

MCKINNEY COMMUNITY DEVELOPMENT CORPORATION

Grant Application

Fiscal Year 2017

IMPORTANT:

- Please read the McKinney Community Development Corporation Grant Guidelines prior to completing this application.
- The Grant Guidelines and Application are available at www.mckinneycdc.org; by calling 972.547.7653 or by emailing cschneible@mckinneycdc.org
- **Please call to discuss your plans for submitting an application in advance of completing the form.** A completed application and all supporting documents are required to be submitted via email or on a thumb drive for consideration by the MCDC board. Please submit the application to:

McKinney Community Development Corporation
5900 S. Lake Forest Blvd., Suite 110
McKinney, TX 75070

- *If you are interested in preliminary Board of Directors review of your project proposal or idea, please complete and submit the **Letter of Inquiry** form, available at www.mckinneycdc.org, by calling 972.547.7653 or emailing cschneible@mckinneycdc.org.*

Applications must be completed in full, using this form, and received by MCDC, via email or on a thumb drive, by 5:00 p.m. on the date indicated in schedule below.

Please indicate the type of funding you are requesting:

- | | |
|---|---|
| <input type="checkbox"/> Project Grant
Projects that are eligible for funding in accordance with the Type B sales tax statute (refer to examples in Grant Guidelines) and that advance the mission of MCDC. | <input type="checkbox"/> Promotional or Community Event Grant (maximum \$15,000)
Initiatives, activities or events that promote the City of McKinney for developing new or expanded business opportunities and/or tourism – and enhancing quality of life for McKinney residents. |
|---|---|

Promotional and Community Event Grants:

Application Deadline	Presentation to MCDC Board	Board Vote and Award Notification
Cycle I: November 30, 2016	December 2016	January 2017
Cycle II: May 31, 2017	June 2017	July 2017

Project Grants:

Application Deadline	Presentation to MCDC Board	Board Vote and Award Notification
Cycle I: December 30, 2016	January 2017	February 2017
Cycle II: March 31, 2017	April 2017	May 2017
Cycle III: June 30, 2017	July 2017	August 2017

APPLICATION

INFORMATION ABOUT YOUR ORGANIZATION

Name: McKinney Downtown Business Re-Development – McKinney Main Street

Federal Tax I.D.: 04-3615798

Incorporation Date: 2004

Mailing Address: McKinney Performing Arts Center, 111 N. Tennessee St.

City McKinney

ST: TX

Zip: 75069

Phone: 972-547-2660

Fax: 972-547-2615

Email: arosenthal@mckinneytexas.org

Website: www.downtownmckinney.com

Check One:

- Nonprofit – 501(c) Attach a copy of IRS Determination Letter
- Governmental entity
- For profit corporation
- Other

Professional affiliations and organizations to which your organization belongs: Texas Downtown Association, Texas Main Street, National Main Street, McKinney Chamber of Commerce, Texas Festivals and Events Association

REPRESENTATIVE COMPLETING APPLICATION:

Name: Amy Rosenthal

Title: Director, MPAC & McKinney Main Street

Mailing Address: McKinney Performing Arts Center, 111 N. Tennessee St.

City: McKinney

ST: TX

Zip: 75069

Phone: 972-547-2652

Fax: 972-547-2615

Email: arosenthal@mckinneytexas.org

CONTACT FOR COMMUNICATIONS BETWEEN MCDC AND ORGANIZATION:

Name: Amy Rosenthal

Title: Director, MPAC & McKinney Main Street

Mailing Address: 111 N. Tennessee St.

City: McKinney

ST: TX

Zip: 75069

Phone: 972-547-2652

Fax: 972-547-2615

Email: arosenthal@mckinneytexas.org

FUNDING

Total amount requested: \$15,000

Matching Funds Available (Y/N and amount): Yes, \$15,000

Will funding be requested from any other City of McKinney entity (e.g. Arts Commission, City of McKinney Community Support Grant)?

Yes

No

Please provide details and funding requested:

PROJECT/PROMOTIONAL/COMMUNITY EVENT

Start Date: September 22, 2017

Completion Date: September 24, 2017

BOARD OF DIRECTORS (may be included as an attachment) - ATTACHED

LEADERSHIP STAFF (may be included as an attachment) - ATTACHED

Using the outline below, provide a written narrative no longer than 7 pages in length:

I. Applying Organization

Describe the mission, strategic goals and objectives, scope of services, day to day operations and number of paid staff and volunteers.

Disclose and summarize any significant, planned organizational changes and describe their potential impact on the Project/Promotional/Community Event for which funds are requested.

II. Project or Promotional/Community Event (whichever is applicable)

- Outline details of the Project/Promotional/Community Event for which funds are requested. Include information regarding scope, goals, objectives, target audience.
- **For Promotional Grants/Community Events** – describe how this initiative will **promote the City of McKinney for the purpose of business development and/or tourism.**
- Describe how the proposed Project/Promotional/Community Event fulfills strategic goals and objectives for your organization.
- Please also include planned activities, time frame/schedule, and estimated attendance and admission fees if applicable.
- Include the venue/location for Project/Promotional/Community Event?
- Provide a timeline for the Project/Promotional/Community Event.
- Detail goals for growth/expansion in future years.

