

**Jackson County Tourism Development Authority
Tourism Capital Project Fund
Project Application Form**

Fund Purpose and Background

The Tourism Capital Project Fund's (TCPF) purpose is to provide leveraged investment in tourism projects that will increase visitation and attendant spending and overall economic impact for Jackson County. The TCPF offers a level of financial support to create sustainable tourism development activities at the local level that maintain and/or create jobs, attract tourists (visitors originating from outside of the County), and enhance the visit experience.

The Jackson County Tourism Development Authority is funded by a 4% room occupancy tax collected from guests of Jackson County accommodations. No property or sales taxes are used to fund the activities of the Jackson County Tourism Development Authority. Expenditures for capital projects must be approved by the Jackson County Tourism Development Authority Board of Directors (JCTDA) and then by the Jackson County Board of Commissioners (BOC).

The authorization to expend up to 1/3 of JCTDA funds on tourism capital projects comes from the N.C. General Assembly Session 2011, Session Law 2011-170 House Bill 96 and the relevant statute follows: *SECTION 2.2.(d) Distribution and Use of Tax Revenue. – Jackson County shall, on a quarterly basis, remit the net proceeds of the occupancy tax levied under this Part to the Jackson County Tourism Development Authority. The Authority shall use at least two-thirds of the funds remitted to it under this subsection to promote travel and tourism in Jackson County and shall use the remainder for tourism-related expenditures.*

In this application, capital projects are defined as projects that are:

New construction, expansion, renovation, or a replacement project for an existing facility or facilities. The project must have a total cost of at least \$25,000 over the life of the project and a useful life of at least 10 years.

OR

A purchase of major equipment (assets) costing \$25,000 or more with a useful life of at least 10 years.

OR

A major maintenance or rehabilitation project for existing facilities with a cost of \$25,000 or more and a useful life of at least 10 years.

Capital projects must be located within Jackson County and serve to establish new or refurbish existing facilities or infrastructure that are **publicly owned and operated, or owned and operated by non-profit organizations and open to the public** and which generate overnight stays within the County at occupancy tax-paying lodging properties.

Pre-Submittal Conference

There will be a pre-submittal conference held twice a year. The pre-submittal conferences will be held approximately 60 days prior to the submittal deadlines. The pre-submittal conferences will provide an opportunity for applicants to ask questions about the application process.

Application Schedule

Please refer to this website for the application schedule:

<https://www.discoverjacksonnc.com/tda-docs/tcpf/>

Application Deadline and Information

Completed capital project applications must be received by 5 p.m. on the due dates listed with the aforementioned schedule.

Applications failing to meet the deadline will not be considered until the next funding cycle. DEADLINES ARE STRICTLY ENFORCED. There are no exceptions, regardless of the proposed project.

All application submittals will be reviewed by the JCTDA to determine if the application package is complete, basic eligibility has been met, and applicants conform to requirements under North Carolina law.

At the applicable JCTDA meeting, the JCTDA will evaluate each capital project application to determine what economic value, if any, the project provides to Jackson County. Only projects having a **substantial, lasting economic impact for Jackson County by promoting tourism and creating overnight stays will receive further consideration, as explained in the Evaluation Criteria outlined herein.**

There are no guarantees that any applicants will be awarded funding. Even though a project may qualify, limited funds may not allow all projects to receive assistance. Decisions regarding the award of funds are at the sole discretion of JCTDA and the BOC.

NOTE: All materials/documentation submitted with the funding application will become a matter of public record, open to inspection by any citizen of the State of North Carolina subject to applicable economic development exemptions in NC G.S. § 132.

The JCTDA and Jackson County bear no burden of the applicant's cost to prepare a Tourism Capital Projects Funding application or related materials regardless of whether the application is approved for funding.

Presentations

Presentations are optional and will only be given on the JCTDA and BOC meeting dates corresponding to the applicable funding cycle. The presentations may be followed by a question-and-answer period, and it is advised that an applicant representative be available for both meetings.

Presentation appointments may be scheduled with the JCTDA during the weeks following the Application Submittal Deadline Date. Appointments will be scheduled in the order of the date and time the application was received. A maximum of five (5) presentations will be scheduled at each JCTDA meeting. The presentations will be limited to 20 minutes each.

