



## Event Development Program

---

The Charlotte County Tourism Event Development Program (EDP) provides *reimbursable funding* to **assist in the development of new events, occurring in low or shoulder seasons, which promote Charlotte County as a tourist destination.**

**The primary objective of this program is to promote tourism and attract overnight visitors to Charlotte County.** Funds received pursuant to the Event Development Program may only be used for the purposes authorized in Section 125.0104(5) of the Florida Statutes and specified in these guidelines.

The Program is administered through the Punta Gorda/Englewood Beach Visitor & Convention Bureau (VCB).

Applicants must substantiate the potential to draw overnight visitors to the area with a regional marketing plan. In addition, applicants must be able to **project a number of overnight visitors staying in Charlotte County accommodations and provide information on how they arrived at that projection (e.g., hotel partnerships).** Applicants should also include their plans on how the event will be established as an annually occurring event.

The amount of each award will be contingent upon the number of applications received and the availability of funds for events occurring between May 1 and September 30 (Summer Program) OR between May 1 and December 15 (Annual Program). Total funding available for the Summer Program is \$20,000. Total funding available for the Annual Program is \$40,000. The total program budget is \$60,000.

Revised June 2023

**Our Best Side is Outside.<sup>SM</sup>**

Punta Gorda/Englewood Beach Visitor & Convention Bureau  
1700 Tamiami Trail, Suite G-2, Port Charlotte, FL 33948 | 941.743.1900

## TABLE OF CONTENTS

---

Application Process.....	3
Program Guidelines.....	3
Eligible Expenses.....	4
Ineligible Expenses.....	4
Attachments.....	5
Attachment A: Event and Festival Application .....	6
Attachment B: EDP Checklist .....	13
Attachment C: Required Post-Event Documentation .....	14
Attachment D: Room Night Certification Form .....	16
Attachment E: Suggested Participant Survey .....	17
Attachment F: Reimbursement Scale .....	18
Attachment G: Scoring.....	19

## Application Process

---

1. Parties interested in the EDP should contact the VCB to discuss their event and qualifications for funding. If the program is a good fit for the applicant, the interested party should move forward with the formal application.
2. Applications are due by February 22<sup>nd</sup> of each year.
3. Applications will be reviewed for completeness.
4. Each applicant must meet with the VCB Program Liaison and/or the Tourism Director during the application process. VCB staff will make recommendations, if applicable, for improvements that might give the application a better chance of approval for funding.
5. Each applicant must present their application in-person to the Tourist Development Council (TDC) at one of the bi-monthly meetings following the application deadline. An oral presentation is mandatory and must include an overview of the event, how the event will be marketed and, more specifically, how the event will draw people from outside the market for overnight stays. The applicants will be notified, in advance, of the TDC meeting during which applications will be reviewed.

## Program Guidelines

---

1. Single application funding cap for both Summer Program or Annual Program events is \$10,000. Funds will only be dispersed as a reimbursement.
2. Reimbursement totals may be pro-rated based on the verified event results reflected in the post-event report.
3. Applicants are limited to two (2) applications per funding cycle.
4. The event must occur during the specified timeframe of May 1 through September 30 if a Summer Program application, or between May 1 and December 15 if an Annual Program application. Under special circumstances, the TDC may review and fund events occurring outside the program window, if the event projects to have another significant benefit to the community outside of room night generation (*i.e.*, widespread media exposure).
5. Must be a new event or the second, consecutive year of a previously funded EDP event. An event, which is reorganizing after a multi-year hiatus, may be considered at the discretion of the TDC.
6. Applicants must receive a minimum score of 60 out of 100 to be considered for funding. The TDC may award partial points for each scoring category.
7. The event may require paid admission but must be open to the public as opposed to a private event with paid admission.
8. An event which provides alcohol service may apply. All laws, local and state, must be stringently followed if alcohol is served at the event.
9. No event or festival shall allow the promotion of any political issue, candidate, or party.
10. The event must be held within Charlotte County.
11. A new EDP Funding Application must be submitted when material changes are made to an event after funding has been approved. Material changes are changes to event location, event date, allocation of EDP funding, or change in event management.
12. Successful applicants will be required to execute an Event Funding Agreement in the form required by the County.
13. Successful applicants will be required to provide a **Required Post-Event Documentation** report in a form acceptable to Charlotte County **within ninety (90) days** after the conclusion of the event. Appropriate funds will be reimbursed after review by the VCB staff and may be pro-rated if room night and/or economic impact projections are not achieved. *See Attachment C.*
14. Applications received after the deadline will be reviewed at the discretion of the VCB and are subject to funding based on the balance of the program budget. Applicants will be required to

present their application in-person to the TDC and will be notified in advance of the presentation date.

