



**Orange County, Florida
TDT Citizen Advisory Task Force
Results from Survey 1 | June 26, 2023**

Prepared by J.B. Adams
Adams Learning, Inc.

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Overview

The purpose of the TDT Citizen Advisory Task Force is to provide **advice and guidance** regarding the applicants requesting the largest amounts of funding from Orange County's Tourism Development Tax. To this end, the task force is charged with developing recommendations and providing them to the Tourist Development Council and the Orange County Board of Commissioners.

The TDT Citizen Advisory Task Force does not have decision-making authority over TDT expenditures.

In addition to providing advice and guidance to the Council and the BCC, the Task Force also provides useful feedback to the applicants.

Between Friday June 16 and Tuesday June 20, 2023, members of the TDT Citizen Advisory Task Force completed Survey 1, which collected data regarding the fourteen organizations that applied for TDT funding in amounts greater than \$20 million.

- Participation rate: 30 out of 31 task force members completed the survey.
- The survey consisted of 147 items.
 - 119 quantitative items (scaled items and yes/no questions)
 - 28 qualitative items (open-ended questions that invited task force members to write comments regarding the applicants' strengths and opportunities for improvement)
- The average amount of time that task force members spent on the survey was 60 minutes.

Survey Results for 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 they support each granting organization's requests.

Task members were also asked to provide written comments regarding the applicants' strengths and opportunities for improvement. Written comments were reviewed and quantified. For the presentation on June 26, 2023, trends in agreement were reported; comments without agreement were not reported. This report includes both the quantified comments as well as the raw, unedited comments.

TDT Application Review Committee (ARC)

QUANTITATIVE SURVEY RESULTS

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%

QUANTIFIED COMMENTS

STRENGTHS (from 5 responses)

IMPORTANT, NEEDED (2)

“This increase in dollars for arts and culture through ARC is extremely important for our overall Orange County economy and future outlook”

“It is a comprehensive and needed piece to TDT funding”

OPPORTUNITIES FOR IMPROVEMENT (from 5 responses)

CALL FOR TRANSPARENCY, RESPONSIBILITY (3)

“We should be encouraging elected leaders to take responsibility for closely examining how we are spending TDT funding”

“Continued Transparency here is a must.”

“The results of the investments need to be reported and reviewed”

TDT Application Review Committee (ARC) (continued)

RAW COMMENTS

STRENGTHS

1

If we are talking about tourism, highlighting the culture of Orange County is definitely a draw.

2

NBA Team, Concerts and Sporting events

3

This increase in dollars for arts and culture through ARC is extremely important for our overall Orange County economy and future outlook.

4

It is a comprehensive and needed piece to TDT funding.

5

Many great projects happen under the aegis of the ARC!

OPPORTUNITIES FOR IMPROVEMENT

1

There must be a very publicized call for applicants from county organizations. It seems as though the same groups get the money each year. We need to ensure newer, and smaller, and diverse organizations receive funding too, not the club of those "in the know."

2

Continued Transparency here is a must

3

I think the ARC process should also lower the threshold for applicants to \$500,000 and more frequently consider seed money projects for three to five years of funding to groups who can demonstrate an ability to self sustain after the initial seed funding.

4


I do not support expanding the project price tag to \$20 million: this is a vast increase in project size, at a time when we should be encouraging elected leaders to take responsibility for closely examining how we are spending TDT funding. Increasing the amount the ARC can allocate by *tenfold* would treat large projects as a routine allocation of funds.

5

The results of the investments need to be reported and reviewed.

Orange County Arts & Cultural Affairs

QUANTITATIVE SURVEY RESULTS

 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%

QUANTIFIED COMMENTS

STRENGTHS (from 6 responses)

RECOGNITION OF SUPPORT FOR ARTS AND CULTURE AS “WHO WE ARE” (2)

“Orange County is a Melting Pot of Cultures, Ethnic Groups and Diversity this will enrich the Arts and Cultural Affairs.”

“We must continue to put our creativity and identity at the forefront of who Orlando is.”

OPPORTUNITIES FOR IMPROVEMENT (from 3 responses)

CALL FOR EXPANSION TO REACH NEW APPLICANTS (2)

“...the same groups get the money each year. We need to ensure newer, and smaller, and diverse organizations receive funding too, not the club of those ‘in the know’”

“I would like to see the Orange County Arts & Cultural Affairs department and United Arts expand their portfolio of efforts beyond the support of local organizations ... we could work to attract artistic endeavors, performances, shows, demonstrations, classes and more from around the world”

Orange County Arts & Cultural Affairs (continued)

RAW COMMENTS

STRENGTHS

1

Orange County is a Melting Pot of Cultures, Ethnic Groups and Diversity this will enrich the Arts and Cultural Affairs

2

Support of arts and culture in our community is important for companies as they continue to move to Orange County; this is a strong step in more business growth here in the community.

3

Excellent leadership and history of success

4

The economic support of many successful cultural arts organizations.

5

We must continue to put our creativity and identity at the forefront of who Orlando is.

6

Is is possible to eliminate the current \$1.5M gap by decreasing the ARC minimum to \$1.0M and increasing the cap for the Arts and Cultural Affairs to \$1.0M.

OPPORTUNITIES FOR IMPROVEMENT

1

There must be a very publicized call for applicants from county organizations. It seems as though the same groups get the money each year. We need to ensure newer, and smaller, and diverse organizations receive funding too, not the club of those "in the know."

2

Rent agreements are just exchanging money from one gov't funded entity to another. Just reduce the rent to a minimum & eliminate this fake market

3

I would like to see the Orange County Arts & Cultural Affairs department and United Arts expand their portfolio of efforts beyond the support of local organizations. I think there is space to consider an effort similar to the Greater Orlando Sports Commission that keeps an inventory of all available athletic venues and works diligently to attract athletic events from around the world. I believe Orlando/Orange County is in a unique position with the number of arts venues that we could work to attract artistic endeavors, performances, shows, demonstrations, classes and more from around the world.

Greater Orlando Sports Commission

QUANTITATIVE SURVEY RESULTS

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%

QUANTIFIED COMMENTS

STRENGTHS (from 4 responses)

ECONOMIC IMPACT / SOUNDNESS OF INVESTMENT (3)

- “Sports is one of the largest driving force of economical revenue in Orange County”
- “They have the highest forecasted ROI of any applicant”
- “This is vital to our growth as a town”

OPPORTUNITIES FOR IMPROVEMENT (from 3 responses)

SUPPORT FOR FUNDING (OR ADDITIONAL FUNDING) BUT WITH CONDITIONS (3)

- “I do not mind an increase in SIC funds, but not to \$10 million”
- “Agree to fund as long as it is directly related to hotel stays and focused on shoulder seasons”
- “I support the SIC fund but believe the funds needs to be requested per project and perhaps through Visit Orlando funding”

Greater Orlando Sports Commission (continued)

RAW COMMENTS

STRENGTHS

1

Sports is one of the largest driving force of economical revenue in Orange County

2

This organization has done a lot on a shoestring budget, so this increase makes a lot of sense for the community.

3

This is vital to our growth as a town. We love sports and always should.

4

If I understand the Economic Impact data shared by GOSC, they have the highest forecasted ROI of any applicant at 62:1. They are attracting visitors to multiple venues throughout Central Florida and not just the tourism corridor which spreads their impact touching more of our businesses and residents. The organization's ability to shift towards more self-sufficient funding lends to a higher likelihood they will be successful with any public investment.

OPPORTUNITIES FOR IMPROVEMENT

1

I do not mind an increase in SIC funds, but not to \$10 million

2

Agree to fund as long as it is directly related to hotel stays and focused on shoulder seasons

3

I support the SIC fund but believe the funds needs to be requested per project and perhaps through Visit Orlando funding.

Survey Results for Eleven Applicants

These remaining eleven non-granting organizations were evaluated by Task Force members according to the criteria developed for the TDT Application Review Committee (ARC).

<p>TOURISM EXPANSION</p> <ul style="list-style-type: none"> • Tourist attraction • Advertising reach • Tourism industry collaboration 	<p>PROJECT SOUNDNESS</p> <ul style="list-style-type: none"> • Quality / longevity maintenance, care & stewardship • Process / design & planning • Operational readiness • Financial readiness 	<p>ANTICIPATED RETURN ON INVESTMENT</p> <ul style="list-style-type: none"> • Economic benefit (jobs, wages, attracting employers and development) • Tax revenues (TDT, sales tax, property tax)
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Each item of measurement was evaluated using a six-point scale with numeric ratings ranging from zero (0) to five (5).

- 5 = Excellent
- 4 = Above average
- 3 = Average
- 2 = Below average
- 1 = Poor
- 0 = Deficient

Task Force members’ responses were averaged, then scores from the three categories were weighted and summed. A perfect score would be a weighted score of 100.

- TOURISM EXPANSION (Weighted to a value of 35)
- PROJECT SOUNDNESS (Weighted to a value of 35)
- ANTICIPATED RETURN ON INVESTMENT (Weighted to a value of 30)

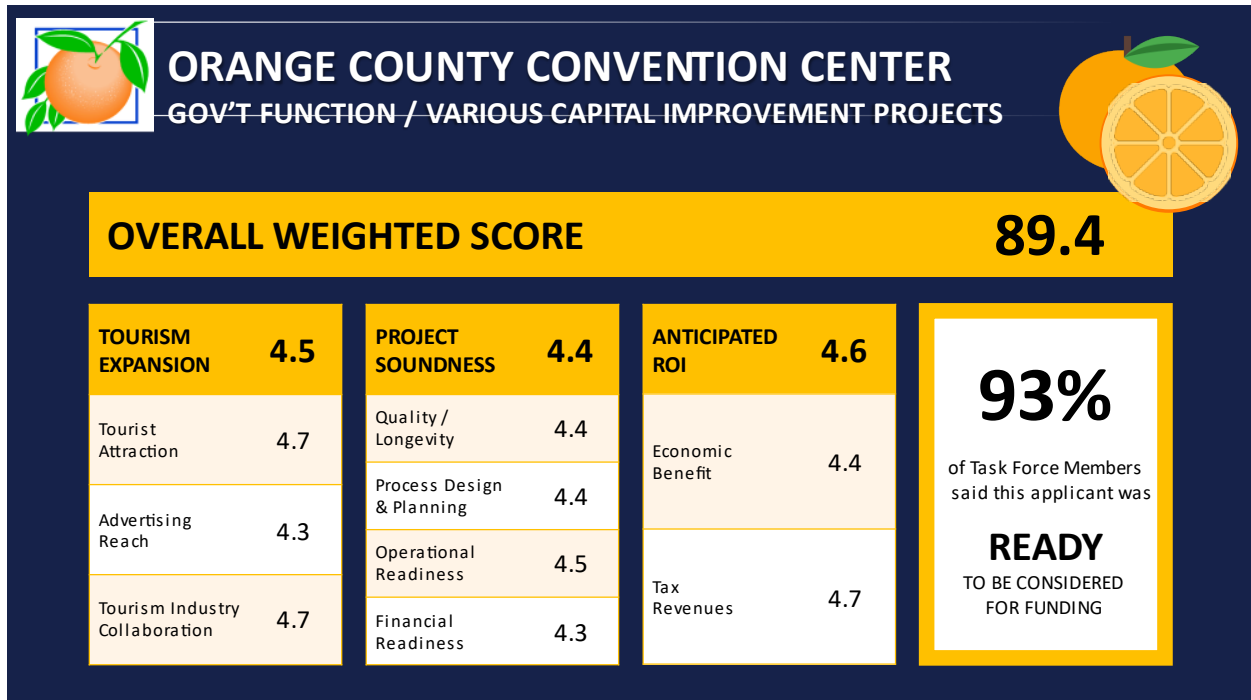
Task force members were asked for their perception of each applicant’s readiness for consideration.

