Event.

This section will be worth up to 35 points

This section will contain information on the nature of the program and/or event (festival, concert, exhibition, etc.), examples of past programs/events conducted by the applicant, and other information to inform the TDC why this program and/or event should be supported through a funding grant.

Be sure to describe the event(s) in sufficient detail to include dates, schedules, venues, and special features. Remember that **Proposals will be judged heavily on this content**.

SECTION III. Tourism Generation/Marketing Plan.

This section will be worth up to 35 points

In this section, Proposals will contain information on why/how the proposed events/activities attract tourists, time of year events are scheduled, marketing and advertising plan that targets tourists (including marketing distribution and impressions), RFP for distribution to lodging industry partners, specific measurable objectives on tourist attraction such as gross attendance and overnight stays, demographic and geographic objectives, methodology on how objectives will be measured, and evaluation criteria. The proposed marketing plan should contain detailed description(s) and itemized costs of “Out-of-County” marketing including media placement in specific markets (electronic and print advertising), public relations (non-paid media such as press releases), additional promotional materials, print and collateral distribution and targeting, signage and way finding. Creative approaches in programming and marketing are encouraged. The proposed plan could include key performance indicators, as well as reporting that showcases the reach for the High Impact Signature Event, while including the OMCVCB/MCBCC logo block in each of its marketing platforms, coupled with a significant integrated marketing spend.

The OMCVCB reserves the right to approve any additional sponsors that will share in media exposure to ensure brand integrity.

SECTION IV. Sustainability and Growth Potential.

This section will be worth up to 10 points

Outline information indicating the event’s community support. Provide information that explains the plan for growth of the event and subsequent attraction of additional visitors in future years.

SECTION V. Provide a detailed Proposal Budget.

This section will be worth up to 10 points

Failure to provide a detailed budget will result in the Proposal being removed from High Impact Signature Event consideration.

Include event-specific income and expense information with a clear indication of where matching funds are coming from.

The TDC reserves the right to negotiate with organizations or make funding amounts contingent upon issues relative to event scheduling. **If your events dates are changed after you have submitted your signed Agreement, your award will be automatically terminated unless you have notified the OMCVCB and MCBCC/TDC 150 days in advance of the program/event and received written permission prior to announcing the new date.**

EVALUATION METRICS

Annual applications will be evaluated on these metrics:

- Number of visitors attending and number of overnight stays projected
- Generation of incremental economic activity
- Quality and reputation of participating artists/exhibitions/performers
- Narrative on how quality will be delivered (i.e. production values - presented, performed, exhibited, etc.)
- Expected total attendance
- Lodging occupancy period (i.e. date of program/event with respect to lodging occupancy)
- Management qualifications of applicant(s) and partners.
- Funding may support direct production costs in addition to out of county market promotion.
 - **At least 50% of the contract award must be allocated to out of county promotion.**
 - Value of media exposure associated with the event/program must be substantially greater than that of the award from the High Impact Signature Event Program.
 - High Impact Signature Event Return on Investment (ROI) calculates the impact of “advertising value” on Ocala/Marion tourism from key markets: Florida, bordering states (with selected designated market areas noted separately), nearby states and key feeder markets. The calculation based the value of the advertising the requestor of the funding shall provide to the County as an ROI. **All calculations are at the sole discretion of the Ocala/Marion VCB.**
- Matching monetary or in kind donations/sponsorships are required (50% match)

Conditions for Media Value (at least 50% of the contract award must be allocated to out of county promotion)

Mandatory Elements for Consideration of Value:

- The ad must have an accredited affidavit of performance
 - An Affidavit of Performance is defined as a document that certifies airing (broadcast) of commercials billed by a radio or television station. It usually accompanies the station's invoice to the advertiser, and serves as a substitute for the clippings (of the printed advertisements) that newspaper and magazine publishers send to the advertiser as a proof of services rendered.

- The ad must run in a market pre-determined by Ocala/Marion to be a market of interest. Ads that run "at event" or "in market" have negligible value and impact in tourism and will not be considered in the formula
- The size of the market, pulled from US census information
- ROI for media value must be 6:1

Examples of eligible exposure:

- An integrated marketing, sales and public relations program where impressions are quantified
 - Impressions are defined as any interaction between a piece of content and an audience member, which measures visibility
- Out of market mediums such as:
 - Newspapers
 - Mass audience magazines
 - Social media
 - Travel journals
 - Trade magazines
 - Radio
 - Television
 - Website
 - Circulation for media and online placements quantified in areas such as reach, impressions, engagement and engagement rate, clicks, CTR (click through rate), views through conversion, CTC (click through conversion)
- Visit Florida advertising or promotional co-op opportunity
- Advertising co-ops coordinated by the OMCVCB

Conditions for Matching Funds

Regardless of the funding amount awarded for each program or event, reimbursements will not exceed documented expenditures. Applicants are required to provide matching amounts (either in-kind or monetary) equivalent to 50% of program funding.

- In-kind services are defined as goods or services provided for the festival, event or program for which you would normally have to pay. The value of the match should be based on the difference of what you would normally have to pay for the goods or services, and what you actually have to pay. Documentation of the value will be required from the contributing entity. Applicants are 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 valuation that has oversight federally 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 organization cannot be used as matching funds for another applicant’s project or as matching funds for any other Marion County program.

An applicant may not receive funding from more than one TDC program for any one event.

PANEL REVIEW PROCESS

The TDC will evaluate and score each request brought forth by the OMCVCB. Each TDC member will score each application independently prior to their regularly scheduled public meeting where a representative(s) of the applicant will offer brief updates and respond to questions from the TDC. The TDC may revise scores following applicant presentations. Any scores changed during the day of presentation will supersede any previous scores.

