City of Santa Fe



8:30 a.m.

8:35 a.m.

8:45 a.m.

8:55 a.m.

9:05 a.m.

9:30:a.m.

9:50 a.m.

**CITY CLERK'S OFFICE** Agendore 1/23/13 TIMF \_11:23 -RECEIVED BY OCCUPANCY TAX ADVISORY BOARD JANUARY 31, 2013 CITY COUNCIL CHAMBERS **Regular Meeting** 1. Procedures: a. Call to Order b. Approval of Agenda c. Approval of Minutes: November 15, 2012 Н. Lodgers Tax Update a. Lodger's Tax update - David Tapia III. Progress Report on O.T.A.B. Grant Program-Jim Luttjohann IV. Request for Funding: Parallel Studios - presented by Frank Ragano a. V. Final Report: Santa Fe Chamber Music Festival - Presented by Steven Ovitsky a. Buffalo Thunder – Presented by Joseph Karnes b. RDC Corp - Presented by Eric Vasquez c. VI. CVB Activity Reports: a. Jim Luttjohann - SFCVB Executive Director Christine Madden - SFCVB Sales b. VII. Meeting Schedule: The next regularly scheduled meeting will be held on February 28, 2013 at 8:30 a.m. in the City Hall Council Chambers. VIII. Adjournment

Persons with disabilities in need of accommodations, contact the City Clerk's office at 955-6520, five (5) working days prior to meeting date.

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# CITY OF SANTA FE OCCUPANCY TAX ADVISORY BOARD MEETING January 31, 2013

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# MINUTES OF THE CITY OF SANTA FE OCCUPANCY TAX ADVISORY BOARD January 31, 2013

#### I. PROCEDURES a) CALL TO ORDER AND ROLL CALL

A regular meeting of the Occupancy Tax Advisory Board was called to order on January 31, 2013, at approximately 8:30 a.m. by Miguel Castillo, Chair at the City Council Chambers, City Hall, Santa Fe, New Mexico.

Roll indicated the presence of a quorum for conducting official business as follows:

#### MEMBERS PRESENT:

Miguel Castillo, Chair Mary Bonney Jon Hendry Paul Margetson Terrell White

MEMBERS ABSENT: None

#### **STAFF PRESENT:**

Jim Luttjohann, Executive Director, SFCVB Christine Madden, SFCVB Sales David Tapia, Finance Division

#### **OTHERS PRESENT:**

Carl Ferguson, CHRISTUS, St. Vincent Regional Medical Center Frank Ragano, Parallel Studios Willard Scott, Santa Fe Century Eric Vasquez, RDC Corp. Shelley Winship, Santa Fe Chamber Music Festival Jo Ann G. Valdez, Stenographer

NOTE: All items in the Committee packets for all agenda items are incorporated herewith by reference. The original Committee packet is on file at the City Clerk's Office.

#### b) APPROVAL OF AGENDA

Mr. Margetson requested to amend the Agenda to add discussion about the fees of the Community Convention Center for local groups. This was added as Item VI (1).

Ms. Bonney moved to approve the agenda as amended. Mr. White seconded the motion. The motion passed unanimously by voice vote.

#### c) APPROVAL OF MINUTES – November 15, 2012

Ms. Bonney moved to approve the Minutes of the November 15, 2012 meeting as submitted. Mr. White seconded the motion. The motion passed unanimously by voice vote.

#### II. LODGERS' TAX UPDATE (DAVID TAPIA)

Chair Castillo said the *Lodgers Tax Report* was e-mailed to the Board Members. He requested that the report be sent to the Board Members in PDF format.

#### III. PROGRESS REPORT ON O.T.A.B. GRANT PROGRAM

Mr. Luttjohann said the on-line application form has been taken down per OTAB's recommendation at the last meeting.

Following the last O.T.A.B. meeting, Mr. Luttjohann forwarded information to the Mayor and City Manager for them to appoint a committee to advise on the creation of the new application process. At that time he was asked to revisit some key elements, including an annualized application period, holding off on appointments in lieu of establishing a grant review committee instead, and for him to work on the process and the existing O.T.A.B. subcommittee to come up with recommendations for the new process and forms. Mr. Luttjohann will present the revised application form to the Finance Committee for approval, once O.T.A.B. finalizes it.

Mr. Luttjohann noted that copies of the current version of the O.T.A.B. grant application process were included in the Board Members' packets. Please see *Exhibit* "A" for the specifics.

Mr. Luttjohann said there are some areas that he needs clarification on:

1) Is it the intent to fund the same events for multiple years (3); or is it the intent to fund 3 new events per year; or is it to do both, so that there is a 3-year seed of multiple new events?

Ms. Bonney expressed concerns about having a 3x limit for funding organizations/events; and the possibility of running out of applicants to fund. She said

maybe the Board should look at the idea of leaving the option for them to come back at the third year, possibly matching the grant that they receive. This would give them time and an opportunity to raise their match and become self-sustainable.

Mr. Hendry said his original proposal was to have \$33,000 from here; \$33,000 in City services; and \$33,000 in community support (match). This would be a pool of assets that could be drawn from.

Mr. Hendry said organizations need to have clear goals and benchmarks. OTAB should be looking at different criteria for any event, for example: How many people they employed? How much did they pay them? Did you give the employees health benefits? Did they have people employed on a year-round basis? How many beds did they fill? He said he would like to make tourism jobs, good year-round jobs with benefits, not just seasonal jobs.

Ms. Bonney said in terms of getting the on-line application done, she would request that the Board vote on the 3x limit for funding organizations/events.

The second item that Mr. Luttjohann requested clarification on - is the clear articulation of "off season" – is it based on defined months (September through April) or is it based on occupancy in a given month (anything under xx% based on previous years)? Mr. Luttjohann said the Resolution does not define this and the applicant needs to know the answer of this, to see where they fit.

Mr. Hendry said he thought the goal was not to define the shoulder season but to "shrink" it. He said to him personally, there is a huge opportunity here to turn Thanksgiving to Christmas to a busy time of the year. He thinks that 26 weeks of the year are not eligible, and 26 weeks are eligible, based on the prior calendar year. He said the Board could come back in January every year and review the applications that will be awarded in the next fiscal year to see which ones are available for this period of time.

Mr. Margetson said the Board should leave shoulder season the way it is but define what the shoulder season is every year. He thinks that all holiday weekends are *not* shoulder season. Therefore, shoulder season excludes holiday weekends.

Mr. Hendry thanked Ms. Bonney for the time she has invested in this. He said if the Board does this right; they should get other people involved in this, like LTAB and the Arts Commission. He said the 1% for the Arts should be working around O.T.A.B's criteria.

Mr. Hendry said the model that he looked at had 52 events per year-an event every weekend. He said this should be the goal.

Mr. White asked if it has to be a new event.

Mr. Hendry said yes.

Mr. Margetson asked about the events that want to expand but they are not new.

Chair Castillo said one of the three events will draw the demographics that they are looking for.

Mr. Hendry said the applicants would have to provide the Board reasons as to why they should fund them again.

Mr. Hendry said at year two, the Board would have to find another \$100,000. He said the Board needs to make the argument that there would be no cost to the City because the criteria would be that the 3 events would bring in at least another \$100,000 in occupancy tax. He explained that this would eventually be a \$1 million fund. He said this would be an investment in future lodgers' tax.

Mr. Hendry said after three years, O.T.A.B. would have funded 9 events and would have put \$300,000 in over three years, which would have been generated from lodgers' tax [from events].

Mr. Hendry mentioned that he had conversations with some County Commissioners about the county investing in this; and there are a number of ways they could do this. Possibly, they could have one of their employees administer the fund. He said if they do not want to participate, then O.T.A.B. won't fund events that are held in the County.

Mr. Luttjohann said the current assumption is that there is \$70,000 in O.T.A.B. funding per fiscal year. He said this is important and, therefore this needs to go back to the City Manager to clarify this.

There was brief discussion about defining the criteria in January of each year; accepting applications in March and awarding the grants before the end of the fiscal year.

#### Mr. Hendry made a motion to revise the O.T.A.B. Resolution as follows:

- 1) Each year in January, O.T.A.B. will review the previous year occupancy to determine the shoulder season; excluding holiday weekends.
- 2) Organizations who receive an award will have to match their award in the third year (in the amount of \$33,000). If they don't match it, they will not be eligible for the \$33,000 grant and the money will go back to the O.T.A.B. fund. They would no longer be eligible as a grantee.

Ms. Bonney seconded the motion. The motion passed unanimously by voice vote.

Mr. Luttjohann was given direction to place this on LTAB's meeting agenda.

Mr. Luttjohann will also meet with the City Manager about the recommended changes to the Resolution.

#### IV. REQUEST FOR FUNDING: a. Parallel Studios – presented by Frank Ragano

Mr. Ragano presented the information from their application. Please see *Exhibit "B"* for the specifics of this presentation.

Parallel Studios is requesting \$10,000 in O.T.A.B. funding to assist them in the citywide event CURRENTS: The Santa Fe International New Media Festival, which will be held from June 14, 2013 to June 30, 2013. This will be the fourth annual festival.

Mr. Ragano said their sponsors include Center for Contemporary Art, the Institute of American Indian Art, El Museo Cultural, the Santa Fe University of Art and Design, the Santa Fe Art Institute, the Railyard Art Committee of the Railyard Stewards, Zane Bennett Contemporary Art, Warehouse 21 and Axle Contemporary.

He said the goal is to create an international destination event that contributes to the strength and vitality of Santa Fe's and New Mexico's Art and Culture Tourism Sector. He explained that young tourists who visit Santa Fe for its outdoor experiences are technology savvy and are drawn to New Media Arts. They are excited by the prospect of combining these two experiences. He said this demographic will certainly become more and more important to our tourism industry and because of this; they see the Currents Festival as a vital component of Santa Fe's future.

Mr. Ragano said Santa Fe University of Art and Design have offered their dorms for the artists to stay while in Santa Fe.

He reported that they had over 4,000 people attend their events. It is difficult for them to say how many of their visitors came to Santa Fe solely for the Festival; however, it is clear that their visibility is growing.

Mr. Ragano said O.T.A.B.'s support would help them expand their national advertising and regional promotions. He mentioned that all their events are free to the public. He said their international call for entries and Festival announcements are posted on over 30 art sites and blogs and are viewable on over 100 sites. Their mailing list reaches artists, educators, developers and programmers and New Media Art enthusiasts on every continent. He noted that their regional advertising budget this year is from \$20,000 to \$25,000. They are taking out full page ads in major art magazines.

Chair Castillo would like to get behind this event because he sees the potential that this event will grow.

#### Ms. Bonney moved to fund the request at \$10,000.

Mr. Margetson said he would like to fund them at \$5,000.

#### Mr. White seconded the motion. The motion passed 3 to 2.

### V. FINAL REPORT: a. Santa Fe Chamber Music Festival – presented by Shelley Winship

Ms. Winship presented the information from their Final Report. A written report was distributed in the Members' packets. Please see Exhibit "C" for the specifics of this report.

Ms. Winship distributed copies of the current brochure. She thanked the Board for their support on behalf of the SF Chamber of Music Festival Board of Directors. She noted that O.T.A.B. awarded them \$5,000 last year and this was applied toward the costs of marketing and distributing the Festival's National Radio Broadcasts, and as such, greatly assisted in increasing both audience and marketing efforts. The Festival's 2012 National Radio Series had an Arbitron audience of 2,666,300. The Festival also added Dallas/Fort Worth and Houston to its list of top-ten U.S. broadcast markets for 2012, which already included Chicago, San Francisco and Philadelphia.

Ms. Winship said for the 2012 Series, the Festival partnered with WFMT's new Director of Network Marketing and Syndication, Tony Macaluso, with the express goal of increased market penetration nationally.

Ms. Winship noted that the series was actively marketed with industry ads, station mailings, phone calls, e-blasts and industry conference displays. This year, they focused on packaging their 13-week product with other comparable radio series to provide 52 weeks of classical programming for stations desiring a year-round product in a particular time slot, and found this approach to be highly successful. Their combined efforts secured a "carriage" list of 315 stations across the U.S. and in the Philippines. They plan to continue these successful strategies in marketing future radio series.

Ms. Winship mentioned that O.T.A.B.'s support was credited in the radio broadcast taglines.

Ms. Winship reported that the Festival sold 15,383 tickets, generating a record of \$562,899 in earned income for the 40<sup>th</sup> Anniversary Season.

Mr. Margetson asked Ms. Winship how many out-of-town visitors attended the festival.

Ms. Winship said there were 1,523 out-of-region attendees. She said the average number of Festival tickets purchased per out-of-region attendees was 4.45, which suggests a 4-night minimum stay on average. They had 250 attendees who included Festival musicians plus family members. They also co-hosted its first ever scientific symposium on music, the brain and healing, in partnership with UNM Cancer Center and Continuing Medical Education Program. This was held at Santa Fe's Eldorado Hotel and out of the 160 Symposium attendees, 120 were from outside the region.

