

visit
MCKINNEY
..... TEXAS

McKINNEY CONVENTION & VISITORS BUREAU

GRANT
APPLICATION

For Fiscal Year 2020-21

For Additional Information:

Dee-dee Guerra, Executive Director

200 W. Virginia • McKinney, TX • 75069

972-547-2059 • dguerra@visitmckinney.com

IMPORTANT:

Please read the Visit McKinney (McKinney Convention & Visitors Bureau) Grant Guidelines, including state-mandated uses for local hotel occupancy tax funds, thoroughly prior to completing this application. The Grant Guidelines and Application are available at www.visitmckinney.com, by calling Dee-dee Guerra at 972-547-2059 or by emailing dguerra@visitmckinney.com.

Interested applicants should call to discuss plans for submitting an application in advance of completing the form. A completed application and all supporting documents should be submitted via email, Dropbox or on a thumb drive for consideration by the Visit McKinney board. Please submit the application to:

**Visit McKinney
200 W. Virginia
McKinney, TX 75069**

If emailing, please send to dguerra@visitmckinney.com.

If you are interested in a preliminary review by the VISIT MCKINNEY Board of Directors of your project, proposal or idea, please complete and submit the **Letter of Inquiry** form prior to completing the grant application, available at www.visitmckinney.com, by calling 972-547-2059 or by sending an email to dguerra@visitmckinney.com.

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

Application Deadline	Presentation to VM Board	Board Vote on Awards
CYCLE 1: October 5, 2020	October 27, 2020	TBA
Extended: CYCLE 2: February 8, 2021	February 23, 2021	March 23, 2021

Total Grant Amount Available in FY 2020-21

\$30,000: \$15,000 per cycle. Any funds not awarded/dispersed during Cycle 1 may be rolled over and made available for Cycle 2.

ABOUT YOUR ORGANIZATION

Name: Heritage Guild of Collin County
Federal Tax I.D.: 75-1602150
Incorporation Date: 1974
Mailing Address: PO Box 583 315 S. Chestnut
75070 75069
City McKinney State: TX Zip Code: _____
Phone: 972-562-8190 Fax: _____ Email: _____
Website: www.chestnutsquare.org

CHECK ONE:

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

PROFESSIONAL AFFILIATION & ORGANIZATIONS TO WHICH YOURS BELONGS:

McKinney Chamber of Commerce
Texas Assoc. of Museums
American Alliance of Museums

REPRESENTATIVE COMPLETING THE APPLICATION

Name: Jaymie Pedigo
Title: E.D.
Mailing Address: PO Box 583
City McKinney State: _____ Zip Code: 75069
Phone: cell 936-524-4743 Fax: (opt) _____ Email: jaymie@chestnutsquare.org

CONTACT FOR COMMUNICATIONS BETWEEN VISIT MCKINNEY & ORGANIZATION

Same as representative completing application from previous page

Name: _____

Title: _____

Mailing Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Fax: (opt) _____ Email: _____

FUNDING REQUESTED & OTHER SOURCES

Total amount requested from Visit McKinney: \$ 1,500

Matching Funds Available:

Yes (Please indicate amount and source): In-Kind vendor discount
 No

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

Yes _____

No

If YES, please provide details and funding requested from other City of McKinney entity: _____

IDENTIFY TOURISM-RELATED EVENT OR PROJECT

Name of Event or Project: Wedding Venue

Start Date: April Completion Date: December 2021

APPLYING ORGANIZATION'S BOARD OF DIRECTORS *(List may be included as an attachment)*

Name: Brian Medina

Name: Sandi Dinehart

Name: Jennifer Cobb

Name: David Clarke

Name: Emil Dahl

Name: Lori Geer

Name: Mark Doty

Name: Jennifer Druckamiller

Name: Nick Keim

APPLYING ORGANIZATION'S LEADERSHIP STAFF *(List may be included as an attachment)*

Name: Jaymie Pedigo, E.D.

Name: Kim Ducote, Wedding + Private Event Mgr

Name: Jamie Siebert, Tourism Manager

Name: Anne Quinn, Curator

Name: _____

Name: _____

Name: _____

Use the outline below to prepare a written narrative no more than seven (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 at the organization making this application. Please provide with this narrative a one-page overview/synopsis synopsis/summary of the plan detailed in your grant application, utilizing it as a cover sheet to the full narrative.
- Disclose and summarize any significant, planned organizational changes, and describe their potential impact on the Advertising/Promotional/Community Event for which funds are requested.

