

# OCONEE COUNTY ATAX GRANT APPLICATION GUIDE

## (Application deadlines are February 15 and August 15)

The South Carolina Code of Laws, Title 6 - Chapter 4 provides for Accommodations Tax Provisions with oversight functions by the SC Department of Revenue.

The Oconee County Parks, Recreation & Tourism Commission serves as the Accommodations Tax Advisory Committee, was established by Oconee County Ordinance 2011-12, to advise Oconee County Council on the expenditures of revenue generated from accommodations tax.

All acts of the Advisory Committee are subject to review and approval by the Oconee County Council. The Oconee County PRT Advisory Commission does not approve funding for activities/projects retroactively, therefore, a time frame allowing approval by the Committee and Oconee County Council must be considered when requesting funds.

### ELIGIBILITY:

To be eligible, an organization must be organized as a non-profit organization or a government agency, and shall demonstrate that it has either an ongoing tourism program or it can develop an effective tourism promotional project.

An organization must substantiate its credibility with financial history. The most recent financial report, IRS tax forms, or financial audit information may be required.

Eligible organizations must show involvement in one or more of the following:

- Destination Advertising Promotion: advertising and promotion of tourism so as to develop and increase tourist attendance through the generation of publicity; ("Travel" and "tourism" mean the action and activities of people taking trips outside their home communities for any purpose, except daily commuting to and from work.)
- Tourism Related Event: promotion of the arts and cultural events;
- Tourism Related Facilities: construction, maintenance, and operation of facilities for civic and cultural activities including construction and maintenance of access and other nearby roads and utilities for the facilities
- Tourism Related Public Services: the criminal justice system, law enforcement, fire protection, solid waste collection, and health facilities when required to serve tourists and tourist facilities. This is based on the estimated percentage of costs directly attributed to tourists;
- Tourist Public Transportation: tourist shuttle transportation;
- Operating Visitor Information Centers.

*Certain Tourism-related grants are awarded on a "percentage of tourism" basis. Applicants must be able to substantiate how much of the total expenditure is related to tourism, and must be able to provide the "percentage of tourism" to the total budget of the project. The grant disbursement must be based exclusively on the estimated percentage of costs directly attributed to attracting or serving tourists. For example: a jazz festival attracts approximately 2500 people to the area for two days. We estimate 30% will be tourists. Overall advertising budget is \$30,000 – we are seeking \$9000. Remainder of the budget is the responsibility of the applicant!*

### QUALIFYING CRITERIA:

All projects will be considered based on their ability and their intent to attract tourists from outside the Oconee County area, more specifically overnight accommodations. Documents **must** be provided demonstrating your event/project promotes tourism in Oconee County, for example: guest logs, phone logs, accommodations contracts, website hits, advertising demographics, photos, and/or letters from local Chambers of Commerce, restaurants, shops or accommodations owners.

**A statement must be included in your publicity acknowledging funding received from Oconee County ATAX revenues. Such as "Funding has been provided by the Oconee County ATAX Committee through the Oconee County Council."**

Bids/Estimates prepared by qualified vendors/contractors for *all* items in the project must be attached to the application. Two written estimates are required for grants up to \$2,500.00. Three written estimates are required for grants above \$2,500.00. For single source bids, a document of explanation is required.

## **APPLICATION PROCEDURE:**

Funds must be requested using the attached form. Funds must be used for the specific purpose requested. Alterations or deviations require an additional request in writing and approval by the Oconee County PRT Commission.

All applications must be received by the 15<sup>th</sup> day of the month when grants are due. If you or member of your group wishes to make a presentation, please notify the PRT Office. If a quorum of the Committee is not present, the request will be tabled until the following scheduled meeting.

After approval from the PRT Commission, a request will be made at the next scheduled Oconee County Council Meeting for the approval of the requested funds and forwarded to the Oconee County Finance Department for disbursement. The reporting period of the project will begin on the date the funds are disbursed.

## **ACCOUNTING:**

**Strict accounting procedures shall be followed.**

The Oconee County ATAX Advisory Committee may disburse funds to unaudited organizations with grants up to \$10,000.00 and to audited organizations with grants up to \$24,999.00. Grants for \$25,000 or more must be handled through normal Oconee County purchasing procedures.

You will then be able to follow your organization's own procurement process once you have received funds. When the project is complete, you **must** submit copies of all receipts to the ATAX Committee with the Final Report. Any funds left over from the project must be returned to the ATAX Committee within 60 days of completion.