#### b. Buffalo thunder - presented by Joseph Karnes

Mr. Karnes presented the information from their Final Report. A written report was distributed in the Members' packets. Please see Exhibit "D" for the specifics of this report.

Mr. Karnes said he is one of the founders of Global Running Culture, which is a non-profit organization that puts on the Santa Fe Buffalo Thunder Half Marathon that is held in the month of September. He said this past September was their second year of the event and O.T.A.B. has been gracious to fund both events and they appreciate their support. O.T.A.B. funded them \$3,500 last year.

Mr. Karnes said their primary goal is to create a destination half marathon here in Santa Fe – to establish Santa Fe as a nationally-recognized running destination. He noted that they grew from 711 entrants to 1,097 in 2012, a 54% increase. There were 190 out of state entrants, which is a 134% increase from the prior year. There were 17 states represented in 2011 and 30 states in 2012, a 76% increase.

Mr. Karnes mentioned that they brought in Olympic legends Billy Mills and Alvina Begay.

He said this year's results validate their vision and inspire the ongoing effort to expand their volunteer rate organization so that the Race may continue to grow and support their mission to advance children's fitness, nutrition and health through participation in sports. He noted that they have been able to secure sponsors like Nike N7, US Bank, Whole Foods Market and the Buffalo Thunder Resort & Casino; and the public agency sponsors include the City of Santa Fe and the Pueblo of Pojoaque.

Mr. Karnes said they look forward to applying for O.T.A.B. funding for the next three years. He explained that they are going in the right direction and their goal is 5,000 to 7,000 runners and to build as many filled beds as possible.

Mr. Margetson asked where the race was held.

Mr. Karnes said in the past two years, the event was held at Buffalo Thunder. He said they would like to have pre-race events here in Santa Fe. Mr. Margetson asked how many people stay at Buffalo Thunder.

Mr. Karnes said he did not have that data now but they are working on collecting that data.

### c. RDC Corp - Presented by Eric Vasquez

Mr. Vasquez presented the information from their Final Report. A written report was distributed in the Members' packets. Please see Exhibit "E" for the specifics of this report.

Mr. Vasquez is the Program Manager of the Regional Development Corporation, which is one partner of Shoot Santa Fe who provided monetary or material and service support. He noted that they are the fiscal agent for the Shoot Santa Fe initiative, which is a campaign to promote film production in New Mexico.

Mr. Vasquez said last year, they came before O.T.A.B. with a proposal to attend the Association of Film Commissioners Locations Trade Show with the idea of promoting Santa Fe and the surrounding region to the industry. In June of this year, the Shoot Santa Fe initiative, a coalition made up of several regional governments and organizations traveled to Los Angeles, California to promote Santa Fe and the region to the film industry. He said this was a very good event and in addition to creating a visible appearance at the Film Commissioners Locations Trade Show, Shoot Santa Fe teams also arranged for private meetings with several studio executives in the days around the trade show. Two teams, including elected officials (Mayor Coss and Councilor Wurzburger) and industry representatives from the Santa Fe region conducted meetings with high level studio executives in charge of site selection, including Fox and Sony Studios.

Mr. Vasquez said Shoot Santa Fe participated at this event by cosponsoring and staffing the State of New Mexico's Film New Mexico booth and by hosting a separate booth showcasing Santa Fe and the surrounding region. Promotional materials were developed and distributed at this event, along with invitations to Shoot Santa Fe sponsored networking events. Shoot Santa Fe hosted two publicity and networking events. The larger of the two events was an invitation-only party near the convention center aimed at film crews and directors. This event drew in more than 200 people, all of whom shared their contact information and have been contacted for subsequent follow-up. A separate and much smaller exclusive event focused on top level studio executives and a list of directors and producers. 14 high level guests attended this private event.

Mr. Vasquez noted that an advertisement was done in *Daily Variety*, a trade journal on Shoot Santa Fe initiative and presence at locations trade show. The cost to do the advertisement was \$3,000. The cost of attending the Trade Show was \$5,085; for a total of \$8,085.

Mr. Margetson asked what the movement is on the film industry – is the Governor moving on this.

Mr. Vasquez said in general, the administration is seeing that this industry is creating jobs in New Mexico and economic activity. Therefore, the efforts to truncate the incentives have ended. He noted that there is a legislative proposal for the film industry incentives-to possibly increase the cap.

Mr. Hendry said the six movies that are being filmed in New Mexico are going to be filmed here in Santa Fe. He explained that they want to market to the film industry to shoot films in New Mexico and be based out of Santa Fe.

Mr. Vasquez said they are starting to see the results of this.

Mr. Luttjohann asked if there is any kind of data base collection on the contacts that were made.

Mr. Vasquez said yes, and this is being shared with the Shoot Santa Fe initiative with stipulations on how they will reach out to these contacts.

Santa Fe Century (Of note: This was not on the agenda.)

Mr. Willard Scott said he is not seeking O.T.A.B. funding for their event that is scheduled for May 19, 2013. He provided the background of Santa Fe Century, which is 25, 50 and 100 mile bike rides that start at CHRISTUS St. Vincent Regional Medical Center. He would like the City to waive the fees for the event.

Chair Castillo asked him to get with Mr. Luttjohann to see if they want to develop a funding request that would come before O.T.A.B.

Mr. Ferguson said they estimate that they put 3,000 people in beds in Santa Fe. He asked if there was any funding to run some web advertising.

Mr. Hendry said they need to fill out the application and go through the application process. He mentioned that there is bond money for promotion of the bike trails and if they expand the event to the bike trails, they may qualify for this funding.

Mr. Scott was informed to contact the City's Recreation Division on the waiving of the fees. They were also asked to go to the County LTAB and seek funding from them.

#### **Discussion on Fees of the Community Convention Center**

Mr. Margetson said he is disappointed that the City of Santa Fe is losing charitable events to Buffalo Thunder. He said the reason for this is that they do not charge an entry fee if people use Buffalo Thunder's Ball rooms. The Community Convention Center charges entry fees. The City of Santa Fe does not receive any

gross receipts or lodgers tax revenue from Buffalo Thunder. Mr. Margetson would like the Board to discuss this further.

Mr. Luttjohann said as part of the strategic planning process, there will be a meeting/session next Tuesday at 10:00 a.m. on the Convention Center's fees, procedures, policies and contractor issues. The Board was invited to attend.

#### 111. **CVB ACTIVITY REPORTS:**

#### a. Jim Luttjohann- SFCVB Executive Director

[Copies of the written report were distributed. A copy is hereby incorporated to these Minutes as Exhibit "F".] Please see Exhibit "F" for the specifics.

#### b. Christine Madden- SFCVB Sales

[Copies of Ms. Madden's Sales Report were distributed in the members' packets. A copy is incorporated herewith to these Minutes as Exhibit "G".) Please see Exhibit "G" for the specifics of this presentation.

Ms. Madden said they are not pacing as they did last year; however, they are booking as far out as 2017 with great success.

#### V. MEETING SCHEDULE

The next meeting is scheduled for February 28, 2013 at 8:30 a.m. in the City Hall Council Chambers.

#### VI. ADJOURNMENT

Its business being completed, the meeting was adjourned at 11:10 a.m.

Approved by:

Miquel Castillo, Chair

Respectively submitted by Jo Ann G. Valdez, Štenographer

Γ	EXHIBIT
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<u>City of Santa Fe</u> Occupancy Tax Advisory Board (O.T.A.B)

# PROCEDURES & APPLICATION FOR LODGERS TAX FUNDING ASSISTANCE OF SPECIAL EVENTS

- 1. To acquire Lodgers Tax Funding Assistance please complete the attached application, or contact the O.T.A.B Administrator at 505-955-6211.
- 2. Our address is: O.T.A.B. c/o Santa Fe Convention & Visitors Bureau 201 West Marcy Street Santa Fe, New Mexico 87501

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

- 3. Below are the policies of the Lodgers Tax Funding Assistance application for your review. Please read them carefully, BEFORE completing the Funding Assistance request form. Failure to comply with any of these requests may result in your application being denied or revoked. If you have any questions about the application, you may contact the O.T.A.B. Administrator at 505-955-6211.
- 3. The organization applying must have non-profit status (as specified in 18-11,15, letter B, Santa Fe City Code) with a tax exempt status and 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 501 (C) 3 status (if applicable)
  - d. Organization's State of New Mexico Non-Taxable Transactions Certificate (if applicable)
  - e. Proof of Insurance as indicated on item number 13 of this application
- 4. Please submit the Lodgers Tax Funding Assistance application, your current budget and supporting documents (including the pre-event budget breakdown), along with ten (10) copies (mailed or delivered) to the attention of the O.T.A.B. Administrator at the above stated address for review. The application must be completed and submitted including all attachments thirty (30) days in advance of a scheduled O.T.A.B. meeting. Any applicant failing to submit their application by the scheduled time will be required to wait until the next meeting to make a funding request.
- 5. Applicants will be scheduled to attend an O.T.A.B. meeting and make a fifteen (15) minute presentation (maximum) at which time their application is reviewed. Board members may ask questions and discuss the application and all aspects of the event. The O.T.A.B. meetings are conducted in compliance with the New Mexico Open Meetings Act.
- 6. If the O.T.A.B. declines funding an application, the applicant may request that the O.T.A.B Administrator place that item on a subsequent meeting agenda for further clarification. The Chairman of O.T.A.B. approves all requested items for the agenda, before the meeting.

- 7. If the applicant's request is approved by the O.T.A.B., the O.T.A.B. 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 the O.T.A.B. Administrator throughout this process.
- 8. Depending upon the amount of the contract, additional approval by the Finance Committee of the City Council may be necessary. If the Finance Committee approves funding, the request will then be forwarded to the City Council for final approval. The applicant will be provided with the dates for the Finance Committee and City Council meetings. The applicant is required to attend all of these meetings, in the event that any questions need to be answered.
- 9. After the City has approved the contract, and the contract is fully executed, a purchase order will be created. The O.T.A.B 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 from the funding. The applicant will submit an invoice for payment to the O.T.A.B. Administrator. The applicant also needs to submit copies of the cancelled checks along with the corresponding invoices and a matching spreadsheet listing all the `payments submitted for reimbursement. A final report and presentation to O.T.A.B is also `required prior to reimbursement being made (see item 14).
- 10. Once the Contract has been executed it shall not be altered, changed, or amended except by a written notice to the O.T.A.B. by the applicant. The O.T.A.B. 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.
- 11. All advertisements and promotional materials for the event must state that "partial funding was granted by the City of Santa Fe Lodger's Tax".
- 12. The intent of funding special events from Lodgers Tax proceeds is to bring overnight visitors to Santa Fe and thus increase tourism for the City of Santa Fe. Events must only use Lodgers 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 located outside of a 50-mile radius of the City of Santa Fe. If an event seeks to attract a significant amount of Santa Fe residents, then funds from sources other than O.T.A.B. must be used for local media purchases.

Example: Your advertising budget is \$6,000. OTAB awards your organization \$2,500. You would spend the OTAB funding amount (\$2,500) on media outside of Santa Fe and your remaining advertising budget (\$3,500) on local media.

- 13. 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.
- 14. Contractor agrees to defend, indemnify and hold harmless the City of Santa Fe, O.T.A.B. members, and the Convention & Visitors Bureau for all losses, damages, claims or judgement, execution, actions or demands whatsoever resulting from the Contractee's actions or inactions as a result of the event.
- 15. After the event a written report must be submitted to the O.T.A.B., within (90 days). You will then be scheduled to make a ten-minute (10) verbal presentation at the next regularly

scheduled meeting of O.T.A.B. The report must include 1) a post event explanation of expenditures and revenues, 2) a descriptive breakdown of how the event directly produced tourism revenue, i.e. 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.

16.

All reimbursement information must be categorized as per City of Santa Fe Professional Service Agreement approved budget.

- ٠ Original invoices must be submitted for payment processing. (Copies of invoices will not be accepted.) Invoices must be dated and paid by the event after the signed agreement date.
- Vendor statements will not be accepted instead of original invoices. ٠
- Copy of cancelled checks (front & back) or signed credit card receipts must accompany invoices as proof of payment.
- Copies/clippings of flyers, banners, advertisements (radio, TV, newspaper, magazine, etc.) must accompany each vendor-related invoice.
- Note: The processing of your payment will be completed in a timely manner by the O.T.A.B. Administrator provided you submit your information during or immediately after the event. 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 has expired.

#### Acknowledgement:

Please sign below that you have read and fully understand the preceding Procedures For Lodgers Tax Funding Assistance of Special Events.

