City of Santa Fe
Occupancy Tax Advisory Board (OTAB)

PROCEDURES & APPLICATION FOR OCCUPANCY TAX
FUNDING ASSISTANCE FOR SPECIAL EVENTS in 2018

1. To acquire Occupancy Tax Funding Assistance please complete the attached application. Funding is for Calendar Year 2018.

2. Our address is:
   OTAB c/o TOURISM Santa Fe
   201 West Marcy Street
   Santa Fe, New Mexico 87501

3. Our office hours are 8:00 a.m.-5:00 p.m., Monday through Friday, except holidays.

4. The purpose of the OTAB funding program is to support marketing efforts of third party non-profit organizational efforts to directly increase tourism through new, multi-year, events or the expansion of existing multi-year events. It can also fund non-profit efforts to increase the awareness of Santa Fe as a desirable tourism destination by providing non-marketing funding to help build public relations worthy events that provide the potential for high visibility regional and national press exposure that does not, in and of themselves, create significant or immediate direct tourism expansion.

5. Below are the policies of the Occupancy Tax Funding Assistance application for your review. Please read them carefully BEFORE completing the Occupancy Tax Funding Assistance Application. Failure to comply with any of these requests may result in your application not being considered or denied. If you have any questions about the application, you may contact Phyllis Ortiz-Hilborn at TOURISM Santa Fe, 505-955-6214 or at peortiz@santafenm.gov.

Resolution 2012-70 sets forward the desires of the Governing Body with regard to OTAB grants and directs City staff to work jointly with Santa Fe County to develop a process and criteria to use existing funds, to fund up to three new or emerging events each year, for a maximum of three years. The criteria for such events shall include, at a minimum:

- The proposed event ideally shall take place in the off-season or shoulder seasons of Santa Fe's tourism calendar; off-season being January through April and shoulder seasons being May through June and mid-October through mid-December. Evaluation also takes into consideration days of the week, other events on the calendar and size of event.
- Events at other times of the year can be considered, however they may not be given as strong a rating as a comparable event in a shoulder or off-season timeframe.
- Funding and planning of the events shall be public/private partnerships that seek to attract tourists younger than 56 that are on message with Santa Fe's overall marketing "Santa Fe-The City Different" efforts, as demonstrated by TOURISM Santa Fe.
- The events shall exhibit potential to build national excitement, recognition of happenings and brand assets that support creative and cultural tourism in Santa Fe, including but not limited to culture, art, history, food, natural beauty and outdoor activities. Ideally the event that is being proposed should be at least 3 months out to insure significant planning time.
- OTAB funds cannot be used to supplement fundraising efforts or goals.

6. Activities shall be integrated with other local tourism related businesses and organizations and demonstrate sustainability beyond the funded period. The organization applying must have an IRS determined non-profit corporation status with a tax identification number **or** umbrella under a

fiscal agent on file. If applicable, a letter from the fiscal agent under which the organization umbrellas must be submitted along with the application and the following qualifying documents:

a. **Copy of current Business License**
b. **New Mexico State Gross Receipts-Withholding Certificate (CRS-1)**
c. **Copy of IRS determination letter acknowledging non-profit status**
d. **Proof of Insurance as indicated on item number 13 of this application**

7. Please submit the Occupancy Tax Funding Assistance application, your current organization budget **and** event budget, along with (10) copies (mailed or delivered) to the attention of the OTAB Administrator at the above stated address for review.

The application is to be completed and submitted, including all attachments, by November 30, 2017 at 5pm. An oral presentation may be required at a meeting of the grant review panel before final selections are made. Any applicants failing to submit their application by the scheduled date and time will be required to wait until the next funding cycle to submit a funding request. Grants are awarded annually unless funds are either not used by a grantee at which time the process may reoccur at the discretion of the OTAB, or issue funds to a second tier of applicants.