- READY to be considered for funding by the Tourist Development Council
- NOT READY to be considered; in need of further development

Task members were also asked to provide written comments regarding applicants’ strengths and opportunities for improvement. Written comments were reviewed and quantified. For the presentation on June 26, 2023, trends in agreement were reported; comments without agreement were not reported. This report includes both the quantified comments as well as the raw, unedited comments.

Orange County Convention Center

QUANTITATIVE SURVEY RESULTS



QUANTIFIED COMMENTS

STRENGTHS (from 15 responses)

ECONOMIC IMPACT (5)

- “Strong economic engine for the tourist industry”
- “The ‘incremental’ impact on TDT is clearly defined”
- “Great attraction and revenue source for Orlando”
- “Will have an immediate, major economic impact to our region”
- “Strongest generator of room nights and economic growth”

PROJECT SOUNDNESS / EFFECTIVE USE OF FUNDS (3)

- “Strongest ROI of any of the projects”
- “Precisely what the use of TDT funds should be focused on”
- “The fact that this project was approved in 2019 speaks to the soundness of this project”

ATTRACTIVE TO TOURISTS (3)

- “Major Magnet for Tourism, both Nationally and Internationally”
- “Clearly, many people visit Orlando because of a convention held at the center”
- “Putting heads on beds”

Orange County Convention Center (continued)

ESTABLISHED, PROVEN (3)

- “Proven track record”
- “History of success”
- “Established institution in our community”

SHOVEL READY (2)

- “Already shovel ready, overdue, let's do this!”
- “Shovel ready”

NEEDED (2)

- “Convention Centers are necessary”
- “This is needed now! Top Priority”

OPPORTUNITIES FOR IMPROVEMENT (from 8 responses)

CONCERNS REGARDING AMOUNT REQUESTED (3)

- “My one challenge is – it’s a lot of money for the convention center”
- “Cost for development are extremely high”
- “This is an expensive project”

CONCERNS REGARDING FUNDING AMOUNT UNCERTANTY (2)

- “Final cost not determined”
- “Still-unclear final price tag”

TRENDS TOWARD VIRTUAL MEETINGS (2)

- “We have clearly entered a new era where people are able to meet electronically in ways not considered realistic even three years ago. This will most certainly have an impact on the convention and meeting industry”
- “In a world of Zoom meetings, and work-from-home, why in the world are we considering spending another cent to make a building that has never turned a profit and needs annual subsidies to exist to become larger?”

OCCC RELATIONSHIP TO THE THEME PARKS (2)

- “The convention center gets used because the parks are close. Not always because they are spectacular facilities”
- “If there were not a convention center at all in the community, people would still visit our theme parks and the hotels would handle significant convention level events. ... When the private sector will clearly find a way to fill the void because people are visiting our community with or without a convention center, I question the wisdom of further investment beyond upkeep and general enhancements”

Orange County Convention Center (continued)

RAW COMMENTS

STRENGTHS

1

The strength is the law was written for them, and there's a lot of rich people who want to use tax money to make them richer while the working class of Orange County do not benefit. This is trickle-down economics, which has been proven to be a failure.

2

The Orange County Convention Center is a Major Magnet for Tourism, both Nationally and Internationally

3

The convention center has a proven track record of attracting visitors, putting heads in beds, and is a strong economic engine for the tourist industry.

4

Already shovel ready, overdue, let's do this!

5

Precisely what the use of TDT funds should be focused on - project that will be accretive - more TDT funds produced.

6

History of success

7

Convention Centers are necessary

8

This is needed now! Top Priority

9

The "incremental" impact on TDT is clearly defined

10

The Orange County Convention Center is an established institution in our community. Clearly, many people visit Orlando because of a convention held at the center.

11

Great attraction and revenue source for Orlando

12

The fact that this project was approved in 2019 speaks to the soundness of this project. Quantifiable and historical tax and TDT revenues make this project a sound investment.

13

Your presentation successfully emphasized your role as an employer, through more than just statements about indirect economic development and jobs created. The Convention Center is a home to relatively good jobs, in a sea of lower-wage, low-stability tourism jobs.

14

Shovel ready, strongest generator of room nights and economic growth of private investors equates to Strongest ROI of any of the projects.

15

The completion of the convention center will have an immediate, major economic impact to our region.

Orange County Convention Center (continued)

OPPORTUNITIES FOR IMPROVEMENT

1

I found it ironic that the day this was presented, it was announced we lost two major conventions because of the new anti-woman, homophobic, transphobic, racist and just purely hateful laws that are taking effect across our state. In a world of Zoom meetings, and work-from-home, why in the world are we considering spending another cent to make a building that has never turned a profit and needs annual subsidies to exist to become larger? This project addressed zero infrastructure issues caused by the project and offers no solutions to them either.

2

While so many professionals I respect are confident in the OCCC as an incredibly important anchor for our tourism industry, I am still uncertain of this investment for a few reasons: 1. The Convention Center was a more critical investment opportunity for our community before we became the theme park capital of the world. In the chicken and egg argument for why people visit Orlando, I don't think anyone is under the illusion it is anything except the major theme parks. If there were not a convention center at all in the community, people would still visit our theme parks and the hotels would handle significant convention level events. Public investment in a pure public good such as a lighthouse or on national defense makes sense since everyone will benefit from it equally. Public investment in a community enhancement like a gazebo in the town square helps visitors know we love our community and want them to know we invest in ourselves. Doing so on a larger scale with a civic center or convention center that itself is not an attraction can be an enhancement to the business community when there is little else to attract people to that location. However, when the private sector will clearly find a way to fill the void because people are visiting our community with or without a convention center, I question the wisdom of further investment beyond upkeep and general enhancements. 2. The Convention Center is primarily asking for further investment so that it may compete with two or three other markets who have larger or more modern meeting spaces. What we are not discussing is the total amount of meeting space if you include all privately owned meeting spaces as well. We may have the third largest convention center with 2.1 million square feet of exhibit space. However, the top five hotels in Orlando have combined almost the same amount of convention square footage at 1.9 million sq ft. 3. While I was impressed by the level of Economic Impact research completed by some of the other applicants, the same data for the OCCC was lacking in my opinion considering the claim of \$3.5 billion in annual impact. This is three times the next largest applicant (Orlando Dreamers) and four times the Amway Arena economic impact information, and while that may be entirely possible, I think it warrants a more detailed scientific evaluation from more than one organization and not one based in the local market. If the OCCC could more explicitly prove its economic impact on not just the tourism industry, but the community as a whole, then the 50:1 ROI might be a no brainer. 4. Where do we meet the stage of diminishing returns? We have clearly entered a new era where people are able to meet electronically in ways not considered realistic even three years ago. This will most certainly have an impact on the convention and meeting industry and needs to be looked at objectively. I am open to any argument that would prove otherwise, but we are being asked to consider massive investment without much verifiable evidence. Many of the other projects are doing the same, but the OCCC has had decades to produce accurate, verifiable evidence of its importance to the business community and the evidence shown thus far isn't sufficient for what I would expect of such an established institution. 5. The major argument seems to be that we need to do this because others have already done it and we are going to lose business to those cities. I guess my question is: if we were no longer to have 20 of the largest 250 conventions hosted in Orlando as we did in 2022 and instead went down to 10, would we be in jeopardy of no longer being the most visited place in the country? Why do we have to host the largest conventions only? In their presentation, the OCCC boasts 160 total events in the last fiscal year with 1.5 million attendees. Do we need more space in order to welcome 1.5 million attendees? Can't we just fill the space we have more effectively? I am not a meeting and convention expert by any means, but I am not certain that moving from 1.5 million attendees a year to 1 million attendees per year is going to make that much difference in our status as a destination city when 75 million people visit annually. I think the bigger question is how do we get more of those 75 million people to take one day out of their trip and spend money with a locally owned business and if we can't, how can the community as a whole most benefit from those people who visit? We are publicly subsidizing one industry out of dozens in our community. Neither the tech sector, financial services sector, small business sector nor healthcare sector are asking for another \$700+ million in infrastructure investment. Maybe they should so we can diversify our economy, maybe they shouldn't and we should lean further into the industry for which we are most famous. I'm not certain, but I am certain that this level of investment should come with some harder evidence of results from past investment and some strings attached should it not work.

Orange County Convention Center (continued)

3

Feel that this should be funded from current dollars and not be a use for "excess" funds

4

Final cost not determined

5

My one challenge is - its a lot of money for the convention center. As a resident i continue to want our city to further develop its own identity away from the theme parks. The parks will always define us - but theres so much more. The convention center gets used because the parks are close. Not always because they are spectacular facilities. I lean more towards funding identity impactful projects.

6

In addition to the key priority of upgrading the Center - also see a key opportunity to add funding to build a rail connection between the Airport/Brightline/SunRail and I-Drive. Completes the Client Advisory Board Mission for Connectivity

7

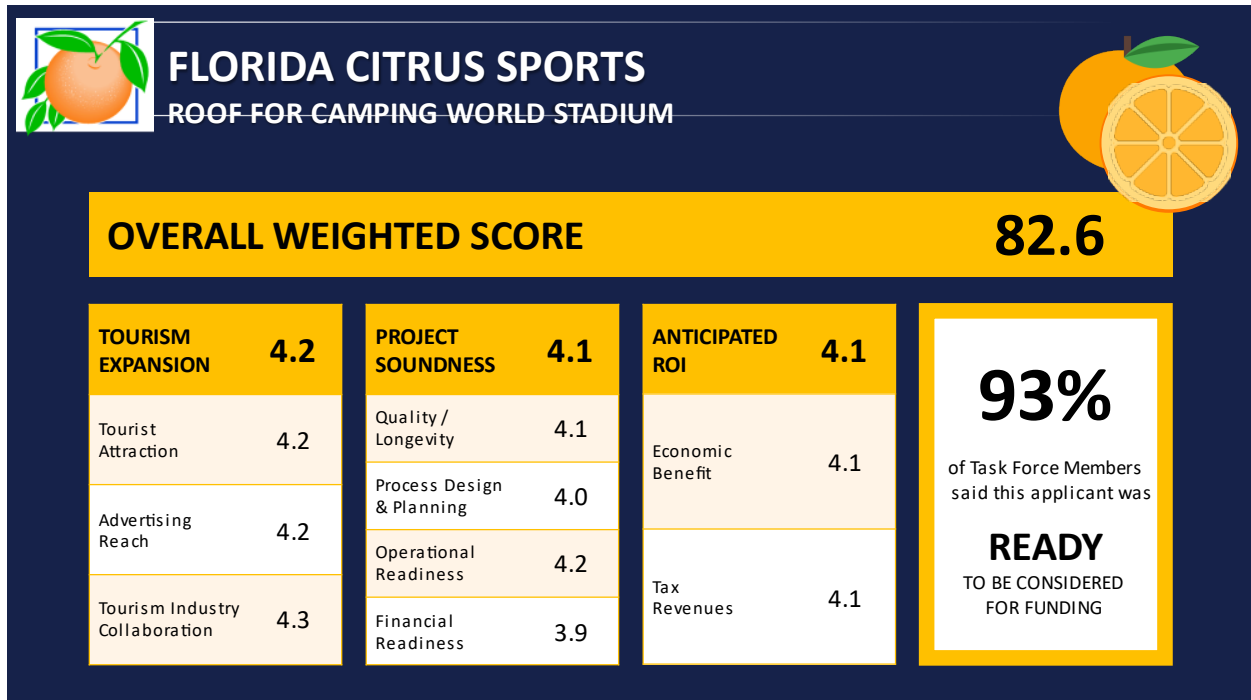
Cost for development are extremely high. Seek better negotiations

8

This is an expensive project (with a still-unclear final price tag) facing many questions about whether an "expansion" is necessary. The jobs indirectly created by OCCC are the main justification given for expanding the convention center, but they are often much lower-quality jobs than those at the convention center itself. Realistically, what does OCCC stand to gain or lose from completing this project or not?

