

**Sumter County**  
**Tourist Development Council**

Tourism Grant Guidelines

C/O Sumter County Chamber of Commerce  
P.O. Box 100  
Sumterville, FL 33585

102 N. Hwy 470  
Lake Panasoffkee, FL 33585  
(352) 793-3099

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## Tourist Development Tax

### **Revenues**

Tourist Development Tax revenues are generated by overnight guests staying in Sumter County RV parks/campgrounds, hotels, motels and condominiums. As a rule, any short term lodging of six months or less is subject to the two percent tax in addition to Sumter County's sales tax. Collections are received through the Florida Department of Revenue and returned to the County on a monthly basis for the County's use. Sumter County places this revenue in a special Tourist Development fund.

### **Use of Revenues**

Florida laws outlines the proper use of these tax funds. The County Commission has decided that its funds will be allocated as follows:

**Capital Projects (60%)**- Funding can be used to acquire, construct, extend, enlarge, remodel, repair, improve, maintain, operate or promote convention centers, sports stadiums, coliseums, auditoriums, or museums that are publicly owned and operated or owned and operated by a not for profit organization and open to the public, and other facilities as outlined in the Florida Statutes.

**Marketing– Sumter County Events (10%)** Funding can be used to promote and advertise festivals, programs or special events to attract tourism into Sumter County. This will include multi-media, newspaper, magazine, billboard, radio or television advertisements and signage. Some entertainment costs for applied events are also eligible.

**Marketing – Sumter County Tourism (10%)** Funding is available for convention bureaus, tourist bureaus, tourist information centers, news bureaus and county agencies or by contract with chambers of commerce or similar associations for conducting tourist promotion. It is also available to promote and advertise tourism in the State of Florida, nationally and internationally.

**Event Funds – New Event Building (seed money) (10%)**

**Existing Event Development (10%)**

**Members of the Tourist Development Council**

Chairman Doug Gilpin  
Sumter County Board of County Commissioners

Erin Munz  
Vice Chairman

Jim Veal, Jr.  
Pana Vista Lodge

Robby Strickland  
Wildwood City Commissioner

Warren Maddox  
Bushnell Vice Mayor

Dan McCormic

Bob Hunt  
Wildwood Country Resort

Jennifer Mc Cubbin  
Idlewild Lodge

Doug Tharp

# Sumter County

## Tourist Development Council

### 2009 Submittal and Meeting Schedule

<b>Submittal Deadline</b>	<b>TDC Meeting Date</b>
November 20, 2008	January 22, 2009
February 20, 2009	April 23, 2009
May 22, 2009	July 23, 2009
August 21, 2009	October 22, 2009

The Sumter County Tourist Development Council meets at 4:00 pm in the Government Offices Building located at 910 N. Main Street, Bushnell.

Please contact (352) 793-3099

\*\*Meeting dates & location subject to change.

## **APPLICATION PROCESS & INSTRUCTIONS**

The Sumter County Tourist Development Council meets quarterly. Each meeting is advertised by legal notice in the Villages Daily Sun. Meetings are held at 4:00 p.m. at the Sumter County Governmental Offices located at 910 North Main Street, Bushnell, FL.

The Sumter County TDC will not fund expenditures that have previously occurred.

Each organization should designation one person who will be the primary contact and will be responsible for communication, correspondence, maintenance of grant, funding and reporting processes. This person will be responsible for ensuring that all fundamentals of the grant are followed and reports submitted in a timely manner.

- **Applications must be submitted at least 60 days prior to event.**
- Each event must have a separate application
- The application should be typed or clearly written. Accuracy is important.
- The application must be completed in its entirety. Any portion not applicable should be clearly marked "N/A". Incomplete applications will be returned. For events, use the **Event Grant Application**. For Capital Projects, use the **Capital Improvements – Request for Funding**.
- An authorized agent of the organization should sign the application. Unsigned applications will be returned.
- The submittal must include one (1) original and fifteen (15) copies of the application and backup.
- Fax or emailed applications are not acceptable. Applications will be date stamped and added to the agenda in the order that they are received.
- All applications are considered in posted meetings that are open to the public. It is important to be present to make an oral presentation and answer questions about your event or project.
- If accepted by the TDC, the grant approval is presented to the Board of County Commissioners for final approval. Funding is available following ratification.
- The Sumter County Commission and the Sumter County Tourist Development Council must be named as additional insured's on the applicant's general commercial liability policy or special event insurance policy with a further certification that the insurance has been fully paid. The limits of liability shall be no less than \$1 million for general liability, \$1 commercial general liability, each occurrence, and \$1 million personal injury, including death. The policy must be occurrence based and a copy

naming the additional insured's must be on file at the Sumter County Chamber of Commerce office prior to the advertising, capital improvement or event.