Applications will be collected and reviewed during the applications cycle. If your application is deemed to meet the criteria with a minimum written evaluation of 30 points, you will be invited to attend an OTAB Grant Review Panel Meeting, to make a 15-minute presentation (maximum). The Grant Review Panel (conflict of interest free) will review the applications/ presentations and may ask questions and discuss the merits of the event with the applicants. Total interview time will not exceed 30 minutes. All OTAB meetings including the Grant Review Meeting are conducted in compliance with the New Mexico Open Meetings Act.

8. Applications will be scored and ranked for funding recommendations by the panel. If the panel consists of a majority of OTAB members, it will finalize a decision at the meeting. If it does not have a majority, the recommendations will be forwarded to OTAB for a final vote at its next monthly meeting.

EVALUATION CRITERIA – WRITTEN – 50 POSSIBLE POINTS

a. **Section 1 – Overall Proposal Concept –** Maximum Points Possible: 20
b. **Section 2 – Marketing Plans –** Maximum Points Possible: 10
c. **Section 3 – Partnerships -** Maximum Points Possible: 5
d. **Section 4 - Financial Capability –** Maximum Points Possible: 10
e. **Section 5 – Outcome and Follow through -** Maximum Points Possible: 5
f. **Section 6 – Formatting –** The evaluator may deduct up to 5 points

EVALUATION CRITERIA – ORAL – 50 POSSIBLE POINTS

g. **Concept & Creativity –** Maximum Points Possible: 20
h. **Value & Impact -** Maximum Points Possible: 20
i. **Comprehensive Approach and Readiness –** Maximum Points Possible: 10

Total Possible Points: 100 Points

SCORING

The proposal process is two-part: a written proposal then an oral presentation. Both parts of the process must be completed to be considered for funding. Each part is worth 50 points, Applicants scoring less than 70 points will not have an opportunity to be funded.

9. If OTAB declines funding an application, the applicant may request that the OTAB Administrator place that item on a subsequent OTAB monthly meeting agenda for further clarification. The Chairman of OTAB approves all requested agenda items for the meeting.

10. If the applicant's request is approved by the OTAB, the OTAB Administrator will then draft a contract of services. This may require the applicant and the Administrator to work together. Due to the time needed for processing the contract, it is very important that the applicant cooperate with OTAB Administrator throughout this process.

11. After the City has approved the contract and the contract is fully executed, a purchase order will be created. The OTAB. Administrator will require an invoice upon completion of services for the event. Only those costs incurred after the contract is fully executed may be invoiced for payment. The invoice must include expenditure detail with paid invoices if the grant is for marketing reimbursement.

A **final report** and **presentation** to OTAB is also required as a part of the grant commitment.

12. Once the Contract has been executed it shall not be altered, changed, or amended except by a written notice to OTAB by the applicant. The OTAB will then hear the request for amendment at its next scheduled meeting and either approve or deny acceptance. If accepted an amendment to the Contract will then be prepared and presented to the City Manager for final approval and signatures.

13. All advertisements and promotional materials for the event must state that **"partial funding was granted by the City of Santa F e Occupancy Tax" and hav e the TOURISM Santa Fe b rand logo (Santa Fe Script) and the Fly Santa Fe logo**

14. The intent of funding special events from Occupancy Tax proceeds is to bring overnight visitors into Santa Fe and thus increase tourism for the City of Santa Fe. Events must **only** use Occupancy Tax funds for advertising, promotion, or marketing that targets an audience outside of a 50-mile radius of the City of Santa Fe. Thus, increasing the likelihood that those people drawn to the event by the marketing efforts will spend at least one night at a lodging establishment in Santa Fe. The City of License for broadcast media must be outside of a 50-mile radius of the City of Santa Fe. If an event needs to attract a significant amount of Santa Fe residents, then funds from sources other than OTAB must be used for local media purchases. For example your advertising budget is $6,000. OTAB awards your organization $2,500. You would spend the OTAB funding amount ($2,500) on a media beyond a 50 mile radius of Santa Fe to attract overnight visitors and your remaining advertising budget ($3,500) on local media

    The purpose of supporting high visibility public relations events or activities is to provide seed development funding in support of a sustainable annual event that significantly increase Santa Fe's position as a cultural travel destination through press. The use of this funding has more flexibility such as event development and production.

