



Events Marketing Funding Application Guidelines

Fiscal year 2018/2019

<i>Table of Contents:</i>	<i>Page:</i>
• <i>Eligibility</i>	<i>3</i>
• <i>Guidelines</i>	<i>3-4</i>
• <i>Criteria</i>	<i>5-6</i>
• <i>Reimbursements</i>	<i>7</i>
• <i>Appendices A-G</i>	<i>8-15</i>

Revised: February, 2018

www.leevcb.com

Sanibel & Captiva Islands, Fort Myers Beach, Fort Myers, Bonita Springs, Estero, Cape Coral, Pine Island, Boca Grande & Outer Islands, North Fort Myers, Lehigh Acres

Dear Lee County event organizer,

On behalf of the Lee County Tourist Development Council (TDC), the Visitor & Convention Bureau (VCB) invites you to apply for funding budgeted to support fiscal year 2018/19 off-peak-season events in Lee County. The Events Marketing program provides reimbursement on approved out-of-area promotions and advertising efforts. Please read the entire application packet carefully to ensure your event meets all requirements of the program.



Things to note:

- Attractions Marketing funding recipients who produce eligible events may also submit a funding request through the Events Marketing program.
- An eligible Lee County nonprofit may submit a maximum of two funding requests per year through the Events Marketing program.
- Event Marketing Grantees will receive VCB cooperative marketing credits (in addition to the funding awarded) that may be used toward the purchase of VCB media buys specifically designed for this program. To receive these credits, grant awardees must attend a Coop Training program.
- Sports related events may request funding assistance through the Lee County Sports Development Office. Please contact Gary Ewen at 239-533-3223 or gewen@leegov.com .

Finally, we continue to request collaboration for the creation of special offers with accommodation partners for your event. ***We strongly recommend that event organizers participate in VCB marketing meetings and Team Tourism events that will allow for such collaboration. For more information, please call or log on to www.leevcb.com.***

We look forward to working with you for a successful 2018-19 fiscal year.

Sincerely,

Tamara Pigott
Executive Director

ELIGIBILITY

Funding is available under the following categories:

1. ORGANIZATIONS

To be eligible to apply, an organization must be legally incorporated as a **Not-For-Profit** under section 501 of the Internal Revenue Code. (Note: First-time applicants must provide a copy of the IRS determination letter of federal tax-exempt status.) Organizations must also have significant county ties and be established primarily to produce cultural programs, festivals or special events. Additionally, they must use private sector financial support and volunteers, as well as paid staff to carry out the objectives of the organization.

2. EVENTS

Multiple-day programs, festivals or special events that have a history of, or the potential for, attracting out-of-county visitors are eligible. Attendees may be participants or spectators, and the event should generate measurable hotel/motel/campground room nights. To be considered, the event must occur **during non-peak months as detailed on page 5**.

Multiple day events that can generate national, state, or regional media exposure for Lee County and its tourist offerings are strongly encouraged to apply.

MAXIMUM FUNDING

Events require a minimum 100% marketing match from the requesting organization with no more than 50% of that match being in-kind contributions. The Events Marketing Program Budget for fiscal year 2018/2019, as established by the TDC and approved by the BoCC, is \$200,000. Any remaining funds not allocated to a specific event will be used by the VCB to explore the development of signature county events.

PROGRAM GUIDELINES

- Incomplete applications without the required documentation will not be considered.
- In the event that a request is not funded, the organization will not be permitted to ask the TDC to reconsider its decision (per Council action of March 11, 1994).
- The maximum award an event may receive is \$25,000 for qualifying applicants.
- All material submitted as part of an application will be a matter of public record open to inspection by any citizen of the State of Florida, subject to Chapter 119 Laws of Florida.

- Each organization receiving funding must designate an event coordinator. He or she will work with the VCB to ensure that all marketing assistance and resources made available to the funding recipients have been implemented.
 - A final event report is due within 60 days of the close of the event, and it must accompany the Request for Reimbursement Form. If the event is scheduled later than June of the fiscal year, the report and final reimbursement request will be due no later than September 1, 2019. The report should:
 - Elaborate on how the scope of work was met (or not).
 - Explain any variances within the budget.
 - Share the results of each marketing effort and indicate how its success was tracked.
 - Present documentation on the number of **“Revenue Producing”** room nights generated.* (See Appendix A for Room Night Certification Form.)
 - Provide results of surveys conducted to gauge attendance, visitor origin and length of stay. (See Appendix B for Survey Form)
- *Room night information must be reported in numbers and not percentage occupancy.*
- Grant requirement: The Lee County TDC or VCB must be included on collateral material (per VCB logo/graphic specifications), and web & print advertisements when listing sponsors. Logo slicks and banners can be obtained at www.leevcb.com