**GRANT APPLICATION**

Applicants will need to submit an original and fifteen (15) copies of this completed grant application, as well as all supporting documentation, for consideration by the Sumter County Tourist Development Council. Please make sure your application is signed and attach the following information, if applicable:

- Charter, Articles of Incorporation, By-laws;
- Minutes of meeting or resolution authorizing officers to apply for grant funds
- IRS determination letter of non-profit status
- List of current officers and board members indicating terms and salaries
- Organizational chart
- Copy of financial statement or 990 from the most recent fiscal year

Organization name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact person: \_\_\_\_\_

Title: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Event/Project Name: \_\_\_\_\_

Event date: Begin \_\_\_\_\_ End \_\_\_\_\_

Category \_\_\_\_\_ Sponsorship  
(check one) \_\_\_\_\_ Special Events  
\_\_\_\_\_ Events  
\_\_\_\_\_ Advertising/Promotion

Amount Requested \$ \_\_\_\_\_

Intended Use \_\_\_\_\_

Of Funds: \_\_\_\_\_

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If the entire request cannot be funded, can the project be restructured for less funding?  
If so, please indicate minimum amount necessary. If not, please explain.

**BACKGROUND INFORMATION**

In the space below, please describe your organization in the following areas:

- Your organization’s goals and objectives
- Your target audiences
- Services your organization provides
- Community need for the services your organization provides
- How Sumter county residents and visitors will benefit from your project and how you will evaluate your effectiveness
- Other sources of funding that your organization can provide to match the funds requested from the Tourist Development Council
- How you will monitor expenditures of grant funds

**PROJECT/EVENT DETAILS**

In the space below, please give details on your project or event so the Tourist Development Council can evaluate the economic impact on the county. Include in your narrative projects on numbers of attendees, hotel rooms needed, restaurant meals to be consumed and your publicity and advertising plans.

**PROJECT BUDGET RECAP**

**INCOME**

Tourist Development Fund Request \$ \_\_\_\_\_ Total Request \$ \_\_\_\_\_

Matching fund sources  
\_\_\_\_\_  
\$ \_\_\_\_\_  
\_\_\_\_\_  
\$ \_\_\_\_\_  
\_\_\_\_\_  
\$ \_\_\_\_\_  
\_\_\_\_\_  
\$ \_\_\_\_\_  
Total matching funds \$ \_\_\_\_\_

Other income sources  
\_\_\_\_\_  
\$ \_\_\_\_\_  
\_\_\_\_\_  
\$ \_\_\_\_\_  
\_\_\_\_\_  
\$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 Total matching funds \$ \_\_\_\_\_

TOTAL INCOME \$ \_\_\_\_\_

**EXPENSES**

Please indicate which items will utilize TDC funds

() \_\_\_\_\_ \$ \_\_\_\_\_  
 () \_\_\_\_\_ \$ \_\_\_\_\_  
 () \_\_\_\_\_ \$ \_\_\_\_\_  
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 () \_\_\_\_\_ \$ \_\_\_\_\_  
 () \_\_\_\_\_ \$ \_\_\_\_\_

TOTAL EXPENSES \$ \_\_\_\_\_

**CERTIFICATIONS**

I have reviewed this GRANT APPLICATION from the Sumter County Tourist Development Council. I am in full agreement with the information contained herein. To the best of my knowledge, the information contained in this Application and its attachments is accurate and complete.

BY: \_\_\_\_\_ (SEAL)  
 Organization Leader

ATTEST: \_\_\_\_\_  
 Secretary

Considered this \_\_\_\_\_ day of \_\_\_\_\_, 200\_\_, at a duly called meeting of the Sumter County Tourist Development council. By motion duly recorded, this funding request is hereby:

\_\_\_\_\_ Approved in the amount of \$ \_\_\_\_\_

\_\_\_\_\_ Denied

SUMTER COUNTY  
 TOURIST DEVELOPMENT COUNCIL

BY: \_\_\_\_\_

Chairman

ATTEST: \_\_\_\_\_  
Secretary

### **Award Process and Funding Disbursement**

When the grant is received at the Sumter County Chamber it is summarized and reviewed for accuracy and the request is measured against the Florida Statutes for compliance. The grant application is presented at the TDC public meeting with a brief overview of the request. All grants awarded by the TDC will be confirmed in an award letter following ratification of the Board of County Commissioners. At the time the grant is ratified, it will be assigned a Purchase Order number. Requests for payment must be presented to the Chamber Office to ensure that payment requirements are met.

