



Tourist Development Tax Citizen Advisory Task Force Board of County Commissioners Meeting

July 25, 2023



TDT Task Force Co-Chairs



Jane Healy

Co-Chair for the Orange County
Tourist Development Task
Citizen Advisory Task Force



Tony Jenkins

Co-Chair for the Orange County
Tourist Development Task
Citizen Advisory Task Force



TDT Citizen Advisory Task Force

AGENDA FOR JULY 25

- Overview of the process
- Recommendations from the Task Force
- Questions





Purpose of the Task Force

Mayor Demings empaneled the TDT Citizen Advisory Task Force on March 22, 2023, to review and provide input to the Board of County Commissioners and Tourist Development Council on potential uses of future, unencumbered TDT revenues.

The TDT Taskforce was comprised of 31 members representing a cross-section of Orange County residents from various geographical and socioeconomic groups including individuals appointed by Orange County Commissioners, municipalities within the county, labor, veterans, various chambers of commerce, and the hospitality industry.



Task Force Members

- **Paul Billings**
City of Apopka Representative
- **Derek Blakeslee**
City of Winter Garden Representative
- **Pete Clarke**
City of Belle Isle Representative
- **Eric Clinton**
AFL-CIO Representative
- **William (Bill) Derrick**
City of Maitland Representative
- **Matthew Downs**
City of Winter Park Representative
- **Stephen Facella**
Orange County Representative, District 1
- **Thor Falk**
The Pride Chamber Representative
- **Jay Galbraith**
Universal Representative
- **Eric Gray**
Orange County Representative, District 4
- **Julian Johnson**
Town of Eatonville Representative
- **Brad Lomneck**
City of Ocoee Representative
- **Brendan Lynch**
CFHLA Representative
- **Xelayris Martinez**
UCF Student Government Representative
- **Jason Mellen**
Orange County Representative, District 2
- **Harold Mills**
OEP Representative
- **Chris Mueller**
I-Drive Resort Area Chamber of Commerce Representative
- **Ron Nesbitt**
African American Chamber of Commerce Central Florida Representative
- **Katie Nguyen**
Asian American Chamber of Commerce Representative
- **Andre Perez**
Orange County Representative, District 3
- **Alejandro Pezzini**
Orange County Representative, District 6
- **Rene Plasencia**
Sea World Representative
- **Jennifer Quigley**
City of Orlando Representative
- **Fred Robinson**
Orange County Mayor's Veterans Advisory Council Representative
- **Ken Robinson**
CFHLA Representative
- **Roberto Santoni**
Hispanic Chamber of Commerce of Metro Orlando Representative
- **Robert Smith**
Town of Windermere Representative
- **Hal Valdes**
City of Edgewood Representative
- **Ella Wood**
Orange County Representative, District 5



Task Force Process

- First two meetings of the Task Force

WEDNESDAY

March 22, 2023

FRIDAY

May 12, 2023

Education on:

- Tourist Development Tax
- Florida Statutes
- Economic impact
- Existing grant programs
- TDT revenues
- Oversight process



TDT Interest Indicator Forms Submitted

Interest indicator process

- 55 Interest Indicator forms submitted
- 52 deemed TDT eligible
- Total requested amount: \$3.8 billion
- 16 organizations had requests over \$20 million (which exceed the cap on existing Orange County grant programs)
- 14 made presentations