APPLICATION INSTRUCTIONS

- Attendance at the Application Workshop is mandatory for all requesting agencies.
- The online application is available at www.leevcb.com/content/forms.
- Repeat applicants must include the new ROI Summary Sheet (Appendix F) with their submissions.
- All requests for fiscal year 2018/2019 Event Marketing funds must be submitted online between March 16 and April 27, 2018.
- Prior to submission, event organizers are encouraged to meet and share marketing plan with the VCB marketing team.
- Events considered by the TDC events Marketing Subcommittee on June 14.
Recommendations for funding will be formalized by the TDC at the July 12 meeting.

Please note that the entire application and review process is conducted online. No hard copy applications will be accepted!

EVALUATION CRITERIA

Grant applications will be judged on a 50-point scale with a minimum score of 25 points being necessary to be considered for funding approval.

- 1. Commitment to the expansion of off-season tourism in Lee County – Max 15 points**
(Minimum of 10 points required in this category to receive funding)
 - The event should attract out-of-county visitors that generate room nights during **non-peak periods: January 1-30 & April 20-December 23**. [10 points]
 - Additional points may be given for multi-day events during the need period. [5 points]

- 2. Soundness of proposed event - Max 9 points**
 - The committee will assess the extent to which the organization has realistically conceptualized and presented a viable project plan, and assigned responsibilities and accountability. [3 points]
 - The applicant must include commitment statements and examples of event packages/deals with web links from accommodation partners and a marketing strategy for placement. [3 points]
 - The applicant must provide evidence that the event is sustainable by showing that funding sources have been identified and the required match is available. [3 points]

- 3. Organization stability and evidence of event management capability - Max 6 points**
 - The organization must have a successful history of service in Lee County, demonstrate the ability to administer public funding, have the necessary staff and internal financial controls to accomplish the activity with the budget, and be able to provide regular, timely reporting to the TDC on the progress of the event. [2 points]
 - Organizers must show evidence of room night and attendance numbers, and their increases in subsequent years. [2 points]
 - Events must have made a concerted effort to implement all requested VCB initiatives, and display effective use of VCB/TDC theme logos and web links in their promotions. [2 points]

4. Out-of county promotion - Max 10 points

- A detailed out-of-county marketing plan and budget must be included as an attachment (using forms in Appendix F) to the application submission. *(Please see the allowable uses of funds in Appendix C and include a 100% marketing match component.)* [5 points]
- Evidence showing the rationale behind the media placement decisions. [5 points]

5. Quality and uniqueness of the proposed event- Max 5 points

- Points will be awarded based on the how much heritage, cultural, environmental and/or artistic significance the event brings to the county. [3 points]
- Unique and/or uncommon elements such as green initiatives, out-of-the-box campaigns and ride sharing promotions etc. also will be considered. [2 points]

6. Bonus - up to a maximum of 5 points can be awarded in two ways:

- New applicants - additional points will be awarded to new event applicants that meet all other criteria in order to encourage an expansion of our product offered to visitors [3 points]
- Past recipients – The success in sustainability criteria has been met. Success will be measured by:
 - substantial growth in room nights year over year
 - demonstrated success in developing financial partnerships with sponsors
 - national media attention gained through event partnerships and promotions[2 points]

SCORING

Funding levels are based on the points scored up to a maximum of \$25,000 per event.

Maximum funding	100%	80%	60%	40%	20%
Avg. score	46-50	41- 45	36- 40	31-35	25-30

PROCEDURES FOR REIMBURSEMENTS

No funds will be reimbursed until a VCB budget is approved, and narrative progress reports must accompany each Request for Reimbursement Form. Payment is by reimbursement and is made after proof of paid invoices have been presented.

Request for reimbursements must be completed and submitted to the VCB no later than 60 days after the event. Proof of paid invoices (which should include a copy of the invoice), a copy of the cancelled check (front & back), and a sample of the collateral material shall be included with the Request for Reimbursement form. Please note: It could take up to 30 days for the county to process reimbursements.