15. In the event of prior funding, OTAB will then institute the following step down process. No more than 3 years of total funding will be considered. The amounts stated are examples using maximum values.

    a. Year one funding $30,000
    b. Year two funding $15,000 with matching of at least $15,000 for marketing
    c. Year three funding $7,500 with other funding of at least $22,500 for marketing
    d. Year four and beyond, no additional funding
        e. Second and third year funding requires a separate application process and is not guaranteed.

16. The Contractor must maintain adequate liability insurance in at least the amount stated in the New Mexico Tort Claims Act (one million fifty thousand dollars **$1,050,000)**. A certificate of insurance must be provided by the Contractor's insurance carrier. It is the sole responsibility of the Contractor to comply with the law.

17. Contractor agrees to defend, indemnify and hold harmless the City of Santa Fe, OTAB members, and TOURISM Santa Fe for all losses, damages, claims or judgment, execution, actions or demands whatsoever resulting from the Contractee's actions or inactions as a result of the event.

18. All reimbursement information must be categorized per City of Santa Fe Professional Service Agreement approved budget.
    a. Original invoices must be submitted for payment processing. (Copies of invoices will not be accepted.) Invoices must be dated and marked paid by the event after the signed agreement date.
    b. Vendor statements will not be accepted instead of original invoices.
    c. Copy of cancelled checks (front & back) or signed credit card receipts must accompany invoices as proof of payment.
    d. Copies/clippings of flyers, banners, advertisements (radio, TV, newspaper, magazine, etc.) must accompany each vendor-related invoice.
    e. Progress payments will be accepted.

Note: **Keep in mind that your Professional Service Agreement with the City is a dated contract and invoices cannot be paid if received after your contract is expired.**

19. After the event, a post-event written report must be submitted to the OTAB within 90 days. Contractor will then be scheduled to make a ten-minute (10) verbal presentation at the next regularly scheduled meeting of OTAB. The report must include: **1) a post-event explanation of expenditures and revenues with a complete event budget. 2) a descriptive breakdown of how the event directly produced tourism revenue, (e.g. number of attendees, participants, number of room nights used in local hotels/ motels), and 3) an estimate of economic impact other than hotel room nights 4) plan for next year's event.**

Acknowledgement:

Please sign below acknowledging that you have read and fully understand the preceding document—*Procedures & Application for Occupancy Tax Funding Assistance for Special Events*.

_____ _____

Applicant's Signature Date

_____

Title/Position

APPLICATION FOR OCCUPANCY TAX FUNDING ASSISTANCE

Date of Application: _____

Applicant's Name & Title: _____

Contact's Name (if different): _____

Contact's Numbers: (Office)_____(Mobile)_____(Fax)_____

Organization's Name: _____

Organization's Address: _____

Phone Numbers: (Office)_____(Mobile)_____(Fax)_____

Event Name: _____

Check Box: New Event ☐ Existing Event ☐

Amount, if any, previously funded by O.T.A.B.:

Year	Amount
_____	$_____
_____	$_____
_____	$_____

Event Location Address:

_____

_____

Federal Tax I.D. Number: _____ Tax Exempt: ☐ Yes ☐ No

City of Santa Fe Business License Number: _____

Amount Requested: $_____

Mark One:

Tourism Related Event ☐
High Impact Public Relations Event ☐

1. Write a brief synopsis (1/2 page) about the event including its purpose and goals. Estimating the economic impact to the city, for example, the number of people & hotel rooms it will sell; length of stay and where guests will be coming from. Be sure to detail how this event will bring visitors between the ages of 35 and 57 to Santa Fe, support increased tourism in the off season and for the City of Santa Fe. For high visibility public relations events please describe its news worthiness and target media with PR plan,

2. Is this event being held Mid-week or on a Weekend?

   What are your proposed dates?