Applicant's Signature

**Co-Executive Director** 

Title/Position

12/3/12 Date

#### APPLICATION FOR LODGERS TAX FUNDING ASSISTANCE

Date of Application:	11/25/12							
Applicant's Name & Title:	Frank Ragano / Co_Executive Director							
Contacts Name (if different)	·							
Organization's Name:	Parallel Studios Inc.							
Organization's Address:	167 Soaring Hawk Trl. Santa Fe NM 87508-1414							
Event Name:	Currents 2013: Santa Fe International New Media Festival							
Check Box:	New Event Existing Event							
Event Location Address:	El Museo Cultural, CCA, IAIA, Zane Bennett, Railvard, Warehouse 21 Axle, SFUAD, SFAI and various smaller venues							
Phone Numbers: (offic	ce) <u>505-216-9638 (</u> cellular) <u>505-670-6473 (</u> fax) <u>NA</u>							
Contact's Numbers: (if different	rent) (office)(fax)(cellular)							
E-Mail Address: paralle	I-contact@earthlink.net							
Federal Tax I.D. Number 36	- 4663305 Tax Exempt: Yes X No							
City of Santa Fe Business Licen	nse Number <u>12-00112085</u>							
Amount Requested: \$10.00	0							

- 1. Write a brief synopsis 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 directly relate to bringing visitors to and increasing tourism for the City of Santa Fe.
- 2. Using a budget format, please include a section devoted to allocation of O.T.A.B. funding as to marketing purposes.
- 3. If this event has received O.T.A.B. 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 making your projections for this application in relationship to that baseline. The advisory board encourages collaborations and creative solutions in the attraction of new and repeat visitors to the City of Santa Fe and your event. IF YOUR ORGANIZATION HAS RECEIVED FUNDING FOR 3 OR MORE TIMES, CONSECUTIVE OR NOT, YOU ARE NOT ELIGIBLE TO REAPPLY.

- The applicant is required to list the name, title and phone number of any other organizations 4. including other City of Santa Fe funds you have been granted or contracted to receive in addition to O.T.A.B. funds. Failure to disclose this information with your application may result in denial of funding.
- 5. Enclose your organization's budget, expenses and income statements for the last, current, and next year If this is a first time event, please specify your projections and justification for expenditures.
- List all paid and volunteer staff positions including total salaries and an organizational chart. 6.
- Provide a copy of your promotional literature from your previous year's event. If this is a first 7. time event, please provide an example piece.
- Any additional information that you believe will be useful in order for the board to make a well 8. informed decision is appreciated, i.e.: a similar event held in another city.

#### APPLICATION FOR LODGERS TAX FUNDING ASSISTANCE

#### \*Acknowledgement Certificate:

State of New Mexico

County of Santa Fe

@ @.A.O certify that the DI 20/0 day of On this

information submitted for Lodger's Tax Funding Assistance is a true and complete.

Acknowledger's Signature

**Co-Executive Director** Title/Position

Subscribed and swom before me this <u>03<sup>rd</sup></u> da By <u>Frank Ragano</u>	ay of December, 2012
(Seal) (Seal)	Notary Public Olimica

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

# \*PRE- AND POST-EVENT BUDGET

Name of Organization

Amount

Date Awarded or Anticipated Date

Specify other revenue

sources contacted:

New Mexico Tourism Dept

<u>\$11.000</u>

August 7 2012

NOTE: All expensed items must be directly related to promotion. advertising and marketing.

Categories Description	<u>Proje</u> <u>- Expenses</u>	ected Revenue		<u>ctual</u> - Revenue
Newspaper	<u>\$</u> -		\$	
Magazine <u>Various/see chart</u>	<u>\$20,000 - \$2</u>	20,000	\$	
Poster	<u>\$</u>		\$	
Brochure	<u>\$</u>		\$	-
Radio	<u>\$</u>	······································	\$	
TV	<u>\$</u>		\$	
Creative Graphic Design	<u>\$4.500 - \$4</u>	500	<u>\$</u>	
Printing	<u>\$</u>	<u></u>	\$	_
Postage	<u>\$</u>		<u>\$</u>	-
Direct Mail	<u>\$</u>		<u>\$</u>	
Production	<u>\$                                    </u>		\$	
Web site	<u>\$</u> -	11 - 11 - 11 - 11 - 11 - 11 - 11 - 11	\$	-
Other (specify)	\$		\$	
TOTALS:	<u>\$24,500</u> - <u>\$2</u>	4.500	\$	
Total Hotel/Motel Rooms Filled:		<b></b>		20
Total Revenue generated from roo	m sales:	\$		\$ <u>1.500</u>
Total number of Attendees				
- (tickets sold, registered guests, p	ublic)	5,500	····	
Total number of Participants				
-(out of town artists/interns working	g event)	<u>25</u>		5
		6		

# 2013 Advertising and Marketing Vendors

Budget	Vezdez		<b>F</b>
Category	Vendor	Description	Expense
		LA Art Magazine/bimonthly	
Print	Art Ltd Magazina	2 Issues March-April, May-	2 600
	Art Ltd. Magazine	June/ full page	2,600
Online Ad	Art Ltd. Magazine	4 mo, included in above	included in above cost
		Exclusive Email	
		Announcement/ 8 weeks/May/	
Email	Visual Art Source/Art Ltd.	June	\$1,200
		Dallas/FW & Houston/monthly	
		3 issues Dallas/FW & 3 issues	
		Houston/April-May-June/full	
Print	Arts and Culture	page	\$3,900
		Denver/Boulder/weekly	
Print		Package/3 wks/ 1/4 page & 2	
	Denver Westword	wks/1/2 page	\$4,800
		Online Ad/Social Media	
		5 wks included in above	
Online Ad	Denver Westword	package	included in above cost
	Juxtapoz/art magazine with		
Print	largest circulation in the US	Full Page Color Ad/May/June	\$3,000
Print	Origin Magazine	Full Page Color Ad/May/June	\$1,500
Print	Chicago Reader	2 Half Page Color/June	\$3,000
Online	Chicago Reader	Online Ads	included in above
Graphic	Dae In Chung, Design	Design of Marketing	
Design	Professor at SFUAD	Campaign	\$4,500
		Total:	\$24,500

# 2013 Advertising and Marketing Schedule

	JULY	AUG	SEP	Ост	Nov	DEC	JAN	FEB	MAR	APR	MAY	JUNE
PRINT	-	1	-	-					X	X	x	X
INTERNET			1	x	x	x	X	x	x	X	X	x
RADIO											X	X
TELEVISION										1		
OUTDOOR		-										X
TRADE SHOWS											1	
BROCHRES/ POSTERS											X	X

#### **REVENUE SOURCE TABLE**

Revenue Source	Amount	Confirmed/ Anticipated
NEA (funded 2012/\$15,000)	\$30,000	Confirmed
New Mexico Arts (funded 2012/\$6,446) \$2,500		
requested for marketing	\$4,680	Confirmed
Santa Fe Arts Commission(funded 2012/\$5,500)		
\$3,000 requested for marketing	\$7,500	Confirmed
New Mexico Tourism Department (funded 2012/\$7,500)	\$11,000	Confirmed
McCune Charitable Trust (funded 2011/\$1,200, 2011/\$7,500, 2012/\$7,500)	\$10,000	Anticipated
Thanksgiving Fund (funded 2011/\$14,000, 2012/\$20,000)	\$25,000	Anticipated
Brown Foundation (new)	\$10,500	Anticipated
Zane Bennett Family Foundation(funded 2010/\$3,000 and funded 2011/\$4,000, 2012/\$5,000)	\$6,000	Anticipated
Fidelity Charitable Trust (funded 2010/\$5,000, 2011/\$5,000, 2012/\$5000)	\$5,000	Confirmed
mediaThe Foundation (funded 2012/\$5,000)	\$6,000	Anticipated
Individual Donations (funded 2010/\$9,143 and 2011/\$10,895, 2012/\$16,380)	\$24,000	Anticipated
Corporate (funded 2011/\$2,350)	\$9,500	Anticipated
Artists' Submission Fees (2010/\$1,782, 2011/\$2170, 2012/\$3,900)	\$5,000	Anticipated
Contributions from Collaborators for Local Ads (2012/\$1500)	\$3,000	Confirmed
Total	\$157,180	

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. Please note your total ticket sales, number of out of town attendees and how the event compared, both to your application estimates and to last year's event in the number of people attending and revenue generated. Please summarize the marketing and publicity strategies used to promote your event and the City of Santa Fe. Make an honest 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 O.T.A.B. meeting scheduled after your event to present your final report.

#### BREAKDOWN OF O.T.A.B. FUNDING REQUESTS FOR FISCAL YEAR 2012/2013

Name of Event	Amount oproved	Actual Amount Spent/Committed		location/ Budget		Total Balance
Opening Balance			\$	70,000.00		
Dual Language	\$ 5,000.00		555255		\$	5,000.00
Museum of NM	\$ 2,500.00				\$	2,500.00
	ан. С				V na se	
					EEXCE	
			C FRANKT !!		9399-39	
			18-26 <b>0</b> 09887		Kat Law	
SUBTOTAL			1559 STATE		\$	7,500.00
	\$ 7,500.00	\$ -	\$	70,000.00	\$	62,500.00