II. Tourism-Related Event or Project

- Outline details of the Advertising/Promotional/Community Event for which funds are requested. Include information regarding scope, goals, objectives, target audience.
- Describe how this initiative will **promote the City of McKinney for the purpose of tourism.**
- Describe how the proposed Event or Project fulfills strategic goals and objectives for your organization.
- Include planned activities, time frame/schedule, and estimated attendance and admission fees, if applicable.
- Provide the venue/location for the Event or Project.
- Provide a timeline for the Event or Project.
- Detail goals for growth/expansion in future years. If this is not the first year of the event, please include attendance numbers and other measurements from previous years.
- Explain methods you plan to use to attract resident and visitor participation to contribute to tourism in McKinney, highlighting and promoting the city as a unique destination.
- Demonstrate informed budgeting/financial planning – addressing revenue generation, costs and use of net revenue.

Provide specific information to illustrate how this Event/Project aligns with one or more of the goals and strategies adopted by McKinney City Council and Visit McKinney.*

- Ensure application eligibility for Visit McKinney consideration under the Texas Hotel Tax Expenditure Requirements (Texas Tax Code § 351.101). (Refer to accompanying Guidelines document.) To be considered for Visit McKinney grant eligibility, your request must satisfy both Category 1 and at least one of the eight state-approved usages in Category #2 as outlined in the Texas Hotel Tax Expenditure Requirements, which are included in this packet.)
- Demonstrate informed financial planning – addressing long-term costs, budget consequences and sustainability of projects for which funding is requested.

FINANCIALS (Please provide the following as attachments)

- An overview of the organization's financial status including the impact of this grant request on the organization's mission and goals.
- 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.

Has a funding request for this Event/Project been previously submitted to Visit McKinney?

Yes

No

Date(s): 2019 - 2020

What is the total estimated cost for this Event or Project? \$ 3500

(Please attach budget details for the Event or Project for which funding is being requested.)

What percentage of the Event/Project funding will be provided by the Applicant? _____

Are Matching Funds available?

Yes

No

Cash \$ _____	Source _____	% of Total _____
In-Kind \$ _____	Source <u>vendor discount</u>	% of Total <u>35%</u>

Please provide details regarding other potential sources for funding. Include the 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 Event or Project 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 Event or Project. If funding is awarded, a final report will be required summarizing success in achieving objectives outlined for the event.

The Heritage Guild of Collin County was established by a group of McKinney women in 1973. Founding members, Martha Schubert and Margaret Hughston initiated the purchase to save the Dulaney House and Dulaney Cottage. Additional property and buildings have been subsequently acquired and preserved. Unlike many historic parks in Collin County, Chestnut Square Historic Village is a private, not-for-profit 501(c)(3), relying on grants, community support and fundraising efforts to achieve its mission.

Chestnut Square's mission: *to preserve history, celebrate community and inspire the future*, is evident in the daily operations and special events that make McKinney "Unique by Nature".

Chestnut Square consists of 10 buildings, spanning the 1850's – 1930's, and includes the oldest house in McKinney. The collection is made up of four homes, an Inn, a reproduction schoolhouse, a general store, a chapel, a reception house & Visitors Center. The campus also includes a Blacksmith Shop, Chicken Coop, goat pen, outhouse and beautiful gardens.

Our original 2020 budget called for \$136,000 in wedding revenues, 39% of total projected income. Once we amended our budget in May for the Covid crisis, we decreased anticipated wedding income to \$122,350. Our actual wedding income in 2020 was \$103,500, an \$18,850 shortfall (15% below budget). Our total budget shortfall (Actual vs Amended budget) was \$23,950.

We executed 89 weddings in 2020 – a very high number of events for our venue – however, due to the restrictions and limitations, our event price averaged \$1100 instead of \$3500. Most were one hour, stand up in the garden or Chapel with 10 family members and friends.

In 2019, a more typical year, we hosted 73 wedding events. Of those, 60 were from outside McKinney, and 44 were from outside Collin County (or further north). Approximately 1/3 of these brides reported booking hotel rooms, and more than ½ report using local caterers or restaurants, bakeries, florists, photographers, etc.

Wedding revenues are crucial to our financial sustainability. As wedding income is approximately 40% of our revenues, personnel costs are approximately 40% of our expenses. This allows our program, event and donor funding to support the preservation and education tenets of our mission.

We are planning to ask MCDC for support for an expansion of our Bevel House reception facility in order to seat a larger crowd, 100-120 (at full capacity) like the Chapel. This is the optimal time for that as most of our weddings are not using the facility due to the pandemic).

To this end, we'd like to produce a video to highlight our wedding venue – to be used as a commercial on our website and social media. We are asking for \$1,500 from Visit McKinney to support this project. We would recognize VISIT MCKINNEY as the sponsor of the video.

Our virtual Home Tour videos are so amazing, we think a quality video of our wedding venue could be what ignites our wedding business again! You can watch them on our website at <https://www.chestnutsquare.org/holiday-tour-of-homes/>.