Funding

Tourism Capital Project Funding must not be the sole source of revenue for a capital project. The TCPF is intended to assist an organization with a portion of capital expenditures. TCPF funds will not exceed fifty percent (50%) of the total project budget.

- Funding applications for capital projects will be reviewed by JCTDA staff, who will present the applications to the Selection Committee. The funding recommendations of the Selection Committee will be taken to the JCTDA board and then, if approved, Jackson County Board of Commissioners, who will make the final funding determination.
- The JCTDA at its sole discretion may award amounts that are higher or lower than the amounts requested or recommended.
- The JCTDA is not required to expend all the available TCPF funds in a given year or application cycle.
- Representatives of the organization applying for capital projects funding may be invited to make a presentation to the JCTDA and/or the Board of County Commissioners.
- If recommended for funding, the applicant will be notified by the JCTDA. The appropriate organization official will be required to sign a Tourism Capital Project Funding Agreement.
- Applicant projects should generally be beyond the conceptual phase and be as close to shovel-ready as feasible, with appropriate permits, agreements, and due diligence in place. An applicant may not use TCPF funds for feasibility studies, to conduct due diligence, etc., but funds may be used for physical planning work such as engineering and design.
- The JCTDA cannot make binding multi-year commitments to a project but will consider giving funding priority to an applicant who requests funding covering multiple years for a single project.

Funding Eligibility

ELIGIBLE CAPITAL PROJECTS:

Eligible capital projects for Tourism Capital Project Funding include but are not limited to construction, extension, expansion, remodeling, repair and/or improvements, and major equipment (capital assets) for convention centers, meeting venues, sports facilities, coliseums, auditoriums, museums, or similar institutions and attractions that are publicly owned and operated, or owned and operated by non-profit organizations and open to the public, in accordance with the Jackson County Tourism Development Strategic Plan and North Carolina statutes regarding the allowable expenditure of occupancy tax funds.

General Requirements:

- Funds may be used to provide for the acquisition, design, construction, extension, remodeling, repair and/or improvement of the applicable project.
- Funds may not be used for marketing purposes.
- Funds may not be used to fund feasibility studies, administrative fees, or salaries.
- Funds require a match for the amount requested. The match must be a minimum one (1) to one (1) match. Documentation showing proof of matching funds is required. Applications not showing a match shall be ineligible for review.
- Bonus points may be allocated at the discretion of the JCTDA if a greater than one (1) to one (1) match is provided.
- Applicants are responsible for securing all appropriate and necessary State, Federal, Tribal, and local permits and/or individual or landowner consents required to execute the project.
- Mitigation activities performed as a condition or precondition for obtaining a Federal permit, license, or funding by other Federal programs are not eligible for these funds.
- No more than one project application may be submitted by any one applicant per application cycle.
- The actual number and size of awards will depend upon available funding as well as the number and quality of applications.

INELIGIBLE USES

The following are examples of how Tourism Capital Project Funding may not be used. (This list is not exhaustive but represents the general scope of ineligible uses. The JCTDA reserves the right to amend the below list at any time and will make the final determination as to eligible uses.)

1. Annual operating expenditures.
2. Legal, medical, accounting, auditing, feasibility studies, fundraising, or similar consulting services.
3. Salaries or supplements to salaries for existing or future staff, or employment of personnel not directly related to the project.
4. Purchasing tangible personal property including but not limited to office furnishings or other equipment valued at less than \$25,000, permanent collections, or individual pieces of art.
5. Interest reduction of deficits or loans.
6. Expenses incurred or obligated prior to or after the funding project period.
7. Prize money, scholarships, awards, plaques, t-shirts and other promotional material, uniforms, or certificates.
8. Travel expenses.
9. Projects which are restricted to private or exclusive participation.
10. Entertainment, including food and beverage.
11. Expenses to fund other events not recommended or approved by Jackson County.

In the event an organization is found to have used the awarded funds for an ineligible use, the organization must repay the funds to JCTDA plus five percent (5%) annual interest. The Funding Agreement will further outline the accounting requirements for the funds.