Project Grants – please complete the section below:

- | | | |
|-----------------------------|------------------------------|-----------------------------|
| • An expansion/improvement? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • A replacement/repair? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • A multi-phase project? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • A new project? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Has a feasibility study or market analysis been completed for this proposed project? *If so, please attach a copy of the Executive Summary.*

Provide specific information to illustrate how this Project/Promotional/Event aligns with one or more of the goals and strategies adopted by McKinney City Council and McKinney Community Development:

- Eligible for MCDC consideration under Sections 501 to 505 of the Texas Local Government Code (refer to MCDC Grant Guidelines)
- Support cultural, sports, fitness, entertainment, community projects and events that attract resident and visitor participation and contribute to quality of life, business development and growth of McKinney sales tax revenue
- Highlight and promote McKinney as a unique destination for residents and visitors alike
- Meet citizen needs for quality of life improvements, business development and sustainable economic growth for residents in the City of McKinney
- Demonstrate informed financial planning – addressing long-term costs, budget consequences and sustainability of projects for which funding is requested
- Educate the community about the impact local dining and shopping has on investment in quality of life improvements in McKinney

Indicate which goal(s) listed above will be supported by the proposed Project/Promotional/Event:

- Support cultural, sports, fitness, entertainment, community projects and events that attract resident and visitor participation and contribute to quality of life, business development and growth of McKinney sales tax revenue
- Highlight and promote McKinney as a unique destination for residents and visitors alike
- Demonstrate informed financial planning – addressing long-term costs, budget consequences and sustainability of projects for which funding is requested
- Educate the community about the impact local dining and shopping has on investment in quality of life improvements in McKinney

Has a request for funding, for this Project/Promotional/Community Event, been submitted to MCDC in the past?

X Yes No

Date(s): 2014, 2016

Financial

- Provide an overview of the organization’s financial status including the impact of this grant request on organization mission and goals.
- Please attach your organization’s budget for the current year and audited financial statements for the preceding two years. If audited financials are not available, please indicate why.

What is the total estimated cost for this Project/Promotional/Community Event?

\$600,000

(Please provide a budget specific to the proposed Project/Promotional/Community Event.)

What percentage of Project/Promotional/Community Event funding will be provided by the Applicant? 97%

Are Matching Funds available? Yes No

Cash: \$15,000	Source: Event Revenue	% of Total 03%
In-Kind \$	Source	% of Total

Please provide details regarding other potential sources for funding. Include name of organization solicited; date of solicitation; amount of solicitation and date that notice of any award is expected.

IV. Marketing and Outreach

Describe marketing plans and outreach strategies for your organization, for the Project/Promotional/Community Event for which you are requesting funding – and how they are designed to help you achieve current and future goals.

V. Metrics to Evaluate Success

Outline the metrics that will be used to evaluate success of the proposed Project/Promotional/Community Event. If funding is awarded, a final report will be required summarizing success in achieving objectives outlined for the event.

Acknowledgements

If funding is approved by the MCDC board of directors, Applicant will assure:

- The Project/Promotional/Community Event for which financial assistance is sought will be administered by or under the supervision of the applying organization.
- All funds awarded will be used exclusively for the purpose described in this application.
- MCDC will be recognized in all marketing, advertising, outreach and public relations as a funder of the Project/Promotional/Community Event. Specifics to be agreed upon by applicant and MCDC and included in an executed performance agreement.
- Organization’s officials who have signed the application are authorized by the organization to submit the application;
- Applicant will comply with the MCDC Grant Guidelines in executing the Project/Promotional/Community Event for which funds were received.
- A final report detailing the success of the Project/Promotional/Community Event, as measured against identified metrics, will be provided to MCDC no later than 30 days following the completion of the Project/Promotional/Community Event.
- Up to 80% of the approved grant may be provided, on a reimbursement basis, prior to conclusion of the Project/Promotional/Community Event with submission of invoices/receipts to MCDC. The final 20% may be paid following MCDC’s receipt of unpaid invoices/receipts; documentation of fulfillment of obligations to MCDC; and final report on the Project/Promotional/Community Event.

- The required performance agreement will contain a provision certifying that the applicant does not and will not knowingly employ an undocumented worker in accordance with Chapter 2264 of the Texas Government Code, as amended. Further, should the applicant be convicted of a violation under 8 U.S.C. § 1324a(f), the applicant will be required to repay the amount of the public subsidy provided under the agreement plus interest, at an agreed to interest rate, not later than the 120th day after the date the MCDC notifies the applicant of the violation.

We certify that all figures, facts and representations made in this application, including attachments, are true and correct to the best of our knowledge.

Chief Executive Officer

Representative Completing Application

Amy Rosenthal

Amy Rosenthal

Signature

Signature

Amy Rosenthal

Amy Rosenthal

Printed Name

Printed Name

May 31, 2017

May 31, 2017

Date

Date

INCOMPLETE APPLICATIONS, OR THOSE RECEIVED AFTER THE DEADLINE, WILL NOT BE CONSIDERED.

CHECKLIST:

Completed Application:

- Use the form/format provided
- Organization Description
- Outline of Project/Promotional/Community Event; description, budget, goals and objectives
- Indicate the MCDC goal(s) that will be supported by this Project/Promotional/Community Event
- Project/Promotional/Community Event timeline and venue
- Plans for marketing and outreach
- Evaluation metrics
- List of board of directors and staff

Attachments:

- Financials: organization's budget for current fiscal year; Project/Promotional/Community Event budget; audited financial statements
- Feasibility Study or Market Analysis if completed (Executive Summary)
- IRS Determination Letter (if applicable)

A FINAL REPORT IS TO BE PROVIDED TO MCDC WITHIN 30 DAYS OF THE EVENT/COMPLETION OF THE PROJECT/PROMOTIONAL/COMMUNITY EVENT.

FINAL PAYMENT OF FUNDING AWARDED WILL BE MADE UPON RECEIPT OF FINAL REPORT.

PLEASE USE THE FORM/FORMAT OUTLINED ON THE NEXT PAGE.