After completion of event, the organization may submit a Reimbursement Request for qualified items that have been expended by the organization. The reimbursement request must be submitted within 60 days following the event to the Chamber Office. An authorized agent of the organization must sign the request. It must include a paid invoice, cancelled check, tear sheet, printed sample or other backup information to substantiate payment. Failure to submit the request correctly will delay payment.

Submit Reimbursement Requests to

Sumter County Chamber of Commerce  
P.O. Box 100  
Sumterville, FL 33585

Physical Address:  
102 N. Hwy 470  
Lake Panasoffkee, FL 33585

Please direct all inquiries to  
(352) 793-3099

Applicants are cautioned not to contact any member of the Sumter County Board of Commissioners or the Tourist Development Council regarding their request. All contacts should be channeled through the Sumter County Chamber of Commerce.

# Sumter County Tourist Development Council

P.O. Box 100  
Sumterville, FL 33585  
(352) 793-3099

## Reimbursement Request Form

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

Event/Project Name \_\_\_\_\_

Contact Person \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

**Reimbursement request must be submitted for qualified items related to the approved grant event. Each expense must include: Paid invoice, cancelled check, tear sheet, printed sample or other backup information to substantiate payment. Failure to submit request correctly will delay payment. REIMBURSEMENT REQUESTS MUST BE SUBMITTED WITHIN 60 DAYS FOLLOWING EVENT.**

Expense Description	Vendor	Invoice Amount	Reimbursement Amt
<b>Total to be reimbursed to Organization</b>			<b>\$</b>

I agree that the above information is accurate and based upon our records. The funds requested are for reimbursement from the awarded grant by the Tourist Development Council and are actual expenses related to the event.

\_\_\_\_\_  
Authorized Agent Signature

\_\_\_\_\_  
Date

## Allowable Expenditures for Capital Improvements

### Examples of Allowable Expenditures

- Advertisement and promotion for convention centers, sports stadiums, coliseums, auditoriums, or museums, including television, radio, newspapers, magazines, multi-media, billboards and signage (must be published primarily outside Sumter County).
- Construction, extension, enlargement, remodeling, repair and/or improvements for convention centers, sports stadiums, coliseums, auditoriums, or museums
- Maintenance and operating expenses for convention centers, sports stadiums, coliseums, auditoriums, or museums
- Any other appropriate expense allowable under Section 125.0104, Florida Statutes

### Examples of Non-Allowable Expenses

- Sales tax
- Resale items that will be sold for profit
- Travel expenses
- Private entertainment, lodging, food or beverages
- Expenses incurred or obligated prior to or after the project ended
- Advertising or promotional materials distributed after a project
- Payments of goods or services purchased for previous or other projects
- Payment for alcoholic beverages
- Any other expense not allowable under State Statutes

1. Consideration shall show how project will generate overnight occupancies in local lodging establishments.
2. Applicant must explain how proposed promotion and advertising efforts outside of Sumter County will attract tourists.
3. Mention of TDC funding and logo usage shall be noted on all resources.

The Sumter County Tourist Development Council **will not** fund expenditures that have already occurred. Funding is available for forthcoming projects only. Funding is available following ratification of the Tourist Development Council's recommended grant. In some cases, a separate funding agreement will be executed. This funding agreement must be followed in order to secure payment.