Florida Citrus Sports

QUANTITATIVE SURVEY RESULTS



QUANTIFIED COMMENTS

STRENGTHS (from 10 responses)

ASSET TO THE COMMUNITY (6)

- “Broad multi county reach”
- “Excellent community asset”
- “This is a county owned facility that is a gathering place for locals and visitors alike”
- “Very important to local community (West Lakes)”
- “The presence of strong community support was notable and the discussion of how your development has considered community partnerships stood out!”
- “They have done a great job of rallying the community behind the events they manage and I would love to see further investment in all of our neighborhoods at the level FCS has done”

POTENTIAL ECONOMIC IMPACT (3)

- “Sports impact on community ... will only increase with expansion”
- “Will have a significant economic impact to Orange County”
- “The ‘incremental’ impact on TDT is clear”

Florida Citrus Sports (continued)

ESTABLISHED HISTORY (3)

- “Builds on previous success”
- “History of great events”
- “Established Sports impact ... since 1936”

ATTRACTIVE TO TOURISTS (2)

- “Drives tourism”
- “With enhancements, we will be able to attract more national and international sporting and concert events”

IMPORTANT, NEEDED (2)

- “Hugely important project for growth of Orange County and Orlando”
- “Needs to be maintained”

NO ANCHOR TENANT (2)

- “It has no billionaire ‘tenant’ that is going to hold maintenance and demands over our heads”
- “There is no anchor tenant as most such venues would have in other communities”

OPPORTUNITIES FOR IMPROVEMENT (from 8 responses)

QUESTIONS REGARDING PROJECT NATURE AND SCOPE (4)

- “I think they should have asked for more money to tear down and rebuild a modern and state-of-the-art facility from scratch”
- “Is half a roof enough. Go bigger now to be more competitive”
- “Ensure new construction is NFL ready”
- “May not have enough TDT to fund whole request”

QUESTIONABLE RETURN ON INVESTMENT (2)

- “Much too high an investment with minimal ROI”
- “The request from FCS is second largest only to the baseball stadium proposal and as such has a much lower projected ROI”

RAW COMMENTS

STRENGTHS

- 1
This is a county owned facility that is a gathering place for locals and visitors alike. It has no billionaire "tenant" that is going to hold maintenance and demands over our heads, and it needs to be maintained.

Florida Citrus Sports (continued)

2

Established Sports impact on community since 1936 will only increase with expansion

3

With enhancements, we will be able to attract more national and international sporting and concert events that will have a significant economic impact to Orange County.

4

Hugely important project for growth of Orange County and Orlando, and also very important to local community (West Lakes). We need to make this a world class venue in order to keep up with the competition, and this will help accomplish that goal.

5

History of great events

6

Broad multi county reach.

7

I think the team at Florida Citrus Sports has done an excellent job in running a landmark facility in the community, especially when you consider there is no anchor tenant as most such venues would have in other communities. They have done a great job of rallying the community behind the events they manage and I would love to see further investment in all of our neighborhoods at the level FCS has done leading by example with the West Lakes Community through LIFT Orlando. The Florida Classic is a wonderful weekend long event for Orlando every year as are both Bowl Games and we are lucky to have such a place to host these memorable events. Clearly tens of thousands of people visit Downtown Orlando, Parramore and West Lakes with each of the events they host. With one eighth of the total number of events hosted at the OCCC, the Citrus Bowl still welcomed 61% of the total visitors to the Convention Center in the same time period. The media value appears to be among the strongest of all applicants with more direct national and international coverage opportunities.

8

The "incremental" impact on TDT is clear

9

The presence of strong community support was notable and the discussion of how your development has considered community partnerships stood out! Your proposal consists of an investment in existing assets and builds on previous success.

10

Drives tourism and excellent community asset.

OPPORTUNITIES FOR IMPROVEMENT

1

I think they should have asked for more money to tear down and rebuild a modern and state-of-the-art facility from scratch.

2

Ensure new construction is NFL ready

3

Opportunities to work with their local community utilizing community benefit agreements in terms of construction for the new project.

4

it is ready yet with priority funding for aspects (may not have enough TDT to fund whole request) that lift capacity and offer opportunities during shoulder season

Florida Citrus Sports (continued)

5

Is half a roof enough. Go bigger now to be more competitive

6

I think there are some opportunities for Florida Citrus Sports and the City of Orlando to have some public discussion as to why Camping World Stadium (owned by the City) is operated by a nonprofit organization with quite a few well compensated staff that only host two events per month on average compared to the Amway Arena (also owned by the city) operated by City of Orlando personnel who manage significantly more events with a similar projection in annual economic impact. The request from FCS is second largest only to the baseball stadium proposal and as such has a much lower projected ROI. I think FCS has reported among the most realistic economic impact projections and is doing so because they have multiple decades of history under their belt. I hope all of the applicants have been as thorough and transparent in their forecasts.

7

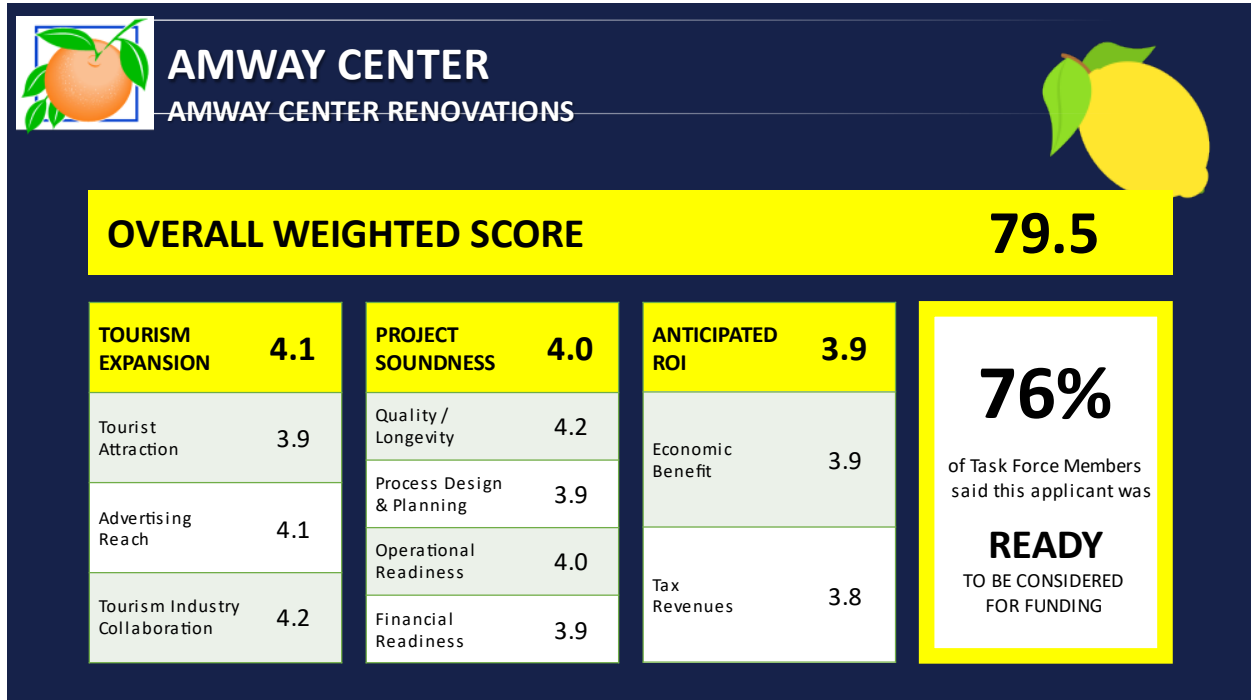
The largest number of jobs involved in this project are the hourly, seasonal operations jobs inside the stadium itself. Can you provide more information about what these jobs contribute to the economy? How much of the year would an employee work? How much do they pay? How many jobs are part-time, full-time, seasonal or casual?

8

Much too high an investment with minimal ROI.

Amway Center

QUANTITATIVE SURVEY RESULTS



QUANTIFIED COMMENTS

STRENGTHS (from 8 responses)

PROVEN TRACK RECORD (3)

- “Building on proven success and tourist contribution”
- “Excellent history of events”
- “Track record of success makes future prediction of success clear”

EVENTS (3)

- “Excellent history of events”
- “They are hosting an impressive number of events weekly, monthly and annually”
- “Orlando Magic, Sports Events and Concerts”

QUALITY OF OPERATIONS, MANAGEMENT (2)

- “The Amway Center is extremely well managed and maintained”
- “Maintaining a high level of operations and facility is ultra important for a competitive advantage in the marketplace”

Amway Center (continued)

OPPORTUNITIES FOR IMPROVEMENT (from 7 responses)

FUNDING FOR IMPROVEMENTS CAN COME FROM OTHER SOURCES (4)

“Let the billionaire tenant pay for the improvements from the profits they make in this City owned building. It is normal in a commercial space to have the tenant pay for the improvements to the landlord's building”

“Feel these improvements should have been put in place from operating revenues”

“Need to understand the private users plans to match and or support the TDT Funding”

“They need to generate their own funding source for maintenance”

RAW COMMENTS

STRENGTHS

1
Orlando Magic, Sports Events and Concerts

2
The Amway Center is a City venue with most of the economic impact remaining within the City.

3
Track record of success makes future prediction of success clear. Maintaining a high level of operations and facility is ultra important for a competitive advantage in the marketplace.

4
Excellent history of events

5
The Amway Arena has become a fixture in our town. I want to keep it healthy.

6
Building on proven success and tourist contribution

7
The Amway Center is extremely well managed and maintained. They are hosting an impressive number of events weekly, monthly and annually. It is interesting to me, but not all that important, that the Amway arena sits geographically between the DPAC and Camping World Stadium as it also hosts larger concerts than the DPAC, but smaller than Camping World Stadium. The indoor venue with healthy seating capacity is in a strong position for future concerts that are becoming a more profitable stream of income for artists since the major shifts in the music industry related to growth of streaming services have changed everything. The multiple applications for the venue are positive for the community.

8
Good idea to preserve existing tourism assets

OPPORTUNITIES FOR IMPROVEMENT

1
Let the billionaire tenant pay for the improvements from the profits they make in this City owned building. It is normal in a commercial space to have the tenant pay for the improvements to the landlord's building. Orange County should not be on the hook or to have the threat of a billionaire moving the team if facility improvement demands are not met. Demands they can pay for themselves. With regard to Live Nation/Ticketmaster wanting specific amenities for venues, that too is not our problem.

Amway Center (continued)

2

Feel these improvements should have been put in place from operating revenues

3

I just hate that the dollars are going to MEP. But it is necessary.

4

Need to understand the private users plans to match and or support the TDT Funding

5

The Amway is located in the Orlando neighborhood with the highest overall rate of poverty. While I am glad the venue serves as such great hosts for many if not most high school graduations in Orange County, as well as some large local job fairs, I'd like to see the venue leadership become more highly engaged in improving the neighborhood surrounding them. This could be done by welcoming the neighborhood inside or going out to the Parramore Heritage neighborhood in some constructive ways much like Florida Citrus Sports has done for the West Lakes neighborhood.