We are also launching a video program for the McKinney Farmers Market similar to the one Canton does at First Monday Trade Days. <https://www.firstmondaycanton.com/post/live-look-at-first-monday-canton>.

With the assistance of a professional marketing & Social Media firm, our trends and social media analytics are improving regularly. The McKinney Farmers Market Facebook page shows a 30% increase in followers January 2020 – January 2021. With 16,500 followers, we're at about half of McKinney Main Street and just 1000 behind McKinney ISD!

We anticipate that this video will help boost our Chapel Social Media channels and web traffic – and coupled with our expansion, to serve additional parties once the time is right for full sized gatherings again. Reaching brides from outside the area brings Hotel Motel and Sales taxes into McKinney and supports local businesses.

Our timeline would be to begin production of the video at the height of the growing season when our property is at its most beautiful – April & May – and then finish up as we are able to (hopefully) showcase the expansion of the reception area, which we anticipate will be done in August and September.

ACKNOWLEDGEMENTS

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

- The Event or Project 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 purposes described in this application.
- Visit McKinney will be recognized in all marketing, advertising, outreach and public relations as a financial sponsor of the Event or Project. Specific statement of recognition will be agreed upon by applicant and Visit McKinney and be included in an executed performance agreement. (We recommend using this verbiage: "This event is funded in part by Visit McKinney" or "Funded in part by Visit McKinney.")
- Organization officials who have signed the application on behalf of the organization are duly authorized by the organization to submit the application on its behalf.
- Applicant will comply with the Visit McKinney Grant Guidelines in executing the Event or Project for which funds were received.
- A final report detailing the success of the Event or Project, as measured against identified metrics, will be provided to Visit McKinney no later than 30 days following the completion of the Event or Project.
- Funds awarded for approved applications are provided on a reimbursement basis, after the event takes place and after all verified receipts and a final report on the Event or Project. (The event/project must take place at least five to six months from the date of the grant award announcement to provide proper promotional opportunities for the event or project.) The required performance agreement will contain a provision certifying that the applicant does not and will not knowingly employ any undocumented workers 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 upon interest rate, not later than the 120th day after the date the Visit McKinney requests repayment.

The undersigned certify that all figures, facts and representations made in this application, including attachments, are true and correct.

Chief Executive Officer

Jaymie Pedigo

Signature

Jaymie Pedigo

Printed Name

2/10/21

Date

Representative Completing Application

Jaymie Pedigo

Signature

Printed Name

Date

PLEASE NOTE:

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

The Heritage Guild of Collin County

BUDGET VS. ACTUALS: FY 2020 - FY20 P&L

January - December 2020

	TOTAL		
	ACTUAL	BUDGET	OVER BUDGET
Income			
40000 Grants	67,840.70	95,840.70	-28,000.00
41000 Direct Public Support	51,723.90	47,575.00	4,148.90
42000 Program Revenues			
42010 Farmers' Market	41,917.53	32,000.00	9,917.53
42030 Merchandise Sales	3,033.00	2,400.00	633.00
42040 Education Programs	1,415.42	1,500.00	-84.58
42050 Ghostly Haunting	4,877.64	2,400.00	2,477.64
42070 Prairie Camps	8,580.10	6,500.00	2,080.10
42080 Public Village Tour	1,654.92	1,000.00	654.92
42090 Tea & Tour	1,814.00	2,000.00	-186.00
42100 Trolley Tour	68.07	0.00	68.07
42199 Other Program Revenues	645.32	128.00	517.32
Total 42000 Program Revenues	64,006.00	47,928.00	16,078.00
42500 Event & Fundraising Revenues			
42520 Farm to Table Dinner	9,190.00	9,190.00	0.00
42550 Ghost Walk	5,736.02	4,000.00	1,736.02
42560 Holiday Home Tour	11,205.14	15,000.00	-3,794.86
42570 Ice Cream Crank Off	496.00	2,000.00	-1,504.00
42580 Murder Mystery	6,239.60	5,500.00	739.60
42699 Other Event/Fund Raising Income	4,657.92	500.00	4,157.92
Total 42500 Event & Fundraising Revenues	37,524.68	36,190.00	1,334.68
43000 Facility Rentals			
43010 Weddings	103,500.00	122,350.00	-18,850.00
43020 Rentals	3,580.00	2,500.00	1,080.00
Total 43000 Facility Rentals	107,080.00	124,850.00	-17,770.00
44000 Other Operating Income	171.46	-19.85	191.31
45000 Investments	100.08	33.08	67.00
Total Income	\$328,446.82	\$352,396.93	\$ -23,950.11
GROSS PROFIT	\$328,446.82	\$352,396.93	\$ -23,950.11
Expenses			
61100 Wedding Expenses	9,554.21	7,500.00	2,054.21
61200 Programming Expenses			
61210 Farmers' Market Costs	8,703.39	12,000.00	-3,296.61
61230 Merchandise Costs	2,353.94	1,500.00	853.94
61240 Educational Programs Costs	1,192.44	750.00	442.44
61265 Pumpkin Patch & Farm Days Costs	-93.80	-93.80	0.00
61270 Tour & Tea Costs	818.07	800.00	18.07
61280 Trolley Tour Costs	826.00	1,000.00	-174.00
61290 Prairie Camp Costs	2,082.53	1,500.00	582.53
Total 61200 Programming Expenses	15,882.57	17,456.20	-1,573.63
61400 Events & Fundraising Expenses			

