

Schoharie County Occupancy Tax Grant Program Guidelines

THE SCHOHARIE COUNTY OCCUPANCY TAX MISSION STATEMENT: “The intent of this local law shall be to provide the financial resources in order to promote and enhance the general economy of Schoharie County, its towns and villages, through increased promotion of tourist related enterprises, recreational opportunities and increasing overnight stays in the County.”

THE OCCUPANCY TAX GRANT PROGRAM is designed to support activities (programs/projects/activities) that will attract tourists (non-resident participants) to Schoharie County. Grants may not be used solely to serve residents.

FUNDING

The Schoharie County Board of Supervisors has made available \$25,000.00 for the 2013 Schoharie County Occupancy Tax Grant Program. The purpose of the grants is to facilitate out-of-area marketing, bringing visitors into Schoharie County – and to assist in covering the costs of tourism-related activities.

GRANT GUIDELINES

WHO MAY APPLY: Non-profit and for-profit organizations, clubs, individuals, groups, sole businesses and business consortiums in Schoharie County may apply. Note that grants cannot be used for normal operating expenses or for capital improvements not directly related to tourism.

HOW TO APPLY: An application must be completed and submitted to the Schoharie County Occupancy Tax Board for review by the stated deadline.

A wide range of activities are eligible for funding, from special one-day activities like concerts, fairs and fireworks to weekend activities like maple sugar festivals, farmers’ markets and town-wide sales to permanent tourist attractions like historic guided tours, maps and signage, nature trails and outdoor “adventure activities” (hiking & biking, hunting & fishing, white water rafting, etc.) Only your imagination and the purpose of the grants (tourism promotion) – limits the possibilities! Preference will be given to NEW activities; “repeat” grant applications for annual activities should incorporate new or expanded aspects in order to sustain eligibility.

For public events, The Schoharie County Occupancy Tax Board will consider up to two applications for one event – the primary application shall be for event advertising/promotion to extend marketing outreach. An additional application for direct event production costs, including artistic and professional fees. Applications for direct production costs may also be submitted.

A grant award may be given for a single item (i.e. promotional material) but not provide a major portion of the budget. In all cases, it is expected that the applicant also contributes substantially to the activity in terms of money, human resources and in-kind contributions. An Occupancy Tax grant may not be the sole support of a project.

ELIGIBILITY

- A. Organization sponsor (and activity, if applicable) must be located in Schoharie County.
 - 1. A responsible party must be identified by name, mailing and/or physical (911) address, and including a Federal Taxpayer ID Number.
- B. Grants are available for advertising and promotions OUTSIDE SCHOHARIE COUNTY.
- C. Three Eligibilities:
 - 1. Promotion and marketing activities, materials and related consumable or durable goods
 - 2. Activity costs, including artistic and professional fees related to an activity
- D. Except in special circumstances, activity grants are generally NOT available for the following:
 - 1. Capital expenditures
 - 2. Promotional items to be used for resale
 - 3. Promotional items that will be used within Schoharie County
 - 4. Operating expenses of facilities
 - 5. Conference or education costs
 - 6. Staff, administrative or operating costs of the applicant, including travel and food

APPLICATION PROCEDURE

All applicants must assign one primary contact for the grant, not necessarily the responsible party referenced in A.1. The application must be filled out completely.

Applications must be submitted to the Schoharie County Planning, Promotion and Development Agency no later than 5 p.m. on February 22, 2013. Upon review, Schoharie County Occupancy Tax Board Members reserve the right to interview grant applicants. Grant awards will be announced on or around March 15th of each year. If questions arise regarding the eligibility of a specific expenditure or activity, the Schoharie County attorney is the final arbiter based upon form and legality.

APPLICATION COMPONENTS

1. TARGET AUDIENCE, THEIR LOCATION(S), SEASON(S) OF ACTIVITY

The application should describe the target audience for the activity, i.e. adults, children, families, special-interest groups, tourism and travel professionals, media and writers. The locations this audience will be drawn from and any other pertinent information, such as audience income level, media circulation or broadcast reach should be identified.