McKINNEY COMMUNITY DEVELOPMENT CORPORATION

Final Report

Organization:

Funding Amount:

Project/Promotional/Community Event:

Start Date:

Completion Date:

Location of Project/Promotional/Community Event:

Please include the following in your report:

- Narrative report on the Project/Promotional/Community Event
- Identify goals and objectives achieved
- Financial report – budget as proposed and actual expenditures, with explanations for any variance
- Samples of printed marketing and outreach materials
- Screen shots of online Promotions
- Photographs, slides, videotapes, etc.
- Performance against metrics outlined in application

Please submit Final Report no later than 30 days following the completion of the Project/Promotional/Community Event to:

McKinney Community Development Corporation
5900 S. Lake Forest Blvd., Suite 110
McKinney, TX 75070

Attn: Cindy Schneible
cschneible@mckinneycdc.org



ABOUT MAIN STREET

Main Street consists of 11 board members (two-year staggered terms) and two full time staff members. The board meets the 2nd Thursday of every month at 8:30 a.m. at the McKinney Performing Arts Center in the Encore Wire Room, 111 N. Tennessee. Main Street also holds business monthly meetings on the second Tuesday of every month at 8:30 a.m. at the McKinney Performing Arts Center, 111 N. Tennessee.

The Main Street approach is to support the continued growth of McKinney's downtown area through economic development, increased promotion, enhancing tourism, infrastructure redevelopment, historical preservation efforts and an increased awareness of McKinney's history. Our mission is to ensure that downtown McKinney continues to be the vibrant, inviting, safe and growing area it is known for today.

In an effort to achieve these goals, McKinney Main Street focuses on a four point approach with committees focused on design, organization, promotion and economic re-development. Committees are the backbone of the organization and the vehicles through which the board implements the Main Street work plan.

DESIGN

Creates an attractive coordinated and quality image of downtown McKinney by capitalizing on our unique assets and heritage. This committee is involved in all aspects of design that affects downtown's image.

ORGANIZATION

Promotes the Main Street Program and focuses on fundraising. Partnerships are key to the success of the program. Main Street needs both public and private allies and advocates to make our revitalization a priority for the community.

PROMOTION

Promotes downtown; to market a unified, quality image of the commercial district as the center of commerce, culture, and community life for residents and visitors alike.

ECONOMIC REDEVELOPMENT

Works in coordination with the Town Center Study resulting in an improved retail mix, a stronger tax base, increased investor confidence and a stable role for downtown McKinney as a major component of the city's economy



ABOUT DOWNTOWN

McKinney enjoys one of the oldest authentic and thriving historic downtowns in Texas. What was once the center of all commercial and social activity for Collin County, again today shines as a viable retail, dining, entertainment and business center.

McKinney's gently rolling hills, tree-lined neighborhoods, historic downtown and beautiful parks give the city a quaint, small town feel. The friendly charm and comfortable pace belies the fact that McKinney, with a population of over 150,000 people, is one of the fastest-growing cities in America and recently named as one of the Best Places to Live in America by *Money Magazine*.

Downtown offers more than 130 unique shops and more than a dozen unique restaurants, including upscale restaurants featuring award-winning chefs, sandwich shops, outdoor patio dining and neighborhood pubs. Downtown McKinney also offers an assortment of specialty shops, art galleries featuring the works of local artists, furniture stores, exquisite antique collections, gift shops, apparel boutiques and a multitude of service businesses.

Visitors with an eye for history enjoy the adjoining historic neighborhood featuring beautifully restored homes from another century. The original Collin County Courthouse, located in the center of downtown, is now known as McKinney Performing Arts Center with a 420-seat theater suitable for intimate arts performances, lectures and events.

Main Street is a national program born out of the National Trust for Historic Preservation. Since 1980, the National Main Street Center has been working with communities across the nation to revitalize historic commercial areas.

Improving economic management, strengthening public participation, and marketing downtown as a destination to dine, shop and enjoy is critical to Main Street's future. Main Street also focuses on recruiting new businesses and retaining existing businesses. Building on downtown's inherent assets -- rich architecture, personal service, and traditional values and most of all, a sense of place -- the Main Street approach supports entrepreneurship, downtown cooperation and civic concern.

McKinney Main Streets work plan includes preserving the Quality Image of Downtown McKinney and maintaining the Historic Designation set forth by the Texas Historic Commission. We work in partnership with public and private allies to boost downtown economics, to enhance festivals and promotion in downtown McKinney, and to meet fundraising goals set forth by the Main Street Board of Directors and City Council.



**McKinney Main Street
Board of Directors
2016-2017**

Name	Business Address	Phone #, Cell #, Fax #, E-Mail
Amy Rosenthal Program Director	City of McKinney-MPAC 111 N. Tennessee St McKinney, TX 75069	Phone # 972-547-2652 Cell # 817-269-1326 Email: arosenthal@mckinneytexas.org
Jan Elwell Chair Term End 9/30/17	JE Corporation 1629 Landon Ln McKinney, TX 75071	Cell # 972-658-3225 Email: jan@jecore.com
Alex Lanio Vice Chair Term End 9/30/17	Goodies Texas 114 N Tennessee St McKinney, TX 75069	Phone # 401 924-4552 Email: alex@goodiestexas.com
Amber Gutschlag Secretary/Treasurer Term End 9/30/17	1405 Clearwater Dr McKinney, TX 75071	Phone # 972-542-8485 Cell # 214-850-9581 Email: a_gutschlag@hotmail.com
Edna Brown Term End 9/30/17	1103 Hyde Park McKinney, TX 75069	Phone #: 214-673-8975 Email: andenana48@gmail.com
Robert 'Matt' Hamilton Term End 9/30/17	207 Byrne St. McKinney, TX 75069	Phone #: 469-952-3838 Email: matt@localyocal.com
Kaci Lyford Term End 9/30/17	Patina Green Home and Market 116 N. Tennessee, Suite 102 McKinney, TX 75069	Phone # 972-548-9141 Cell# 469-233-2472 Email: info@patinagreenhomeandmarket.com
Ric Anderson Term End 9/30/17	1501 Timberline McKinney, TX 75070	Cell # 214-632-9652 rfa@andersonbrand.com
Jolie Williams Term End 9/30/17	Coldwell Banker, Apex REALTORS® 7290 Virginia Parkway, Suite 2400 McKinney, TX75071	Cell # 214-502-6495 Email: Jolie@Diva-Homes.com
Courtney Ward Term End 9/30/17	907 West St. McKinney, TX 75069	Cell # 817-614-7015 Email: courtneylaurenward@gmail.com
CoCo Good City Liaison	City of McKinney – Marketing & Comm. 216 N Tennessee St McKinney, TX 75069	Phone # 972-547-7508 Cell # 214-585-3610 Email: cgood@mckinneytexas.org
Barry Shelton City Liaison	City of McKinney – City Manager's Office 221 N. Tennessee St. McKinney, TX 75069	Phone # 972-547-7402 Cell # 469-534-5254 Email: bshelton@mckinneytexas.org