TDT FUNDING INTEREST RESPONSES

	Organization	Project Description	Total Amount of TDT Requested	Portions Funded in FY
1	Orlando City Baseball Dreamers, LLC	Construction of new domed baseball stadium	\$975,000,000	2025-2034+
2	Florida Citrus Sports	Roof for Camping World Stadium	\$800,000,000	2024
3	Convention Center	Government function/Various capital improvement projects at the North/South Building (2019 \$)	\$586,738,302	2024-2028
4	Arts & Cultural Affairs/United Arts	Government function to provide TDT grants to eligible organizations	\$314,600,000	2024-2034
5	City of Orlando	Amway Center renovations	\$256,000,000	2024-2033
6	UCF Sports	Construction of a sports village	\$176,625,000	2024-2033
7	Dr. Phillips Performing Arts	Front lawn enhancements	\$145,000,000	2024
8	Greater Orlando Sports Commission/Sports Incentive	Government function to provide TDT grants to eligible organizations	\$126,500,000	2024-2034
9	Association to Preservation of Eatonville Community Inc. (P.E.C.)	Construction of the ZORA! Campus	\$87,857,524	2024-2034
10	TDT Application Review Committee	Government function to provide TDT grants to eligible organizations	\$60,000,000	2024-2028
11	Orange County Regional History Center	Government function/Renovation of permanent galleries	\$52,500,000	2025-2028
12	Friends of the Menello Museum of Art	Expansion of the museum	\$29,000,000	2024-2026
13	City of Orlando	Expansion of Leu Gardens	\$25,000,000	2024-2026
14	Holocaust Memorial and Resource Center	Construction of museum	\$25,000,000	2024-2026
15	Orlando Urban Film Festival Foundation	Annual Love Orlando "Rock-n-Soul fest"	\$20,500,000	2024-2034
16	P.A.S.T.	Renovation of Wells' Built Museum and construction of multi-purpose cultural center	\$20,000,000	2025-2026
17	Orlando Science Center	Terrace renovations (part of Unlock Science campaign)	\$13,000,000	2026-2028
18	Entertainment Galore LLC	Mid-Florida Jams annual music festival	\$11,000,000	2024-2034
19	Rollins Museum of Art	Construction of new museum	\$10,000,000	2024-2028
20	Creative City Project IMMERSE	Annual arts festival	\$10,000,000	2024-2033
21	4Roots	Construction of "The Farm Campus"	\$10,000,000	2024-2027
22	OnePulse	Construction of a museum	\$10,000,000	2024-2025
23	Central Florida Community Arts	Construction of an arts center with rehearsal, event, and performance space	\$8,500,000	2024-2026
24	Orlando Museum of Art (OMA)	To support museum's annual art programs	\$6,000,000	2024-2034
25	Winter Park Playhouse	Develop/Construct new home stage	\$6,000,000	2024-2025
26	Garden Theatre, Inc.	Auditorium renovations	\$5,500,000	2024-2034
27	Orlando Fringe	Annual International Fringe Festival	\$4,950,000	2024-2034
28	Orlando REP	Theater renovations	\$3,500,000	2024,27-29



16 Large TDT Interest Indicator Forms Submitted

16 Large Forms submitted seeking \$20m or more

Line numbers 1 to 16 on the summary sheet

- | | | | |
|---|--------|---|----------------|
| • Orlando City Baseball Dreamers | \$975m | • Greater Orlando Sports Commission | \$127m |
| • Florida Citrus Sports | \$800m | • Association to Preserve the Eatonville Community (P.E.C.) | \$88m |
| • Orange County Convention Center | \$586m | • TDT Application Review Committee (ARC) | \$60m - \$100m |
| • Arts and Cultural Affairs and United Arts | \$315m | • Orange County Regional History Center | \$53m |
| • Amway Center (City of Orlando) | \$256m | • Orlando Mennello Art Museum | \$29m |
| • UCF Sports | \$177m | • *Leu Gardens (City of Orlando) | \$25m* |
| • Dr. Phillips Center for the Performing Arts | \$145m | • *Holocaust Museum (HMREC) | \$25m* |
| | | • Orlando Urban Film Festival | \$21m |
| | | • P.A.S.T. Wells' Built Museum | \$20m |

* Organizations withdrew their applications



Presentations from Fourteen Applicants

WEDNESDAY May 24, 2023
Mennello Museum of American Art
<i>TDT Application Review Committee (ARC)*</i>
Orange County Regional History Center
Orlando City Baseball Dreamers

WEDNESDAY June 7, 2023
Association to Preserve African- American Society, History, and Traditions (PAST)
<i>Orange County Arts & Cultural Affairs*</i>
Orange County Convention Center
Florida Citrus Sports
<i>Greater Orlando Sports Commission*</i>