2. ACTIVITY/PROJECT DESCRIPTION

Describe the activity in detail, include any history of activity/project and future expectations. Specify how it will appeal to the target audience and its benefits to Schoharie County and local residents. Activity grants will be based on the “draw power” of the entertainment. Separate grant funding is available to offset the cost of artistic and professional fees related to an activity if applied for in conjunction with a marketing grant application. Grants solely for entertainment will not be awarded.

Submit a budget of all income and expenses related to the project, including marketing and entertainment and in-kind donations.

3. MARKETING PLAN

The applicant should submit a detailed marketing plan describing how the applicant will promote the project. "Specific" means an overall media plan detailing the total amount you'll be spending on advertising, broken down into separate investments for Internet, TV, Radio and Print. A clear distinction must be made between marketing funded through the grant and advertising venues funded directly by the applicant. The grant will not be limited to advertising; however, the promotional plan (coupons, give-aways, posters) must detail how the money will be used. Please see ELIGIBILITY, D, for additional ineligible expenditures.

EXAMPLE

Estimates (Total)		Our Group:	OT Grant:
Internet	\$750	\$750	\$ 0
TV	\$500	\$250	\$250
Radio	\$500	\$350	\$150
Print	\$250	\$150	\$100
Total Investment:	\$2000	\$1500	\$500

In addition, the applicant is required to provide the names of your media contacts as references. (John Doe, Central NY Radio; Jane Doe, Times Union newspaper, Jim Doe, WKTV)

4. EXPECTED OUTCOME AND VISITOR PROFILE

Applicants are asked to submit a profile of their anticipated average visitor with their marketing plan. If this is a previous activity, please use last year's survey tally to indicate who visited, where they came from, did they overnight and where (B&B, family), etc if available. The Schoharie County Occupancy Tax Board will provide a simple form which the Grantees will use to survey a random selection of visitors. These completed forms will provide the Schoharie County Occupancy Tax Board with information about the audience.

5. LOCAL BUSINESS REFERENCES

Applicants must submit three business contacts that the Schoharie County Occupancy Tax Board will reference for verbal support of the initiative.

The application process requires that the references must include a lodging business, food service and a general business or non-profit organization. These references may be contacted via telephone to determine why they feel this activity is important to the Community, to Visitors, and to that Specific Business.

Applicants are encouraged to discuss their grant proposals with references.

SCORING

The scoring will be completed by the Schoharie County Occupancy Tax Board. Scoring criteria will be based on, but not limited to, the criteria listed below:

(1 to 5; with 5 being the highest rating – up to the limits listed)

Ability to result in overnight stays	5
Seasonality (Shoulder and Off-season activities are encouraged)	5
Collaboration of businesses, organizations, and individuals	5
Promotion of the entire area, as well as the activity	5
Community interest, support, and benefit	5
Matching Support	4
Outreach of Marketing Plan (further the better)	4
Expected Attendance	4
New Activity = 3; (in existence 1 to 5 years = 2; over 5 years = 1)	3
Ability to continue the activity independent of Schoharie Co. Grant Program	3
Bonus (Up to 5 pts awarded at the discretion of the O-Tax Board)	-

GRANTEE RESPONSIBILITIES

ALL ADVERTISING AND PROMOTIONAL MATERIALS CREATED FOR THE PROJECT MUST BE APPROVED BEFORE IMPLEMENTATION. PROMOTIONAL MATERIALS USING OCCUPANCY TAX FUNDS ARE REQUIRED TO INCLUDE THE FOLLOWING STATEMENT: “Please visit Schoharie County Tourism at www.upstatevacations.com or call 1-800-41-VISIT.”

Signage for artistic and professional performances/entertainment must also include the above information.

The Schoharie County Tourism collateral material must be available at the venues. If the applicant has a website, they must include a link to www.upstatevacations.com.