AMY SHOULTS ROSENTHAL
8001 Tonkawa Trail, McKinney, TX 75070
817-269-1326 amyrosenthal@sbcglobal.net

PROFILE: Arts and events executive director with 20 years of experience. Proven results in increased attendance, funding and visibility. Expert understanding of industry from project inception to production. Innovative and creative communicator. Strategical thinker with knowledge, motivation and skill set to achieve the dream.

MCKINNEY MAIN STREET / MCKINNEY PERFORMING ARTS CENTER

Executive Director (2006 to Present, ED since January 2014)

- Manage \$1.5 million annual budget – combination of private 501c3 and City Fund
- Generate over \$800,000 of revenue annually through sponsorships and event programs
- Conduct monthly meetings with downtown merchants and business owners
- Work as liaison with between different city departments and downtown business owners
- Develop budgets, reports and monthly financials for 11 member Board of Directors, City Council and City Manager's Office
- Organize and execute 8 annual events attracting more than 100,000 visitors to Historic Downtown McKinney
- Member of initial operations team to launch, brand and promote city-run performing arts facility in readapted historic building
- Design and execute media campaigns for 70 MPAC-presented live performance events.
- Develop and achieve media sponsorships with *The Dallas Morning News* and WFAA Channel 8
- Write promotional copy for organization including season brochures, direct mail pieces, newsletters and facility rental materials
- Generate sponsorship proposals and write grant applications.
- Supervise 6 FT and 2 PT employees including facility operations, events coordinator, ticket office manager, marketing specialist, and maintenance workers
- Develop and maintain MPAC's public communication mechanisms including website, email notifications and social networking sites
- Collaborate with local arts organizations utilizing MPAC to ensure unified message.
- Design and execute MPAC promotional activities including subscriber and donor events, chamber gatherings and artist receptions
- Nurture community relationships with McKinney ISD, Historic Neighborhood Association, Downtown Merchant Organization, McKinney Arts Commission, McKinney Chamber of Commerce and McKinney Community Development Corporation

DALLAS CHILDREN'S THEATER (1995 – 2006)

Public Relations Director, Outreach Program Manager, Development Associate (1995 – 2006)

- Develop and implement PR and marketing campaigns for \$3.1 million organization serving over 250,000 annually – nationally recognized as one of top family theater organizations in US
- PR campaigns include \$8.6 million capital campaign, 45 theatrical productions, special events, and educational programming
- Coordinate \$112,000 community service project in conjunction with Apartment Association of Greater Dallas
- Manage all media relations. Coverage includes national publications, *TIME* magazine and *American Theatre Magazine*, in addition to front-page articles in *The Dallas Morning News*

- Generate pr/marketing strategies, budgets, timelines, sales goals, income projections
- Develop funding requests for educational programming securing over \$250,000 in grant support
- Write curriculum for multi-sensory lessons implemented in classrooms nationwide
- Coordinate and train volunteers to replicate program and instruct teachers and administrators on application of arts in-education
- Assist with grant requests to corporations, foundations, government institutions, and individuals.
- Maintain and oversee database of donors
- Track donor giving, record statistical data for reports, and administer donor correspondence

EDUCATION/PROFESSIONAL DEVELOPMENT:

Corporate and Private Sponsorship, IEG (Chicago, IL)
Business of Presenting II, Association of Presenting Arts Professionals (New York, NY)
Bachelor of Fine Arts, Theatrical Performance, University of Texas at Austin

WRITING SAMPLES AND REFERENCES AVAILABLE UPON REQUEST

GEOFF FAIRCHILD, CFEE
423 Daniel Street, Richardson, TX 75080
214.738.5794 geoff4fair@yahoo.com

Relevant Professional Experience

CITY OF MCKINNEY, McKinney, Texas; *January 2016 to present*
Special Events Coordinator, McKinney Main Street Program

CITY OF RICHARDSON, Richardson, Texas; *January 2002 to January 2016*
Special Events Manager, Parks and Recreation Department

SPRINGFEST MUSIC FESTIVAL (501c3), Pensacola, Florida; *December 1996 to July 2001*
Marketing and Public Relations Director

The following summarizes experiences gained from the above three positions:

Marketing

- Developed and implemented the festival's first ever marketing campaign and prepared the annual marketing timeline- resulted in SpringFest's attendance tripling and revenue doubling in just three years.
- Oversee the concept and design of all marketing and advertising including promotional collateral material, print ads, radio & TV spots, outdoor billboards, festival website, street banners, credentials and event handouts.
- Direct ad agency media buys and placements as well as the festival's digital campaign.
- Created and implemented *regional* CVB promotional contests/campaigns that resulted in increased hotel stays.
- Prepared the event's marketing budget and initiated co-op advertising programs with sponsors.
- Winner of industry awards: Best TV Ad, Best Radio Ad, Best Web Site, Best Press Kit, Best Collateral Material.
- Managed the festival's marketing coordinator, intern, street team and volunteer marketing committee.