FRIDAY June 16, 2023
Association to Preserve the Eatonville Community (P.E.C.)
Orlando Urban Film Festival
Dr. Phillips Center for the Performing Arts
UCF Sports
Amway Center



Applicant Evaluation Criteria (Provided by ARC)

TOURISM EXPANSION

- Tourist attraction
- Advertising reach
- Tourism industry collaboration

PROJECT SOUNDNESS

- Quality / longevity maintenance, care & stewardship
- Process / design & planning
- Operational readiness
- Financial readiness

ANTICIPATED RETURN ON INVESTMENT

- Economic benefit (jobs, wages, attracting employers and development)
- Tax revenues (TDT, sales tax, property tax)

TDT ARC Capital evaluation matrix	Tourism Expansion (35 pts)			Project Soundness (35 pts)			Anticipated Return on Investment (30 pts)			
	Multiplier x 3	Multiplier x 3	Multiplier x 1	Multiplier x 1	Multiplier x 2	Multiplier x 2	Multiplier x 2	Multiplier x 3	Multiplier x 3	
	Tourist Attraction	Advertising Reach	Tourism Industry Collaboration	Quality/Longevity Maintenance, Care & Stewardship	Process/Design & Planning	Operational Readiness	Financial Readiness	Economic Benefit (Jobs, wages, attracting employers and development)	Tax Revenues (TDT, Sales Tax, Property Tax)	
5	Excellent	Host exceptional traveling visitor counts, need times, multi-hotel guaranteed room blocks, lengthy stays, high F&B	Generating extended periods of international coverage with high positive impact	Significant local room booking and advertising partnerships with tourism partners	Long-term facility, will avoid obsolescence, excellent history and plan for care & maintenance	Shovel ready project with great design/build team, permits, plans and approvals	Extremely strong experienced board or leadership, logistics confirmed, project implementation guaranteed	Extremely strong project financial plan and budget, good financial experience, strong financial partnerships and good cashflow	Notable large scale project preferred by high wage job employers, driver of surrounding new development, construction and operating jobs, helps nearby business	Hosts many extended stay visitors (TDT driver), drives sales tax growth by high visitor spending, promotes new development
4	Above Average	Host sizable traveling visitors, good timing, multi-hotel room blocks, lengthy stays, some F&B	Generating some extended national coverage with high positive impact	Some local room booking and advertising partnerships with tourism partners	Long-term facility above average usability, good plan for care & maintenance	Shovel ready project with design/build team, with some permits, plans and approvals	Strong experienced board or leadership, logistics mostly confirmed, project implementation very likely	Strong project financial plan and budget, good experience, some financial partnerships and good cashflow	Important project, driver of surrounding new development, construction and operating jobs, helps nearby business	Hosts some extended stay visitors (TDT driver), drives sales tax growth, some visitor spending, promotes new development
3	Average	Host traveling visitors, hotel room block(s), couple day stay	Media coverage with positive impact	Some local room booking with little advertising partnerships with tourism partners	Mid-term or transitional facility, average usability, good untested care & maintenance plan	Almost ready project with design/build team, needing permits, plans and approvals	Suitable board or leadership, logistics mostly confirmed, some past operational experience	Reasonable project financial plan and budget, some financial partnerships and some cashflow	Medium project, support for existing surrounding development, some construction and operating jobs	Hosts some overnight stay visitors (TDT), some sales tax growth by some visitor spending
2	Below Average	Host equal traveling visitors and locals, single day stays, no room blocks, poor timing	Random outcomes covered and periodic reviews	No local booking partnership and advertising already taken	Longevity concerns, care & maintenance plan concerns	Proposed project with some team, having some permits, plans and approvals delays	Inexperienced board or leadership. Some logistics undeveloped. Some past experience.	Tight project financial plan and budget, inexperienced, less financial partnerships and weak cashflow	Smaller project, little support for existing surrounding development, few construction and operating jobs	Hosts fewer overnight stay visitors (TDT), some sales tax growth by some visitor spending and locals spending may just displace other local spending
1	Poor	Host primarily locals, low stays, poor timing	Little impactful media coverage	Sponsored by competing destination, no local booking or advertising partnership	Longevity concerns, competing facilities, historic care & maintenance problems	Proposed project with team concerns, and permitting and approval concerns	Questionable ability to develop and operate the project effectively.	Gaps in project financial plan and budget, inexperienced, all TDT no financial partnerships and weak cashflow	Small project, weak support for existing surrounding development, few construction and operating jobs	Hosts few overnight stay visitors (low TDT), little sales tax growth by limited visitor spending and locals spending may just displace other local spending
0	Deficient	Travel unknown, lacking data, poor timing	No media plan or data, possible negative coverage	No plans or data	No usable response, maintenance nightmare	Speculative project - concerns with ownership and permitting	No data or past failures.	No data or math errors.	Weak project data, clashes with existing surrounding development, local opposition	No data, some tax exemption