6

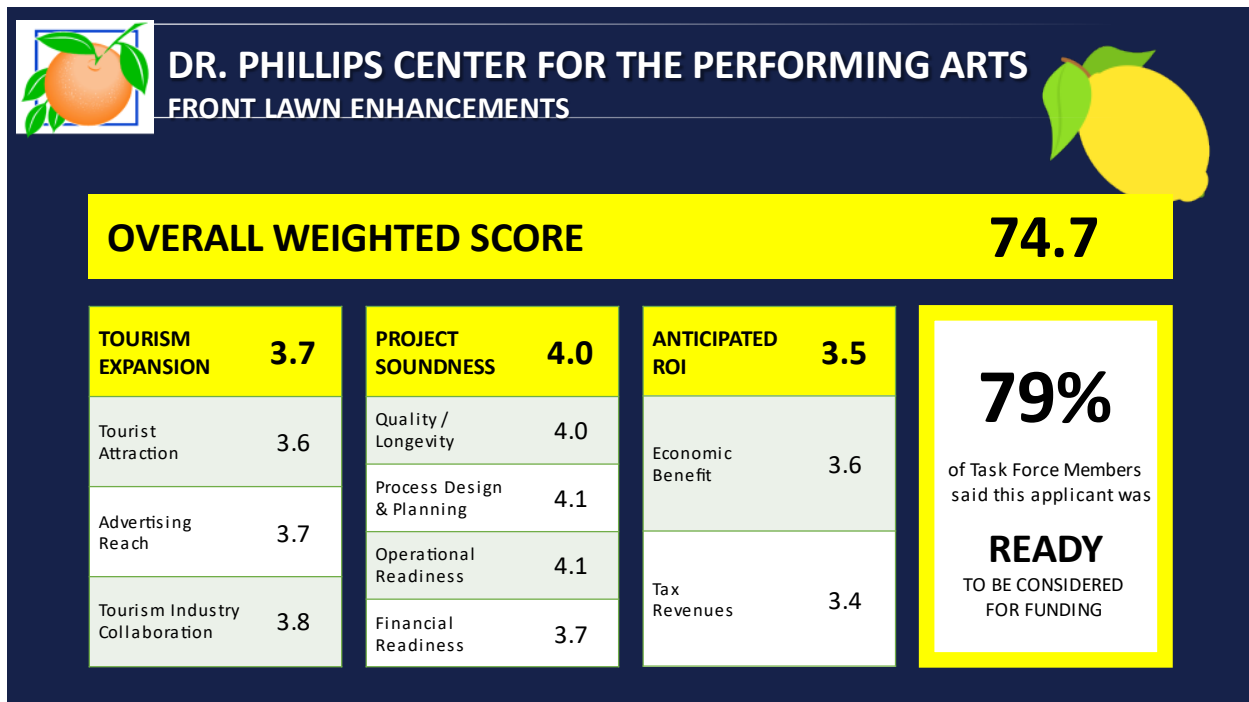
It nearly enough details on the "upgrades and improvements"- seems to be for technology that may or may not happen

7

Question how many hotels are actually being generated. They need to generate their own funding source for maintenance

Dr. Phillips Center for the Performing Arts

QUANTITATIVE SURVEY RESULTS



QUANTIFIED COMMENTS

STRENGTHS (from 8 responses)

PLAN / PRESENTATION (2)

- “Well thought out plan”
- “Fantastic Presentation”

THE FACILITY (2)

- “Steinmetz Hall is the one only auditorium like that in the world”
- “Great existing facility”

ATTRACTIVE TO TOURISTS (2)

- “Globally renowned artists can bring their fans as tourists”
- “The Center clearly brings in visitors from outside a 50 mile radius ... it has become its own singular destination”

Dr. Phillips Center for the Performing Arts (continued)

ECONOMIC IMPACT / IMPACT ON THE COMMUNITY (2)

“Although located within the city, the Dr Phillips PAC has community outreach that also positively impacts the citizens of Orange County”

“The DPAC has in a short amount of time been able to definitively show its economic impact on the community”

POTENTIAL FOR FUTURE IMPACT (2)

“The public access spaces you're envisioning are beautiful and have so much potential for changing what downtown Orlando offers to the community”

“Will do wonders for our City”

OPPORTUNITIES FOR IMPROVEMENT (from 8 responses)

UNCLEAR OR WEAK IMPACT ON TOURISM (4)

“No collaboration with tourism”

“The ‘incremental’ impact on TDT unclear”

“Concerns about whether this enhances TDT (unlike the halls themselves)”

“Failed to generate private growth beyond its walls. Does not generate additional property tax revenue very little bed tax”

CONCERNS OVER HOW LAND WILL BE USED (3)

“Land purchased with tax payer funds, and a building built with tax payer funds should not be sold as condominiums for the wealthy”

“Need more information related to private philanthropy and long-term land-use plan that drives revenue to support capital expansion”

“I was also a little concerned about the planned residential development on the property since the Center is owned by the City of Orlando”

CONSIDERATIONS FOR AFFORDABLE HOUSING (2)

“It was disappointing to hear that you have apparently not considered workforce housing at all, and wouldn't offer even an explanation of why it isn't included”

“With Orlando being one of the worst affordable housing markets in the country, we need to use every opportunity we can to develop mixed use residences. ... I don't think it is positive for any City owned properties to not include some affordable units”

Dr. Phillips Center for the Performing Arts (continued)

RAW COMMENTS

STRENGTHS

1

Steinmetz Hall is the one only auditorium like that in the world

2

Although located within the city, the Dr Phillips PAC has community outreach that also positively impacts the citizens of Orange County.

3

Well thought out plan

4

Fantastic Presentation - will do wonders for our City.

5

Globally renowned artists can bring their fans as tourists

6

The DPAC has in a short amount of time been able to definitively show its economic impact on the community. The Center clearly brings in visitors from outside a 50 mile radius and while I don't believe many theme park visitors are taking time from their trip to attend a concert, I think what the DPAC has done is better in that it has become it's own singular destination. The ROI information has been objectively produced and I calculate it based on the figures shared at a 25:1 overall ROI. While this is not the highest overall ROI of all applicants, I have more faith in the numbers being shared than I do from other applicants because they are using multiple companies to review their impact. Additionally, the sheer volume of activities at the venue to date is extremely impressive, especially compared to some of the other applicants. There is some event almost every day of the year and a significant number of educational programming events.

7

The public access spaces you're envisioning are beautiful and have so much potential for changing what downtown Orlando offers to the community.

8

Great existing facility.

OPPORTUNITIES FOR IMPROVEMENT

1

Land purchased with tax payer funds, and a building built with tax payer funds should not be sold as condominiums for the wealthy.

2

Some concerns over project support from City - needs more vetting; also concerns about whether this enhances TDT (unlike the halls themselves).

3

Need more information related to private philanthropy and long-term land-use plan that drives revenue to support capital expansion

4

It was disappointing to hear that you have apparently not considered workforce housing at all, and wouldn't offer even an explanation of why it isn't included. That gave me serious concerns about how much thought is going into making sure that this project is accessible to and interesting to Central Florida residents. If successful this could be a good tourism and development driver. But tourism in downtown Orlando isn't robust enough to make it successful without local interest in visiting and spending time there.

Dr. Phillips Center for the Performing Arts (continued)

5

The "incremental" impact on TDT unclear

6

Failed to generate private growth beyond its walls. Does not generate additional property tax revenue very little bed tax.

7

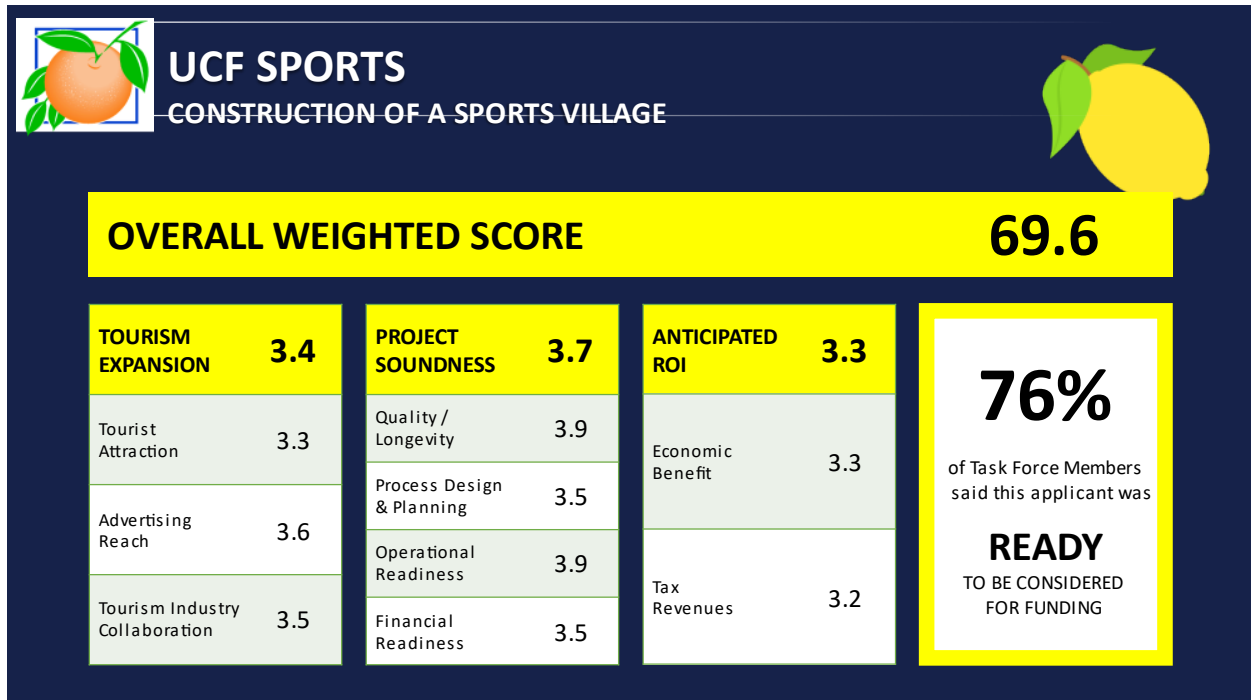
Looks over designed for the space. No collaboration with tourism.

8

The community has already invested heavily in the Performing Arts Center both through public and private means. This has created three significant theater spaces with one more smaller venue opening soon. I am not convinced that the proposed additions will really be open and free to the public in the way described. I'm not sure I see residents from nearby Parramore, Thorton Park or SODO coming to the outdoor venue and would like to hear more about how they will make this aspect of the nine acre campus open and welcoming to all people. I was also a little concerned about the planned residential development on the property since the Center is owned by the City of Orlando. I can see where such an investment would help the budget of the DPAC in years to come, but with Orlando being one of the worst affordable housing markets in the country, we need to use every opportunity we can to develop mixed use residences. I don't think the entire project should include housing affordable for people earning below the Area Median Income, but I don't think it is positive for any City owned properties to not include some affordable units. This is still a public/non-profit venture much like Camping World stadium and needs to address the needs of a broader cross section of the community, not just those that can afford tickets.

UCF Sports

QUANTITATIVE SURVEY RESULTS



QUANTIFIED COMMENTS

STRENGTHS (from 5 responses)

CONFIDENCE IN THE PLAN (2)

- “Well thought out expansion plan”
- “I think the project is sound”

IMPACT ON TOURISM (2)

- “The ‘incremental’ impact on TDT clear”
- “People from around the nation will visit making the athletic facilities a stand alone attraction all their own”

UCF Sports (continued)

OPPORTUNITIES FOR IMPROVEMENT (from 10 responses)

INAPPROPRIATE USE OF TDT FUNDS (5)

- “This project is not an appropriate use of TDT dollars”
- “Need deeper dive into whether this type of funding is appropriate for UCF, vis-a-vis other funding opportunities, and other Universities in Florida”
- “Not a fan of using these funds for athletic program”
- “This is a very specific interest place for those who have attended or love the school. Not universal for TDT funding”
- “This project should not be funded through TDT”

CONSIDER OTHER SOURCES OF FUNDING (4)

- “I struggle allocating dollars toward UCF. A LOT of wealthy donors that love the school”
- “This project seems to be more suited for private investment”
- “Not a fan of using these funds for athletic program that seems to have adequate funding sources and will gain funding sources in the future”
- “You have access to considerable private funding resources that many other projects don't”

QUESTIONABLE IMPACT / RETURN ON INVESTMENT (4)

- “Need to better understand the short and long-term funding plans. Need time to truly understand the lift of visitation from joining the Big 12 and will they stay in Orange County”
- “The numbers supplied by UCF have among the lowest ROI projections at about 3:1”
- “It's difficult to quantify how multiple improvement to the Athletic Village will equates to a substantial increase in tourism”
- “I have concerns about how wise this expenditure would be given your profitability compared to some other projects”

RAW COMMENTS

STRENGTHS

- 1
Now in the Big 12 Conference
- 2
While I rated this project either average or above average in some of the categories, UCF has the ability and proven track record to fund its own projects which most schools do.
- 3
Well thought out expansion plan
- 4
The "incremental" impact on TDT clear

UCF Sports (continued)

5

The University of Central Florida is a highly reputable institution and any investment will be handled wisely. This is a public institution and the athletic events and activities will be generally more accessible than those of other applicants. While the statute is not as clear to me on whether investment in a state university athletic project is allowable, I think the project is sound and clearly people from around the nation will visit making the athletic facilities a stand alone attraction all their own.