   What other events are known to be taking place on those dates?

   Are those events in anyway in conflict or are they in some way a compliment to your proposed event?

   Will the event use any City owned facilities such as the Community Convention Center? If so, have you verified availability of the space on your intended dates?

3. Is this event being held "off-season or shoulder-season"?

4. Will you be partnering with another organization to put on this event? If YES, please provide the name, email and contact information for the other organization.

5. Have you or will you be applying for other grant funds such as the New Mexico Tourism Department annual grant program? If so, please provide any known details in writing (1/2 page

6. Using a budget format, please include a section devoted to allocation of OTAB funding as to marketing purposes. For high visibility public relations events please describe in detail how and when you will be spending funds.

7. If this event has received OTAB funding in the past, please state, in detail, what changes and or additions have been made to the event or your organization's promotion of the event that have the potential of increasing the numbers of visitors to the city. Please use the actual figures of visitors and room-nights from your last final report as a baseline and make your projections for this application in relationship to that baseline. Please provide media event media coverage the event receives. The advisory board encourages collaborations and creative solutions to the attraction of new and repeat visitors to the City of Santa Fe and your event.

8. The applicant is required to list the name, title and phone number of any other organizations, including other City of Santa Fe funds, you have been granted or contracted to receive in addition to OTAB funds. Failure to disclose this information with your application may result in denial of funding.

9. **Enclose your organization's budget, expenses and income statement for the last, current, and next year. In addition, include a separate event budget. If this is a first-time event specify your projections and justification for expenditures.**

10. List all paid and volunteer staff positions including total salaries and an organizational chart.

11. Provide a copy of your Marketing Plan that includes public relations along with any existing promotional literature. If this is a first-time event, please provide an example piece.

12. Attach up to five items of any additional information that you believe will be useful in order for the committee to make a well informed decision. Examples might include information on a similar event held in another city.

APPLICATION FOR OCCUPANCY TAX FUNDING ASSISTANCE

*Acknowledgement Certificate:

State of _____

County of _____

On this _____ day of _____, 20___ , I _____certify that the information submitted for the Occupancy Tax Funding Assistance Application is true, exact and complete.

_____
Acknowledger's Signature

_____
Title/Position

Subscribed and sworn before me this _____day of _____, 20___

By: _____.

_____
(Seal) Notary Public

My commission expires: _____

Note: This application will not be accepted without full acknowledgement.

*Pre and Post Event Budget Report Form

Name of Organization:_____

Amount of Grant: $_____Date Awarded: _____

Specify other revenue sources contacted/granted:

_____ $_____

_____ $_____

_____ $_____

NOTE: All expensed items must be directly related to promotion, advertising and marketing outside of 50 mile radius.

Categories	**Description**	**Projected Expenses - Revenue**	**Actual Expenses - Revenue**
Newspaper		$ -	$ -
Magazine		$ -	$ -
Poster		$ -	$ -
Brochure		$ -	$ -
Radio		$ -	$ -
TV		$ -	$ -
Digital		$ -	$ -
Creative		$ -	$ -
Printing		$ -	$ -
Postage		$ -	$ -
Direct Mail		$ -	$ -
Production		$ -	$ -
Web site		$ -	$ -
Other (specify)		$ -	$ -
TOTALS:		**$ -**	**$ -**

Total Hotel/Motel Rooms Filled: _____

Total Revenue generated from room sales: $_____

Total number of Attendees- (tickets sold, registered guests, public): _____

Total number of Participants: _____

Total of Out-of-town vendors/volunteers working event: _____

Estimate of earned media value: $_____
Please provide copies of press release and publication articles.

- The Pre- and Post-Event Budget needs to be completed and attached to your final report. Your final report should include a one to two page summary of your event with the following information.