15. The event organizer will be responsible for tracking event attendance and the methodology for tracking. *See Attachment E for Suggested Participant Survey.*
16. The event organizer will be responsible for tracking room night generation through partnerships with Charlotte County accommodations. Event organizers must work with hoteliers to set-up room blocks and/or preferred rates on a first-come, first-serve basis. Once rates and/or blocks are established, it's the event organizer's responsibility to promote these rates to their potential attendees through their marketing efforts. *See Attachment D for Suggested Room Night Certification form.*
17. All marketing efforts (print/digital) must include the VCB logo as a primary sponsor of the event. The VCB shall also have the option to display two (2) banners and/or branded 10'x10' tents during the duration of the event. Advertising and all promotional materials with the VCB logo should be approved by the Tourism Director and/or Marketing Director prior to the start of advertising. Evidence of logo inclusion should be included in post-event reporting.

## Eligible Expenses

---

1. Entertainment fees, *e.g.*, musicians, singers, and other performers.
2. Exhibits or materials for special activities as part of an event or festival.
3. Advertising, marketing, postage, printing (applications & registration forms), and the purchase of mailing lists.
4. Transportation for larger venues, *e.g.*, carriages, wagons, and shuttles, particularly if additional transportation options are needed to increase attendance.
5. Equipment rental, such as staging and lighting.
6. Event signage.
7. Location fees and permitting fees for an event.
8. Event insurance.

## Ineligible Expenses

---

1. Any event expenses not specifically approved for funding under "Eligible Expenses."
2. Salaries, administrative expenses, or other monetary compensation to event organization staff.
3. Food and beverage, or any hospitality or social functions.
4. Any entertainment that is not for the general audience of the event.
5. Legal, medical, engineering, accounting, or other consulting services.
6. Interest or reduction of deficits or loans.
7. Police or public safety services.

## Attachments

---

The following pages are the Event and Festival Application, supporting documents, and post-event documentation.

## Attachment A: Event and Festival Application

Name of Event: \_\_\_\_\_  
Date(s) of Event: \_\_\_\_\_  
Location(s) of Event: \_\_\_\_\_  
Hours of Event: \_\_\_\_\_

Is this a first- or second-year event?      1<sup>st</sup> year      2<sup>nd</sup> year  
Was this event funded by EDP last year?      Yes      No

Have you or your organization received EDP funds in previous years?      Yes      No  
If yes, please list any events that previously received funding:

--

### Contact Information

**Primary Contact:** Primary event organizer who is authorized to sign contracts and communicate with VCB staff.

Name:	
Address:	
Phone, Cell:	
Phone, Office:	
Email:	

**Presenter:** A presentation to the TDC is required. If the person presenting is different from the primary event contact, please provide their contact information.

Name:	
Address:	
Phone, Cell:	
Phone, Alt:	
Email:	

Please summarize the event management/planning experience of the persons who will be responsible for the planning and execution of this event. Use additional sheets if necessary. Résumés are acceptable documentation.

**Provide a detailed description of your event.** Use additional sheets if necessary. This should include the type of event, *e.g.*, “Blue Grass Festival,” as well as activities and attractions that will be included in the event.

Website: \_\_\_\_\_

Facebook: \_\_\_\_\_

Instagram: \_\_\_\_\_

Twitter: \_\_\_\_\_

Other: \_\_\_\_\_

Additional Information:



Please provide an estimate of anticipated attendance as described below.  
See Attachment E: Suggested Participant Survey

Please describe how projections were estimated and how tickets sales will be tracked.

Please provide an estimate of anticipated room nights as broken-out below.

Please describe how projections were estimated and how room nights, related to the event, will be tracked. *E.g., room blocks, discount code; see the Attachment D: Room Night Certification Form*

9 | Page

**Accommodation Partners**

*Please list hoteliers that you are working with to track room nights during the duration of the event.*

Hotel	Point of Contact/Position	Phone Number	Contracted Room Block (Y/N)

**Additional Information:**

--

Please complete the following budget form for your event.

### Projected Income

Please list Event Development Program funds request under Projected Income.

Source	Amount	Cash	In-Kind
Total:			

### Projected Expenses

Please indicate with a "Y" or "N" if you plan to cover the expenses with Event Development Program funds.