					of Santa F		_							
					ng Tax Rej							_		
			<u>For the</u>	Mont	th of Dece	mber 2012						4		
19/ Lodeing Toy														
4% Lodging Tax Month		iscal Year		Field	cal Year		Ci	scal Year		Fiscal Year	Monthly	-+-	Fiscal Year	Monthly
montai		008-2009	% Gain/Loss		09-2010	% Gain/Loss		010-2011	% Gain/Loss	2011-2012	% Gain/Loss		2012-2013	% Gain/Loss
July	\$	474.642	2.49%		368.059	-22.46%		466.349	27%			% \$		269
August	\$	578,255	3.03%		508,480	-12.07%		559,878	10.11%			% \$		-89
September	\$	655,056	34.15%		604,580	-7.71%		621,818	2.85%			% \$		49
October	\$	477,328	-34.34%		420,868	-11.83%		417,264	-0.86%			% \$		19
November	\$	364,609	-30.31%		400,356	9.80%		489,309	22.22%			% \$		19
December	\$	374,153	67.69%	\$	229,101	-38.77%	\$	234,852	2.51%	\$ 223,558	-5	% \$	261,800	179
January	\$	184,871	-53.42%	\$	268,342	45.15%	\$	260,667	-2.86%	\$ 275,908	6	% \$		-100
February	\$	222,910	-10.69%	\$	167,499	-24.86%	\$	201,287	20.17%	\$ 184,248	-8	% \$	-	-1009
March	\$	235,832	11.17%	\$	200,011	-15.19%	\$	198,305	-0.85%	\$ 167,482	-16	% \$		-1009
April	\$	224,625	-41.67%	\$	306,086	36.27%	\$	285,430	-6.75%	\$ 276,748	-3	% \$		-1009
May	\$	296,021	-14.32%		275,292	-7.00%		265,120	-3.69%			% \$		-1009
June	\$	409,259	-9.44%	\$	384,175	-6.13%	\$	349,553	-9.01%	\$ 481,800	38	% \$		-100%
Fiscal YearTotals	\$	4,497,561	- <u>10.53</u> %	\$ 4	4,132,849	- <u>13.43</u> %	\$	4,349,832	<u>5.25</u> %	\$ 4,381,163		\$	2,860,009	
Cumulative Months							-	·····						
July - DecemberTotals	\$	2,924,043		\$ 2	2,531,444	-13.43%	\$	2,789,470	10.19%	\$ 2,731,028	-2.10	% \$	2,860,009	4.729
	+				<u> </u>		-				· · · · · · · · · · · · · · · · · · ·	-+		
												-		
									·					
Convention Center 3% Lodgers Tax														
Convention Center 3% Lodgers Tax Month	Fi	scal Year		Fise	cal Year		Fi	scal Year		Fiscal Year	Monthly		Fiscal Year	Monthly
		scal Year 008-2009	% Gain/Loss		cal Year 09-2010	% Gain/Loss		scal Year 010-2011	% Gain/Loss	Fiscal Year 2011-2012	Monthly % Gain/Loss		Fiscal Year 2012-2013	Monthiy % Gain/Loss
<u>Month</u>			% Gain/Loss 2.49%	200		% Gain/Loss -22.46%	2				% Gain/Loss		2012-2013	% Gain/Loss
	2	008-2009		200 \$	09-2010		2 \$	010-2011	27%	2011-2012	% Gain/Loss		2012-2013 406,301	% Gain/Loss 269
MonthJuly	2 \$	008-2009 355,983	2.49%	200 \$ \$	09-2010 276,043	-22.46%	2 \$ \$	010-2011 349,762	27%	2011-2012 \$ 322,245 \$ 438,373	% Gain/Loss -8	% \$	2012-2013 406,301 402,077	% Gain/Loss 269 -89
Month July August	2 \$ \$	008-2009 355,983 433,691	2.49% 3.03% 34.15% -34.34%	200 \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651	-22.46% -12.07% -7.71% -11.83%	2 \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948	27% 10.11% 2.85% -0.86%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310	% Gain/Loss -8 4 -5 10	% % % % \$	2012-2013 406,301 402,077 456,646 345,863	% Gain/Loss 269 -89 49 19
Month	2 \$ \$ \$	008-2009 355,983 433,691 491,292 357,996 273,456	2.49% 3.03% 34.15% -34.34% -30.31%	200 \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267	-22.46% -12.07% -7.71% -11.83% 9.80%	2 \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982	27% 10.11% 2.85% -0.86% 22.22%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750	% Gain/Loss -8 4 -5 10 -5	% \$ % \$ % \$ % \$	2012-2013 406,301 402,077 456,646 345,863 337,769	% Gain/Loss 269 -89 49 19
Month July August September October	2 \$ \$ \$ \$	008-2009 355,983 433,691 491,292 357,996	2.49% 3.03% 34.15% -34.34% -30.31% 67.69%	200 \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77%	2 \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141	27% 10.11% 2.85% -0.86% 22.22% 2.51%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668	% Gain/Loss         -8           4         -5           10         -5           -5         -5	% % % % % % % % % %	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350	% Gain/Loss 269 -89 49 19 19 179
Month       July       August       September       October       November	2 \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,691 491,292 357,996 273,456	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77% 45.15%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931	% Gain/Loss         -8           4         -5           10         -5           -5         6	% % % % % % % % % % % %	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350	% Gain/Loss 269 -89 49 19 19 179 -1009
Month       July       August       September       October       November       December       January       February	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,691 491,292 357,996 273,456 280,614 138,653 167,182	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42% -10.69%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 125,624	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77% 45.15% -24.86%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186	% Gain/Loss         -8           -8         -8           -4         -5           -5         -6           -2         -5           -2         -2	% \$ % \$ % \$ % \$ % \$ % \$ % \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 -	% Gain/Loss 269 49 19 19 19 17 179 -1009 -1009
Month       July       August       September       October       November       December       January       February       March	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,691 491,292 357,996 273,456 280,614 138,653 167,182 176,874	2.49% 3.03% 34.15% -34.34% 67.69% -53.42% -10.69% 11.17%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 125,624 150,008	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77% 45.15% -24.86% -15.19%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186 \$ 125,611	% Gain/Loss         -8           4         -5           100         -5           -5         -5           -6         -5           -7         -5           -6         -5           -7         -5           -7         -5           -7         -5           -7         -7           -7         -7           -7         -7	% \$ % \$ % \$ % \$ % \$ % \$ % \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - -	% Gain/Loss 269 
Month       July       August       September       October       November       December       January       February       March       April	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,691 491,292 357,996 273,456 280,614 138,653 167,182 176,874 168,469	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42% -10.69% 11.17% -41.67%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 125,624 150,008 229,566	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77% 45.15% -24.86% -15.19% 36.27%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 207,561	% Gain/Loss         -8           4         -5           0         -5           0         -5           0         -6           -6         -76	% \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - -	% Gain/Loss 266 497 19 19 19 177 -1007 -1009 -1009 -1009
Month       July       August       September       October       November       December       January       February       March       April       May	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,691 491,292 357,996 273,456 280,614 138,653 167,182 176,874 168,469 222,016	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42% -10.69% 11.17% -41.67% -14.32%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 125,624 150,008 229,566 206,469	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77% 45.15% -24.86% -15.19% -36.27% -7.00%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072 198,840	27% 10.11% 2.85% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75% -3.69%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 207,561 \$ 197,961	% Gain/Loss         -8           4         -5           0         -6           -5         -6           -6         -6           -7         -6           -7         -7           -7         -7           -7         -7	% \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - - - -	% Gain/Loss 269 49 19 179 -1009 -1009 -1009 -1009 -1009 -1009 -1009
Month       July       August       September       October       November       December       January       February       March       April	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,691 491,292 357,996 273,456 280,614 138,653 167,182 176,874 168,469	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42% -10.69% 11.17% -41.67%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 125,624 150,008 229,566	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77% 45.15% -24.86% -15.19% 36.27%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 207,561 \$ 197,961	% Gain/Loss         -8           4         -5           0         -6           -5         -6           -6         -6           -7         -6           -7         -7           -7         -7           -7         -7	% \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - - - -	% Gain/Loss 269 49 19 19 179 -1009 -1009 -1009 -1009 -1009 -1009
Month         July         August         September         October         November         December         January         February         March         April         May         June	2 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	008-2009 355,983 433,651 491,292 357,996 273,456 280,614 138,653 167,182 176,874 168,469 222,016 306,944	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42% -10.69% 11.17% -41.67% -14.32% -9.44%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 125,624 150,008 229,566 206,469 288,131	-22.46% -12.07% -7.71% 9.80% -38.77% 45.15% -24.86% -15.19% 36.27% -7.00% -6.13%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072 198,840 262,165	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75% -3.69% -9.01%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 367,7668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 127,961 \$ 197,961 \$ 361,350	% Gain/Loss         -8           4         -5           0         -6           -5         -6           -6         -6           -7         -6           -7         -7           -7         -7           -7         -7	% \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - - - - - - -	% Gain/Loss 269 49 19 19 179 -1009 -1009 -1009 -1009 -1009 -1009
Month         July         August         September         October         November         December         January         February         March         April         May         June	2 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	008-2009 355,983 433,691 491,292 357,996 273,456 280,614 138,653 167,182 176,874 168,469 222,016	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42% -10.69% 11.17% -41.67% -14.32%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 125,624 125,624 150,008 229,566 206,469	-22.46% -12.07% -7.71% 9.80% -38.77% 45.15% -24.86% -15.19% 36.27% -7.00% -6.13%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072 198,840	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75% -3.69% -9.01%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 207,561 \$ 197,961	% Gain/Loss         -8           4         -5           0         -6           -5         -6           -6         -6           -7         -6           -7         -7           -7         -7           -7         -7	% \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - - - -	% Gain/Loss 269 49 19 19 179 -1009 -1009 -1009 -1009 -1009 -1009
Month         July         August         September         October         November         December         January         February         March         April         May         June	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,681 491,292 273,456 280,614 138,653 167,182 176,874 168,469 222,016 306,944 <b>3,373,170</b>	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42% -10.69% 11.17% -41.67% -14.32% -9.44%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 125,624 125,624 125,624 206,469 288,131 3,099,636	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77% 45.15% -24.86% -15.19% 36.27% -7.00% -6.13% -8.11%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072 198,840 262,165 3,262,376	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75% -3.69% -9.01% 5.25%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 207,561 \$ 197,961 \$ 34,350 \$ 3,285,871	% Gain/Loss         -8           4         -5           0         -5           -5         -6           -6         -7           -7	%     \$       %     \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - - - - - - - - - - - - -	% Gain/Loss 26' -8' 19 19 17' -100' -100' -100' -100' -100' -100'
Month         July         August         September         October         November         December         January         February         March         April         May         June	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,651 491,292 357,996 273,456 280,614 138,653 167,182 176,874 168,469 222,016 306,944	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42% -10.69% 11.17% -41.67% -14.32% -9.44%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 125,624 150,008 229,566 206,469 288,131	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77% 45.15% -24.86% -15.19% 36.27% -7.00% -6.13% -8.11%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072 198,840 262,165	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75% -3.69% -9.01% 5.25%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 367,7668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 127,961 \$ 197,961 \$ 361,350	% Gain/Loss         -8           4         -5           0         -5           -5         -6           -6         -7           -7	%     \$       %     \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - - - - - - -	% Gain/Loss 26' - 8' - 11' - 10' - 100' - 100' - 100' - 100' - 100'
Month         July         August         September         October         November         December         January         February         March         April         May         June	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,681 491,292 273,456 280,614 138,653 167,182 176,874 168,469 222,016 306,944 <b>3,373,170</b>	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42% -10.69% 11.17% -41.67% -14.32% -9.44%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 125,624 125,624 125,624 206,469 288,131 3,099,636	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77% 45.15% -24.86% -15.19% 36.27% -7.00% -6.13% -8.11%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072 198,840 262,165 3,262,376	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75% -3.69% -9.01% 5.25%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 207,561 \$ 197,961 \$ 34,350 \$ 3,285,871	% Gain/Loss         -8           4         -5           0         -5           -5         -6           -6         -7           -7	%     \$       %     \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - - - - - - - - - - - - -	% Gain/Loss 26 - 8 - 4 - 1 - 1 - 10 - 100 - 100 - 100 - 100 - 100
Month         July         August         September         October         November         December         January         February         March         April         May         June	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,691 491,292 357,996 273,456 280,614 138,653 167,182 176,874 168,469 222,016 306,944 3,373,170 2,193,032	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42% -10.69% -11.77% -14.32% -9.44% -10.53%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 125,624 150,008 229,566 206,469 288,131 3,099,636 1,898,582	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77% 45.15% -24.86% -24.86% -15.19% -36.27% -7.00% -6.13% -8.11% -13.43%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072 198,840 262,165 3,262,376 2,092,105	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75% -3.69% -9.01% 5.25% 10.19%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 127,561 \$ 197,961 \$ 361,350 \$ 3,285,871 \$ 2,048,271 2 2,048,271	% Gain/Loss         -8           4         -5           100         -5           -5         -6           -6         -7           -7	% \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - - - - - - - - - - - - -	% Gain/Loss 26' -8' -10' -10' -100' -100' -100' -100' -100' -100'
Month         July         August         September         October         November         December         January         February         March         April         May         June	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,681 491,292 357,996 273,456 280,614 138,653 167,182 176,874 168,469 222,016 306,944 3,373,170 2,193,032	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42% -10.69% 11.17% -41.67% -14.32% -9.44%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,851 300,267 171,826 201,256 125,624 125,624 206,469 288,131 3,099,636 1,898,582	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77% 45.15% -24.86% -24.86% -15.19% -36.27% -7.00% -6.13% -8.11% -13.43%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072 198,840 262,165 3,262,376 2,092,105	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75% -3.69% -9.01% 5.25% 10.19%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 127,611 \$ 207,561 \$ 3,285,871 \$ 3,285,871 \$ 2,048,271	% Gain/Loss         -8           4         -5           100         -5           -5         -6           -6         -7           -7	% \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - - - - - - - - - - - - -	% Gain/Loss 26' -8' -10' -100'
Month         July         August         September         October         November         December         January         February         March         April         May         June	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,691 491,292 357,996 273,456 280,614 138,653 167,182 176,874 168,469 222,016 306,944 3,373,170 2,193,032	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42% -10.69% -11.17% -41.67% -14.32% -9.44% -10.53%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 125,624 150,008 229,566 206,469 288,131 3,099,636 1,898,582	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77% 45.15% -24.86% -24.86% -15.19% -36.27% -7.00% -6.13% -8.11% -13.43%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072 198,840 262,165 3,262,376 2,092,105	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75% -3.69% -9.01% 5.25% 10.19%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 127,561 \$ 197,961 \$ 361,350 \$ 3,285,871 \$ 2,048,271 2 2,048,271	% Gain/Loss         -8           4         -5           100         -5           -5         -6           -6         -7           -7	% \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - - - - - - - - - - - - -	% Gain/Loss 26 -8 -8 -1 1 1 1 1 1 7 -100 -100 -100 -100 -100
Month         July         August         September         October         November         December         January         February         March         April         May         June	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,681 491,292 273,456 280,614 138,653 167,182 176,874 168,469 222,016 306,944 3,373,170 2,193,032 2,193,032	2.49% 3.03% 34.15% -34.34% 67.69% -53.42% -10.69% 11.17% -41.67% -14.32% -9.44% -10.53%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 125,624 150,008 229,566 206,469 288,131 3,099,636 1,898,582	-22.46% -12.07% -7.71% -11.83% 9.80% -38.77% 45.15% -24.86% -24.86% -15.19% -36.27% -7.00% -6.13% -8.11% -13.43%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072 198,840 262,165 3,262,376 2,092,105	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75% -3.69% -9.01% 5.25% 10.19%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 138,186 \$ 207,561 \$ 197,961 \$ 361,350 \$ 3,285,871 \$ 2,048,271 <b>22</b> <b>5 7,047,964</b>	% Gain/Loss         -8           4         -5           -10         -5           -2         -6           -10         -5           -2         -6           -38         -2           -2         -2           -2         -10	% \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$ % \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - - - - - - - - - - - - -	% Gain/Loss 26' -8' -10' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100'
Month         July         August         September         October         November         December         January         February         March         April         May         June         Fiscal YearTotals         Cumulative Months         July - DecemberTotals         Part Year Comparison         Primed Telli #2+35 Flocal Year Totals	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,681 491,292 273,456 280,614 138,653 167,182 167,182 167,182 167,182 168,469 222,016 306,944 3,373,170 2,193,032 2,193,032	2.49% 3.03% 34.15% -34.34% -30.31% 67.69% -53.42% -10.69% -11.17% -41.67% -14.32% -9.44% -10.53%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 201,256 201,256 201,256 201,256 205,624 150,008 229,566 206,469 288,131 3,099,636 1,898,582	-22.46% -12.07% -7.71% 9.80% -38.77% 45.15% -24.86% -15.19% 36.27% -7.00% -6.13% -7.00% -6.13% -13.43%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072 198,840 262,165 3,262,376 2,092,105 7,912,305	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75% -3.69% -9.01% 5.25% 10.19% 5.25%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 138,186 \$ 207,561 \$ 197,961 \$ 361,350 \$ 3,285,871 \$ 2,048,271 <b>\$ 2,048,271</b>	% Gain/Loss         -8         4         -5         0         -5         0         -5         0         -5         0         -2         -2.10         -2.10         -2.10         -2.10         -2.11         -2.11	%     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - - - - - - - - - - - - -	% Gain/Loss 26' -8' -10' -10' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100' -100'
Month         July         August         September         October         November         December         January         February         March         April         May         June         Fiscal YearTotals         Cumulative Months         July - DecemberTotals         Part Year Comparison         Primed Telli #2+35 Flocal Year Totals	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	008-2009 355,983 433,681 491,292 273,456 280,614 138,653 167,182 176,874 168,469 222,016 306,944 3,373,170 2,193,032 2,193,032	2.49% 3.03% 34.15% -34.34% 67.69% -53.42% -10.69% 11.17% -41.67% -14.32% -9.44% -10.53%	200 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	09-2010 276,043 381,360 453,435 315,651 300,267 171,826 201,256 201,256 201,256 201,256 201,256 205,624 150,008 229,566 206,469 288,131 3,099,636 1,898,582	-22.46% -12.07% -7.71% 9.80% -38.77% 45.15% -24.86% -15.19% 36.27% -7.00% -6.13% -7.00% -6.13% -13.43%	2 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	010-2011 349,762 419,908 466,364 312,948 366,982 176,141 195,500 150,965 148,729 214,072 198,840 262,165 3,262,376 2,092,105	27% 10.11% 2.85% -0.86% 22.22% 2.51% -2.86% 20.17% -0.85% -6.75% -3.69% -9.01% 5.25% 10.19% 5.25%	2011-2012 \$ 322,245 \$ 438,373 \$ 440,925 \$ 343,310 \$ 335,750 \$ 167,668 \$ 206,931 \$ 138,186 \$ 125,611 \$ 138,186 \$ 125,611 \$ 138,186 \$ 3,61,350 \$ 3,61,350 \$ 3,285,871 \$ 2,048,271 <b>20</b> <b>5</b> <b>7,047,964</b>	% Gain/Loss         -8           4         -5           -10         -5           -2         -6           -10         -5           -2         -6           -38         -2           -2         -2           -2         -10	%     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$       %     \$	2012-2013 406,301 402,077 456,646 345,863 337,769 196,350 - - - - - 2,145,007 2,145,007 2,145,007	% Gain/Loss 269 -89 49 19 179 -1009 -1009 -1009 -1009 -1009 -1009 -1009 -2009 -