Financial Guidelines

Applicants must provide at least 50% match of the budget for the total cost of an approved capital project. Examples of in-kind match are donated goods and services, land, facilities, etc. Volunteer time does not count toward the match for a capital project. Value estimates must be verifiable. Applicant must submit proof of other sources of funding which, when combined, provide total funding for the full project. The applicant must meet further requirements as outlined in the Funding Agreement and as deemed necessary by the JCTDA and the County Finance Officer.

Funds will be disbursed only after the Funding Agreement has been fully executed by all parties, and all other requirements set forth in this document have been satisfied. The recipient of the funds is to return the signed agreement to JCTDA within thirty (30) calendar days of the date the BOC approves the funding. Failure to do so within this time will be deemed as a withdrawal from the funding process, and no further funding will be awarded to the Organization without reapplication. Upon execution of the Funding Agreement by all parties, a Funding Commitment Letter will be issued to the Organization Officer official via the e-mail contact address provided in the application. The Funding Commitment Letter will be provided within ten (10) business days following the final approval to fund the capital project.

Any exceptions to the agreement language must be submitted with the application. The County is under no obligation to honor requests for exceptions, and an award of funds may be rejected if the exception is not, in the sole opinion of the JCTDA or the County, in its best interests.

The JCTDA may require that specific project milestones be met before any or all funding is awarded to an applicant, and funding may be provided in phases. Funds must be expended only upon the completion of items authorized and in accordance with the information provided in the funding application. Changes to the project, project timeline, or budget submitted with the application after the Funding Agreement has been executed will require a formal modification to the agreement by the JCTDA and BOC.

NOTE: Tourism Capital Project Funding may not be used for activities that reimburse the organization for expenditures incurred prior to the notification of approval of the funding request by the BOC. All applicants should wait until final approval and notification of award by the JCTDA. PAYMENT WILL ONLY BE MADE TO THE ORGANIZATION RECEIVING THE FUNDS. NO PAYMENTS WILL BE MADE DIRECTLY TO VENDORS OR INDIVIDUALS.

Evaluation Criteria

Applications will be reviewed to determine how they meet the following criteria:

- Return on Investment of JCTDA Funds
- Generator of Jackson County Room Nights in Occupancy Tax-Paying Properties
- Generator of Economic Impact for Jackson County
- Frequency of Use
- Applicant Contribution or Match
- Useful Life of Project
- Applicant's Commitment to Jackson County TDA and its Strategic Plan
- Soundness of the Proposed Project
- Quality and Uniqueness of Proposed Project
- Stability, Organization, and Management Capacity
- Readiness to Contribute as an Asset

If Tourism Capital Project Funding becomes inadequate to fund all or part of a Tourism Capital Project Funding Agreement, the JCTDA reserves the right to reduce funding for a project accordingly.

Projects not approved by the JCTDA:

If the JCTDA does not recommend approval of a project's funding, the applicant may re-apply in future application cycles. It is recommended such applicants incorporate JCTDA recommendations for changes. Following re-application, the applicant will be required to meet with the Selection Committee for review prior to a follow-up presentation to the JCTDA.

Scoring Rubric for Applications

1. **Up to 20 points – Tourism Promotion Impact** - complements the JCTDA strategic destination plan and mission of the JCTDA. Provide details of anticipated economic impact and other key performance measures.
2. **Up to 20 points – Room Nights** – the project should attract visitors from more than 90 miles away from Jackson County and possess the ability to generate overnight stays in occupancy tax-producing accommodations. Applicants should be detailed on how their project will be able to generate room nights. Projects that demonstrate the ability to generate off- and shoulder season visitation and revenue may receive more favorable consideration.
3. **Up to 15 points – Scale/Capacity to Attract Visitors** – projects should be a motivator of overnight travel to Jackson County. The

primary goal of the project should be to generate a distinct visit. The project should be a motivator of visitation and not a satisfier. Motivator of visitation = a key reason to take a trip to Jackson County; satisfier of travel = something to do once a visitor is already here or that creates greater satisfaction with their visit