Item	Estimated Expense	Event/Activity/Attraction	EDP (Y or N)
Total:			

Summary of Funding Request

Total Budget:	\$
Amount of Requested EDP Funds:	\$

EDP Funds as a percentage of total budget: \_\_\_\_\_ %

If the event is not awarded EDP funds, or the full amount of the request, how will this affect the success of the event?

Please provide any additional comments:

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Email your completed application and event marketing plan as an attachment to:

[Brynja.Phipps@charlottecountyfl.gov](mailto:Brynja.Phipps@charlottecountyfl.gov)

---

## Attachment B: EDP Checklist

---

*Key steps in the Event Development Program process:*

- ☐ Meet with Program Liaison and/or Tourism Director to review application and program.
- ☐ Submit application. Be sure to include the following:
  - Event Budget.
  - Marketing Plan.
  - Copies of relevant Marketing Materials.
    - a. Items that have been produced already or will be produced.
  - Room Night and Attendance Estimates.
  - Evidence of Hotel Partnerships.
  - Evidence of Community Partnerships/Sponsors.
- ☐ Present application to the TDC at a scheduled meeting.
  - A presentation is mandatory. Applicant will be notified in advance of the meeting.
  - Presentations should be timely and allow for the TDC to ask questions about the event.
- ☐ Execute a Funding Agreement furnished by Charlotte County.
- ☐ Submit Event Insurance.
  - To be submitted at least fifteen (15) days before the start of the event.
- ☐ Complete and submit Required Post-Event Documentation report within ninety (90) days after the close of the event.
  - Include request for reimbursement and W-9.
  - Include invoice for the amount of funding the TDC approved.
    - a. Actual amount may be reimbursed and may be pro-rated depending on verified event results.

## Attachment C: Required Post-Event Documentation

---

### Due Within Ninety (90) Days Following The Last Day Of The Event

Event Name: \_\_\_\_\_  
Event Date(s): \_\_\_\_\_  
Event Host: \_\_\_\_\_

1. Document all EDP funded expenditures. Provide copies of corresponding documentation:
  - a. Receipts, cancelled checks, or credit card statements; and
  - b. Signed contracts or vendor invoices.
2. Provide evidence of local partnerships and how you worked together.
3. Provide documentation of attendance estimates and the process used to determine attendance numbers, *e.g.*, ticket sales, participant survey, aerial photos, law enforcement estimates, etc. See *Attachment E: Suggested Participant Survey*.
4. Provide documentation of all relevant media coverage. This may be done in a spreadsheet. Please include:
  - a. Type of Media, *e.g.*, print, radio, television, etc.;
  - b. Circulation or audience reach;
  - c. Geographic coverage of each advertising placement – local, regional, national, or international; and
  - d. Marketing materials showing evidence of VCB logo inclusion.
5. Provide a general overview of the event to include:
  - a. Elements of the event that were most successful;
  - b. Changes that would make the event more successful; and
  - c. Any factors impacting the event either positively or negatively, *e.g.*, weather, location, duration, etc.

6. Provide estimate of, and method used to determine room night generation. *See Attachment D: Room Night Certification Form.*
7. Request for Reimbursement: To simplify the reimbursement process, please include the following with the Required Post-Event Documentation report:
  - a. Invoice for amount in Funding Agreement
  - b. Current W-9

Submitted by:

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**\*Failure to submit a completed Required Post-Event Documentation report  
will affect reimbursement and future funding eligibility.**

## Attachment D: Room Night Certification Form

---

**TO:** Accommodation General Manager and/or Director of Sales

The purpose of this form is to quantify the actual number of room nights utilized in Charlotte County for the \_\_\_\_\_ event.

Your cooperation in the documentation of these room nights is very important to the Visitor & Convention Bureau and our Event Marketing efforts. Thank you in advance for your assistance. Please provide the following information.

**Hotel/Location:** \_\_\_\_\_

TRACKED ROOM NIGHTS					
Group Name:					
Event:					
Date(s):					
Paid Room Nights:					
Comp. Room Nights:					

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



## Attachment E: Suggested Participant Survey

---

Visitor Tracking Survey for \_\_\_\_\_

Hi, my name is \_\_\_\_\_, and we are taking a short survey about \_\_\_\_\_  
\_\_\_\_\_. I would like to ask you a few questions  
which should only take 1-2 minutes.