OPPORTUNITIES FOR IMPROVEMENT

1

This project is not an appropriate use of TDT dollars. UCF should focus on lowering the cost of tuition, getting their students employed in high-paying jobs where they can afford a house in our community, not focusing on making millions off the backs of student athletes with high paid coaching staff.

2

Not a fan of using these funds for athletic program that seems to have adequate funding sources and will gain funding sources in the future

3

Need deeper dive into whether this type of funding is appropriate for UCF, vis-a-vis other funding opportunities, and other Universities in Florida.

4

I struggle allocating dollars toward UCF. A LOT of wealthy donors that love the school. This is a very specific interest place for those who have attended or love the school. Not universal for TDT funding.

5

Need to better understand the short and long-term funding plans. Need time to truly understand the lift of visitation from joining the Big 12 and will they stay in Orange County

6

Mostly driven by football which is only 4 months in the year

7

While I am not supremely confident in many of the economic impact forecasts reported by applicants, the numbers supplied by UCF have among the lowest ROI projections at about 3:1.

8

This project seems to be more suited for private investment. The impressive move to the Power 5, Big 12 conference should be an automatic draw for opposing team fans. It's difficult to quantify how multiple improvement to the Athletic Village will equate to a substantial increase in tourism.

9

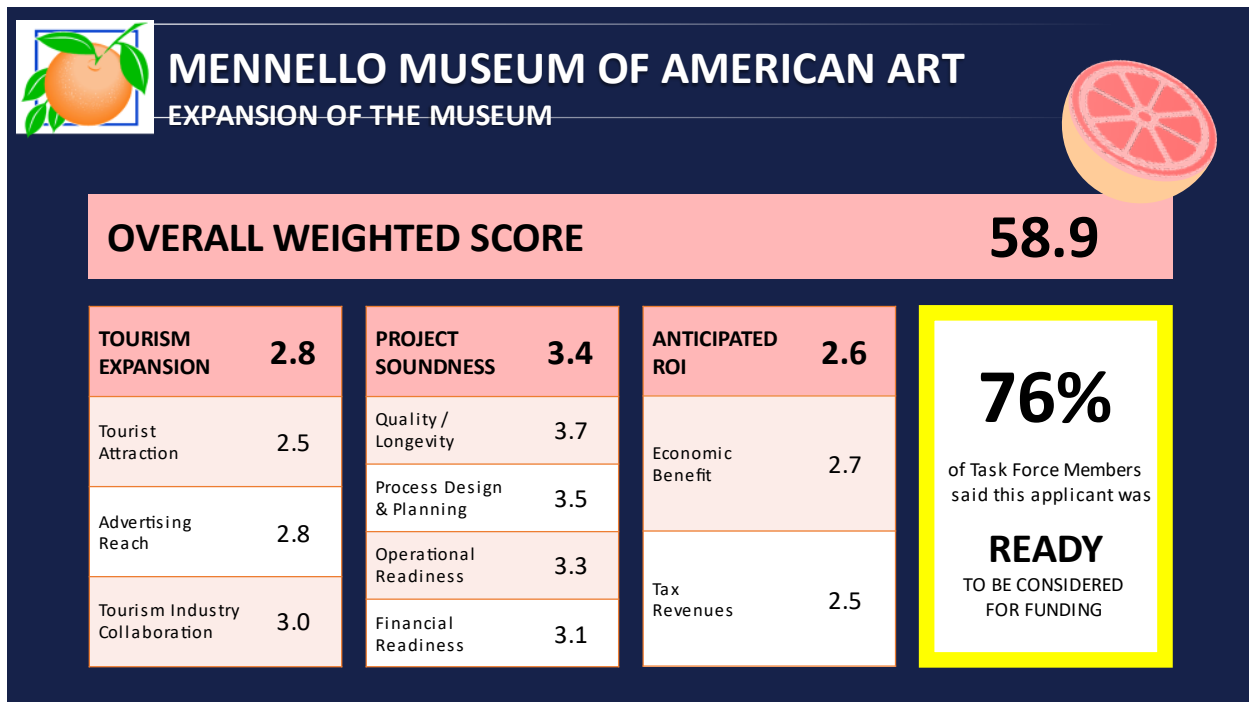
Given how far UCF is from most of the tourist destinations in Central Florida, it'll take some work to connect it to the rest of the industry and extend visitors' time in Orlando. Have you considered how to do that? You have access to considerable private funding resources that many other projects don't. It is not clear where to consider than on this rubric, but I have concerns about how wise this expenditure would be given your profitability compared to some other projects.

10

This project should not be funded through TDT. As exhibited by 1 project ever being funded through TDT in the entire state.

Mennello Museum of American Art

QUANTITATIVE SURVEY RESULTS



QUANTIFIED COMMENTS

STRENGTHS (from 10 responses)

BEAUTIFUL DESIGN (4)

- “A beautiful designed building with a lot of care to blend in with natural aesthetics”
- “The vision for this expansion is beautiful and impactful”
- “Beautiful design”
- “A beautiful project, well thought-out artistic vision”

POTENTIAL IMPACT OF EXPANSION (4)

- “Art has the potential to be a tourist destination”
- “Will boost the area's reputation as an arts and culture destination and significantly expands their space for exhibits with the potential of welcoming higher caliber travelling exhibits”
- “Great for community”
- “This would help develop the arts attractions within a compact geographic area, which have an excellent aggregate effect”

Mennello Museum of American Art (continued)

RECOGNITION AND ACCOLADES (3)

“Impressive institution recognized regionally and nationally”

“Partner to Smithsonian American art Museum, 2021 Award for best unbuilt design, AIA 2022 National Gold Medal, raised 1.9 million already”

“Their Accolades”

OPPORTUNITIES FOR IMPROVEMENT (from 9 responses)

QUESTIONABLE OR UNCLEAR IMPACT / RETURN ON INVESTMENT (5)

“Low ROI question room night generation”

“The "incremental" TDT impact unclear”

“The return on investment seems very aggressive based on the amount of funds requested ... not convinced it'll generate tourism specific income”

“This location is not a tourist draw to merit TDT funding”

“Need more specific financial and economic impact information”

RAW COMMENTS

STRENGTHS

1

A beautiful designed building with a lot of care to blend in with natural aesthetics.

2

Partner to Smithsonian American art Museum, 2021 Award for best unbuilt design, AIA 2022 National Gold Medal, raised 1.9million already

3

The vision for this expansion is beautiful and impactful.

4

Good history of quality.

5

Their Accolades

6

Clear Vision and comprehensive presentation

7

Art has the potential to be a tourist destination

8

They are using a historic space in Orlando (former home of notable resident) and have already turned it into an impressive institution recognized regionally and nationally. This new plan continues that advancement, will boost the area's reputation as an arts and culture destination and significantly expands their space for exhibits with the potential of welcoming higher caliber travelling exhibits. The plan also provides for additional revenue streams to better ensure the museum is self sufficient in the long term.

Mennello Museum of American Art (continued)

9

Beautiful design great for community

10

A beautiful project, well thought-out artistic vision. This would help develop the arts attractions within a compact geographic area, which have an excellent aggregate effect.

OPPORTUNITIES FOR IMPROVEMENT

1

This location is not a tourist draw to merit TDT funding.

2

Need more specific financial and economic impact information.

3

Geared towards weddings and local businesses.

4

The "incremental" TDT impact unclear.

5

As with all applicants, it is my hope to see how not only will potential projects boost tourism into our community, but how it will benefit permanent residents as well. The Orlando MSA has a 16% rate of poverty compared to a national rate of 11%. Additionally, 75% of Orange County Public School students are on free or reduced meal plans. I'd like to see how this project can further engage students or families from Title 1 schools or extremely low-income households in an effort to expose them to the beauty and history of American Art.

6

More marketing efforts and more programming to attract larger audience

7

The return on investment seems very aggressive based on the amount of funds requested. The renderings look amazing and should generate substantial local income but not convinced it'll generate tourism specific income.

8

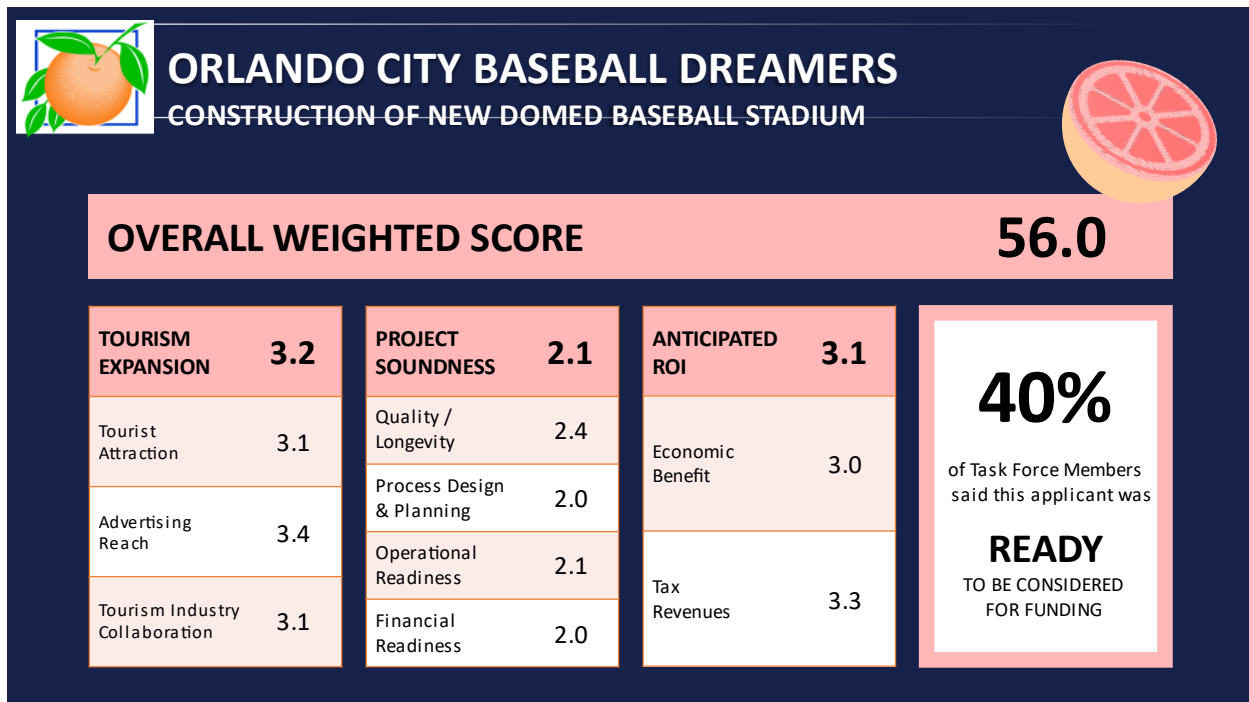
Low ROI question room night generation.