Communications/Media Relations/Social Media

- Official City of Richardson festival spokesperson- Arranged and led press conferences and currently conduct all media interviews, guest speaker opportunities and City Council presentations.
- Co-produced and hosted local cable TV show promoting the festival.
- Wrote copy for the following: event press releases, print and broadcast advertisements, collateral marketing material, event web site, festival handouts, e-newsletters, calendar/web listings and the festival's Facebook page.
- Managed the Wildflower Festival's contracted Social Media Coordinator and its Publicist.
- Developed the advance press kit and the event Media Guide garnering coverage in *USA Today, New York Newsday, New Orleans Times-Picayune, Atlanta Journal-Constitution, and Southern Living* magazine.
- Devised media guidelines for the event (request for interviews, credentials, photo policies, and on-site logistics).

Event Entertainment/Production/Operations

- Directed the planning, production and implementation of Richardson's Wildflower Arts and Music Festival.
- Oversee the entertainment programming strategy including headliner/regional/local band selection and strolling entertainers, contract administration, band technical, publicity advancement and all on-site production.
- Direct all aspects of the event operations including the coordination of logistics, procurement of rentals and temporary services, site layout, concessions, property agreements, volunteers, vendors, fireworks display, public/private utilities, site décor, festival/band merchandise sales, insurance requirements, and risk management. This coordination involves working with City departments as well as community groups and private businesses.
- Oversaw all ticketing operations including pricing strategy, advance outlet and Internet sales, group ticket sales, Richardson Resident Discount Program and day-of-show box office operations.
- Prepare and administer festival/event operating budgets.
- Renegotiated vendor contracts and streamlined operations- resulted in increased revenue and lower expenses.

- Manage and coordinate annual events/festivals produced by the McKinney Main Street Program- Krewe of Barkus Parade, Arts In Bloom, Bike The Bricks, Red White & Boom Patriotic Parade, McKinney Oktoberfest, Scare on The Square, and Home For The Holidays.

Public Relations

- Developed the festival's public relations plan and implemented strategies that improved the event's perception by residents and political, corporate, civic, and educational leaders. This included our fundraising efforts, support of the arts and scholarships, use of volunteer groups, award recognition and the positive impact on the economy.
- Established cooperative relationships throughout the Southeast with entertainment/travel editors, convention and visitor bureaus, Radio/TV program directors, on-air media personalities and state/local tourism personnel- resulted in increased coverage and positive perception of the event.
- Authored an emergency crisis Public Relations Media Plan for dealing with both on-site and year round incidents.
- Designed and coordinated event surveys that resulted in improved public and corporate perception of event.

Sponsorship

- Designed solicitation packets for corporate/media outlets; identified and implemented new areas of sponsorship and determined pricing and benefit structure for those areas - resulted in the securing of 60 new sponsors.
- Negotiated and secured cash and in-kind media as well as event services sponsorships totaling over \$400,000.
- Developed post-event sponsor booklets recapping sponsor return-on-investment: media coverage, proof of performance affidavits, on-site photos, copies of ads, samples of marketing materials and event synopsis.
- Coordinated on-site logistics (signage, credentials, booth set-up, promotional giveaways, meet-n-greets, stage backdrops, vehicle placement) for sponsors, media outlets and product promotional vehicles.

Miscellaneous Event Industry Projects and Accomplishments

- Conference speaker (marketing, entertainment, sponsorship) – Texas Festivals and Events Association; International Festivals and Events Association; Texas Event Leadership Program administered by Texas A&M.
- Graduate of The International Festival and Events Association's **Certified Festival and Event Executive Program** (CFEE) – This is the highest and most recognized certification within the special events industry.
- Authored article- "Alternatives to Marketing Your Event" published in *IE Magazine* (IFEA quarterly periodical).
- Successfully partnered with **FLAUSA** and **Texas Department of Transportation**, respectively, on regional promotional contests, interstate welcome center displays, brochure placement and web presence.
- Prepare and administer third-party Special Event and Film Permits for the City of McKinney.
- Event Management consultant for the City of: Milton, FL; Pensacola, FL; Mesquite, TX; Murphy, TX; Allen, TX
- Directed advance publicity, promotional contests and on-site logistics for: **VH1's "Rock Across America" Tour, Chevrolet Monte Carlo Tour, Peavey, Gibson Guitar, and The Rock n' Roll Hall of Fame Museum.**
- Worked with the Pensacola Convention and Visitors Bureau and designed a festival presentation that resulted in SpringFest Music Festival being named the "**2000 Festival of the Year**" by **The Southeast Tourism Society.**
- Secured funding from the Pensacola CVB further leveraging SpringFest's advertising and promotional budget.

Other Professional Experience

EMPIRE DISTRIBUTORS, Atlanta, GA; *February 1992 to January 1995*; Alcoholic beverage wholesales
QUALITY BEVERAGE, Houston, TX; *August 1990 to January 1995*; Alcoholic beverage wholesales

Education

December 1997

Bachelor of Science in Business Administration; Accounting
UNIVERSITY OF WEST FLORIDA- Pensacola, Florida

May 1990

Bachelor of Science in Business Administration; Marketing
UNIVERSITY OF SOUTHERN MISSISSIPPI- Hattiesburg, Mississippi

Professional Affiliations/Community Involvement

Past Board of Director/President of the Texas Festivals and Events Association (TFEA); **Member-** International Festivals and Events Association (IFEA); **Alumni-** Leadership Pensacola, Class of 2000

**MCKINNEY MAIN STREET
MCDC PROMOTIONAL ACTIVITY / COMMUNITY EVENT GRANT APPLICATION
MAY 31, 2017 – MCKINNEY OKTOBERFEST SUPPORT**

I. APPLYING ORGANIZATION

McKinney Main Street organization information is attached.