Approved expenditures may not be substituted for other opportunities unless they are approved by VCB. Reimbursement may be requested only for marketing placements specifically included in the event's scope of work and in the marketing plan that was approved by the TDC.

AUDITS AND RECORDS:

The organization receiving funds must maintain records and accounts, including property, personnel and financial records, as are deemed necessary by Lee County to ensure proper accounting for all TDC funds. These financial records will be made available for audit or inspection purposes at any time during normal business hours, and as often as the TDC deems necessary. The TDC's right of inspection and audit will also apply to any audits made by any other agency whether local, state or federal. The VCB will retain all of its records and supporting documentation pertaining to the funding application for five years for inspection.

PROGRAM TIMELINE - Fiscal Year 2018/19		
Application Workshop & cycle opens	Thursday, March 15	@ 3:00pm
Application Deadline	Friday, April 27	@ 5:00pm
Subcommittee Workshop <i>Discussion of requests</i>	Thursday, June 14	@ 10:00am (following TDC)
Consideration by TDC	Thursday- July 12	@ 9:00am
Budget Approval from BoCC	September, 2018	

APPENDICES

The forms that follow are for use in requesting funds and final reporting.

<u>Appendix</u>	<u>Form</u>	<u>Page:</u>
A-	<i>Eligible Expenses</i>	9
B-	<i>ROI Summary Sheet</i>	10
C-	<i>Marketing Plan & Budget forms</i>	11
D-	<i>Progress/Final Report</i>	12
E-	<i>Participant Survey</i>	13
F-	<i>Room Night Certification Form</i>	14
G-	<i>Request for Reimbursement</i>	15

Appendix A: ELIGIBLE EXPENSES

TDC Funding is restricted to the advertising and promotion of your approved event. Advertising and promotion must take place in areas that are at least 140 miles away or two hours driving time.

Eligible costs	Ineligible costs
<ul style="list-style-type: none"> ✓ Creative design of advertisements. ✓ Printing for out-of-area placement. ✓ Copying of pieces going out of area. (Must document locations distributed.) ✓ Media buys for ad placement in newspapers, magazines, radio and television, digital and social medium.* ✓ Brochure or program creation and distribution outside area.** ✓ Development/management for event’s dedicated website (hosting fees are not included). <p><i>* Please provide publication/media outlet or digital site and location where the ad will be placed.</i></p> <p><i>**Direct mail must provide the addresses to show they are eligible</i></p>	<ul style="list-style-type: none"> ❖ Operating expenditures. ❖ Fees for contractors, consultants, professional, legal, engineering, accounting, auditing, or PR services. ❖ Staff Salaries ❖ Capital improvements, including but not limited to, new construction, renovation, restoration and installation or replacement of fixtures. ❖ Tangible personal property ie: office furnishings or equipment, permanent collections or pieces of art. ❖ Interest or reduction of deficits or loans, expenses incurred or obligated prior to or after funding period. ❖ Prize money, scholarships, awards, plaques, event bags, certificates, posters, t-shirts or other giveaways. ❖ Travel, accommodations and personal expenses. ❖ Purchase of VCB coop with TDC funds ❖ Payments or reimbursements for goods or services purchased for previous or other events. ❖ Advertising and promotion within Lee County and/or surrounding counties that are less than two hours driving distance away. ❖ Other event expenses including but not limited to: tent rental, travel or accommodations for participants, security, food, entertainment, insurance, sanction fees, etc; ❖ Website development/management for general organization purposes.

Appendix B: ROI SUMMARY SHEET

This section must be completed by events that have received funding in the past three years.

Measurements	Yr. 2015/16	Yr. 2016/17	Yr. 2017/18
Event attendance			
Number of paid room nights generated			
Media impressions (print, online, radio, tv)			
Social media reach and engagement			

Name of event: _____

Appendix C: EVENT MARKETING BUDGET TEMPLATE (This should be presented in two parts.)

1. Show total event budget. This allows the Tourist Development Council to determine what percentage of the total budget is dedicating to promoting the event.

ACTIVITY	TDC Request	Organization Match	TOTAL
TOTAL			

2. **Show your marketing budget breakdown.** This allows the Tourist Development Council to determine how the Events Marketing funds will be utilized.

