

# Attraction Development Fund

# Program Guide

## *Enhancing the Community through Attraction Development*

The Attraction Development Fund is made possible by the Tourist Development Tax (TDT). All accommodations rented for six months or less in Charlotte County are subject to the tax. The tax is 5%. Of the 5 pennies, 3 are used to market and promote Charlotte County as a tourist destination. The other 2 pennies go toward the debt service on the stadium at the Charlotte Sports Park. As the tax is generated by overnight guests in area accommodations, one of the *primary* purposes of any expenditure must be to create tourism which results in overnight stays. This provides for a continual replenishment of the fund.



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## 1.1 Introduction

### 1.2 A Letter from the Chair

Dear Attraction Development Program Applicant:

The Charlotte County Tourism Visitor and Convention Bureau (VCB) is pleased that you are interested in applying for funding from the Attraction Development Fund. As Chair of Tourist Development Council (TDC), the body charged with making funding recommendations to the Board of County Commissioners (BCC), I am excited to work with you and to play a role in the development of projects that have potential to significantly impact the tourism industry as well as benefit the entire community.

The specific criteria by which Attraction Development funding decisions are made are outlined in this Attraction Development Program Guide. Please carefully review both the grant requirements and criteria for evaluation. The Tourist Development Council may recommend to advance a project if the specifications fall outside the criteria yet represents a significant impact to room nights and Charlotte County's economy. The TDC may also require a feasibility study if it determines the information provided is not sufficient to prove the financial or operational viability of the Project.

The source of Attraction Development funding is the Tourist Development Tax. All applications are subject to the requirements regarding public records found in Florida state statute 125.0104. Submitted applications will be disclosed upon request.

If you have specific questions about the application process, contact Lorah Steiner, director of Tourism at [Lorah.Steiner@CharlotteCountyFL.gov](mailto:Lorah.Steiner@CharlotteCountyFL.gov) or by calling (941) 743-1900.

Thank you for your interest in the Attraction Development Program and in helping grow our economy.

Sincerely,

Bill Truex  
Chair, Tourist Development Council

### **1.3 Florida Statute Governing the TDT**

The functions of the Tourist Development Council and the uses of the Tourist Development tax are set forth in Florida Statutes Chapter 125, 125.0104.

### **2.1 People Behind the Process**

Attraction Development Program applications are submitted to the VCB and reviewed by the Tourist Development Council. The Council will then make a recommendation to approve or deny funding and submit the recommendation to the Charlotte County Board of Commissioners. The Board of County Commissioners has final authority to approve or deny funding.

### **2.2 Tourist Development Council Board Members**

Commissioner Bill Truex – Chair – Charlotte County Board of Commissioners

Tish Sheesley – Tourism Industry Member – Charlotte County Arts & Humanities Council

Rick Brunette – Tourism Accommodations Member – Palm Island Resort

Jaha Cummings – Elected Municipal Official – City of Punta Gorda

Kathy Burnam – Tourism Accommodations Member – Fishermen’s Village

Julie Mathis – Tourism Industry Member – Charlotte County Chamber of Commerce

Robin Madden – Tourism Accommodations Member – Islander Properties

Rachel Keesling – Elected Municipal Official - City of Punta Gorda

Kelly Williamson – Four Points by Sheraton – Punta Gorda

### **2.3 VCB Staff**

The Charlotte County VCB, a department of Charlotte County Government, is located at 18500 Murdock Circle in Port Charlotte, Florida. The office is in Building B – Room 104. The VCB has a staff of 6 full-time and 3 part-time staff. Staff names, titles and contact information are listed below. Depending upon the nature of the attraction for which funding is requested, applicants might wish to consult with one or more staff members prior to developing their application.

Lorah Steiner - Director – 941-764-4939

Jennifer Huber – Communications and Public Relations Manager – 941-764-4937

Sean Doherty – Sports and Meetings Manager – 941-764-4936

Chip Futch – Marketing Manager – 941-764-4935

Jerry Jones – Film and Digital Media Manager – 573-690-0791

Elizabeth Parker – Administrative Secretary – 941-743-1900

Julie Pennock – Administrative Assistant – 941-764-4940

Brynja Phipps – Project Manager – 941-764-4931

### **2.4 Charlotte County, Florida Destination Brand Promise**

Our brand is grounded in Charlotte County's natural product; its fisheries, blueways, beaches, flora and fauna. *"Punta Gorda / Englewood Beach promises more of and easy access to the primary reason people want to come to Florida – to relax and enjoy Florida – 'outside.'"*

If you are awarded Attraction Development funding, your organization will be required to work with the VCB to ensure your employees and/or volunteers represent the Charlotte County Area Destination Brand to visitors, including the following marketing activities:

- Distribute VCB Travel Guides at your location
- Display a reciprocal web link to VCB website on your website
- Ensure your staff knows and understands the Punta Gorda/Englewood Beach brand
- Distribute VCB Visitor Guides at your locations
- Refer in-bound groups requiring 10 rooms or more per night for meetings, conventions and events to the VCB sales department.