# Parallel Studios CURRENTS: The Santa Fe International New Me



Young tourists who visit Santa Fe for its outdoor experiences are technology savvy and are drawn to New Media Arts. They are excited by the prospect of combining these two experiences. This demographic will certainly become more and more important to our tourism industry. Because of this we see the Currents Festival as an vital component of Santa Fe's future.

Thanks to our 2013 NM Tourism matching grant of \$11,000 we will continue to advertise outside of New Mexico, placing multiple full page ads in Art and Culture (Dallas/Fort Worth, Houston – April/May/June), Origin Magazine (available in 96% of Whole Foods Markets around the country – June), Westward (Denver – 5 week package, print, online and social media), and Art Ltd. (Art Ltd, published in Los Angeles, covers artists and art events from Chicago to the Pacific Coast, and serves the art reader and collector nationally both in print and online – March/April and May/June - as well as 8 weekly email blasts to 26,000 subscribers). OTAB support would help us expand our national advertising and regional promotions.

Our international call for entries and Festival announcements are posted on over 30 art sites and blogs and are viewable on over 100 sites, once they've gone viral. Our mailing list reaches artists, educators, developers and programmers and New Media Art enthusiasts on every continent.

We are asking O.T.A.B. to assist us in the development of this important component of Santa \* Fe's cultural and tourism industries. In it's fourth year, the Festival has a strong track record of expansion and growth and with your help we can realize our vision of a truly international destination event.

# Parallel Studios CURRENTS: The Santa Fe International New Media Festival

**Parallel Studios** produces the citywide event **CURRENTS: The Santa Fe International New Media Festival.** Currents 2013 (June 14-30, 2013), www.currentsnewmedia.org, will be the fourth annual Festival. As an international event, this year spanning 17 days and three weekends, we exhibit over 100 local, regional and international artists, programers and multimedia performers. Exhibitions and events are Free to the public. Our partners next June include the Center for Contemporary Art, the Institute of American Indian Art, El Museo Cultural, the Santa Fe University of Art and Design, the Santa Fe Art Institute, the Railyard Art Committee of the Railyard Stewards, Zane Bennett Contemporary Art, Warehouse 21 and Axle Contemporary.

> You can find video documentation of the Currents 2012 main exhibition here http://www.currentsnewmedia.org/currents2012.html

> > and view a full preview of the Currents 2012 Catalog here http://www.blurb.com/books/3279400

Our goal is to create an international destination event that contributes to the strength and vitality of Santa Fe's and New Mexico's Art and Culture Tourism Sector. We have seen funding, advertising, attendance and editorial recognition grow each year of the Festival. In 2012, the Festival's third annual event, we had 4500 visitors at 17 days of events. Our guest book listed attendees from Albuquerque, Santa Fe, Española, Truchas, Los Alamos, Antony, Taos, Las Cruces and states such as Colorado, California, Texas, Kansas, New York, Arizona, Florida, Ohio, Illinois, Oklahoma, Maine, and Massachusetts (to name a few), and countries as far aways as Australia, Canada and Italy.

New Mexico artists have always served as the core of the **CURRENTS** exhibitions. In addition, however, Parallel Studios is committed to bringing participating New Media installation artists to Santa Fe to install their work. In 2012 Parallel Studios covered the cost of travel, shipping and lodging for 26 visiting artists, some of whom staid in the city for as long as four weeks. Their attendance creates a vibrant Festival community that fosters the exchange of ideas and lasting professional and personal relationships, as well as an appreciation of our remarkable, small, energetic and artistically vigorous city.

It is difficult to say how many of our visitors came to Santa Fe solely for the Festival. It is clear that our visibility is growing. The Festival had editorial coverage in *Art* + *Culture* (Dallas/Fort Worth and Houston), *Art LTD* (circulation from Los Angeles to Chicago), and our own *THE Magazine* and *Pasatiempo*. We were also covered by online blogs including *Hyperallergic*, *Adobe Airstream* and *Santa Fizz*.

You can view the Currents 2012 editorial coverage here http://www.currentsnewmedia.org/2012press.html

This will be the fourth year that the Festival is an annual citywide event. Due to Santa Fe's central national location and limited population base, we may never reach the attendance levels of the similar Zero 1 Festival in San Jose, CA (47,000 in 2010). However, there is a growing audience for New Media content and few venues in the United States that offer the Art/Science/Technology mix that is the foundation of the **CURRENTS** Festival's exhibitions and events.

This art form has a diverse audience. Each year the visitors to the Festival represent an increasingly broad demographic: from children spinning through the galleries reveling in interactive New Media, to seniors contemplating image and meaning; from working class families, for whom New Media Arts are a new experience, to savvy collectors.

Hall page ad ¢ banner

# CURRENTS

Santa Fe International New Media Festival

# JUNE 22 - JULY 8

Video, Interactive Installations, Animation, Web, Art/Art Gaming, Digital Dome Screenings, Experimental Documentaries, Multimedia Performances, Panels & Workshops

# **OPENING NIGHT EVENTS**

Friday June 22 at Santa Fe Railyard District

MAIN EXHIBITION OPENING from 6pm to Midnight El Museo Cultural de Santa Fe

OUTDOOR PROJECTIONS Sunset till Midnight Students and Faculty Santa Fe University of Art and Design

Deborah Fort, Axle Contemporary, Meow Wolf

Presented by Parallel Studios, El Museo Cultural de Santa Fe, Center for Contemporary Arts, Institute of American Indian Art, Santa Fe University of Art and Design, Zane Bennett Contemporary Art

This project is made possible in part by the National Endowment for the Arts, New Mexico Arts, A Division of the Department of Cultural Affairs, The Santa Fe Arts Commission, The New Mexico Tourism Department, and many generous foundations and individual donors.

www.currentsnewmedia.org | parallel-contact@earthlink.net



EN HEXCO TAL



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currents 2012

# june 22-july 8 santa fe - new mexico

VIDEO - INTERACTIVE INSTALLATIONS - ANIMATION - WEB - ART/ ART GAMING DIGITAL DOME SCREENINGS - EXPERIMENTAL DOCUMENTARIES MULTIMEDIA PERFORMANCES - PANELS & WORKSHOPS

FREE ADMISSION

page ad



This project is made possible in part by the National Endowment for the Arts, New Mexico Arts a division of the Department of Cultural Affairs, the Santa Fe Arts Commission, the New Mexico Tourism Department, McCune Charitable Foundation, mediaThe foundation and many generous individual donors.

www.currentenewmedtenorg | pricilietagenwenemerner

# Parallel Studios CURRENTS: The Santa Fe International New Media Festival

#### Paid Staff

Year Round

Frank Ragano / Co-Executive Director - Projected 2013 Salary\$17,700Mariannah Amster / Co-Executive Director - Projected 2013 Salary\$16,700Part Time Administrative Assistant / we hope to add in 2013\$4,500

Contracted/Paid Installation Festival Staff

Tim Jag / Lead Preparator	\$2,000
Equipment Manager / yet to be selected	\$1,000
Construction Supervisor / yet to be selected	\$1,000
Labor Assistants / yet to be selected	\$2,000

#### Volunteer Staff

Volunteer Coordinator / yet to be selected Board Members Many volunteers from the community to assist with managing the run of the Festival 1:23 PM

#### 10/09/12 Accrual Basis

# Parallel Studios Inc. Profit & Loss January through December 2011

	Jan - Dec 11
Ordinary Income/Expense Income	
Catalog Purchase	161.00
Donation/Foudation	32,550.00
Donation/Individuals	16,645.00
Donations/Business	2,350.00
Professional Services	170.00
Submission Application Fees	2,706.00
Total Income	54,582.00
Gross Profit	54,582.00
Expense	
Advertising and Promotion	3,233.45
AV Equipment Purchase	3,234.62
AV Equipment Rental	2,780.09
Bank Service Charges	13.45
Business Licenses and Permits	180.00
City Parking	91.00
Computer and Internet Expenses	460.39
Craft Services	83.54
Equipment Rental	1,912.83
Insurance Expense Board Insurance	574.00
Total Insurance Expense	574.00
Janitoriał Expense	605.84
Meals and Entertainment	1,704.04
Miscellaneous Expense	0.00
Office Supplies	580.78
Postage and Delivery	322.18
Printing and Reproduction	2,037.64
Production and Supplies Costs	4,695.38
Professional Fees	430.23
Rent Expense	
Storage Rental	50.00
Rent Expense - Other	8,050.00
Total Rent Expense	8,100.00
Schools Program	
meals	74.02
travel	277.63
Total Schools Program	351.65
Signage	28.56
Studio and Location Costs	675.00
Subcontracted Services Taxes	3,825.9 <b>4</b>
State	10.00
Total Taxes	10.00
Travel Expense	5,830.16
Total Expense	41,760.77
Net Ordinary Income	12,821.23
Net Income	12,821.23