Task Force Survey 1 and Meeting

SURVEY 1

- Completed between Friday June 16 and Tuesday June 20
- Participation rate: 30 out of 31
- 147 items
 - 119 rated items (quantitative)
 - 28 open-ended items (qualitative)
- Average amount of time each task force member spent on the survey: 60 minutes

MEETING

- The Task Force met to discuss the results of Survey 1 and consider recommendations.
 - Three granting organizations
 - Eleven other applicants (non-granting organizations)

MONDAY

June 26, 2023



Three Granting Organizations

These granting organizations review applications and provide funding to other tourism-related organizations in Orange County.

- **TDT Application Review Committee (ARC)**
- **Orange County Arts & Cultural Affairs**
- **Greater Orlando Sports Commission**

Because they differ in nature from the other applicants, they were removed from the ranked comparison. In the survey, task force members were asked to indicate whether or not they support each granting organization's requests.



TDT Application Review Committee (ARC)

	% YES
Support for providing ARC with its requested TDT funding amount of \$60 million (\$12 million per year * 5 years) (\$12 million per year for the five year period from FY 2024 to FY2028)	93%
Support for providing ARC with additional TDT funding in the amount of \$100 million (\$20 million per year * 5 years) (\$20 million per year for the five year period from FY 2024 to FY 2028 when excess TDT funds allow for it)	69%
Support for expanding the maximum amount that ARC can provide to individual projects to fall in a range between \$2 million and \$20 million	60%



Orange County Arts & Cultural Affairs

	% YES
Support for increasing the cap for Arts and Cultural Affairs funding toward individual projects to go from \$500,000 to \$2 million	79%
Support for increasing the cap of the cultural venue rental subsidy from \$500,000 to \$1 million	76%
Support for increasing Arts & Cultural Affairs funding from 3% of the first four cents to 5% of the first four cents	80%
Support for increasing Arts & Cultural Affairs funding from the fixed amount of \$2 million to a fixed amount of \$5 million	77%



Greater Orlando Sports Commission

	% YES
Support for increasing operational funding for Greater Orlando Sports Commission from \$300,000 to \$740,660.50 per year	80%
Support for increasing the amount of SIC funding that GOSC receives from \$4 million to \$10 million per year for a term of the next eleven years	67%



RECOMMENDATION 1

The Task Force supports advancing the three granting organizations requests as presented to the Board of County Commissioners and will include the survey results for the board to make the final level of funding decision.