4. **Up to 10 points – Benefit to the Destination** – the project should:
 - a) Provide value to Jackson County as an economic impact generator.
 - b) Be an enhancement to the overall landscape and complement Jackson County's destination brand.
 - c) Enhance the visitor experience while also benefitting resident quality of life.
 - d) Exemplify Jackson County's heritage.
 - e) Add to beautification efforts in the county.
 - f) Enhance the reach of potential visitors to the destination.
 - g) Instill local pride that inspires locals as tourism ambassadors.
5. **Up to 5 points – Enhance Visitor Experience** – provides an exceptional experience that is one-of-a-kind, authentic to Jackson County, memorable, and marketable.
6. **Up to 5 points – Program Components** – projects have clearly defined timeline, business model, partners, purpose, and sustainability.
7. **Up to 5 points – Quality of Research** – applicant can demonstrate data and supporting information that support the project.
8. **Up to 5 points – Comprehensive Marketing Approach** – projects that require marketing to generate visitation should have a clear marketing strategy including timeline, demographics, public relations plan, online/and or social media presence, direct mail, cross-marketing campaigns, etc. Projects that rank highly will have a strategic marketing campaign with out-of-market components.
9. **Up to 5 points – Suitable Target Market** – the plan should pinpoint a clear target market that would attract visitors to Jackson County for a specific reason.
10. **Up to 5 points – Evidence of Partnership** – applicants must demonstrate that they have solid partnerships to make the project a success. Suitable evidence may be letters of support, documented donations, final reports, board lists, etc.
11. **Up to 5 points – Organizational Structure/Management Capability** – the request must exemplify a sustainable organization with a strong management structure.

Selection Committee

A Selection Committee will be established to review all projects and provide evaluations and recommendations for each application. Projects recommended by the Selection Committee will be submitted to the JCTDA for review. The JCTDA will review and recommend projects to be presented to the Board of County Commissioners (BOC) who will have final authority to approve the project funding and/or provide recommendations for changes to an application, or recommend an application not be funded.

The Selection Committee members will be comprised of seven (7) individuals related to the tourism sector to be selected by the JCTDA from the following sectors:

- Accommodations Operator
- Food and/or Beverage Operator
- At-Large Industry Representative
- Chamber of Commerce Representative
- Arts and Cultural Representative
- Community Representative
- JCTDA Board Chairman
- County Commissioner

Ethical and Legal Considerations

As an occupancy tax-funded governmental unit charged with making recommendations to the Board of Commissioners regarding the use and management of occupancy tax dollars, the JCTDA and the Selection Committee are subject to a number of North Carolina laws

governing public entities that do not generally pertain to the private business sector. North Carolina public records laws, applicable ethics laws, and procurement policies are key to the ethical and legal conduct of JCTDA business.

The JCTDA is comprised, by ordinance, of representatives from the tourism sector. The expertise and experience of those stewards helps ensure a well-functioning Destination Marketing Organization. Similarly, the JCTDA is interested in drawing upon the experience, expertise, and interest of the tourism community as it evaluates the merits of applications for funding to foster tourism in Jackson County. At the same time, the JCTDA and the Selection Committee are also committed to complying with State law and eliminating conflicts of interest related to the selection process. Steps will be taken to address these potential conflicts:

- All JCTDA and Selection Committee members will follow applicable North Carolina laws. Particular attention will be given to communications outside of public, posted meetings; retention and accessibility of public records; County procurement policies; and identification of potential conflict of interest situations.
- Membership will include representatives of organizations not directly dependent upon tourism.
- Members of the JCTDA and the Selection Committee will be cautioned to disclose any potential conflicts of interest or relationships with organizations submitting applications prior to the initiation of the selection process or as soon as they become aware of a potential conflict of interest.
- Questions regarding potential conflicts will be submitted to the JCTDA for review prior to selection meetings.
- The Selection Committee members will utilize the Evaluation Criteria for its review of all submitted applications.

Reporting Requirements

Project Status Reports: Regular reports must be submitted by the recipient of funding to the JCTDA to provide information on the status of the capital project.

- These reports are due at least every six months following execution of the Project Agreement; more frequent reports may be required and noted in the funding agreement.
- The report should contain a brief narrative summary providing updated information on the capital project, including financial status report for the project, planning, and construction-related activities.