Parallel Studios / Curren	COMMITTED	PENDING	TOTAL	2012 Actuals 12/1/11- 11/30/12
Foundations	44,000		44,000	44,000
NM State: NM Arts/SF Arts				
Commission/NM Tourism	18,896		18,896	18,896
Federal: NEA	15,000		15,000	15,000
Corporate	700			700
Partner Contribution	750		750	750
Individuals	15,034		15,034	15,034
Catalog Purchase	649		649	649
Submission Fees	3,836		3,836	3,836
Donations/Door	1,346		1,346	1,346
Workshop Fee	500		500	500
12/1/2011 Bank Balance	9,144		9,144	9,144
TOTAL INCOME	109,155	0	109,155	109,155
Parallel Studios/2012	Operational	Budget		
EXPENSES				
Expense Category	PLANNED EXP	IN-KIND	CASH	2012 Actuals 12/1/11- 11/30/12
Marketing Expenses				
Graphic/Web Design	5,000	3,000	2,000	2,250
Web Hosting	250	0	250	250
Administrative Expenses				
Office Supplies	1,000	0	1,000	1,837
Operating Expenses				
Office Rental	4,000	0	4,000	3,000
Board Insurance	600	0	600	483
Storage Unit	1,000	0	1,000	780
PO Box	50	0	50	
Accountant	500	0	500	179
Personnel				
Executive/Artistic Director/FR	35,000	28,500	6,500	10,744
Executive/Artistic Director/MA	35,000	28,500	6,500	
Schools Program/Director/FR	4,000	2,000	2,000	
Schools Program/Director/MA	2,000	1,000	1,000	
Employment Taxes/11.65%	8,854	6,990	1,864	
Administrative Assistance	0,001	-,	.,	250
Schools Travel/Meals			. <u> </u>	436
Total Operational Expenses	97,254	69,990	27,264	
Total Project Expenses	102,236	20,500	81,736	
Total 2012 Expenses	199,490	90,490	109,000	

EXPENSES Expense Category	PLANNED EXP	IN-KIND	CASH	2012 Actuals 12/1/11- 11/30/12
Venue Rental	11,600	0	11,600	10,996
Audio/Video Rentals	11,000	4,000	7,000	5,556
Audio/Video Purchases	3,000	0	3,000	3,665
Production Supplies	6,000	0	6,000	3,631
Construction Rentals	2,500	0	2,500	2,225
Technical Outsource	800	0	800	541
Marketing Expenses				
Printing and Graphics	5,286	2,500	2,786	1,092
Catalog Printing	1,000	0	1,000	1,049
Signage	1,500	0	1,500	1,667
Local Advertising	5,500	0	5,500	
Regional Advertising	15,000	0	15,000	15,000
Opening Reception	1,600	0	1,600	1,032
Administrative Expenses				· · · · · · · · · · · · · · · · · · ·
Shipping	2,500	0	2,500	942
Office Supplies	500	0	500	
Parking	200	0	200	187
Operating Expenses				
Event Insurance	750	0	750	803
Personnel				
Lead Preparator	2,000	0	2,000	1,920
Labor Assistants	11,000	10,000	1,000	1,464
Equipment Manager	1,000	0	1,000	640
Artist Services				
Artists Honorariums	5,000		5,000	500
Artist Workshop Fee				550
Travel Allowances (20)	8,000	0	8,000	7,764
Housing Allowance	5,000	4,000	1,000	1,395
Craft Services	500	0	500	411
Misc. Expenses	1,000	0	1,000	1,315
TOTAL PROJECT EXPENSES	102,236	20,500	81,736	69,465

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COMMITTED	PENDING	TOTAL
5,000	57,500	62,50
23,180		23,18
30,000		30,00
	9,500	9,50
3,000		3,00
500	20,500	21,00
	5,000	5,00
	3,000	3,00
61,680	95,500	157,18
PLANNED EXP	IN-KIND	CASH
2,000	1,000	1,00
250	0	25
1,000		1,00
1,000	0	1,00
4,000	0	4,00
500	0	50
1,080	0	1,08
50	0	5
500	0	50
35,000	19,300	15,70
35,000	19,300	15,70
4,000	2,000	2,00
2,000	1,000	1,00
8,854	4,846	4,00
4,500		4,50
2,500	1,000	1,50
300		30
102,534	48,446	54,08
124,642	21,550	103,09
	5,000 23,180 30,000 3,000 3,000 500 <b>500</b> <b>61,680</b> <b>7</b> <b>7</b> <b>7</b> <b>7</b> <b>7</b> <b>7</b> <b>7</b> <b>7</b>	5,000         57,500           23,180

# Parallel Studios/2013 Operational Budget

EXPENSES			
Expense Category	PLANNED EXP	IN-KIND	CASH
Venue Rental	14,300	1,800	12,500
Audio/Video Rentals	11,500	4,000	7,500
Audio/Video Purchases	3,500	0	3,500
Production Supplies	5,500	0	5,500
Construction Equipment Rental	2,600	0	2,600
Technical Outsource/AV System	750	0	750
Marketing Expenses			
Printing	1,500	0	1,500
Graphic Design	6,000	1,500	4,500
Catalog Printing	1,042	0	1,042
Signage	2,500	0	2,500
Local Advertising	7,500	0	7,500
Regional Advertising	20,000	0	20,000
Opening Reception	3,000	1,000	2,000
Administrative Expenses			
Shipping	3,000	0	3,000
Parking	200	0	200
Operating Expenses			
Event Insurance	1,000	0	1,000
Personnel			
Lead Preparator	2,000	0	2,000
Construction Sucervisor	1,000		1,000
Labor Assistants	12,000	10,000	2,000
Equipment Manager	1,000		1,000
Subcontracted Services	500		500
Artist Services			·····
Artists Honorariums	5,000		5,000
SFAI Residency	2,000		2,000
Travel Allowances	10,000	0	10,000
Housing Allowance	4,500	3,000	1,500
Craft Services	750	250	500
Misc. Expenses	2,000	0	2,000
Total Project Expenses	124,642	21,550	103,092

# Parallel Studios/Currents 2013 Project Budget

# Parallel Studios CURRENTS: The Santa Fe International New Media Festival

Parallel Studios carries yearly Board Insurance and obtains Event Insurance for the duration of the the Festival in June. Attached you will find a copy of the Declarations page of our Board Insurance and the Currents 2012 Declarations page of our Event Insurance which we will again purchase for Currents 2013.



ExecPro ***
DECLARATIONS
for

Nonprofit Solutions Insurance Policy

301 E. Fourth Street, Cincinnati, OH 45202

Insurance is afforded by the company indicated below: (Each a capital stock corporation)

🗵 Great American Insurance Company

	Policy Number: EPP11	16986		Policy Form Number:	D16100	
Item I.	Name of <b>Organization</b> : Mailing Address: City, State, Zip Code:	PO BOX 31674 SANTA FE, NN	A 87594			
Item 2.	Attr: Policy Period: From (Both dates a	(Month, Day, Year)	To	03/31/2013 (Month, Day, Year) of the <b>Organization</b> as stated	- d in Item 1)	
Item 3.	Aggregate Limit(s) of Li	ability for each <b>Policy</b>	Year:			
	<ul> <li>(a) \$ 1,000,000</li> <li>(b) \$ 10,000</li> <li>for all Claims other than Claims for Employment Practices Wrongful Acts. Donor Data Loss Crisis Fund Sublimit of Liability. This limit is part of and not in addition to the Limit of Liability provided for in 3(a).</li> </ul>					
	<ul><li>(c) \$ 1,000,000</li><li>(d) \$ 150,000</li></ul>	for all <b>Claims</b> for <b>En</b> i part of and not in c separate from and FLSA Defense Subli- the Limit of Liability	n 3(a). r in 3(a).			
Item 4.	Retentions: Insuring Agreement A: Insuring Agreements B			ch Claim ch Claim	•	
Item 5.	Premium: \$ 555					
Item 6.	Endorsements Attached: D16057 D1	6353 DTCV	/_09P DTE	P_09P		
Item 7.	Gre Exe P.C	ired to be given to the eat American Insurance ecutive Liability Divisio D. Box 66943 icago, Illinois 60666	e Companies	Policy shall be addressed to:		

Item 8. Prior & Pending Litigation Date: 03/31/2011

These Declarations along with the completed and signed Proposal Form and Nonprofit Solutions Insurance Policy, shall constitute the contract between the **Insureds** and the **Insurer**.

#### THIS IS A CLAIMS MADE POLICY. READ IT CAREFULLY.

COMMERCIAL GENERAL LIABILITY COVERAGE PART DECLARATIONS

> COVERAGE IS PROVIDED IN THE COMPANY DESIGNATED BY NUMBER. A STOCK INSURANCE COMPANY

(HEREIN CALLED THE COMPANY)

1 NEW HAMPSHIRE INSURANCE COMPANY 2GRANITE STATE INSURANCE COMPANY 3ILLINOIS NATIONAL INSURANCE COMPANY

Renewal of Number\*

**Parallel Studios** 

.

Policy No. 12252291

1

Jul 13, 2012

to

Named Insured and Mailing Address (No., Street, Town or City, County, State, Zip Code) +

•

167 Soaring Hawk Tr., Santa Fe, NM 87508

Policy Period \*: From May 30, 2012

EXECUTIVE OFFICES 175 WATER STREET, 18<sup>TH</sup> FL.+ NEW YORK, N.Y. 10038

Producer: HCC Specialty Underwriters 84213

at 12:01 A.M. Standard Time at your mailing address shown above.

IN RETURN FOR THE PAYMENT OF THE PREMIUM, AND SUBJECT TO ALL THE TERMS OF THIS POLICY, WE					
AGREE WITH YOU TO PROVIDE THE INSURANCE AS STATED	N THIS POLICY.				
	<u> </u>				
General Aggregate Limit (Other Than Products-Completed Operations)	\$2,000,000.00				
Products-Completed Operations Aggregate Limit	\$1,000,000.00				
Personal and Advertising Injury Limit Each Occurrence Limit	\$1,000,000.00				
Damage To Premises Rented to You Limit	\$1,000,000.00	)			
Medical Expense Limit	\$300,000.00				
	\$Not Covered	Any One Person			
DESCRIPTION OF BUSINESS AND LOCATION OF PREMISES					
	ability Company				
Organization (Other than one indicated above)	No at Dail Vard District / El Musas C	ultural de Conte			
Business Description*: Currents 2012 to be held 06/22/2012 - 07/08/2	12 at Hall Yard District / El Museo C	ultural de Santa			
Fe, Santa Fe, NM 87501					
Location of All Premises You Own, Rent or Occupy:					
Rail Yard District / El Museo Cultural de Santa Fe / 555 Camino de	a Familia Santa Fe_NM_87501				
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	· · · · · · · · · · · · · · · · · · ·				
PREMIUM-SUBJECT TO AUDIT**	Rate Advance F	Promium			
Classification Code No. Premium Basi		All Other			
Art Show 2,500.00	\$0.10 N/A \$250.00				
An Ghow 2,000.00	<b>40.10 10 1</b>				
Additional Insured(s)	\$100.00 \$100.00				
TRIA	\$4.00 \$4.00				
	· •				
		i			
Т	ax/Other (if applicable)				
Т	otal Advance Premium \$354.00				
**Audit Period (if applicable): ( ) Annually ( ) Semi-Annually	() Quarterly () Monthly				
Premium shown is payable*: \$354.00 at inception; \$ 1st Ann	versary; \$ 2nd Anniversary				
FORMS AND ENDORSEMENTS					
Forms and Endorsements applying to this Coverage Part and made part of this policy at time of issuet:					
See attached Forms and Endorsements Schedule					
	8				
Countersigned:*					
* Entry optional if shown in Common Policy Declarations.		p			
+ Forms and Endorsements applicable to this Coverage Part omitted if shown elsewhere in the policy. Authorized Representative					
THESE DECLARATIONS AND THE COMMON POLICY DECLARATIONS, IF APPL ERAGE FORM(S) AND FORMS AND ENDORSEMENTS, IF ANY, ISSUED TO FOR	CABLE, TOGETHER WITH THE COMMON POLICY A PART THEREOF. COMPLETE THE ABOVE NU	CONDITIONS, COV-			

JDL 190 (2)-X-A (1-95)

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City Of Santa Fe PO BOX 909 Santa Fe NM, 87504

# City of Santa Fe, New Mexico BUSINESS LICENSE

Official Document Please Post

# Business Name: PARALLEL STUDIOS INC

### Location: SF COUNTY

# Class: BUSINESS LOCATED OUT OF CITY LIMITS

Comment:

Control Number: 0057087

License Number: 12-00112085

Issue Date March 05, 2012

Expiration Date December 31, 2012

PARALLEL STUDIOS INC PO BOX 31674

**SANTA FE NM 87594**
Susana Martinez

Governor

### STATE OF NEW MEXICO Taxation and Revenue Department



Demesia Padilla, CPA Secretary Designate

PARALLEL STUDIOS INC 167 SOARING HAWK TRL SANTA FE, NM 87508-1414 February 24, 2011 CRS: 03-166217-00-0 Letter ID: L0938690112

### STATE OF NEW MEXICO TAXATION AND REVENUE DEPARTMENT REGISTRATION CERTIFICATE

Date ID Issued	IDENTIFICATION NUMBER	Business Start Date
07-Dec-2009	03-166217-00-0	04-Dec-2009
Business Location		Business End Date
167 SOARING H	AWK TRL	· ]\
City and State	MAR AND A C FRANK	Zip Code
SANTA FE, NM		87508-1414
Taxpayer Name	A CONTRACTOR OF THE OWNER	Taxpayer Type
PARALLEL STUD	DIOS INC	CORPORATION
		CORFORATION
Firm Name		Filing Frequency
PARALLEL STUD	DIOS INC	Max of
Mailing Address		site of
167 SOARING H	IAWK TRL	. And the second second
City and State		Zip Code
SANTA FE, NM	and the second	87508-1414
orm Revised 02/2003		- Anna

This Registration Certificate is issued pursuant to Section 7-1-12 NMSA 1978 for Gross Receipts, County Gross Receipts, Municipal Gross Receipts, Compensating and Withholding Taxes. This copy must be displayed conspicuously in the place of business. Any purchaser of the registrant's business is subject to certain requirements under Section 7-1-61 NMSA 1978.