- TDT Application Review Committee (ARC)
- Orange County Arts & Cultural Affairs
- Greater Orlando Sports Commission



Ranking of Eleven Organizations

WEIGHTED SCORES		LEVELS	PERCEPTIONS OF READINESS	
Orange County Convention Center	89.4	ORANGE These applicants have a weighted score greater than 80 and a perceived readiness percentage greater than 90%.	Florida Citrus Sports	93.3%
Florida Citrus Sports	82.6		Orange County Convention Center	93.1%
Amway Center	79.5	YELLOW These applicants have a weighted score between 60 and 80, and/or a perceived readiness percentage between 50% and 90%.	Dr. Phillips Center for the Performing Arts	78.6%
Dr. Phillips Center for the Performing Arts	74.7		UCF Sports	75.9%
UCF Sports	69.6		Amway Center	
Mennello Museum of American Art	58.9		Mennello Museum of American Art	
Orlando City Baseball Dreamers	56.0	PINK These applicants have a weighted score below 60 and/or a perceived readiness percentage below 50%.	Association to Preserve African American Society, History, & Traditions (PAST)	40.0%
Association to Preserve the Eatonville Community (P.E.C.)	53.6		Association to Preserve the Eatonville Community (P.E.C.)	
Orange County Regional History Center	50.7		Orlando City Baseball Dreamers	
Association to Preserve African American Society, History, & Traditions (PAST)	47.1		Orange County Regional History Center	37.9%
Orlando Urban Film Festival Foundation	39.2		Orlando Urban Film Festival Foundation ¹⁷	24.1%



RECOMMENDATION 2

The Task Force supports advancing groups with a weighted score of 60 or higher for consideration by the Board of County Commissioners in this order/rank:

1. Orange County Convention Center
2. Florida Citrus Sports
3. Amway Center
4. Dr. Phillips Center for the Performing Arts
5. UCF Sports



Task Force Survey 2

SURVEY

Between Wednesday June 28, 2023 and Monday July 3, 2023, members of the TDT Citizen Advisory Task Force completed Survey 2, which collected ideas and recommendations for topics to discuss at the task force meeting scheduled for Monday July 17, 2023.

- 17 task force members provided a total of 33 comments.

MEETING

- The Task Force met to discuss the results of Survey 2 and consider recommendations.

MONDAY
July 17, 2023



Survey 2 Summary / Thematic Analysis

Theme	Members	Comments
Alternative uses of TDT funding	9	14
General calls for alternative uses of TDT funding	3	3
Specific calls for alternative uses of TDT funding	6	11
Mass transit infrastructure	3	5
Consider funding for specific communities	2	2
Other infrastructure projects	2	2
Other projects	1	2
The work of the task force is complete	4	4
Tourist Impact Tax / Affordable housing for workers	3	3
Recommended changes to policy or oversight	3	6
Procedural concerns/questions	2	2
One-offs	3	4



RECOMMENDATION 3

The Task Force recommends that Mayor Demings and the Board of County Commissioners strongly push the legislature to change the Tourist Impact Tax so it applies to all counties in Florida.



RECOMMENDATION 4

The Task Force recommends that the county update its criteria for assessing TDT project funding to better evaluate the project's contribution to community and workforce needs and jobs.



Presentation to the Tourist Development Council

The Task Force chairs met with the Tourist Development Council to present the recommendations and respond to questions.

The TDC moved to support the recommendations of the TDT Citizen Advisory Task Force and recommend that they be forwarded to the Board of County Commissioners.

TUESDAY

July 18, 2023



RECOMMENDATIONS

The TDT Citizen Advisory Task Force supports / recommends:

1. Advancing the three granting organizations requests as presented to the Board of County Commissioners and will include the survey results for the board to make the final level of funding decision.
2. Advancing groups with a weighted score of 60 or higher for consideration by the Board of County Commissioners in this order/rank:
3. That Mayor Demings and the Board of County Commissioners strongly push the legislature to change the Tourist Impact Tax so it applies to all counties in Florida.
4. That the county update its criteria for assessing TDT project funding to better evaluate the project's contribution to community and workforce needs and jobs.

- TDT Application Review Committee
- Orange County Arts & Cultural Affairs
- Greater Orlando Sports Commission

1. Orange County Convention Center
2. Florida Citrus Sports
3. Amway Center
4. Dr. Phillips Center for the Performing Arts
5. UCF Sports



REQUESTED ACTION

Accept the Orange County Tourist Development Tax Citizen Advisory Task Force Report.



Tourist Development Tax Citizen Advisory Task Force Board of County Commissioners Meeting

July 25, 2023