II. PROMOTION / COMMUNITY EVENT

McKinney Main Street respectfully requests promotional support of McKinney Oktoberfest 2017.

III. FINANCIAL

Currently, the majority of McKinney Main Street's financials are founded by event revenues. Typically, event revenues are spent on event expenses. However, McKinney Oktoberfest is McKinney Main Street's only event that potentially generates a profit. This profit is directly invested into holiday decorations and activities for Home for the Holidays and other projects for McKinney Main Street. In essence, McKinney Oktoberfest is a fundraiser for Home for the Holidays. (Home for the Holidays has the biggest economic impact for the merchants of Historic Downtown McKinney.)

Budget overview for Oktoberfest is attached.

IV. MARKETING AND OUTREACH

Support from MCDC will allow Main Street to advertise and promote Oktoberfest to attract regional and new visitors to McKinney. 100% of MCDC support will be invested in promotions and advertising to bring guests from areas surrounding McKinney.

Plans for a robust marketing campaign (outside of McKinney area) include:

- Trip Advisor Digital Ads
- Digital billboards
- Major market radio
- Frisco/Plano monthly mailed publications
- Food and Lifestyle Blogs – Social Media

Standard marketing initiatives:

- Posters in downtown and throughout community
- Postcards
- Press releases
- Ads in The Dallas Morning News and Star Local Media
- Email blasts

- Downtown marquees
- Website presence, downtownmckinney.com, mckinneyperformingartscenter.org, mckinneytexas.org, visitmckinney.com
- Social media promotions – Facebook, Twitter, Instagram and Pinterest

V. METRICS TO EVALUATE SUCCESS

The success of this project will be measured on overall foot traffic attendance, store specific sales increases, vendor and community feedback. McKinney Main Street execute short surveys to gather demographic information. Sample questions will include: zip code of event attendee's residence, inquiring if this is a first visit for the guest, and collecting overall impressions of the event. As customary with all McKinney Main Street events, a post-event survey is conducted to all vendors in downtown.

McKinney Oktoberfest



McKinney meets Bavaria in September 2017 10th Anniversary!

Drawing on the colorful tradition that began in Munich, Germany in 1810, McKinney's Oktoberfest represents many things to many people. This family-friendly event offers a celebration of tradition and the cultural contributions of German immigrants who settled in Texas. Enjoy authentic German music, food and drink, traditional costumes, dancing, and children's activities.

Germans have a special word – *Gemütlichkeit* – suggesting a warm atmosphere of open and generous hospitality, and with that heartfelt welcome, we greet over **55,000 guests** to our Historic Downtown. Oktoberfest has become Historic Downtown McKinney's most attended festival, and the large number of visitors provide a major economic impact on McKinney's 168 year-old square featuring vibrant specialty shops and restaurants.

Many communities have an Oktoberfest celebration, but McKinney's Oktoberfest has established a reputation and an enthusiastic regional following for its dedication to German tradition. From food and drink to entertainment, the weekend is full of German culture - showcasing beer from McKinney's own German breweries - Franconia and Tupps. 2016 welcomes the addition of a German brewery, Hofbrau. Most importantly McKinney's Oktoberfest is a free community event that maintains a family-friendly setting with activities, attractions and a VW car show with appeal to a wide variety of ages.

Based on the success of previous years and in celebration of the event's 10th anniversary, Oktoberfest 2017 festivities last three days - September 22, 23 and 24. Opening ceremonies begin Friday evening, and the event continues through Sunday afternoon with more food, entertainment and attractions for the entire family.

- JULY: Secure sponsorships and funding. Reserve advance media buys.
- AUGUST: Coordinate and confirm vendor contracts. Reserve infrastructure elements.
- SEPTEMBER: Largest concentration of promotions. Recruit volunteer support.
- SEPTEMBER 22-24: Festival
- OCTOBER: Thank you's and reporting



McKinney Oktoberfest



BUDGET

McKinney Oktoberfest is the primary revenue producing event that McKinney Main Street hosts. This revenue is intended to help sustain the organization's activities throughout the remainder of the year. Funds from McKinney Oktoberfest are reinvested into Home for the Holidays to purchase lighting and decorations for downtown. As all outdoor events, revenue generated from McKinney Oktoberfest is based on weather conditions. **Marketing commitments are made in advance of the event and require obligations made regardless of event weather circumstances.**

INCOME	2015 Final	2016 Final	2017 Budget
Sponsorships, Vendor Booths, Tickets Sales, Merchandise Alcohol Revenue	759,365	713,335	750,000
EXPENSES			
Infrastructure, Logistics, Admin Fees	54,611	59,707	57,000
Entertainment	29,600	30,866	35,000
Marketing	28,087	34,588	35,000
Concession Payouts, Staffing, Alcohol	519,474	442,094	475,000
TOTAL Expenses	631,772	567,255	602,000