# Sumter County Tourist Development Council

P.O. Box 100  
Sumterville, FL 33585  
(352) 793-3099

Capital Improvements – Request for Funding

## **Organization Information**

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

Contact Person \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email address \_\_\_\_\_

## **Projection Description**

Project Name \_\_\_\_\_

Project Dates \_\_\_\_\_

Amount Requested \$ \_\_\_\_\_

Total Budget for Project \$ \_\_\_\_\_

Description of project:

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

Intended use of funds  
requested for Project:

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

Who is your targeted audience? \_\_\_\_\_

How will Sumter county benefit from your project? \_\_\_\_\_

How will you evaluate the success of your project?  
\_\_\_\_\_  
\_\_\_\_\_

How will the project promote or enhance overnight stays in Sumter County?  
\_\_\_\_\_  
\_\_\_\_\_

What is your strategy for marketing and advertising?  
\_\_\_\_\_  
\_\_\_\_\_

**Funding**

If the entire request cannot be funded, can the project be restructured for less funding? YES \_\_\_\_\_ NO \_\_\_\_\_

Not, please explain \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Are there other sources of funding that your organization can provide to match the funds rested from the Tourist Development Council?  
YES \_\_\_\_\_ NO \_\_\_\_\_

List Past TDC Funding:

Year	Project	Requested Amt	Award Amt	Spent Amt

What additional sources of funding has your organization sought?  
\_\_\_\_\_  
\_\_\_\_\_

Provide all additional contributors, sponsors, and sources of funding for this project (If not applicable, please explain)  
\_\_\_\_\_  
\_\_\_\_\_

How will TDC funding help this project?

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**Organization Background**

Provide an overview of the organization history/mission.

What services does your organization provide?

Is there community need for the services that you provide?

YES \_\_\_\_\_ NO \_\_\_\_\_

If yes, please explain:

**CERTIFICATIONS**

I, the applicant or Authorized Agent of the organization requesting TDC funds, have reviewed this application for funds from Sumter County Tourist Development Council and concur with the information submitted herein. To the best of my knowledge and belief, the information contained in this application and its attachment is accurate and complete. If funds are awarded, I agree to follow all guidelines as provided and will follow any funding agreements as directed.

\_\_\_\_\_  
Authorized Agent Signature  
Printed Name \_\_\_\_\_

\_\_\_\_\_  
Date

Title \_\_\_\_\_

: \_\_\_\_\_ (SEAL)  
Organization Leader

ATTEST: \_\_\_\_\_  
Secretary

Considered this \_\_\_\_\_ day of \_\_\_\_\_, 200\_\_\_\_, at a duly called meeting of the Sumter County Tourist Development council. By motion duly recorded, this funding request is hereby:

\_\_\_\_\_ Approved in the amount of \$ \_\_\_\_\_

\_\_\_\_\_ Denied

SUMTER COUNTY  
TOURIST DEVELOPMENT COUNCIL

BY:

\_\_\_\_\_  
Chairman

ATTEST:

\_\_\_\_\_  
Secretary

## **Important information**

The basic position of the TDC is that funding of special events and on-going programs should be on limited term basis, as “seed funding”, and not as an ongoing revenue source, excluding advertising. This is to encourage organizations to develop their programs in ways that help them become self-sufficient regarding their promotional expenses. This makes funds available to other organizations and events, helping tourism throughout the County continue to grow.

After reviewing the guidelines, your organization should consider the following before deciding to apply for grant:

*Is the project eligible for tourist development tax funding?* Only those requests demonstrating a substantial economic impact on the County from visitors will be considered.

*What are some initials steps?*

Describe the project; include all requested background information on your organization. Describe how the funding will be used. List other funding sources. Include your event budget, a program, and other details. Details should include a good estimate of the number of room nights in lodging properties which will be generated by the event. If you have an agreement for complimentary rooms, please identify the number and subtract them from the total of rooms. Remember, the idea is to increase the number of lodging rooms and campsites to increase revenues and the related tax on these rentals.

*Only governmental and non-profit organizations can apply.*

*Include a marketing plan.*

*Demonstrate how your organization stimulates local tourism through the generation of room-nights if this is a request for an on-going program.*

### **Some things to keep in mind:**

We will not release the award distribution unless all supporting documentation (tear sheets, cancelled checks, etc) are received

We will not release payment if irregularities questioned by staff are not clarified and resolved to staff's satisfaction.

We will discontinue the release of remaining funds if disallowed expenses are identified by staff and not corrected by the agency.

We will place an agency on reimbursement basis if infractions are identified.

We will recommend termination of contract to the TDC and BOCC if issues arise over expenditures or if fraud is suspected.

**The Chamber and TDC Relationship**

The Chamber serves as the administrative arm of the TDC by virtue of a contract with the Board of County Commissioners. Under this contract, the Chamber will advertise the availability of grants and provide application forms to applicants.