### **3.0 Application Process**

The enabling legislation mandates that the Tourist Development Council review all applications and make funding recommendations to the Board of County Commissioners. Projects must pass a Phase I and Phase II approval by the Tourism Development Council prior to consideration by the Board of County Commissioners.

Potential applicants should review both Phase I and Phase II applications at the commencement of the process to ensure that they are capable of providing all of the information requested in both phases.

Phase I consists of a short application form which requests important preliminary information and is designed to assess the viability of the application and its conformity to the goals of the fund without requiring significant effort from the applicant. Successful Phase I applicants will be invited to participate in Phase II.

Phase II consists of a more comprehensive application requesting additional information from applicants, such as financials and business plans. Applicants will have the opportunity to present projects in person to the TDC Board as part of the review process. Phase II may also include site visits, as per TDC request.

#### **3.1 Attraction Development Funding Requirements**

Applications are assessed based on the following requirements. The TDC Board may recommend to advance a project if the specifications fall outside the requirements yet represent a significant impact to hotel room nights and Charlotte County economic sustainability.

1. Funding must be for capital investments only (“bricks and mortar” projects--design not included). Operational expenses will not be considered for funding.
2. A project must demonstrate that it will create substantial new and incremental hotel room nights in Charlotte County.
3. The TDC Board will only recommend funding for projects that have a minimum of a 1-to-1 funding match to the Attraction Development Program funding requested. No more than 25% of the match may be in-kind goods and services. Cash and in-kind donations pledged as a match for your request to the TDC’s Attraction Development Program may not be pledged as a match for any other funding. Design fees already expended will be considered as counting towards the 1-to-1 funding match.
4. Projects that either directly increase hotel room nights by themselves or support a larger initiative that will increase room nights, will be evaluated equally.
5. Projects may not solely benefit a single hotel owner, hotel property, or be situated on a hotel property.
6. Attraction Development funds cannot be the first funds committed to a project.

### 3.2 Criteria by Which Projects Will Be Evaluated

- **Financial Stability of the Requesting Organization**

Each applicant organization will be evaluated for financial sustainability, and perceived ability to raise additional funds as needed to bring the Project to completion.
- **Ratio of Room Nights Generated to Funding Requested**

The amount of Attraction Development funding requested will be analyzed versus the potential return of new hotel room nights in Charlotte County to be generated by the Project.
- **Strength of Business Plan and Sales and Marketing Plan**

The proposed business plan for the Project will be evaluated on its accuracy, completeness, and likelihood to support a successful and sustainable operation once the Project has opened.

Sales and marketing plans for projects will be evaluated upon the level of investment budgeted for these activities and the likelihood they will succeed in drawing visitation to the destination.
- **Generator of New and Incremental Room Nights**

The room night impact of the proposed Project will be assessed on whether the Project will draw new visitors to the area, or simply pull from existing visitors in Charlotte County while not increasing the number of new room nights.
- **Association with an Identified Need Period**

Projects that draw visitors to the destination specifically during identified periods of need for hotel room nights may receive more consideration than those that draw visitors exclusively during peak and established visitation periods. The identified need period for Charlotte County is May through November.
- **Attraction Audience**

Projects that target large audiences capable of filling many area hotel rooms are valued, but projects that draw new and untapped niche markets to Charlotte County may also be worthy of consideration.
- **Scope of Impact on Lodging Market**

The impact of the proposed Project on the occupancy rate of Charlotte County accommodations will be considered not only in terms of number of lodging room nights generated, but also in terms of the geographic impact and types of accommodations filled by visitors.
- **Timeliness of the Project**

Projects which are “shovel ready” may rate more highly than those which are still two or more years from beginning construction.
- **1-to-1 Funding Match Exceeded**

While it is a requirement for applying organizations to have secured a funding match equal to the amount for which they are applying from the TPDF, projects that exceed the 1-to-1 requirements may receive particular consideration.
- **Uniqueness and Innovation of Project**

Attractions and activities which are new to the region or not available to visitors living in key feeder markets for the destination may be valued more highly than those which duplicate offerings already available to visitors.

- **Strength of Brand Alignment**

Projects will be evaluated on whether they are consistent with the Charlotte County destination brand and provide additional support for the brand.

- **Projects Already Funded**

Projects that have previously received Attraction Development Program funding may apply, but the application should be for a new project scope with additional incremental room nights.