**McKinney Main Street
Oktoberfest 2016 Profit and Loss
January 1 - November 14, 2016**

	Oktoberfest
Income	
Downtown Membership Income	
Events Income	
Alcohol Sales	
Concession Sales Food and Beverage	250.98
Downtown Christmas Tree Fund	
Ticket Sales	645,197.99
Total Events Income	\$ 645,448.97
Miscellaneous Income	273.75
Non Profit Income	
MPAC Seat Cushion Fundraiser	
Total Non Profit Income	\$ 0.00
Programs Income	
Shoppers Guide	
Total Programs Income	\$ 0.00
Sales of Product Income	
Sponsorship Income	42,750.00
Vendor Income	24,862.00
Total Income	\$ 713,334.72
Gross Profit	\$ 713,334.72
Expenses	
Administrative Expenses	1,125.00
Associations/Dues/Subscriptions	
Board Expense	
Bookkeeping/Audit	
Office Expenses	
Other Fees	
Bank Service Charges	
Credit Card Fees	
Interest	
Total Other Fees	\$ 0.00
Postage	
Supplies	458.96
Food	660.55
Total Supplies	\$ 1,119.51
Travel/Training	495.00
Total Administrative Expenses	\$ 2,739.51
Event Expenses	
Activities Expense	4,437.59
Alcohol Expense	51,557.77
Liability Insurance	2,860.20

Servers		15,221.25
TABC Permit		924.00
Total Alcohol Expense	\$	70,563.22
Decorations Expense		1,658.51
Downtown Christmas Tree Expense		
Entertainer Expense		30,866.00
Event Permit		
Infrastructure		
Electricity		14,315.47
Fencing		3,374.39
Ice		3,150.00
Portables		2,079.72
Rentals		33,987.36
Total Infrastructure	\$	56,906.94
Marketing Expense		3,500.00
Billboards		
Event T-Shirts		3,545.50
Misc Marketing		5,313.77
Newspaper		2,500.00
Radio		7,650.00
Signage		5,011.24
Social Media		7,087.73
Television		
Total Marketing Expense	\$	34,588.24
Merchandise		17,750.00
Office/General Administrative Expenses		
Prize Winnings		
Special Events Expense		
Prize Winnings		
Total Special Events Expense	\$	0.00
Staffing Expense		
Cashiers		7,830.00
Misc Staff		4,550.00
Porters/Cleanup		2,257.16
Total Staffing Expense	\$	14,637.16
Supplies & Materials		2,652.35
Ticket Redemption		319,796.78
Weather Insurance		10,600.00
Total Event Expenses	\$	564,456.79
Mileage		58.96
Program Expenses		
Promotional Project Expense		
Directional Sign Expense		
Shoppers Guide Expense		
Total Promotional Project Expense	\$	0.00
Seat Cushion Replacement		
Total Program Expenses	\$	0.00

Total Expenses	\$	567,255.26
Net Operating Income	\$	146,079.46
Net Income	\$	146,079.46

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McKinney Main Street

BALANCE SHEET

As of May 31, 2017

	TOTAL	
	AS OF MAY 31, 2017	AS OF MAY 31, 2016 (PY)
ASSETS		
Current Assets		
Bank Accounts		
Capital One - Checking	39,186.24	29,851.71
Capital One - Reserve Acct.	3,993.68	3,682.36
Clearing	0.00	
First United Bank Checking	36,086.93	45,096.83
First United Savings	7,500.93	
Petty Cash	0.00	0.00
Total Bank Accounts	\$86,767.78	\$78,630.90
Accounts Receivable		
Accounts Receivable	46,693.89	3,000.00
Total Accounts Receivable	\$46,693.89	\$3,000.00
Other Current Assets		
Prepaid Expenses	0.00	
Undeposited Funds	0.00	0.00
Total Other Current Assets	\$0.00	\$0.00
Total Current Assets	\$133,461.67	\$81,630.90
Other Assets		
Polaris Gem	24,193.89	
Santa House	17,386.73	
Total Other Assets	\$41,580.62	\$0.00
TOTAL ASSETS	\$175,042.29	\$81,630.90
LIABILITIES AND EQUITY		
Liabilities		
Current Liabilities		
Accounts Payable		
Accounts Payable	1,500.00	0.00
Total Accounts Payable	\$1,500.00	\$0.00
Credit Cards		
CitiCard Main Street	6,368.51	
Total Credit Cards	\$6,368.51	\$0.00
Other Current Liabilities		
Unearned Revenue	0.00	
Total Other Current Liabilities	\$0.00	\$0.00
Total Current Liabilities	\$7,868.51	\$0.00
Total Liabilities	\$7,868.51	\$0.00
Equity		
Opening Bal Equity	0.00	
Retained Earnings	215,618.75	663,094.77
Net Income	-48,444.97	-581,463.87

	TOTAL	
	AS OF MAY 31, 2017	AS OF MAY 31, 2016 (PY)
Total Equity	\$167,173.78	\$81,630.90
TOTAL LIABILITIES AND EQUITY	\$175,042.29	\$81,630.90

McKinney Main Street

PROFIT AND LOSS

October 2016 - May 2017

INCOME	ARTS IN BLOOM	BIKE THE BRICKS	HOME FOR THE HOLIDAYS	KREW OF BARKUS	MCKINNEY CHRISTMAS TREE	OKTOBERFEST	POLARIS GEM	SCAPE ON THE SQUARE	NOT SPECIFIED	TOTAL
Administrative Income									25.00	\$25.01
Downtown Membership Income									7,022.50	\$7,022.51
Events Income										\$0.01
Activities Income		68,778.19								\$68,778.11
Bike the Bricks		1,500.00								\$1,500.01
Concession Sales Food and Beverage						0.00				\$7,985.41
Downtown Christmas Tree Fund					7,136.25					\$7,136.21
Entertainer Grant			2,600.00							\$2,600.01
Registration Fees										\$20,540.01
Ticket Sales		47,182.00							-100.00	\$47,082.01
Vendor Commission		12,921.21								\$16,883.91
Total Events Income		62,703.21			7,136.25				-100.00	\$173,507.81
Miscellaneous Income									24,193.89	\$24,351.31
Programs Income										\$0.01
Polaris Gem Advertising Income										\$15,000.01
Total Programs Income									15,000.00	\$15,000.01
Sponsorship Income										\$96,500.01
Vendor Income										\$60,884.91
Vendor Application Fee										\$3,234.71
Total Vendor Income									-150.00	\$64,119.71
Total Income									1,750.00	\$3,510.00
GROSS PROFIT									\$44,991.39	\$380,526.41
EXPENSES										
Administrative Expenses										\$3,375.01
Associations/Dues/Subscriptions										\$8,926.11
Board Expense										\$109.11
Bookkeeping/Audit										\$2,380.01
Office Expenses										\$213.01
Other Fees										\$0.01
Bank Service Charges										\$35.01
Credit Card Fees										\$6,170.31
Total Other Fees										6,205.31
Postage										\$3,889.81
Printing and Reproduction										\$534.91
Supplies										\$683.31
Food										\$899.21
Total Supplies										804.61
Travel/Training										\$549.28
Total Administrative Expenses										19,821.25
Event Expenses										\$14,600.01
Activities Expense										\$53,650.01
Decorations Expense										\$37,272.61
										64.75