Construction Completion Report: Within forty-five (45) days of the completion of the funded capital project, the recipient must summarize its efforts by providing the following information:

- A brief narrative summary of the successful completion of the project.
- An evaluation of the economic impact the capital project has initially had upon Jackson County.
- A financial statement listing all the funding received and expenses paid during the development and completion of the project that clearly defines how and where the JCTDA funds were used. Expenses should be paid by a trackable method and receipts for all expenditures using grant funding must be provided promptly upon request.
- Photographs and/or video of the project and any related events, including images of the construction taken during the development of the project.
- Copies of flyers, ads, brochures, or other marketing efforts utilized to attract overnight visitors. This may include a media plan used to achieve this objective.
- A summary of any events that have been held since completion of the project, include local businesses utilized as part of the events.
- Final documented or, if unable to provide actual numbers, estimated number of event participants.
- Room Night Certification Form (Exhibit A) — the funded organization must make every effort to obtain the number of overnight stays in Jackson County overnight accommodations that housed those attending events at the project (if applicable). This means that for events requiring registration, the recipient should make available a list of Jackson County lodging to registrants and encourage overnight stays. For events that do not require registration, information should be provided as part of the event promotion or communication to attendees to encourage an overnight stay. After the event, the funding recipient will be required to request that the lodging property provide information regarding the number of individuals staying at the property as a result of the event.

- **Project Impact Reports:** No later than January 30th and July 15th of each calendar year after completion of the project for a term of three (3) years, the recipient shall provide JCTDA staff with a detailed report of all events that have taken place as a result of the completion of the funded project. These Project Impact Reports shall include survey results from the attendees of the events. These surveys shall provide information pertaining to the number of persons attending the event, the number of nights stayed in Jackson County, food and entertainment budget while visiting, and ways to improve attendees' visits to Jackson County. Additionally, the recipient shall provide Room Night Certification Forms for each event held at the Tourism Capital Project's funded project for the same 3-year term.

NOTE: IF THE PROJECT RESULTS IN NO OR FEW MEASURABLE OVERNIGHT STAYS, THE RECIPIENT MUST DOCUMENT ITS EFFORTS TO PROMOTE OVERNIGHT STAYS IN JACKSON COUNTY OCCUPANCY TAX-PAYING PROPERTIES.

Recipients of JCTDA grant funding will be required to acknowledge funding support from the JCTDA at the project itself (such as in signage or plaques) and in announcements, press releases, and other communication (printed or electronic) announcing the project's start and opening. The JCTDA will review and approve any communication in advance of distribution or publication.

Application Form and Instructions

For funding consideration, please make sure your application is complete and accompanied by the following information. If any item is not applicable, indicate N/A over the checkbox.

- ☐ Completed Checklist (this form)
- ☐ Funding Application and Applicant Certification
- ☐ IRS Form W-9 Request for Taxpayer Identification Number and Certification (The applicant must have received non-profit status certification prior to the awarding of any funds.)
- ☐ Narrative Report(s)
- ☐ Written authorization on official organization letterhead for an AUTHORIZED AGENT to act on behalf of Applicant
- ☐ Organizational outline, including but not limited to names and addresses of each board member and corporate officers (except government entities)
- ☐ Complete budget outline for the project
- ☐ Three letters of support from outside the organization applying for funding
- ☐ A schematic or similar design of the project, including any specifics that will assist in the approval process. All projects must meet all zoning requirements, building codes, permitting regulations, and other applicable laws.
- ☐ All written agreements involving media, accommodations, and venue contracts/leases.

Tourism Capital Project Funding Application Form

Note: This form will be fillable online only with the ability to upload documents and attachments. This draft is for proofing before an online form is created.

A. Background

1. Name of Capital Project: _____
2. Location: _____
3. Projected Timeline - Start of Construction: _____ Completion: _____
4. Please circle the description that best describes the nature of your Project:

New Construction

Expansion

Renovation

Major Equipment

Other

5. Executive Summary - Please provide a brief overview of the Project and its benefits to Jackson County:

B. Applicant Information

1. Name of Submitting Organization: _____
2. Purpose and Mission of Submitting Organization: _____

3. How long has the organization been operating in Jackson County? _____
4. Tax Status of Submitting Organization: _____
5. EIN Number: _____ (Please submit your W-9 with Application)
6. Contact Person & Title: _____
7. Address: _____
Phone(s): _____ Fax: _____
E-mail: _____ Website: _____
Social Media Channels: _____

C. Project Details

1. *Details on project space/construction type, clients served, and the Project itself:* _____

