



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 (dba 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 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
CYCLE 2: February 1, 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: SBG Hospitality

Federal Tax I.D.: 81-5195550

Incorporation Date: 2/2017

Mailing Address: 7200 W University Drive, suite 210

City McKinney State: TX Zip Code: 75071

Phone: 318.527.9221 Fax: NA Email: hello@sbghospitality.com

Website: www.sbghospitality.com

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

REPRESENTATIVE COMPLETING THE APPLICATION

Name: Lauren Stephan

Title: President

Mailing Address: 2509 Tremont Boulevard

City McKinney State: TX Zip Code: 75071

Phone: 318.527.9221 Fax: (opt) NA Email: hello@sbghospitality.com

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: \$8,000

Matching Funds Available:

☐ Yes (Please indicate amount and source): _____

☒ No Not unless you count the additional advertising that SBG will do...

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 Im not certain yet- depends on our calendar. Perhaps MCDC

☒ No

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

Maybe MCDC. We do not plan on it but if we arent allowed to have big festivals we will need to ask for more support to expand this series.

IDENTIFY TOURISM-RELATED EVENT OR PROJECT

Name of Event or Project: McKinney Sip & Stroll Series 2021

Start Date: February 2021 Completion Date: October 2021

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

Name: _____

Name: _____

Name: _____

Name: _____

Name: _____

Name: _____

Name: _____

Name: _____

Name: _____

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

Name: Lauren Stephan, President/ Owner

Name: Andrew Stephan, VP

Name: Airess Eatmon, Director of Festivals & Events

Name: _____

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.

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 can be found on page 10 of the *Grant Guidelines* document.)
- Demonstrate informed financial planning – addressing long-term costs, budget consequences and sustainability of projects for which funding is requested.
- Identify the opportunities for internal efficiencies through recurring analyses and continuous improvement.
- Balance resources generated by the local Hotel Occupancy Tax.
- Continue to market and highlight McKinney as an authentic and memorable destination for visitors and residents alike.

Indicate which Texas Hotel Tax Expenditure Requirement(s) found on page 10 of the *Grant Guidelines* document will be supported by the proposed Event or Project:

Each walk will promote tourism in McKinney and will promote for visitors to come stay and play in McKinney!

The grant meets criteria #3 as we will be using the grant for advertising to attract tourists to the city!

FINANCIALS: Please provide the following items 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): _____

What is the total estimated cost for this Event or Project? \$ 100,000- 140,000 (\$20k per walk)

(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? 100% minus grant

Are Matching Funds available?

Type text here

☐ Yes

☒ No

Cash \$ _____	Source _____	% of Total _____
In-Kind \$ _____	Source _____	% of Total _____

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.

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 or project takes place and after all receipts and a final report on the Event or Project have been verified by Visit McKinney. (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

Signature

Printed Name

Date

Representative Completing Application

Lauren Stephan

Signature

Lauren Stephan
Printed Name

10/15/20
Date

PLEASE NOTE:

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

CHECKLIST

Completed Application:

- ☐ Use the form/format provided
- ☐ Organization Description
- ☐ Outline of Event or Project - description, budget, goals and objectives
- ☐ Indicate how this event/project supports City of McKinney and Visit McKinney's goals
- ☐ 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
- ☐ All receipts for which you are seeking reimbursement
- ☐ Samples of printed marketing and outreach materials
- ☐ Screen shots of online promotions
- ☐ Actual tear sheets from print advertisements (a PDF of just the ad by itself will not be accepted)
- ☐ Photographs, slides, videos, etc. from the event
- ☐ Performance against metrics outlined in application

IMPORTANT! In order for Visit McKinney to reconcile and verify your financial report, please include a summary sheet on top of your final report and then collate and staple all of the receipts for which you are seeking reimbursement in the same order in which the expenditures are listed on this summary.

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