	ARTS IN BLOOM	BIKE THE BRICKS	HOME FOR THE HOLIDAYS	KREWE OF BARKUS	MCKINNEY CHRISTMAS TREE	OKTOBERFEST	POLARIS GEM	SCAPE ON THE SQUARE	NOT SPECIFIED	TOTAL
Downtown Christmas Tree Expense					12,675.26					\$12,675.26
Entertainer Expense	16,050.00	4,120.00		23,908.88				300.00		\$45,603.81
Event Permit		1,270.00								\$1,270.00
Event Staff	7,516.50									\$7,516.51
Hospitality	2,037.12		650.71							\$2,687.83
Infrastructure										\$0.00
Electricity	13,689.42		19,989.71							\$33,679.13
Fencing	2,987.89		981.59							\$3,969.48
Portables			999.60	282.26						\$1,281.86
Rentals	11,067.41	257.00	14,841.90			0.00		-374.00		\$25,792.31
Total Infrastructure	27,744.72	257.00	36,812.80	282.26		0.00		-374.00		\$64,722.71
Marketing Expense									10,000.00	\$10,000.00
Billboards			12,276.00							\$12,276.00
Event T-Shirts	276.80		611.90							\$888.71
Misc Marketing	4,918.68			144.00	448.04	-0.09	450.00	4,277.50		\$10,238.11
Newspaper	3,955.00		4,205.00							\$8,160.00
Radio	7,000.00		4,040.00	1,500.00						\$12,540.00
Signage	3,788.77		1,302.02	183.00						\$5,253.79
Social Media	4,925.82	543.82	3,159.14					36.86		\$8,720.31
Total Marketing Expense	24,845.07	543.82	25,594.06	1,827.00	448.04	-0.09	450.00	54.74	14,314.36	\$69,077.01
Merchandise	3,847.55									\$3,847.55
Office/General Administrative Expenses	20.57									\$20.57
Prize Winnings		24,075.00								\$24,075.00
Special Events Expense										\$0.00
Bike the Bricks									-621.05	\$-621.05
Home for the Holidays...A Mck									-50.00	\$-50.00
McKinney Oktoberfest									-24.94	\$-24.94
Prize Winnings		74.75		33.75				625.79		\$734.29
Special Events Liability Ins.	1,549.00									\$1,549.00
Total Special Events Expense	1,549.00	74.75		33.75				625.79	-695.99	\$1,587.31
Staffing Expense										\$0.00
Cashiers	1,060.20		2,772.00							\$3,832.20
Misc Staff	550.00								225.00	\$775.00
Porters/Cleanup	1,021.72									\$1,021.72
Total Staffing Expense	2,631.92		2,772.00					225.00	225.00	\$5,628.91
Supplies & Materials	257.08						10.28		484.86	\$752.22
Ticket Redemption	37,164.51		19,551.10						160.00	\$56,875.61
Ticket Redemption - prior year correction									-4,038.09	\$-4,038.09
Total Ticket Redemption	37,164.51		19,551.10				480.28		-3,878.09	\$52,837.51
Total Event Expenses	123,666.04	30,340.57	169,224.96	3,368.01	13,128.30	-0.09	460.28	1,045.28	55,598.85	\$396,827.01
Maintenance									2,507.00	\$2,507.00
Mileage			87.65						249.00	\$336.65
Program Expenses										\$0.00
Promotional Project Expense										\$0.00
Directional Sign Expense									715.20	\$715.20
Shoppers Guide Expense									500.00	\$500.00
Total Promotional Project									1,215.20	\$1,215.20

Expense	ARTS IN BLOOM	BIKE THE BRICKS	HOME FOR THE HOLIDAYS	KREWE OF BARKUS	MCKINNEY CHRISTMAS TREE	OKTOBERFEST	POLARIS GEM	SCORE ON THE SQUARE	NOT SPECIFIED	TOTAL
Total Program Expenses										
Total Expenses	\$127,715.10	\$30,340.57	\$173,254.60	\$3,968.01	\$13,563.39	\$ -0.09	\$468.33	\$1,045.28	1,215.20	\$1,215.20
NET OPERATING INCOME	\$10,604.82	\$2,524.43	\$ -33,657.75	\$1,986.99	\$ -1,425.14	\$0.00	\$3,251.67	\$2,464.72	\$79,191.10	\$428,976.21
OTHER INCOME						\$0.00		\$2,464.72	\$ -34,193.71	\$ -48,449.81
Interest Earned										
Total Other Income	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	4.91	\$4.91
NET OTHER INCOME	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4.91	\$4.91
NET INCOME	\$10,604.82	\$2,524.43	\$ -33,657.75	\$1,986.99	\$ -1,425.14	\$0.00	\$3,251.67	\$2,464.72	\$ -34,194.80	\$ -48,444.91