2. *Describe in detail the strategic rationale and justification for the Project:*

3. *Projected Useful Life of Project:* _____

4. *Please attach any schematics, plans, or images related to the Project. (UPLOAD BUTTON)*

D. Financial Summary

1. *Amount of Tourism Capital Project Funding Requested This Cycle:* _____

2. *Project Costs:*

	Total
Total Project Cost	
Land Value (if applicable)	
Design and Project Management Costs	
Facility Hard Construction Costs	
Infrastructure and Equipment Costs	

3. *What percentage of the Project costs will be spent locally, if known?* _____

4. *Are there any recurring costs to purchase new equipment / update the facility? If yes, list and explain:*

5. Please submit the following additional financial information for the Project:

- A detailed Pro Forma Analysis for the Project
- A Sources and Uses Budget for the Project.

E. Project Demand

1. Who or what is the targeted population, audience, or events for the Project? _____

2. Please create and submit an event calendar for the previous twenty-four (24) months, if applicable, and the first 24 months for the Project using the format below. If the Project is an expansion to an existing facility, please only include events unique to the funded Project.

Event Name	Event Dates	# of Participants	# of Spectators	Total Attendance	Room Nights
Event #1					
Event #2					
Event #3					

3. Please fill in the following with estimates for the expected number of annual attendees in each category, if applicable. If the Project is an expansion to an existing facility, please only include those attendees unique to the development of this Project.

Type of Attendee or Guest	Origin of Attendees			Avg. Length of Stay (Nights)
	Out of State	In-State, Non-County	Local	
Spectators/Visitors				
Vendors				
Players/Participants/Coaches – Adult*				
Players/Participants/Coaches – Youth*				
Media/Staff				

*For sporting events only

4. On average, how many months per year will the Project be utilized? _____

5. For those months, how many average days per month will the Project be utilized? _____

6. Please fill in the following Room Night Chart with estimates for the number of room nights generated annually. If the Project is an expansion to an existing facility, please only include those room nights resulting from the development of this Project.

	Total
Projected Room Nights	
Occupancy Tax Exempt Room Nights (If Applicable)	
Average Expected Nightly Room Rate	

7. Please submit a brief narrative of the plan for this project to generate room nights in Jackson County:

8. List additional sponsors/partners if known: _____

9. List host hotels if committed (if applicable): _____

10. List host hotels applied for (if applicable): _____

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11. How will you evaluate and measure the Project's success? _____

12. Will events held through the Project charge an entry fee, admission fee, parking fee, etc.? _____

If yes to any of these, please detail:

F. Marketing Summary

13. *Outline of the marketing plan for the Project and resulting events:*

14. *Describe what steps will be taken to attract new visitors and thus increase overnight stays:*

F. Signature

I have reviewed the JACKSON COUNTY TOURISM DEVELOPMENT AUTHORITY CAPITAL PROJECTS FUNDING APPLICATION. I am in full agreement with the information contained in this application and its attachments as accurate and complete. I further acknowledge my understanding that the County in approving a funding agreement does not assume any liability or responsibility for the ultimate financial profitability of the project for which the funds are awarded. The County, unless otherwise specifically stated, is only a financial contributor to the project and not a promoter or co-sponsor and will not guarantee or be responsible or liable for any debts incurred for any activities occurring at the funded project. I have placed all third parties on notice that the County will not be responsible for payment of any costs or debts for the project.

Signature

Date

Name and Title of Person Authorized to Sign the Application

Applicant's Organization

Exhibit A – Room Night Certification

TO: Accommodation General Manager and/or Director of Sales

The purpose of this form is to quantify the actual number of room nights utilized in Jackson County for this event. Your internal correspondence or documentation on this Room Night Certification Form is critical for the project's receipt of funds.

Lodging Property/Location: _____

Organization Name:

Event Name:

Date(s) of Event:

Paid Room Nights:

Please provide any comments:

Lodging Property Representative

Signature: _____

I certify the organization/event listed above utilized the reported Room Nights.

Print Name: _____ Title: _____

Telephone Number: _____ Email: _____

Your cooperation in completing this form is greatly appreciated. For additional information please contact the Jackson County Tourism Development Authority at 828-339-1160 or Director@DiscoverJacksonNC.com.