



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](mailto:dguerra@visitmckinney.com)



## VISIT McKINNEY GRANT Final Report

Organization: McKinney Philharmonic Orchestra  
Funding Amount: \$8,000  
Event or Project: 2020-2021 Concert Season  
Start Date: December 13 2020  
Completion Date: May 15 2021  
Location of Event or Project: McKinney Performing Arts Center / Church St Auditorium  
McKinney ISD

**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

**ABOUT YOUR ORGANIZATION**

Name: McKinney Philharmonic Orchestra

Federal Tax I.D.: 45-4399538

Incorporation Date: January 2012

Mailing Address: 1011 Thomas St

City: Denton

State: TX

Zip Code: 76201

Phone: (940) 594-8790

Fax: \_\_\_\_\_

Email: odysseuschamberorchestra@gmail.com

Website: www.mckinneyphilharmonic.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:**

Odysseus Chamber Orchestra

**REPRESENTATIVE COMPLETING THE APPLICATION**

Name: Jason Lin

Title: Artistic Director + Conductor

Mailing Address: 1011 Thomas St

City: Denton

State: TX

Zip Code: 76201

Phone: (940) 594-8790

Fax: (opt) \_\_\_\_\_

Email: odysseuschamberorchestra@gmail.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): Admissions (\$8,000)  
☐ 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 McKinney Arts Commission / McKinney Community Development  
☐ No

If YES, please provide details and funding requested from other City of McKinney entity: \$15K from

Art Commission to go towards Artistic + Contract expenses +  
operational expenses / 5K from MCDC - going towards radio ads  
through WRR Classical (101.1)

**IDENTIFY TOURISM-RELATED EVENT OR PROJECT**

Name of Event or Project: 2020-2021 Concert Season

Start Date: December 2020 Completion Date: June 2021

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

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

*Attachment*

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

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

*Attachment*

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:**

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**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?** \$ 48,273  
(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 \$ <u>8,000</u>	Source <u>Admissions</u>	% of Total <u>100%</u>
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 120<sup>th</sup> 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

Jason Lim  
Signature

Jason Lim

Printed Name

9/28/2020

Date

Representative Completing Application

Jason Lim  
Signature

Jason Lim

Printed Name

9/28/2020

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.**

**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](http://www.visitmckinney.com), by calling Dee-dee Guerra at 972-547-2059 or by emailing [dguerra@visitmckinney.com](mailto: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](mailto: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](http://www.visitmckinney.com), by calling 972-547-2059 or by sending an email to [dguerra@visitmckinney.com](mailto: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.



2020-2021 MPO Budget

**EXPENSES**

PROJECTIONS

PAYROLL

Orchestra	36241
Guest Soloists	5740
Conductor	8750

ADMINISTRATION

Manager	2250
Librarian	1000

PROMOTIONS

Facebook	0
Posters and Flyers	0
other	0

PRINTING

Programs	0
Tickets	0

FEES

	300
PayPal	0

ASCAP

350

INSURANCE

590

RENTALS

0

Music

1000

FACILITIES

3250

CARTAGE

340

TECH

900

MISC

440

61151

**INCOME**

BALANCE FORWARD

7813.05

GRANTS

0

MAC

20000

MAC - GNTYO

Frisco Arts

3038

TCA

4500

Visit McKinney

0

SPONSORSHIPS

0

TRB

500

IBTX

500

Luthier

1000

FOUNDATIONS

0

Love Life

3000

Texas Communities (North Texas Giving Day)

1000

0

2020-2021 MPO Budget

ADMISSIONS	27125
DONATIONS	2000
ADS	3000
	73476.05