**-Where do you live?**

City: \_\_\_\_\_

Zip Code: \_\_\_\_\_

**-Are you here by yourself or with others?**

Solo: \_\_\_\_\_ Others: \_\_\_\_\_

**-If others, how many are in your group?**

Size of travel party: \_\_\_\_\_

**-Are you (or your party) staying in a local hotel or vacation rental? - (\_\_\_\_) Yes (\_\_\_\_) No**

(If yes, which hotel? \_\_\_\_\_)

(If yes, how many rooms for your party? \_\_\_\_\_)

(If yes, how many nights for your party? \_\_\_\_\_)

## Attachment F: Reimbursement Scale

---

Reimbursement for the Event Development Program is based on the percentage of actual room nights achieved compared to anticipated room nights.

On average, EDP participants can expect the following reimbursement based on room nights achieved.

Room Nights Achieved vs. Anticipated Room Nights
>75% =100% of Award
50% - 74% =75% of Award
25% - 49% = 50%of Award
<25% = 0% of Award

## Attachment G: Scoring

---

Applications will be evaluated by the TDC using the following criteria:

### **Production of Room Nights** – 35 Points

*Factors to be considered include:*

- Does the applicant provide a well-researched plan for attracting visitors from outside Charlotte County who will need overnight accommodations?
- What is the projected Room Night generation? Is it reasonable?
- Has a host hotel or accommodation partnership(s) been established?
- What is the event duration and what is the effect on Room Nights generated?

#### Second year events:

- Did the applicant establish hotel or accommodation partnership(s) during last year's event? Were they successful?
- Is it reasonable to expect the same or similar out-of-County attendance or does the applicant project an increase or decrease?

### **Out-of-County Marketing/Advertising** - 35 Points

*Factors to be considered include:*

- Does the event provide opportunities for state, regional, national, and/or international exposure? How many potential visitors could marketing be expected to reach?
- Is the event being advertised using digital media?
- Are advertisements and other promotions planned sufficiently in advance to promote travel to the event and produce overnight visitors?
- Does the Marketing Plan include an itemized marketing/advertising budget?
- How effective is the marketing plan? Is it creative? Is it reasonable?
- Does the applicant propose co-op advertising opportunities with other events or the VCB?
- Is there a designated person or a committee assigned to handle publicity/media relations?

#### Second year events:

- How effective was the marketing/advertising plan for last year's event?
- How does the level, type, markets, and target of advertising compare to last year's event?
- Has the applicant provided information as to what percentage of attendees from last year's event were from out-of-County? How many?
- Did last year's event generate regional, state, national, and/or international exposure for Charlotte County?

**Economic Impact** – 15 Points

*Factors to be considered include:*

- What is the projected number of event attendees?
- What is the projected number of attendees from out-of-County?
- Does the event funding request represent more than 50% of the total event budget?
- How strong is the overall benefit to tourism and the economy of Charlotte County?

Second year events:

- How strong was the overall benefit to tourism and the economy of Charlotte County generated from last year's event? Is a similar level of economic benefit reasonable to expect this year?
- Did the applicant comply with the post-event reporting requirements last year in a manner acceptable to the County?

**Event Timing, Location, and Duration** - 10 points

*Factors to be considered include:*

- How unique is the event as compared to other events in Charlotte County and surrounding counties?
- Is the event single- or multi-day? Is the event going to occur annually?
- Does the event occur on a date when other events are already planned (*i.e.*, a competing event)? If so, is the event organizer collaborating with other events, organizations, or businesses?
- Does the event occur on a date where it could be a supporting or companion event to another scheduled event (*i.e.*, on a different day in the same weekend)?

Second year events:

- When was last year's event, and was the timing and location successful?

**Additional Information** - 5 points

*Factors to be considered include:*

- What people or organizations within the Charlotte County Community are supporting this event?
- Does the event already have sponsorship commitments, and from whom?
- Are any event sponsors or collaborators from out-of-County?
- Will the event hire or utilize the services of any Charlotte County citizens or businesses?

**\*\*Note: Partial points may be awarded for each scoring category\*\***

Event:	
Event Date(s):	
Organizer:	

*Minimum Score of 60 required for TDC funding*

Production of Room Nights:	/35
Out-of-County Marketing/Advertising:	/35
Economic Impact:	/15
Timing, Location, Duration:	/10
Additional Information:	/5

<b>Total Score:</b>	<b>/100</b>
---------------------	-------------

Scored by: \_\_\_\_\_