Audit and Compliance Deputy Division Director

By

Any inquiries concerning your Idenfication Number should be addressed to the Audit & Compliance Division, P.O. Box 630, Santa Fe, New Mexico 87504-0630

THIS CERTIFICATE IS NOT TRANSFERABLE

STATE OF NEW MEXICO TAXATION AND REVENUE DEPARTMENT REGISTRATION CERTIFICATE



INTERNAL REVENUE SERVICE P. O. BOX 2508 CINCINNATI, OH 45201

Date: FER 0 2 2011

PARALLEL STUDIOS INC 167 SOARING HAWK TRL SANTA FE, NM 87508-1414

Employer Identification Number: 36-4663305 DLN: 17053287323020 Contact Person: RONALD D BELL ID# 31185 Contact Telephone Number: (877) 829-5500 Accounting Period Ending: December 31 Public Charity Status: 170(b)(1)(A)(vi) Form 990 Required: Yes Effective Date of Exemption: October 7, 2010 Contribution Deductibility: Yes Addendum Applies: No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Sincerelv to J. Oterne

Lois G. Lerner Director, Exempt Organizations

Enclosure: Publication 4221-PC

Letter 947 (DO/CG)

### Lodgers Tax Funding Assistance for Special Events - FY 12 Final Report

Organization: Santa Fe Chamber Music Festival City of Santa Fe Professional Services Agreement Number: **11-1053** 

**Event Summary - The Festival** 

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BL BY C

Out-of-region Festival attendees (including foreign and NM outside commuter range): 1,523 Average number of Festival tickets purchased per out-of-region attendee: 4.45 (suggests 4-night minimum stay on average)

Out-of-region Festival musicians plus family members: 250 (average minimum stay of 6 nights) Out-of-region Symposium attendees: 120 (3-night minimum stay)

The Santa Fe Chamber Music Festival's very successful **40th Anniversary Season ran from July 15 through August 20, 2012 and featured 45 concerts of chamber music** from all stylistic periods performed by some of the world's most renowned artists. This season's programming explored the breadth and depth of chamber music by presenting not only chamber music repertoire of the classical and romantic eras, but also baroque, world music, and contemporary music, including three world premieres and the New Mexico premieres of two other newly co-commissioned works. The Festival welcomed renowned New York Philharmonic Music Director Alan Gilbert as its 2012 Artist-in-Residence.

Over the course of the 2012 season, more than 100 internationally acclaimed instrumentalists, singers, and ensembles interpreted more than 100 compositions, of which some 50 had never before been performed at the Festival. Community members and visitors to Santa Fe also enjoyed access to daily, free open rehearsals and free pre-concert conversations with composers whose works were being premiered at the Festival. For attendees of Santa Fe's popular Indian Market, the Festival once again presented its annual free evening concert of music chosen expressly for that audience.

The 2012 Season also saw the Festival co-hosting **its first-ever scientific symposium on music, the brain and healing**, in partnership with the University of New Mexico Cancer Center and Continuing Medical Education Program. Held at Santa Fe's Eldorado Hotel, the symposium drew an impressive roster of scientific leaders and others from around the world who attended as both presenters and participants— all of whom enjoyed the hospitality of Santa Fe's hotels, restaurants, retail establishments and museums as well as attending several Festival performances before, during and after this four-day event. Out of 160 Symposium attendees, 120 were from outside the region.

A significant percentage of Festival ticket buyers were from out of state, and from areas of New Mexico outside immediate driving distance—a majority of whom stayed multiple nights to take in several Festival performances. Additionally, the Festival's visiting musicians and their families each typically stayed in Santa Fe for a week or more. Presenters and participants at the Festival's scientific symposium stayed in Santa Fe hotels a minimum of three nights each; most extended their stays on one or both sides of the conference.

The Festival enjoyed positive reviews of its 2012 Season from local and national critics, as well as an overwhelming response from audiences. Despite the continuing economic downturn, ticket sales achieved record levels, and contributed income exceeded budget.

The Festival sold 15,383 tickets (81% of capacity), generating a record \$562,899 in earned income for the  $40^{\text{th}}$  Anniversary Season.

#### Lodgers Tax Funding Assistance for Special Events - FY 12 Final Report

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Marketing and publicity for the Festival's 2012 Season included the Festival's own 13-week syndicated radio broadcasts, airing on 315 stations nationally; print advertisements in festival and performing arts programs nationally; three national direct-mail marketing campaigns; radio spots (Santa Fe, Albuquerque and translators throughout NM) airing March-August; year-round e-marketing, through regular e-newsletters and periodic e-blasts; our own web page, and more than 200 links on other music-related sites; cross-promotional partnerships with other New Mexico performing arts groups; rack cards at tourism information kiosks and hotel concierge desks statewide; newspaper and magazine advertising throughout New Mexico; taxi toppers and sandwich boards in Santa Fe; and our first-ever billboard (I-25 northbound at Algodones).

To promote its scientific symposium on music, the brain and healing, the Festival also opted to purchase underwriting spots which aired on either side of its national radio series in the strategic markets of Albuquerque, Las Cruces, Phoenix, Tucson, Colorado Springs, El Paso, Austin, Dallas and Houston (all markets within a days' drive of Santa Fe). Analysis of symposium registrations corroborates the effectiveness of this strategy.

For the Festival's 2013 Season, no symposium is planned but other programming and marketing strategies will remain much the same.

#### **Event Summary – The National Radio Broadcasts**

Number of Programs: 13 Length of each program: 1 hour Number of Stations currently carrying program nationally: 315 (up from 239) Number of Top-Ten markets: 5 (up from 4) Arbitron Audience: 2,666.300 (up from 1,853,097)

Produced and distributed by the WFMT Radio Network since 2005 in **a 13-week, hour-long radio series**, the Santa Fe Chamber Music Festival's nationally syndicated, weekly radio broadcasts present performances from recent seasons recorded by Grammy-winning engineer, Matthew Snyder. The programs feature some of the greatest chamber musicians of our time performing the Festival's wide range of musical programming. WFMT's Kerry Frumkin hosts the series with commentary from Festival artistic director Marc Neikrug and remarks from many of the featured musicians. Louise Frank is the series producer.

In addition to the high-caliber music, the programs feature artist interviews recorded specifically for this project, with atmospheric comments about Santa Fe, the Festival and the music being performed. In 2012, even more short features about Santa Fe's rich culture and natural beauty were incorporated. These are included to form cohesive programs satisfying to radio listeners.

WFMT Producer Louise Frank has created a series website where listeners and web visitors can enjoy additional artists' comments, videos, photographs and other interesting and related web extras. Links to these special features are available at <u>http://www.wfmt.com/santafe</u>.

The series is distributed by the WFMT Radio Network at no charge to radio stations nationally and abroad as well as to carriers offering on-line streaming audio, and has had a consistent carriage list of at least 150 stations each year. These syndicated broadcasts have had a major impact on out-of-state ticket sales for the Festival over the years, and serve as a magnet for not just the Festival but for the City of Santa Fe—and because of their effectiveness in attracting tourists to Santa Fe, the Festival chose to utilize the additional funding received via Santa Fe Lodgers Tax funding in this particular area of its marketing efforts.

### Lodgers Tax Funding Assistance for Special Events - FY 12 Final Report

For its 2012 Series, the Festival partnered with WFMT's new Director of Network Marketing and Syndication, Tony Macaluso, with the express goal of increased market penetration nationally. The series was actively marketed with industry ads, station mailings, phone calls, e-blasts and industry conference displays. This year, we focused more on packaging our 13-week product with other comparable radio series to provide 52 weeks of classical programming for stations desiring a year-round product in a particular time slot, and found this approach to be highly successful. We are pleased to report that our combined efforts secured a carriage list of 315 stations across the U.S. and in the Philippines (up from 239 stations the year prior). We plan to continue these successful strategies in marketing future radio series.

The Festival's 2012 National Radio Series had an Arbitron audience of 2,666,300. The Festival also added Dallas/Fort Worth and Houston to its list of top-ten U.S. broadcast markets for 2012, which already included Chicago, San Francisco and Philadelphia.

The entirety of the City of Santa Fe's Lodgers Tax Funding Assistance for Special Events award to the Santa Fe Chamber Music Festival, in the amount of \$5,000, was applied toward the costs of marketing and distributing the Festival's National Radio Broadcasts, and as such, greatly assisted in increasing both audience and market share for the series' consistent and powerful portrayal of Santa Fe as a prime destination for the affluent cultural tourist. Lodgers Tax support was credited in radio broadcast taglines.

Name of Business/Foundation

See detailed lic-Tto

Amount

nt Date Awarded or Anticipated Date on or before 8,800 btal Oct. 31. 2012

Specify other revenue sources contacted:

NOTE: All expensed items must be directly related to promotion, advertising and marketing.

Namative

	Projected	Actual
Categories Description	Expenses - Revenue	Expenses - Revenue
Newspaper NM/Abg/Sauth Fe	\$ 26,00 D-	\$30,496
Magazine NM/AP2 SantaFe	\$ 7,700-	\$ 9,926
Poster incl. printing & design	\$1,100-	\$
Brochure National Distribution	\$ 7,900-	\$17,024-
Radio Regional + Nat'l Broadc.	\$43,800-	\$45,168-
TV	\$	\$
Creative (Day +addesign	\$ 9,800-	<u>\$9,800 -</u>
Printing ind. brochure design	\$8,700-	\$8,400.
Postage - for machine marlings	\$5,500-	\$5,556.
Direct Mail (see mochure)	<u>s</u>	\$
Production Regional Not'l Brander,	\$44,000-	\$ 45, 295 -
Web site & e-marketing	\$10'000-	\$ 10,331.
Other (specify) Taxi Toppers	15,000 @ 3,50 D	\$25,745 @ 7,729 \$22151 @4159
TOTALS: OPSillboard	\$194,700	\$ 218,526
Total Hotel/Motel Rooms Filled:	840	950
Total Revenue generated from room sa	les: <u>\$ 436,800</u>	\$ 526,415
Total number of Attendees - (tickets sold, registered guests, public	) 414,500 tidets	<ul> <li>15,383tickets</li> </ul>
Total number of Participants - (out-of-town vendors/volunteers work	ing event) 🗱 187	<b>*</b> 185

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. Please note your ticket sales, number of tourists attending your event and how your event compared both to your application estimates and to the number of people attending and revenue generated at your event. Please summarize the marketing and publicity strategies used to promote your event and the City of Santa Fe. Make an honest assessment of what





## Race Report - 2012

The second running of the Santa Fe to Buffalo Thunder Half Marathon advanced Global Running Culture's goals of establishing Santa Fe as a nationally-recognized running destination and implementing our mission to help our next generation through participation in sport.

The Race grew substantially in all aspects, while participant feedback that quality improved and both race and cultural amenities were expanded and enhanced.