9

Xcellent design

Orlando City Baseball Dreamers

QUANTITATIVE SURVEY RESULTS



QUANTIFIED COMMENTS

STRENGTHS (from 11 responses)

BIG EXCITING PROJECT (4)

“Big dream”

“The applicant is wide open to take a swing at landing the first Major League baseball stadium and team in the area”

“Any plan to recruit professional sports into our community is exciting”

“Certainly a major project!”

BEAUTIFUL DESIGN (2)

“Beautiful attraction”

“The designs were fantastic”

POTENTIAL TO DRAW TOURISM (2)

“Will bring in crowds”

“The potential location of the complex would make it more likely for tourists to visit for games and other events”

Orlando City Baseball Dreamers (continued)

CONTRIBUTION TO OUR TOURISM IDENTITY (2)

"I would love having a baseball team in Orlando. Continue to broaden the identity of our town"
"If successful, this would be a significant contribution to Orlando's profile as a sports tourism destination"

OPPORTUNITIES FOR IMPROVEMENT (from 16 responses)

NO COMMITMENT FROM TEAM, OWNER, OR MAJOR LEAGUE BASEBALL (8)

"Team not secured"
"Will they get a baseball team to come to Orlando?"
"Identify solid ownership interest and financial capabilities"
"No team"
"No team/owner in place"
"No confirmation of a team"
"It would be absolutely negligent to commit that kind of money without a firm commitment from Major League Baseball"
"The financial viability of this project without a clear plan for team ownership is concerning"

INAPPROPRIATE USE OF TDT; FUNDING COULD COME FROM OTHER SOURCES (6)

"Though it fits the parameters, I think this would be a poor choice for the TDT funds"
"Take a less amount of TDT money and privately raise more dollars"
"Would like to see more private funding for this endeavor"
"Orange County should not be subsidizing a billionaire owner's business, tying up the bonding ability of the county"
"I'm dubious of using tax revenue for such a purpose"
"A lot of other projects need funding and we would be tying up dollars on a maybe"

QUESTIONABLE MARKET FOR BASEBALL (3)

"Baseball stadiums are empty across this State and Country"
"Risk to assume market can absorb team so close to Tampa"
"We already have a baseball stadium equipped to host at least a minor league team in the community and I have to wonder why this stadium doesn't already [have a team]"

CONCERNS REGARDING PROPOSED STADIUM LOCATION (2)

"I don't love the location"
"Almost all professional sports arenas are in or near a downtown core or an area of future growth ... This project further promotes the tourism corridor... Would the team be a boost for all of the Orlando/Orange County market, all of Central Florida or would it just be a boost to one specific portion of our community ...?"

Orlando City Baseball Dreamers (continued)

RAW COMMENTS

STRENGTHS

1

None.

2

Newest Baseball Stadium in America, Host World Series, Home Run Derby, MLB All-Star game, World Cup Soccer, National Baseball Hall of Fame South, Final Four, MLB Draft and Concerts

3

Very well fleshed out plan with experienced leadership.

4

Big dream

5

The applicant is wide open to take a swing at landing the first Major League baseball stadium and team in the area.

6

I would love having a baseball team in Orlando. Continue to broaden the identity of our town.

7

Baseball remains a strong sport and can contribute to social impact on community.

8

Any plan to recruit professional sports into our community is exciting and should be looked at seriously as well as critically. The potential location of the complex would make it more likely for tourists to visit for games and other events.

9

Beautiful attraction and will bring in crowds

10

Certainly a major project! A number of categories on this rubric explicitly favor "large" projects, which benefits this proposal. If successful, this would be a significant contribution to Orlando's profile as a sports tourism destination.

11

The designs were fantastic.

OPPORTUNITIES FOR IMPROVEMENT

1

Orange County should not be subsidizing a billionaire owner's business, tying up the bonding ability of the county. It would be a great insult to the children of Orange County if we funded a boondoggle like this. Baseball stadiums are empty across this State and Country and to think we would build this using public funds is criminal.

2

Continue marketing awareness

3

Would like to see more private funding for this endeavor.

4

Though it fits the parameters, I think this would be a poor choice for the TDT funds.

5

Significant concerns about not being anywhere near shovel-ready, with no team/owner in place.

Orlando City Baseball Dreamers (continued)

6

Team not secured

7

Take a less amount of TDT money and privately raise more dollars

8

I don't love the location - i realize that is limited given what we are talking about. Also I struggle with the contingency factor. A lot of other projects need funding and we would be tying up dollars on a maybe.

9

Risk to assume market can absorb team so close to Tampa.

10

In their presentation, it was stated the Orlando Market is the largest without professional baseball of any kind and I think the reason for this is more than the proximity of the MLB teams in St. Pete and Miami. We already have a baseball stadium equipped to host at least a minor league team in the community and I have to wonder why this stadium doesn't already. It is unlikely that anyone local, even a consortium of owners, would invest the \$2.5 billion or more to purchase an expansion franchise or lure one to the area meaning once more we would have a large company in the community where the profit would go to people living outside of Orlando. We are also the largest market in the country without a Fortune 500 headquartered here. I'm dubious of using tax revenue for such a purpose. I understand that committing to such a process as the one requested may be integral to attracting a team, but it is an extremely large investment to make with what appears to be an ROI at least half that of other projects being proposed even if you consider the Economic Impact forecast of \$1.16 billion annually to be a realistic number. Additionally, professional baseball hosts a minimum of 81 games per year in a stadium of at least 45,000 people. Typically, MLB would only consider a market if they believe they could sell half of the stadium in season tickets. Visitors to the community are not going to be season ticket holders. As one of the lowest income communities in the nation, with the lowest percentage of manufacturing jobs (4%) among major markets, the second highest percentage of service jobs (21%) and the lowest median individual incomes of any major community, I believe one of the reasons we don't already have a professional baseball franchise, minor or major league is because not enough people in the community could afford an 81 game season ticket package to entice ownership. Finally, almost all professional sports arenas are in or near a downtown core or an area of future growth in an effort to promote the community as a whole as they further identify with the team and build excitement that leads to further development, business, residents, tax revenue and more. This project further promotes the tourism corridor, and while I am certain many residents would purchase season tickets, would the team be a boost for all of the Orlando/Orange County market, all of Central Florida or would it just be a boost to one specific portion of our community that seems to more and more look to separate itself from the residents who work there and live elsewhere and with few exceptions are owned by people who don't live here at all? I so appreciate the enthusiasm Mr. Williams showed for this interesting project, but I think where the proposal glistens with style, at this time it lacks in substantive data that supports the historic level of investment being requested. As more work is completed on the details of this project, including investment needed, economic impact expected and benefits it would have to a low income community, the project should continue to be considered seriously and soon. There are just not enough details at this time to warrant such a massive investment even as exciting as the prospect is for a third major sports league to call Orlando home.

11

Will they get a baseball team to come to Orlando?

12

Identify solid ownership interest and financial capabilities.

13

No team

14

This project would create a very large number of jobs, but most of them in a low-wage sector with many seasonal and low-stability jobs. It would be very helpful to learn more about how you, as a major employer, would ensure that your jobs would have a positive impact on the workforce, rather than just adding to the pool of substandard jobs. The main concern is the likelihood of this project being successful. The financial viability of this project without a clear plan for team ownership is concerning. I'm also eager to see more evidence of local community support, which will be necessary to make the project successful.

Orlando City Baseball Dreamers (continued)

15

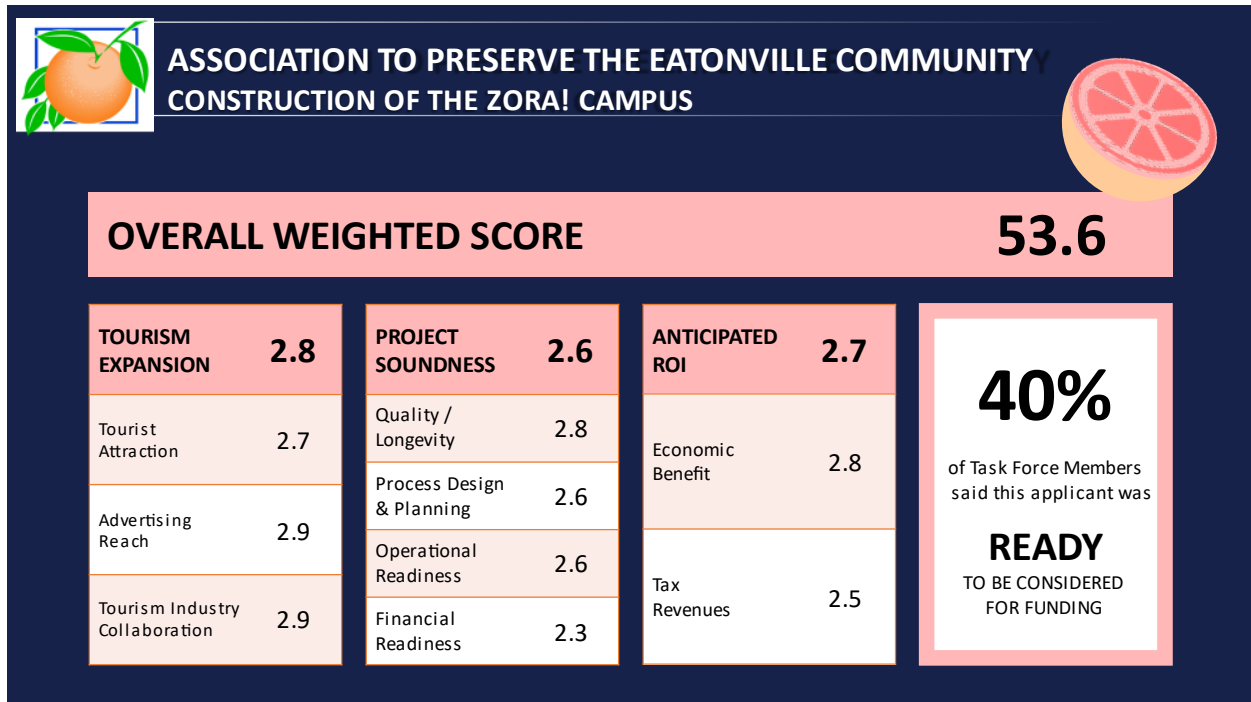
No confirmation of a team

16

It would be absolutely negligent to commit that kind of money without a firm commitment from Major League Baseball.

Association to Preserve the Eatonville Community (P.E.C.)

QUANTITATIVE SURVEY RESULTS



QUANTIFIED COMMENTS

STRENGTHS (from 6 responses)

IMPORTANCE OF PRESERVING HISTORY (2)

- “Strong History that needs to be preserved and presented”
- “Oldest Incorporated African American Town in the United States rich in Culture and History”

CONFIDENCE IN ABILITY TO DRAW TOURISM (2)

- “This is going to positively transform the Eatonville community and will draw more visitors to stay longer and spend more money in the area”
- “Cultural tourism growing”

OPPORTUNITIES FOR IMPROVEMENT (from 7 responses)

UNCLEAR PLAN, NEEDS MORE DEVELOPMENT (4)

- “Needs more development and planning before any real consideration”
- “The ‘incremental’ impact on TDT unclear”
- “Better financial planning”
- “It would be very helpful if your presentation contained somewhat more concrete description of what you intend to build or add to your programming”

Association to Preserve the Eatonville Community (P.E.C.) (continued)

ISSUES REGARDING LAND OWNERSHIP (3)

“Applicant does not own the land for this project”

“Must control land to proceed”

“Better options for the entire tract of land currently owned by OC public schools”

RAW COMMENTS

STRENGTHS

1

This is going to positively transform the Eatonville community and will draw more visitors to stay longer and spend more money in the area.

2

Oldest Incorporated African American Town in the United States rich in Culture and History

3

Excellent passion

4

Strong History that needs to be preserved and presented. I again like the idea of connecting with broader Orlando African American Historical connectivity.