The Chamber will assist them with any questions they have during the process. The Chamber TDC Committee will review the application and make sure that it meets eligibility through the Florida State Statutes. They will then rank each application and prepare an overview for the Tourist Development Council.

The Chamber will advertise the public meetings of the TDC. The Chamber will prepare meeting agendas, serve as recording secretary in the meeting, and keep all records of the TDC.

The Chamber has created a Marketing Plan for the promotion of tourism in Sumter County. This plan is reviewed annually.

The Chamber from time to time will conduct market research related to tourism and the promotion of Sumter County.

The Chamber will work with other Chambers of Commerce and Tourist Development Commissions to promote tourism.

The Chamber will promote tourism through an advertising plan.

The Chamber will ensure compliance with all laws and rules governing tourist development tax revenues.

The Chamber will review all TDC procedures and recommend changes as necessary to ensure compliance and for the protection of the BOCC and TDC.

### **Sumter County Tourist Development Grant Process Overview**

1. The Chamber will advertise and educate the public regarding grant usage
2. Applications are distributed through the Chamber office.
3. Applications are submitted to the Chamber office.
4. Chamber TDC Committee will review the grant application and communicate with the applicant to ensure that content is accurate.
5. Chamber TDC Committee will determine a rank and make a recommendation for disbursal to the Tourist Development Council.
6. TDC will vote to approve or deny the application and may change the amount awarded.
7. BOCC ratifies the TDC decision by acceptance of the minutes and awards. At this time the County issues a purchase order.
8. The grants then re-enter the Chamber office. The Chamber will handle all requests for payment, making sure that supporting documentation is received.
9. After approved events are held, the applicant will submit a summary report of fund usage and event outcome.
10. Chamber will prepare a quarterly report for the BOCC and TDC.
11. Chamber will hold documents in storage for auditing.

**SUMTER COUNTY CHAMBER OF COMMERCE  
TOURISM DEVELOPMENT COMMITTEE  
GRANT APPLICATION RANKING**

The goal of the Tourism Development Committee is to endorse and recommend quality events and projects that will ultimately increase tourism within Sumter County. With that goal in mind, grant applications received will be evaluated based on the impact that the event or project may have on tourism. Events receiving a higher ranking are those most likely to promote a minimum of one night's stay within the county at a local hotel, RV park, etc.

The ranking system is as follows:

- 5 – Maximum impact
- 4 – Significant impact
- 3 – Average impact
- 2 – Somewhat impacts
- 1 – Marginally impacts
- 0 – No apparent impact

Recommendations will be made to the Tourism Development Council for approval based on this ranked evaluation.

## **Sumter County Chamber of Commerce Tourist Development Council Marketing Plan**

### **Marketing Objective**

It is in the best interest of the Chamber of Commerce to market Sumter County in such a manner as to increase overnight stays in Sumter County. The focuses of marketing campaigns for Sumter County should be geared to have potential visitors contact the Chamber to request additional information. This provides the Chamber an opportunity to target individuals that have expressed initial interest in Sumter County and increase awareness to potential visitors.

### **Target Market Profile**

1. RV Communities
2. Persons interested in rural vacation spots.
3. Historical Societies.
4. Nature Societies.
5. Outdoor sportsmen (hunting, fishing, boating, equine activities and trails)

### **Methods of Communication**

1. Chamber of Commerce website.
2. VisitFlorida website.
3. Press releases geared to target events and provide grant information to prospective applicants.
4. Undiscovered Florida Magazine:
  - a. Undiscovered Florida maintains a distribution of 405,000 published in National Geographic Traveler.
  - b. An additional 70,000 copies are distributed to North American Travel agencies.
  - c. Advertisements are designed by Worth International Media Group.
  - d. Undiscovered Florida is distributed throughout all state funded visitor center.
5. Florida Monthly Magazine:
  - a. Distribution of 834,000/monthly.

- b. Distribution in 50 states and 35 countries.
  - c. 66% of readers plan hunting activities within the next year.
  - d. Advertisements are designed by Florida Monthly.
6. Distribution of publications at Florida Welcome Centers.
  7. We are researching sport and event specific trade publications to enhance visibility for local events that generate overnight tourism.
  8. Response to direct inquiries via walk-in visitors, email requests, and telephone requests.

Chamber of Commerce newsletter to continuously promote tourism grants.

Document History-

Original Guidelines Ratified on 07-17-08

2009 Update including Committee Members, Meeting Dates and Fund Allocations 12-05-08