The Heritage Guild of Collin County

BUDGET VS. ACTUALS: FY 2020 - FY20 P&L

January - December 2020

	TOTAL		
	ACTUAL	BUDGET	OVER BUDGET
61420 Farm to Table Dinner Costs	1,061.15	1,200.00	-138.85
61450 Ghost Walk Costs	46.07	350.00	-303.93
61460 Holiday Home Tour Costs	1,373.25	4,200.65	-2,827.40
61470 Ice Cream Crank Off Costs	544.76	350.00	194.76
61480 Murder Mystery Costs	1,714.75	2,375.00	-660.25
61599 Other Event Costs	1,107.53		1,107.53
Total 61400 Events & Fundraising Expenses	5,847.51	8,475.65	-2,628.14
61600 Business Expenses			
61610 Advertising, PR & Marketing	26,531.75	19,161.76	7,369.99
61680 Staff Relations	69.90		69.90
Total 61600 Business Expenses	26,601.65	19,161.76	7,439.89
61700 Outside Services			
61730 Fundraising Expenses	2,900.00		2,900.00
61740 Outside Contract Services	18,876.22	17,775.00	1,101.22
Total 61700 Outside Services	21,776.22	17,775.00	4,001.22
62000 Facilities and Equipment	105,406.18	101,391.27	4,014.91
63000 Office Operations	20,122.01	19,409.62	712.39
64000 Other Administrative Expenses	12,645.94	10,048.73	2,597.21
65000 Payroll Expenses	123,796.29	148,900.00	-25,103.71
67000 Travel Expenses	125.00	125.00	0.00
Sales Tax	75.86	75.86	0.00
Total Expenses	\$341,833.44	\$350,319.09	\$ -8,485.65
NET OPERATING INCOME	\$ -13,386.62	\$2,077.84	\$ -15,464.46
Other Income			
71000 Property Damage, Net			
71010 Insurance Proceeds	32,918.49		32,918.49
Total 71000 Property Damage, Net	32,918.49		32,918.49
Total Other Income	\$32,918.49	\$0.00	\$32,918.49
NET OTHER INCOME	\$32,918.49	\$0.00	\$32,918.49
NET INCOME	\$19,531.87	\$2,077.84	\$17,454.03

The Heritage Guild of Collin County

BALANCE SHEET

As of December 31, 2020

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	\$116,497.55
Accounts Receivable	\$6,728.00
Other Current Assets	\$45.00
Total Current Assets	\$123,270.55
Fixed Assets	\$1,873,745.29
TOTAL ASSETS	\$1,997,015.84
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Credit Cards	\$1,231.50
Other Current Liabilities	
24450 Wedding Damage Deposit	8,500.00
24500 Deferred Income Billings	
24510 Weddings	56,193.30
Total 24500 Deferred Income Billings	56,193.30
27000 Notes Payable	29,000.00
Total Other Current Liabilities	\$93,693.30
Total Current Liabilities	\$94,924.80
Total Liabilities	\$94,924.80
Equity	
30000 Unrestricted Fund Balance	1,882,559.17
Net Income	19,531.87
Total Equity	\$1,902,091.04
TOTAL LIABILITIES AND EQUITY	\$1,997,015.84

CHECKLIST

Completed Application:

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

Attachments:

- A one-page summary of the goals/activities involved in the Event or Project for which you are seeking VISIT MCKINNEY grant funding.
- Financials: organization's budget for current fiscal year
- Event or Project 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 VISIT MCKINNEY WITHIN 30 DAYS
OF COMPLETION OF THE EVENT OR PROJECT.**

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

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

VISIT MCKINNEY GRANT Final Report

Organization: _____

Funding Amount: _____

Event or Project: _____

Start Date: _____

Completion Date: _____

Location of Event or Project: _____

Please include the following in your report:

- Narrative report on the Event or Project
- 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
- Actual tear sheets from print advertisements (PDF of the ad by itself will not be accepted)
- Photographs, slides, videotapes, etc. from the event
- Performance against metrics outlined in application

**Please submit this Final Report no later than 30 days following completion
of the Event or Project to:**

VISIT MCKINNEY
200 W. Virginia
McKinney, TX 75069
Attn: Dee-dee Guerra