If an activity is cancelled for any reason other than weather, the grantee must return the grant money to Schoharie County within one month of the original activity date. If the activity date is changed or postponed for any reason, a rain date must be set within one month following the original activity date and Schoharie County Planning & Development must be notified.

It is the responsibility of the applicant to ensure any image or other materials used are free of copyright infringement.

FINAL REPORT

All Grant Recipients must submit the following within 60 days following the activity:

1. Visitor Profiles on the individuals attending or resulting from the initiative (Survey instrument provided by the Schoharie County Occupancy Tax Board Members). Ten visitor profiles must be completed per \$200 awarded.
2. One copy of all the ads or other promotional tools placed through the grant utilizing the County logo or brand (slogan), with copies of invoices.

3. Summary narrative detailing how the grant assisted in promoting the activity.
4. Compare the final outcome of the activity with initial expected outcome.
5. Any FINAL REPORT arriving late will result in a scoring penalty for the following year's grant program.
6. THE SCHOHARIE COUNTY OCCUPANCY TAX BOARD MEMBERS ARE NOT RESPONSIBLE FOR REMINDING APPLICANTS OF THE NEED FOR SUBMITTING REQUIRED MATERIAL (ADS AND/OR PROMOTIONAL MATERIAL AND THE FINAL REPORT).

Due by 5pm on FEBRUARY 22, 2013. Call 518-295-8770 for questions or inquiries.

Submit To:
Schoharie County Occupancy Tax Grant Program
c/o Schoharie County Planning & Development Agency
276 Main Street - Suite 2
PO Box 396
Schoharie, NY 12157

Revised 11/2012

2013 OCCUPANCY GRANT SCORING WORKSHEET

APPLICANT NAME: _____

ACTIVITY NAME: _____

Scoring criteria will be based on, but not limited to, the criteria listed below: (1 to 5; with 5 being the highest rating)

CATEGORY:	UP TO:	RATING
Ability to result in overnight stays	5	_____
Seasonality (Shoulder and Off-season activities are encouraged)	5	_____
Community interest, support, and benefit	5	_____
Promotion of the entire area, as well as the activity	5	_____
Collaboration of businesses, organizations, and individuals	5	_____
Matching Support	4	_____
Outreach of Marketing Plan (further the better)	4	_____
Expected Attendance	4	_____
New Activity = 3; Activity in existence 1 to 5 years =2; Over 5 years = 1	3	_____
Ability to continue activity independent of Grant Program	3	_____
Bonus	5	_____
	Total	_____
TOTAL POINTS POSSIBLE (excluding bonus)	43	

Notes pertaining to activity: _____

**2013 OCCUPANCY TAX GRANT PROGRAM
APPLICATION**

ORGANIZATION: _____

APPLICANT NAME: _____ TAX ID NUMBER: _____

ADDRESS: _____

DAY TIME PHONE: _____ FAX: _____

E-MAIL: _____

NAME OF ACTIVITY: _____

LOCATION: _____

DATE (S): _____

TOTAL COST OF PROJECT: _____

GRANT AMOUNT REQUESTED: _____

1. Submit up to one page [12 pt font] of general information about the project.
2. Activity / Entertainment description: Include proposed artistic, professional and materials qualifications and specifications.
3. Costs: Submit a budget of expenses and income related to the project. Break out separate marketing and entertainment costs.
4. Visitor Profile: Submit an accurate visitor profile of the average visitor.
5. Marketing: Submit a detailed marketing plan including media contacts.
6. Expected Outcome: Submit up to two pages detailing how attended the initiative is expected to be, anticipated number of visitors that will spend the night(s) within Schoharie County.
7. List three business references, including name, contact person, contact information (phone, email).

Due by 5pm on FEBRUARY 22, 2013. Call 518-295-8770 for questions or inquiries.

Submit To:
Schoharie County Occupancy Tax Grant Program
c/o Schoharie County Planning & Development Agency
276 Main Street - Suite 2
PO Box 396
Schoharie, NY 12157