## **FUND DISBURSEMENT, INTERIM AND FINAL REPORTS:**

Applications and Forms are available at [www.oconeesc.com](http://www.oconeesc.com)

**An Interim Project Report is required every 60 days to update the ATAX Committee of the project's progress until it is completed, at which time a Final Project Report is required. Forms are included for this purpose. Funds must be spent within two (2) years after receipt of initial funding.**

The ATAX Committee **must** be notified in writing along with a Final Report, an explanation, and funds returned, if the applicant does not complete the project.

The Final Report should include:

- Copies of paid invoices for all expenditures
- Balance Sheets
- Guest logs, phone logs, accommodations contracts, website hits, advertising demographics
- Promotional materials, flyers
- Pictures, news clippings, letters of endorsement
- Other materials that will be helpful in evaluating your project
- Check payable to Oconee County for unused portion of grant funds

***Failure to comply with all reporting provisions could disqualify this Grant and may disqualify future applications from your organization and require funds to be returned!***

For more information or to submit an application, please contact:

**Oconee County PRT  
c/o ATAX Application  
1099 South Cove Road  
Seneca, SC 29672  
(864) 888-1488**

**OCONEE COUNTY ATAX GRANT  
APPLICATION FORM  
FOR TOURISM RELATED PROJECTS**

**I. APPLICANT**

A. Name of Organization \_\_\_\_\_

B. Address \_\_\_\_\_  
\_\_\_\_\_

**II. FUNDS REQUESTED**

A. ATAX Funds Requested \$ \_\_\_\_\_

B. How will ATAX Funds be used? \_\_\_\_\_  
\_\_\_\_\_

C. Estimated percentage of costs directly attributed to attracting or serving tourists? \_\_\_\_\_

D. Funds furnished by your organization \_\_\_\_\_  
Matching Grant \_\_\_\_\_ Source \_\_\_\_\_  
Matching Grant \_\_\_\_\_ Source \_\_\_\_\_  
Other Funding \_\_\_\_\_ Source \_\_\_\_\_  
Other Funding \_\_\_\_\_ Source \_\_\_\_\_

Provide an itemized total budget for your event **and** an itemized budget only reflecting how ATAX funds will be spent. **THIS IS REQUIRED, attach on a separate sheet**

**III. NARRATIVE PROJECT DESCRIPTION**

A. Project Title \_\_\_\_\_

B. Description of project \_\_\_\_\_  
\_\_\_\_\_

C. Who will benefit from this project? \_\_\_\_\_  
\_\_\_\_\_

**IV. DATES OF PROJECT**

Beginning \_\_\_\_\_ Ending \_\_\_\_\_

**V. APPLICANT CATEGORY**

\_\_\_\_\_ Government Entity:  
\_\_\_\_\_ Non-profit Organization: Incorporation|date \_\_\_\_\_  
\_\_\_\_\_ Eleemosynary Organization under IRS Code: IRS # \_\_\_\_\_  
\_\_\_\_\_ Date of Determination Letter \_\_\_\_\_

**VI. DEMOGRAPHIC DATA**

How will the project influence tourism in Oconee County?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

A. How many visitors/participants attended the event last year and are anticipated this year?

B. How many of the visitors/participants were from beyond a 50 mile radius of Oconee County last year and are anticipated this year?

Last Year \_\_\_\_\_

This Year \_\_\_\_\_

C. How many overnight stays were created by this event last year and are anticipated this year?

Last year : \_\_\_\_\_

This Year: \_\_\_\_\_

D. How do you plan to advertise this event beyond a 50 mile radius of Oconee County?

\_\_\_\_\_

E. What other documentation can you provide demonstrating this event promotes Tourism in Oconee County? (i.e. photographs, letters from local chambers of commerce, restaurants, shop or accommodations owners) \_\_\_\_\_

F. What records will be kept during this event to obtain the above demographic data? (i.e. guest logs, phone logs, accommodations contracts, website hits, advertising demographics) \_\_\_\_\_