#### **4.1 Application Materials**

The applications are available for download on the Charlotte County VCB website, [www.CharlotteHarborTravel.com](http://www.CharlotteHarborTravel.com) as editable PDF forms. ***Please save the PDF form to your computer before beginning your work. Enter your information in the form fields, and be sure to save often.***

#### **4.2 Phase I Application**

Download here: [Phase I Application](#).

Phase I applications must be completed and submitted to the Charlotte County Visitor and Convention Bureau prior to the completion of the Phase II applications. Phase I applications will be reviewed and submitted to the Tourist Development Council for consideration. If the Tourist Development Council finds there is sufficient merit in the Phase I application, the applicant will be invited to complete the Phase II application. When finished with the application, email the PDF file as an attachment to:

Tourist Development Council  
Attraction Development Fund  
18500 Murdock Circle  
B-104  
Port Charlotte, FL 33948

Handwritten applications will not be accepted. Additional files and attachments will not be accepted in Phase I.

#### **4.3 Phase II Application**

Download here: [Phase II Application](#).

*Potential applicants should review the Phase II application to ensure that they are capable of providing all of the information requested should they be invited to participate in Phase II.*

When finished with the application, email the PDF file as an attachment to:

Tourist Development Council  
Attraction Development Fund  
18500 Murdock Circle  
B-104  
Port Charlotte, FL 33948



Handwritten applications will not be accepted. There are several additional files required in Phase II as outlined in the application. Please attach the files in .doc, .xls, or .pdf formats in the email with your completed application. **Name the files as instructed in the application.**

### **5.1 Awardee Information**

If an application is recommended for funding, the applicant will be notified of the date on which the funding request will appear on the Board of County Commissioners' agenda. Once approved by the BCC, Contracts for Service will be developed. A standard contract is available for reference at and should be reviewed prior to submission of your application.

### **5.2 Approved Project Funding Timeline**

Subject to contractual conditions, the first disbursement will be made when the Project is one-third completed; the second disbursement will be made when the Project is two-thirds completed; and the third disbursement will be made upon the date of completion. The Contract for Service shall specify the requirements for determining the completion of each stage of construction for the purpose of reimbursement. Disbursement requests require supporting documentation as outlined in the Contract for Service.

There is also an option to receive one disbursement based on specific project needs; however, single disbursements will only be processed after construction is 100% complete.

### **5.3 Reporting Requirements**

An annual report must be made to the Charlotte County Tourist Development Council by January 15 of each year during the term of the Contract for Service with the term commencing on the effective date of the contract and continuing for four years after the completion date. Reports include marketing plans and methodologies for capturing annual and out-of-market visitation, up-to-date room night projections, and copies of survey instruments used for data among other requirements.

## **6.1 Contact Information**

All questions should be directed to the director of tourism. Email: [Lorah.Steiner@CharlotteFL.com](mailto:Lorah.Steiner@CharlotteFL.com)  
Phone: (941)-764-4939

## **6.2 Workshop for Applicants**

An information Session will be held quarterly to explain the process and provide assistance for interested applicants. For dates and locations, please go to [www.CharlotteHarborTravel.com/ADF](http://www.CharlotteHarborTravel.com/ADF)

### 6.3 Glossary

Definition of terms used in the application materials:

**Average daily room rate (ADR)** – The average hotel or motel room rate paid by guests over a given period of time in a given market. This rate does not include taxes and fees paid by the guest. The Charlotte County VCB receives ADR data for hotels and motels in Charlotte County via a subscription from Smith Travel Research, an international provider of lodging market data.

**Demographics** – A description of a particular audience based upon certain segmentation characteristics, including age, household income, educational level attained, gender, and the presence of children at home.

**Tourist Development Tax** – A tax paid by guests staying in paid accommodations such as hotels, motels, vacation rentals, and bed and breakfasts. The tax is not applied to religious organizations, educational organizations, and summer camps. Guests in lodging properties in Charlotte County pay a total of 5% occupancy tax (in addition to applicable state sales tax).

**Out-of-market** – A term used to describe guests who reside outside of the Charlotte County market. This term is used to indicate different geographic areas, including guests living outside of Charlotte County, outside of the region Manatee, Sarasota, Fort Myers and Collier counties or outside of the state of Florida.

**Room nights** – One room night is defined as a single night spent in one room in any accommodation for which Tourist Development Tax is collected and remitted. Even if there are two or more guests staying in the room for one night, it is considered to be one room night.

**New or Incremental Room Nights**—“New” room nights are defined as those which are truly new to the market—that is, attracting new visitors to Charlotte County who would not have otherwise visited and who stay overnight in paid accommodations. “Incremental” room nights are room nights generated by visitors extending their stay by at least one night directly as a result of a new project.

**VCB** – Visitor and Convention Bureau