5

Cultural tourism growing

6

This is a very exciting vision for a major new direction for Central Florida tourism

OPPORTUNITIES FOR IMPROVEMENT

1

Needs more development and planning before any real consideration.

2

Applicant does not own the land for this project.

3

The "incremental" impact on TDT unclear

4

Believe the Budget request is too high.

5

Better financial planning and better options for the entire tract of land currently owned by OC public schools

6

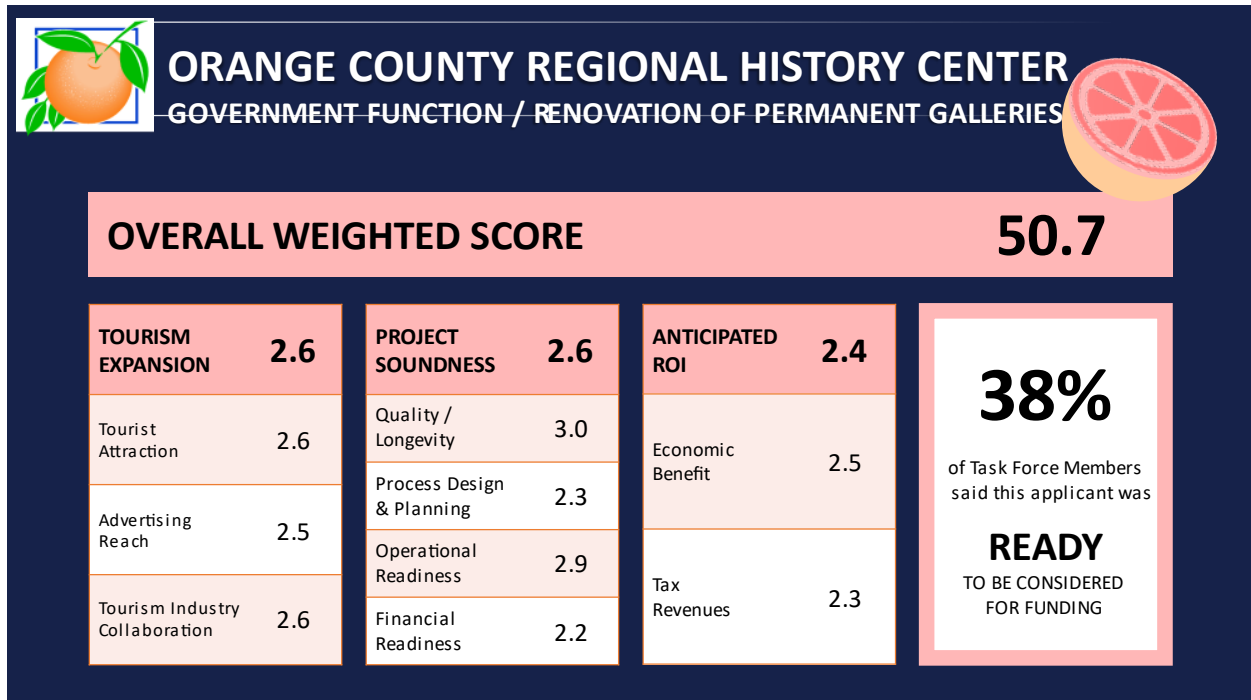
It would be very helpful if your presentation contained somewhat more concrete description of what you intend to build or add to your programming.

7

Raise capital Must control land to proceed

Orange County Regional History Center

QUANTITATIVE SURVEY RESULTS



QUANTIFIED COMMENTS

STRENGTHS (from 8 responses)

ROLE IN PRESERVING HISTORY (2)

“Collaboration with other Central Florida organizations preserving Orlando history as it happens”

“The applicant plays an important role in preserving the history of our community”

IMPACT ON DOWNTOWN (2)

“Adding additional exhibit space for Smithsonian Level travelling exhibitions would be a boost to tourism and travel to the Downtown corridor”

“Good vision for downtown”

OPPORTUNITIES FOR IMPROVEMENT (from 7 responses)

UNCLEAR PLAN (4)

“The presentation was theoretical and an idea for what could be done if funding were granted”

“I am unsure how developed the plan for expansion is at this time”

“No concrete plan yet”

“There didn’t seem to be a physical expansion location identified”

Orange County Regional History Center (continued)

UNCLEAR OR WEAK IMPACT ON TOURISM (3)

“Not enough tourist overnight stays”

“The "incremental" impact on TDT unclear”

“Nobody is staying in a hotel or coming to town because of the applicant's facility”

RAW COMMENTS

STRENGTHS

1

The applicant plays an important role in preserving the history of our community.

2

1 of 200 National Smithsonian Affiliates, Accredited by National Alliance of Museums, Telly awards, Golden Brick awards,

3

Collaboration with other Central Florida organizations preserving Orlando history as it happens.

4

Secure funding from the County.

5

Need a feasibility study first - then a proposed plan. There is no plan currently

6

History museums can be tourist destinations

7

The Orange County Regional History Center has come a long way from it's roots in Loch Haven Park to now occupying the 1927 Orange County Courthouse. Pulling down the old annex building to showcase the historic facade of the original building was a wonderful change over 20 years ago in Downtown Orlando. Adding additional exhibit space for Smithsonian Level travelling exhibitions would be a boost to tourism and travel to the Downtown corridor.

8

Good vision for downtown

OPPORTUNITIES FOR IMPROVEMENT

1

Nobody is staying in a hotel or coming to town because of the applicant's facility. Also, the presentation was theoretical and an idea for what could be done if funding were granted. Theoretically we could do a lot of things around our county with funding.

2

I am a little concerned about covering up some of the historic facades of the building after so much work went into uncovering them in the first place. However, change is inevitable and adding a high quality exhibition space in Downtown Orlando would be positive. I am unsure how developed the plan for expansion is at this time, but have confidence that the board and staff for the museum will rise to the occasion. The museum already hosts most Orange County Public School students at least once for a field trip to learn about local history. I'd like to see more in their proposal about how they can lean further into this portion of their mission and impact children and families in our community through the education of local history. Since Orlando's tourism industry has slowly developed us into one of the most diverse communities in the world. This is one of many unique aspects to the country's most popular community the museum could potentially focus on in their future growth. I think a plan that distinguishes the History Center from other similar programs around the country would help their effort to raise capital for this project.

Orange County Regional History Center (continued)

3

Not enough tourist overnight stays.

4

The "incremental" impact on TDT unclear

5

6-8 month visibility assessment, 1-2 year timeline on expansion, Fee's ability study, allocation of money, now or within the next 5 years, shovel ready?

6

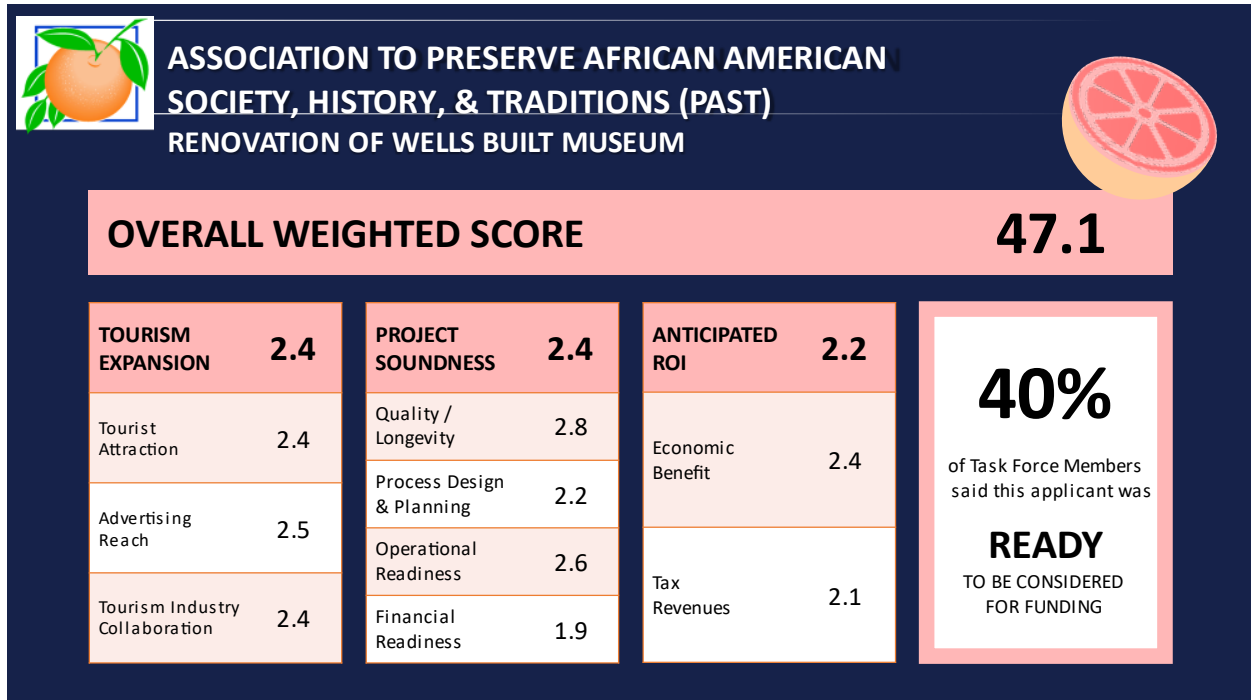
No concrete plan yet

7

There didn't seem to be a physical expansion location identified.

Association to Preserve African American Society, History, & Traditions (PAST)

QUANTITATIVE SURVEY RESULTS



QUANTIFIED COMMENTS

STRENGTHS (from 8 responses)

IMPORTANCE AND IMPACT OF HISTORY (5)

- “It is important that Orange County be a beacon of truth and knowledge for school children and adults who will travel here to experience this museum”
- “Historic Building and Artifacts”
- “Positive cultural and historical impact”
- “Strongly support continued light on the History that is Central Florida African American History”
- “The legacy of PAST’s work to preserve and promote this important piece of Central Florida’s history is excellent. Developing cultural tourism around African American history would add great depth to what kind of destination Orange County can be”

Association to Preserve African American Society, History, & Traditions (PAST) (continued)

OPPORTUNITIES FOR IMPROVEMENT (from 9 responses)

LACK OF READINESS, NEEDS ADDITIONAL PLANNING (5)

“Not ready for prime time yet - need to do feasibility study and more planning”

“Shovel Ready?”

“There wasn't a proper plan”

“Some work to do on developing a more concrete vision of what you will create”

“Unfortunately, I don't believe the project planners had enough time to put together a detailed enough plan that can reasonably considered for this level of investment”

PROJECT HAS POTENTIAL (3)

“I feel strongly that with effective collaboration ... this could be a powerful place for African American History and learning opportunities”

“As more details of the project are developed, I think this should be seriously considered for future TDT investment. ... I think the opportunities and potential benefits for this project to our community are enormous”

“The overall vision is an exciting one, building on a legacy of good work in Central Florida”

UNCLEAR RETURN ON INVESTMENT / IMPACT (2)

“The ‘incremental’ impact on TDT unclear”

“It's difficult to quantify the amount of direct tourism draw and likewise difficult generating a solid ROI”

RAW COMMENTS

STRENGTHS

1

As the State tries to erase African American history from our school systems, it is important that Orange County be a beacon of truth and knowledge for school children and adults who will travel here to experience this museum.

2

Historic Building and Artifacts, with dire need of expansion to facilitate future growth

3

Positive cultural and historical impact

4

Sincere passion.

5

Strongly support continued light on the History that is Central Florida African American History.

6

Other cities have proven potential in this space

Association to Preserve African American Society, History, & Traditions (PAST) (continued)

7

I am very excited about the possibility of a major civil rights museum in Orlando. The local leaders involved with the project are a major plus and should be seriously considered when looking at this potential project. If I had a personal favorite for which I would love to tell my children I had even a small part in helping make a reality, it would be this project.