\_\_\_\_\_

**VII. AUDIT**

Does your organization perform an independent audit? Yes \_\_\_\_ No \_\_\_\_

Name of the Auditor: \_\_\_\_\_

**VIII.** Will your project be using any funds from another group that received ATAX funds? \_\_\_\_\_

\_\_\_\_\_

*I have read the guidelines for the Oconee County Accommodations Grant Request and do hereby agree to comply with all rules and requirements. I understand failure to comply may result in a loss of funding for the project. I will complete interim reports every sixty days and two final reports at completion of project. All information required for final reporting MUST be detailed when project is complete.*

A. **Contact Name:** \_\_\_\_\_ **Title** \_\_\_\_\_  
**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_  
**Address** \_\_\_\_\_  
**Email** \_\_\_\_\_ **Fax No.** \_\_\_\_\_  
**Phone Number (s)** \_\_\_\_\_

B. **Alternate Contact Name:** \_\_\_\_\_ **Title** \_\_\_\_\_  
**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_  
**Address** \_\_\_\_\_  
**Email** \_\_\_\_\_ **Fax No.** \_\_\_\_\_  
**Phone Number (s)** \_\_\_\_\_

# OCONEE COUNTY ATAX GRANT INTERIM PROJECT REPORT

This form is intended for use as a report on the spending of the ATAX funds recently authorized by the PRT Commission. *Please note this report is due within 60 days of the disbursement date of ATAX funds, unless you have completed the project and a Final Report has been filed.* Interim reports are required every 60 days if the project has not been completed. Reports submitted must be original no faxed copies will be accepted.

ORGANIZATION: \_\_\_\_\_

PROJECT NAME: \_\_\_\_\_

AMOUNT AUTHORIZED \$ \_\_\_\_\_

DISBURSEMENT DATE \_\_\_\_\_

AMOUNT SPENT TO DATE \$ \_\_\_\_\_

STATUS OF PROJECT: \_\_\_\_\_

\_\_\_\_\_

CONTACT NAME: \_\_\_\_\_

ADDRESS : \_\_\_\_\_

\_\_\_\_\_

PHONE NUMBER \_\_\_\_\_ DATE \_\_\_\_\_

Report forms are to be submitted to:

Oconee County PRT  
c/o ATAX  
1099 South Cove Road  
Seneca, SC 29672  
Ph: (864) 888-1488  
FAX: (864) 888-1489  
pshirley@oconeesc.com

# Accommodations Tax Funding

## Final Report

This form is to be used as a Final Report on the spending of the ATAX funds recently authorized by the PRT Commission. Please note this report is due within 60 days of the ATAX disbursement date of funds unless the project has not been completed and an Interim Report has been filed. A Final Report is required when the project has been completed. Reports submitted must be original no faxed copies will be accepted.

### I. PROJECT INFO:

Date: \_\_\_\_\_ Amount: \_\_\_\_\_ Project : \_\_\_\_\_

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

### II. PROJECT COMPLETION:

Were you able to complete the project as stated in your original application? \_\_\_\_\_

If no, state any problems you encountered. \_\_\_\_\_

### III. PROJECT SUCCESS:

Please share any additional comments regarding the project. (e.g., lessons learned, successes, problems encountered, etc.)

### IV. PROJECT ATTENDANCE:

Record numbers in table below, as requested by the Tourism Expenditure Review Committee. Numbers are to reflect attendance and funds received for projects for current and previous years.

	Last Year	Current Year
Total budget of event/project		
Amount funded by Oconee County A-tax		
Amount funded by A-tax from all sources		
Total attendance		
Total tourists*		

\* Tourists are generally defined as those who travel at least 50 miles to attend; however, the Committee considers every project/event on a case by cases basis.

### V. METHODS:

Please describe the methods used to capture the attendance data listed above (license plates, surveys, etc.) \_\_\_\_\_

### VI. PROJECT BUDGET:

Attach report indicating project expenses of Accommodations Tax grant. Please Check Appropriate Boxes and Attach Copies: (This material will become the property of the Oconee County ATAX Advisory Committee)

- Copies of paid invoices for all expenditures
- Promotional materials, flyers
- Balance Sheets
- Pictures, news clippings, letters of endorsement
- Guest logs, phone logs, accommodations contracts, website hits, advertising demographics
- Other materials that will be helpful in evaluating your project

### VII. ORGANIZATION SIGNATURE:

Provide signature of official within organization, verifying accuracy of above statements.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Report forms are to be submitted to:

Oconee County PRT  
c/o ATAX  
1099 South Cove Road  
Seneca, SC 29672  
Fax: (864) 888-1489