Marketing Activities	Brief description	Amount being requested	Organization match	Number of ads/impressions
Ad placement				
Direct mail				
Brochure/program distribution				
Social media tactics				
Other				
Other				
Other				

*Refer to Appendix C for other eligible expenses

Appendix D: NARRATIVE PROGRESS/FINAL REPORT FISCAL YEAR 2018-19

Event Name: _____

Reporting Date: _____ Organization: _____

Funding Manager: _____ EMAIL: _____

Address: _____ Phone: _____

=====
ANSWER THE FOLLOWING QUESTIONS FOR EACH ELEMENT IN YOUR SCOPE OF WORK. ATTACH
ADDITIONAL NARRATIVE OF EVENT IF NECESSARY.

FINAL – Required for reimbursements 50%+ of total - Answer each question as it relates to the
Scope of Work for the event.

1. What is the overall assessment of the event? Did the event have the anticipated results?
 - a. Number of participants and attendees from out of the Lee County area.
 - b. Number of revenue producing room nights generated by the event (provide documentation)
2. Did expenditures fall within the most recent event funding budget categories?
3. How and what were the results of the marketing efforts proposed in funding request? (Impressions, tracking, surveys, analytics) Refer to Appendix F
4. List efforts made to ‘green’ your event and the benefits derived.
5. What recommendations do you have for improved results in the future?
6. What VCB workshops and assistance did you participate in and find helpful?

Appendix E: PARTICIPANT SURVEY *(suggested questions, feel free to add more)*

Thank you for attending the _____

Please take a moment to fill out this brief survey so that we can continue to make this experience great for all our attendees.

1. How did you hear about the event? (select all that apply)
 - a. Attended last year!
 - b. TV/Radio: Which station: _____
 - c. Print publication: Which one _____
 - d. Website: Which one _____
 - e. Social Media- Which platform(s)? _____
 - f. Other _____

2. Where are you from? (city/state) _____

3. What was your mode of transportation to Lee County?
 - a. Fly into RWS
 - b. Drive
 - c. Local Resident

4. What is your age group?
 - a. Centennial (born 1996 and later)
 - b. Millennial (born 1977 to 1995)
 - c. Gen X (born 1965 to 1976))
 - d. Baby Boomer (born 1946 to 1964)
 - e. Traditionalist (born 1945 and before)

5. How many nights of local accommodations did you book to attend this event?
 - a. None
 - b. One night
 - c. Two nights
 - d. Three nights
 - e. Four or more nights

6. Would you like to receive more information about our next event and The Beaches of Fort Myers & Sanibel?
 - a. If Yes. Provide your email address here _____.

Appendix F: ROOM NIGHT CERTIFICATION FORM

To:

The purpose of this form is to quantify the actual number of room nights booked in Lee County as a result of _____. Your cooperation in helping us to document these room nights will enable us to fulfill important Tourism Development Council requirements, and assist the Lee County VCB in its marketing efforts.

Hotel Name: _____

Hotel Location: _____

Event Name: _____

Tracked room nights

Date						
Paid room nights						
Complimentary room nights						

**Kindly add date columns if the event lasted longer than six days.*

Total number of PAID room nights for duration of event _____

Please provide any noteworthy comments: _____

Hotel Representative Signature:

Date: _____

Print Name and Title:

Tel: _____

Thank you for completing this form. If you require additional information, please contact Nancy Macphee at the Lee County VCB via email at nmacphee@leegov.com.

Appendix G: REQUEST FOR REIMBURSEMENT FORM (FISCAL YEAR 2018-19)

Please provide one original and one copy of this form and all supporting documentation.* Incomplete requests may cause a delay in the reimbursement process. Copies of all invoices, cancelled checks (front & back) and a copy of the ad, brochure or flyer (or digital screen shots) must be attached with this form. An interim progress report or a final narrative report must also be included.

Event Name: _____

Organization: _____

Funding Manager: _____ Phone: _____

Report Period Date: _____

INTERIM REQUEST FINAL REQUEST

NOTE: Furnishing false information may constitute a violation of applicable State and Federal laws.

CERTIFICATION OF FINANCIAL OFFICER: I certify that the above data is correct based on this organization’s official accounting system and records, consistently applied and maintained, and that the costs shown have been made for the purpose of, and in accordance with the terms of the TDC funding application. The funds requested are for reimbursement of actual costs made during this time period. The CEO of the Organization is expected to sign this form. Please notify the VCB in the event that someone else signs these forms.

CEO’S Signature: _____ Title: _____

Printed Name: _____ Date: _____

***Send requests for reimbursement to Nancy MacPhee, Lee County Visitor & Convention Bureau 2201 Second Street, Suite 600, Fort Myers, FL 33901**