8

The legacy of PAST's work to preserve and promote this important piece of Central Florida's history is excellent. Developing cultural tourism around African American history would add great depth to what kind of destination Orange County can be.

OPPORTUNITIES FOR IMPROVEMENT

1

The facility should be larger to allow for more education.

2

Expansion 6-8 month Visibility Assessment, 1-2 year timeline on expansion, Fee's ability study, allocation of money now, or within next 5 years, Shovel Ready?

3

Not ready for prime time yet - need to do feasibility study and more planning

4

There wasn't a proper plan.

5

I feel strongly that with effective collaboration with Zora Festival and Eatonville Historical Society this could be a powerful place for African American History and learning opportunities.

6

The "incremental" impact on TDT unclear

7

Unfortunately, I don't believe the project planners had enough time to put together a detailed enough plan that can reasonably be considered for this level of investment. As more details of the project are developed, I think this should be seriously considered for future TDT investment. Even though Orlando is one of the youngest large communities in the nation, we have a rich history of diversity and significant linkages to the civil rights movement. I think the opportunities and potential benefits for this project to our community are enormous.

8

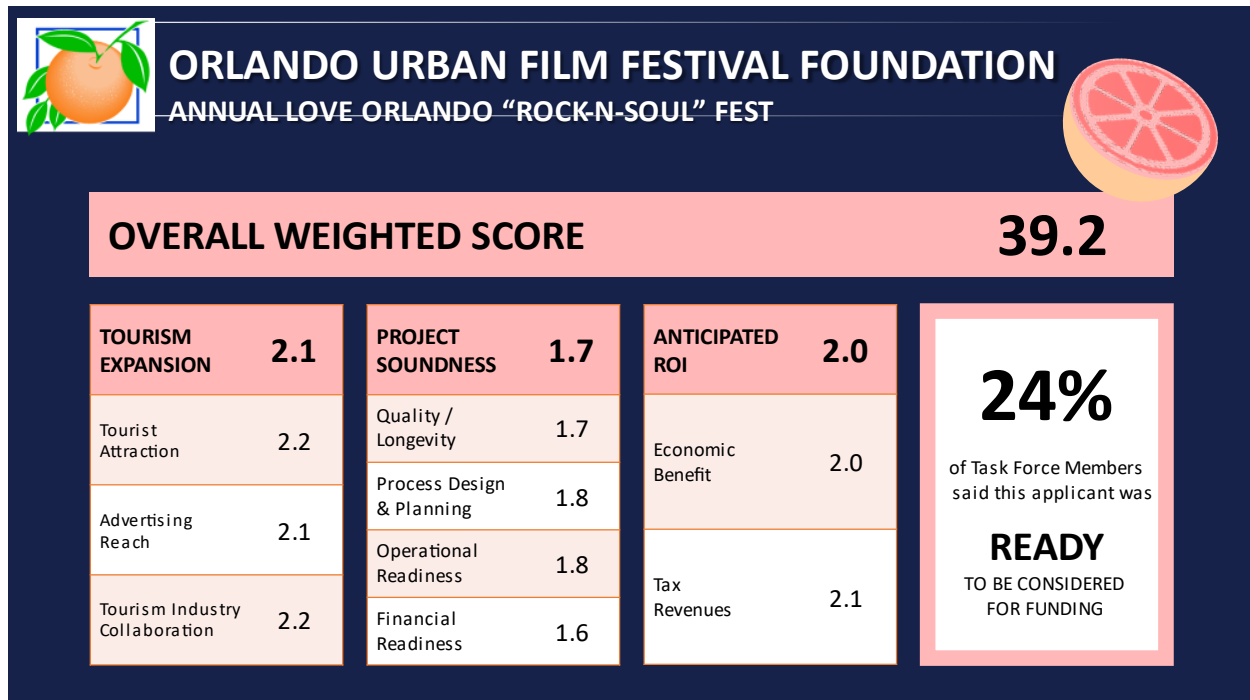
It's difficult to quantify the amount of direct tourism draw and likewise difficult generating a solid ROI.

9

The vision for this project is not as well-developed as some others. I rated this project as "ready" for consideration because the overall vision is an exciting one, building on a legacy of good work in Central Florida, but there is some work to do on developing a more concrete vision of what you will create.

Orlando Urban Film Festival Foundation (Love Orlando Rock-N-Soul Fest)

QUANTITATIVE SURVEY RESULTS



QUANTIFIED COMMENTS

STRENGTHS (from 4 responses)

VISION (2)

“Good vision”

“Your creative vision for the Love Orlando branding is great”

OPPORTUNITIES FOR IMPROVEMENT (from 8 responses)

NOT APPROPRIATE FOR THIS CATEGORY OF TDT FUNDING (4)

“Project likely belongs in different category (ARC) so that feasibility study can be completed”

“Should go through the ARC”

“One-time events do not have the stable, transformative economic impact on our communities that we should be pursuing through TDT spending”

“Need to have a smaller proof of concept first before you scale up to large level”

Orlando Urban Film Festival Foundation (Love Orlando Rock-N-Soul Fest) (continued)

QUESTIONABLE PLAN (4)

- “Zero direction on event and nothing set in stone as far as collaboration is concerned”
- “I don't think the project is developed enough to be considered for TDT investment at this time”
- “Seemed loose”
- “Fairly thin on the plan for implementation”

QUESTIONABLE FINANCIALS / IMPACT (3)

- “Current financials are weak”
- “Poor financials in presentation”
- “The ‘incremental’ impact on TDT unclear”

RAW COMMENTS

STRENGTHS

- 1
Music Festivals reach all people, international Audiences
- 2
Good vision
- 3
I like the character this has the potential to show of our musical history.
- 4
Your creative vision for the Love Orlando branding is great. I would be interested to see a more modest start to this proposal, before returning to this major investment.

OPPORTUNITIES FOR IMPROVEMENT

- 1
Project likely belongs in different category (ARC) so that feasibility study can be completed.
- 2
Current financials are weak.
- 3
Seemed loose - Music Festivals are tough sells and seems like we need to have a smaller proof of concept first before you scale up to large level.
- 4
The "incremental" impact on TDT unclear
- 5
I am excited about the concept, but I don't think the project is developed enough to be considered for TDT investment at this time.
- 6
Zero direction on event and nothing set in stone as far as collaboration is concerned- poor financials in presentation

Orlando Urban Film Festival Foundation (Love Orlando Rock-N-Soul Fest) (continued)

7

This is a very large investment in a plan that is fairly thin on the plan for implementation. Also, even if successful, this would create a once-a-year major event. One-time events do not have the stable, transformative economic impact on our communities that we should be pursuing through TDT spending.

8

Should go through the ARC and venues like OCCC to host the events



ORANGE COUNTY, FLORIDA
TOURIST DEVELOPMENT TAX CITIZENS ADVISORY TASK FORCE
SURVEY RESULTS SUMMARY
 Prepared by J.B. Adams of Adams Learning, Inc. | June 26, 2023

SURVEY RESULTS REGARDING EVALUATIONS OF ELEVEN APPLICANTS

Task force members were asked to evaluate the eleven applicant organizations that requested TDT funding in amounts greater than \$20 million, using the same criteria used to assess organizations applying for funding through the TDT Application Review Committee (ARC); these criteria emphasize tourism expansion, project soundness, and anticipated return on investment. Thirty out of 31 task force members responded (n=30). Responses were calculated into a weighted score, with a perfect score being 100. Weighted scores are presented on the left. Task force members were also asked if they believed the applicants were “ready” or “not ready” to be considered for funding. Percentages of task force members indicating perceived readiness are presented on the right.

WEIGHTED SCORES			LEVELS	PERCEPTIONS OF READINESS			
1	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%	1	
2	Florida Citrus Sports	82.6		Orange County Convention Center	93.1%	2	
3	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%	3	
4	Dr. Phillips Center for the Performing Arts	74.7		UCF Sports	75.9%	4	
5	UCF Sports	69.6		Amway Center		75.9%	4
6	Mennello Museum of American Art	58.9		Mennello Museum of American Art		75.9%	4
7	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%	7	
8	Association to Preserve the Eatonville Community (P.E.C.)	53.6		Association to Preserve the Eatonville Community (P.E.C.)		40.0%	7
9	Orange County Regional History Center	50.7		Orlando City Baseball Dreamers		40.0%	7
10	Association to Preserve African American Society, History, & Traditions (PAST)	47.1		Orange County Regional History Center	37.9%	10	
11	Orlando Urban Film Festival Foundation	39.2		Orlando Urban Film Festival Foundation	24.1%	11	

SURVEY RESULTS REGARDING SUPPORT FOR THREE GRANTING ORGANIZATIONS

Task force members were asked about their support for the requests from Orange County’s three granting organizations (ARC, Arts & Cultural Affairs, and Greater Orlando Sports Commission). Each question had only “yes” or “no” as possible responses. Thirty out of 31 task force members responded (n=30).

TDT Application Review Committee (ARC)	% YES
In its interest indicator form, ARC requested a total of \$60 million (\$12 million per year for the five year period from FY 2024 to FY 2028). QUESTION: Do you support providing ARC with its requested TDT funding amount?	93%
In its interest indicator form, ARC requested additional funding beyond the requested \$60 million to expand TDT application evaluations. (Suggesting up to \$20 million in a year when excess TDT funds allow for it; up to a total of \$100 million over five years.) QUESTION: Do you support providing ARC with additional TDT funding to fulfill this request?	69%
ARC currently evaluates projects and allocates funding toward projects that have a budget falling within the range of a minimum of \$2 million and a maximum of \$10 million. QUESTION: Do you support expanding the maximum amount that ARC can provide to individual projects to fall in a range between \$2 million and \$20 million?	60%

Arts & Cultural Affairs

In its interest indicator form, Orange County Arts & Cultural Affairs acknowledged that the amount of funding they can provide toward individual requests is capped at \$500,000 per project, creating a funding amount gap for any projects that might wish to request between \$500,000 and \$2 million. (The minimum amount for ARC funding is \$2 million.) QUESTION: Do you support increasing the cap for Arts and Cultural Affairs funding toward individual projects to go from \$500,000 to \$2 million?	79%
In its interest indicator form, Orange County Arts & Affairs acknowledged that the current cultural venue rental subsidy is capped at \$500,000, which limits the amount of funding that can be provided to groups who need assistance for renting events facilities. QUESTION: Do you support increasing the cap of the cultural venue rental subsidy from \$500,000 to \$1 million?	76%
In its interest indicator form, Orange County Arts & Cultural Affairs acknowledged that they currently receive TDT funding at an amount of 3% of the first four cents of the six-cent Tourist Development Tax, plus a fixed amount of \$2 million, providing an estimated total of \$8 million. They requested that the percentage be raised to 5% of the first four cents, along with a fixed amount of \$5 million, providing an estimated total of \$16 million. QUESTION: Do you support increasing Arts & Cultural Affairs funding from 3% of the first four cents to 5% of the first four cents?	80%
QUESTION: Do you support increasing Arts & Cultural Affairs funding from the fixed amount of \$2 million to a fixed amount of \$5 million?	77%

Greater Orlando Sports Commission

In its interest indicator form, Greater Orlando Sports Commission acknowledged that they currently receive \$300,000 per year for operational funding. They request an increase in funding to \$740,660.50 per year (\$0.50 for each of Orange County’s 1,481,321 residents). This amount will allow them to expand what they provide and also reinstate reimbursement of international and domestic trade show and travel expenses. QUESTION: Do you support increasing operational funding for Greater Orlando Sports Commission from \$300,000 to \$740,660.50 per year?	80%
In its interest indicator form, Greater Orlando Sports Commission acknowledged that they currently receive \$4 million in Sports Incentive Committee (SIC) funds to recruit, secure, and retain sporting events that promote our destination, foster economic development, support job growth and visitor spending, and drive economic impact. They request an increase in SIC funding to \$10 million per year for a term of the next eleven years. QUESTION: Do you support 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%