    - Total ticket sales.
    - Number of out of town attendees
    - How the event compared, both to your application estimates and to any prior year's events, using the number of people attending.
    - Revenue generated.
    - Please summarize the marketing and publicity strategies used to promote your event and the City of Santa Fe, including efforts and activities in conjunction with the TOURISM Santa Fe marketing team. Make a comprehensive assessment of what strategies worked, which did not and what changes you might anticipate making if the event is repeated.

- You will be required to attend the next OTAB meeting scheduled after your event to present your final report.

CITY OF SANTA FE, NEW MEXICO

RESOLUTION NO. 2012-70

INTRODUCED BY:

Councilor Wurzburger
Councilor Ives

A RESOLUTION

DIRECTING STAFF TO ENERGIZE SANTA FE TOURISM BY PREPARING A PROCESS FOR FUNDING AND OTHER ASSETS TO ESTABLISH EVENT ATTRACTIONS THAT WILL BRING A NEW GENERATION OF TRAVELER TO SANTA FE.

WHEREAS, Santa Fe is a popular tourist destination and its economy is dependent on tourism revenue; and

WHEREAS, data from recent years show that the median age of tourists in Santa Fe is increasing, and is thus unsustainable; and

WHEREAS, current travel trends indicate tourists travel to events rather than locations; and

WHEREAS, tourists in the age range of 35-56 can help establish a vibrant community for entrepreneurs and other talent who will further enhance Santa Fe's economy; and

WHEREAS, throughout the country, events like South by Southwest in Austin, TX, attract tourism and have proven to be a valuable community and economic development tool; and

WHEREAS, Santa Fe has events that have proven to be powerful attractions for tourists like Indian and Spanish Market, Fiestas de Santa Fe, the Wine and Chile Festival and ArtFeast; and

WHEREAS, the City needs to make investments to attract tourists who are in the age range of 35-56 in order to sustain the tourism industry, leverage key Santa Fe brand assets, including: culture and history, cuisine, natural beauty/outdoors and Art.

NOW, THEREFORE, BE IT RESOLVED BY THE GOVERNING BODY OF THE CITY OF SANTA FE that staff shall work jointly with Santa Fe County to develop a process and criteria to use existing funds, to fund up to three new or emerging events each year, for a minimum of three years. The criteria for such events shall include, at a minimum that:

- The events shall take place in the off-season or shoulder season of Santa Fe's tourism calendar
- Funding and planning of the events shall be public/private partnerships that seek to attract tourists younger than 56 that are on message with Santa Fe's overall marketing effort as demonstrated by the Santa Fe Convention and Visitors Bureau
- The events shall exhibit potential to build national excitement, recognition of happenings and brand assets that support creative and cultural tourism in Santa Fe, including but not limited to culture, art, history, food, natural beauty and outdoor activities
- Activities shall be integrated with other local destination marketing organizations (DMO) and demonstrate sustainability beyond the funded period.

BE IT FURTHER RESOLVED that the objective of the Governing Body is to add five off-season weeks to the tourism calendar that will bring in a total of $10 million in new annual revenue.

BE IT FURTHER RESOLVED that prior to the implementation of the plan outlined in this resolution, staff shall:

1. Present the proposed plan, along with a fiscal impact report, to the Occupancy Tax Advisory Board (OTAB), the director of the Convention and Visitor's Bureau (CVB) and the private sector for review and recommended amendments to the plan.
2. Thereafter, the proposed plan, a fiscal impact report, the OTAB minutes, a memo

from the CVB Director, any input received from the private sector and correspondence between City staff and County staff ensuring that the City and County are working jointly on the plan and the implementation of the plan shall be presented to the Finance Committee for approval.

PASSED, APPROVED and ADOPTED this 25th day of July, 2012.

DAVID COSS, MAYOR

ATTEST:

YOLANDA Y. VIGIL, CITY CLERK

APPROVED AS TO FORM:

GENO ZAMORA, CITY ATTORNEY

M/Melissa/Resolutions 2012/event tourism