Applicants requesting funding are required to attend and must offer a three (3) minute “update” at the assigned TDC meeting in which the Proposal comes up for review and respond to questions from the TDC. ***Failure of an event representative to attend the specified TDC meeting will result in the Proposal being removed from the High Impact Signature Event consideration.***

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Miscellaneous Submission Directions

Upon acceptance of your Letter of Intent, one printed hard copy of the Proposal and High Impact Signature Event Application Summary containing original signature(s) of the Authorizing Official(s) must be submitted (via mail or hand delivery) to the OMCVCB prior to applications being forwarded to the TDC. EARLY SUBMISSIONS ARE HIGHLY ENCOURAGED. The OMCVCB will conduct a “technical review” of Proposals and notify organizations of deficiencies. Applicants will be notified of any deficiencies and will have 72 hours to correct the deficiencies. Applications will only be given one technical review. The technical review only includes required forms and documents and will not correct math or typographical errors in the Proposal.

Prior to the deadline, the OMCVCB will be available to provide individual technical assistance in completing the Proposal. This service will be offered by appointment only. The OMCVCB cannot assure any applicant their Proposal will be funded. After the technical review period, 15 hard copies of the Proposal and High Impact Signature Event Application Summary must be delivered to the OMCVCB (via mail or hand delivery) to be distributed to the TDC for their initial consideration and scoring.

CONTRACT PARAMETERS

All contracts are for one year. No contracts are guaranteed to be renewed. The County fiscal year begins October 1st of each year and runs through September 30th of the following year. Payments or reimbursements for expenses occurring outside of that time period are not allowed.

Tourist Development Tax funds are intended to supplement, not replace the sponsoring organization's project budget. Organizations must recognize that not every Proposal will be funded either fully or partially. There is a limited amount of money available. This is a highly competitive process and Proposals will be reviewed and scored on specific criteria (as outlined on pages 4-6).

Contract Reporting Requirements

- Once the TDC award recommendations have been reviewed and subsequently approved by the Board of County Commissioners, all contracts will be issued by and returned to the OMCVCB office. Final Reports and all reimbursement requests are to be submitted to the OMCVCB office.
- A final report must be submitted with reimbursement requests within 60 days after the event concludes.
- Included in the Final Report must be a documented assessment of results measured against the program goals listed and the applicant's program and event attendance and tourism projections as stated in the Proposal.
- Any funded event or activity that fails to file reports required in the application will not be eligible for TDC funding during the next funding period. **Under no circumstances will reimbursement payment be made for an event with reports outstanding.**
- Recipients must notify the OMCVCB and TDC of any changes (i.e. date, venue, event content etc.) to their event/program plans in writing at least **150 days prior** to the event or program 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. 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 High Impact Signature Event Program will become a matter of public record, except for proprietary information pursuant to State Statute 125.0104 (9)(d)(2)
- Requests for reimbursement must be signed by the organization chief officer.

Record Keeping and Audit

- Funding recipients agree to allow TDC staff access to their program or event for the purpose of determining economic impact and return on investment. If tickets are required for the program or event, the funding recipient is required to collect either a street address or email address along with the purchaser's name for the purpose of surveying the purchaser about attendance at the program or event. Recipients 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, the applicant must provide media passes for use by OMCVCB staff to attend and cover the event 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.
- Recipients must acknowledge funding by the OMCVCB in all advertising and publicity for the event or program. That can be achieved in the following ways:
 - Recognition of the OMCVCB must be included where appropriate on all printed material and the organization’s web site and referred to in public relations activities. A camera-ready logo will be provided. 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.**

RESTRICTIONS

High Impact Signature Event funds **MAY NOT** be used for:

1. Capital improvements, including expenditures for the acquisition, construction or alteration of a facility, unless allowed by Florida Statutes, Chapter 125.0104, Paragraph 5 Authorized Uses of Revenue.
2. Mortgage payments.
3. Payment of past deficits.
4. Administrative costs.
5. Activities and events, which do not promote tourism in Marion County.
6. Rent paid to a sponsoring organization for hosting a special event.
7. Prize money, scholarships, awards, plaques, trophies, certificates
8. T-shirts that do not include the Ocala/Marion County Visitors and Convention Bureau logo block.
9. Any and all travel expenses. (Includes, but is not limited to, car rental fees, airline tickets, hotels, food, luggage fees, etc.).
10. Private entertainment, food, beverages, or any type of concession.
11. Annual operating expenditures not directly related to the event.
12. Legal, medical, security, engineering, accounting, auditing, planning, feasibility studies or other consulting services.
13. Real property or capital improvements to facilities.
14. Tangible personal property including but not limited to office furnishings or equipment.
15. Interest or reduction of deficits and loans.
16. Expenses incurred or obligated prior to or after the grant event period.
17. Receptions or social functions other than those specifically designed for pre-event media promotional purposes.
18. Sales tax.
19. Website design not specific to the event.
20. Ongoing or annual facility maintenance.

Eligible Use of Funds:

High Impact Signature Event funds **MAY** be used for:

1. Promotional Expense

- a. Promotional expenses in conjunction with the event to increase participation and bring visitors outside of a 60 mile radius of Ocala/Marion County to the event.
- b. Advertising and publicity outside of the Central Florida area to increase participation, attendance and awareness of the event and generate hotel room nights:
 - 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/Event Banners
 - x. Printing Collateral
- c. OMCVCB logo block and name inclusive on all digital and printed material associated with the event and listed as a sponsor of the event including t-shirts, event merchandise, and or give away items.

2. Operational Expense

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

An applicant may not receive funding from more than one TDC program for any one event.