	2012	2011	% Increase	
Maniferinana	1,097	711	54%	*
ីរសាសលើលលា <sup>ញ</sup> សាសលើ	623	467	33%	
Six Finishes	204	145	41%	
On or Steve Bairenas	190	81	134%	*
SincestRepresented	30	17	76%	
Winning Three	1:03:32 – M 1:12:54 - W	1:04:49 – M 1:15: 55- W	New State records in both events	
Wollinneer Strapper	150	50	300%	

To highlight northern New Mexico's unique culture, Global Running Culture provided the following special race amenities:

Pre-race Dinner for 200 featuring Olympic	12 page official New Mexico Centennial
legend Billy Mills and Alvina Begay	Event race program
Hand-made age group medals by 3 local artists & 1,100 Billy Mills finisher medals	Original Patricia Mills runner petroglyph paintings awarded to race winners
Six local musical groups at start, on the course and at the finish	Performances by 2 award winning native American Hoop Dancers at award ceremony
Participation by 5 Rarámuri (Tarahumara)	Expo featuring artisanal crafts from NM
runners and artisans from Chihuahua, Mex.	Pueblos, Copper Canyon and Africa

The Programs advancing Global Running Culture's non-profit mission continue to expand:

Fitness Food & Fun program with Whole	Free Global Footprint Youth Relay – 88
Foods at Santa Fe Boys & Girls Clubs	participants ages 6-13 ran 148 miles in 1.5 hrs
Half price entries for Pueblo members	Billy Mills talks at Pojoaque Teen Center grand opening & Global Footprint event
3-day indoor soccer clinic at Pojoaque	Kenya trip to deliver donations & lay
Boys & Girls Club (1/13)	groundwork for Keiyo school project (2/13)

The Exposure Global Running Culture has generated in promoting the Race and its Sponsors and media coverage continues to build the foundation for long-term growth and national recognition of our events:

½ page full color ad in June 2012 Runner's World Magazine – 650,000 circulation	Three front page articles in Santa Fe New Mexican & Albuquerque Journal
Two feature articles in New Mexico Sports Magazine – 30,000 circulation	Four billboards on I-25 and Highway 285 featuring the Race and Billy Mills
Emails to over 300 running clubs across the Country	Race Expo attendance at Bolder Boulder, Run for the Zoo & 3 other NM races

**Conclusion** – A world class travel destination, spectacular course, first class event and unexpected and valued participant amenities are keys to establishing a successful destination race. This year's results validate our vision and inspire the ongoing effort to expand our volunteer race organization so that the Race may continue to grow and support our mission to advance children's fitness, nutrition and health through participation in sports.

Global Running Culture thanks our Gold Level sponsors: Nike N7, US Bank, Whole Foods Market and the Buffalo Thunder Resort & Casino our public agency sponsors: the City of Santa Fe and the Pueblo of Pojoaque and all off our other sponsors and supporters. We look forward to an even bigger and better race in 2013!

Global Running Culture, Inc. a 501 (c)(3) non-profit organization

### www.santafethunder.com

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tabbies <sup>t</sup>	F	
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### OTAB Report on Promotional Activities from the Shoot Santa Fe Initiative

In June of this year the Shoot Santa Fe initiative, a coalition made up of several regional governments and organizations traveled to Los Angeles California to promote Santa Fe and the region to the film industry. See below for summary of approved expenses for which Shoot Santa Fe is seeking reimbursement.

Payee	Summary	Expense
Reed Business	Advertisement in Daily Variety, a trade journal on Shoot Santa Fe	\$3,000.
Information/	initiative and presence at locations trade show.	
Daily Variety		
Association of Film	AFCI Locations Trade Show booth rental for 2012 event in Los	\$5,085.
Commissioners	Angeles, California.	
International		
Total		\$8,085.

Documentation of expenses and payment by RDC (fiscal agent for Shoot Santa Fe Initiative) attached.

### Summary

X

The primary focus of this trip was the annual Association of Film Commissioners Locations Trade Show, the principal showcase event for site selectors in the film industry. Shoot Santa Fe participated at this event by cosponsoring and staffing the State of New Mexico's Film New Mexico booth and by hosting a separate booth showcasing Santa Fe and the surrounding region. Promotional materials were developed and distributed at this event, along with invitations to Shoot Santa Fe sponsored networking events.

Shoot Santa Fe hosted two publicity and networking events. The larger of the two events was an invitation only party near the convention center aimed at film crews and directors. This event drew in more than two hundred people, all of whom shared their contact information and have been contacted for subsequent follow-up. A separate and much smaller exclusive event focused on top level studio executives and A-list directors and producers. 14 high level guests attended this private event.

To promote Santa Fe and the surrounding region to the industry and highlight our presence at the trade show, Shoot Santa Fe also placed an advertisement in the major industry periodical, Daily Variety which appeared on June 15<sup>th</sup> (see attachment). This magazine is read widely by members of the industry and placement in this issue was deemed important to promoting Santa Fe and reminding the industry that New Mexico incentives are still available and attractive.

In addition to creating a visible appearance at the Film Commissioners Locations Trade Show, Shoot Santa Fe teams also arranged for private meetings with several studio executives in the days around the trade show. Two teams including elected officials and industry representatives from the Santa Fe region conducted meetings with high level studio executives in charge of site selection, including Fox and Sony Studios.

The partners of Shoot Santa Fe who provided monetary or material and service support to make this promotional activity possible include the City of Santa Fe, Santa Fe County, Rio Arriba County, Los Alamos County, Taos County, Santa Fe Studios, IATSE Local 480, Los Alamos National Bank, HDNM Entertainment, Garson Studios, Albuquerque Studios, the Regional Development Corporation and several others. Please view the campaign website at <u>www.ShootSantafe.com</u> for more information on all sponsors.



Santale

CONVENTION & VISITORS BUREAU

1/26/13

## **December Sales Activity**

July 1, 2012 - December 31, 2012

A. <u>Sales Reports</u> :		FY'12-'13	<u>FY'11-'12</u>
<ol> <li>Confirmed Bookings</li> <li>Tentative (pending signature)</li> <li>Lost</li> <li>Turn Down</li> </ol>	see attached see attached see attached see attached	22,253 1,231 12,194 2,250	19,395 cannot get history reading 8,936 3,675
	Leads Wor	king: 32,254	cannot get history reading

Per Simpleview, our Lead Conversion Rate is: Booked = 63.12% Lost = 36.99%

#### B. Site Inspections:

Completed Sites from July 1, 2012 until present:

		om July 1, 2012 until p		
<u>Jul</u>	Hogan	SPIR	Oct 2013	180rn-Cfmd
	Barker	Intl. Encaustic	Oct 2013	435rn-Cfmd
	Sollars	Soc.Rsch BioRhythms	May 2014	1325rn
	Wright	Natl Tax Assn.	Nov 2014	388rn**-Cfmd
	Resnick	NLIT	May 2013	1150rn**-Lost
	Williams	Optimus	Sep 2013	290rn-Cfmd
Aug	Fisher	TX Apt. Assn.	Jun 2013	55 rn-Cfmd
	Barker	Intl. Encaustic	Oct 2013	435 rn-Cfmd
	Flinchman	Nat.Gas Partners	Jul 2013	600 rn** may consider CC
	Holland	356 Registry (Porsche)	Sep 2013	1200 rn** Partials Cfmd
	Koonce/Becker	St. Bar of NM	Jun 2013	670 rn**-Cfmd
	Kealy	CAC	Apr 2013	1000 rn**-Partials Cfmd-to-date
<u>Sep</u>	Parker	College Music Soc.	Oct 2016	840 rn
Oct	Miller	ABA	Jun 2013	160 rn
	Achtenhagen	Day Trippers	Oct 2013	105 rn-Cfmd
	Karlyani	Neighbor Works	Jan 2013	65 rn-Cfmd
Nov	Chappel	SRBR	May 2014	1325 rn
<u>Dec</u>	None			

C. <u>Travel/Tradeshow Reports</u>:

Attended

Jul None

Aug None

Sep None

**\*\*CC=Center related booking** 

OctNoneNovNoneDecNone

D. FAM Trips/Blitzes Completed:

Jul	No	ne						
<u>Aug</u>	Miı	nneapolis/St. Paul	with 43 travelled Incentive	Meeting   I with he e, BI Wor , Dochert	ouched territory, Planners. Our Ho r. Potential busing Idwide, American y Incentives & Ma	tel part ess: IN Societ	ner La Posada a G, ACA Internati y of Neuroimagi	ssisted and onal, TriStar
Sep	No	ne						
Oct	Sar	nta Fe FAM	8 Meetii					ancellations due to
							the following bo	okings being worked:
			Soc. For	the Scien	tific Study of Rea	ding	750 rn + CC	Jul 2014
			SDI-Spiri	itual Dire	ctors		850 rn +CC	Apr 2014
			Tomlins	on		RFP in	next two month	S
						+ +	ues to source Sa	
			Media:	San Doul	off – have already	y seen S	F blog on dining	5
Nov	DC	Blitz	accomp	lished me	etings with and d	lrop-bv	's for 29 Meetin	g Planners
		Dirtz	-	Booked:	-		312 rn	Jun 2015
					AAJ		150 rn	May 2013
					N.A. Clean Wate	r		
				Tent:	Agrotechnology		235 rn	Jul 2014
					N.A. Regional Co	uncils	300 rn	Sep 2015
					-		/not rec'd/follow	
Dec	No	ne			•			
E. Ot								
	•	DOS Meeting July 19, 2012 Sales Blitzes are coming up last FAM of this year continuing efforts to have Sin Launched 'On Us' Promotion	-	to 300 fr email bla addition in Octob In Nover schedule large, cit work for email bla Septema Three m are sche The Pror night mi	om 500. TKO and ast to ~8000 Meet al emailing in Oct er: Chicago nber - DC ed for the last weet ywide-size meeti us. There are stil ast to over 7,000 ore mailings for t duled for Octobe notion is targetin nimum stay. We - A - Co - R	I Studic ting Pla ober/N ek of O ngs to p ll major Meetin en rate he Pror r, Nove g group are off A choice omp Ce eimbur gned)	oX are on board inners with the l lovember and D ctober with mar plan (plus Media problems in the g Planners was of 33% tracked. motion (a differe mber and Janua os of 300 rooms ering: e of one of 4 acti sement of site in	ay good names with a representation) e Reports module. accomplished on ent look each time) ary. on peak with a 3 vities bace nspection costs (if
	•	DOS Meeting Sep 21, 2012			l Travel, FAM and on DC and Chica			
	•	Finalize planning for IMBA		IMBA ha unusual	is been a source of components that	of comp t will er	orehensive Press ngage throughou	

Email Blast to acknowledge and include those businesses which display the sign at their business locations. We are booking as far out as 2017 with great success. A listing

• Citywides

We are booking as far out as 2017 with great success. A listing of confirmed and Tentative Citywides is included with this report.

Attachments:

- Detail of FY '12-'13 Sales Productivity
- Travel Outline Calendar 2013

SANTA FE CONVENTION AND VISITORS BUREAU

----- SantaFe.org -----

DECEMBER 2012

Prepared On: 01/15/2013 Prepared By: Christine Madden

### \* Production Summary w/o Rep \*

Status	SUM: Requested Rooms	
Confirmed	22253	
Grand Totals	22253	

Status: Confirmed

Account Name	Lead ID	Lead Name	Request Room Block Begin	Status	Requested Rooms	Repeat Business	Convention Center	Headquarter Hotel
Measured Progress	1491	June 2012 IRC and Bias Review Committee Meetings (Option 1)	06/17/2012	Confirmed	118	No	No	Bishops Lodge Ranch Resort & Spa
Measured Progress	1510	June 2012 IRC and Bias Review Committee Meetings (Option 2)	06/24/2012	Confirmed	110	No	No	Bishops Lodge Ranch Resort & Spa
Integrated Vet Technologies	1669	Integrated Vet Technologies 2012	08/21/2012	Confirmed	210	No	No	Hotel Santa Fe, The Hacienda and Spa
Krell Institute	1977	Board Meeting	09/ <b>19/2</b> 012	Confirmed	26	No	No	Hotel St Francis
Optimus Meetings	20 <b>2</b> 8	2012 NM Youth Alliance October Gathering	10/19/2012	Confirmed	80	No	No	Hyatt Place Santa Fe
Administrative Office of the US Courts	1839	Admin Off of the US Courts - Train the Trainers 2012	10/31/2012	Confirmed	125	No	Νο	Hotel Santa Fe, The Hacienda and Spa
European Alliance for Innovation	1957	COMPLEX	12/04/2012	Confirmed	250	No	Yes	La Posada de Santa Fe Resort & Spa
ING	2099	ING Board Meeting	12/10/2012	Confirmed	16	No	No	La Posada de Santa Fe Resort & Spa

The Princeton Review	2120	Princeton Review Councilor's Trip 2013	01/24/2013	Confirmed	16	No	No	Inn of the Governors
SAE International	1955	SAE A-5 Meeting	01/27/2013	Confirmed	94	Yes	No	Inn and Sp at Loretto
Neighbor Works America - Rocky Mountain District	2040	3rd Annual Rocky Mountain District Homeownership Center Managers Meeting	01/29/2013	Confirmed	60	No	No	Eldorado Hotel & Spa
New Mexico Nurses Association	2050	New Mexico Nurses Association Legistative Conference	02/04/2013	Confirmed	50	No	No	Hotel Sant Fe, The Hacienda a Spa
American Bar Association	1944	Standing Committee on Paralegals - Winter Business Meeting	02/14/2013	Confirmed	25	No	No	La Posada Santa Fe Resort & Sp
Association of College Educators for Deaf and Hard of Hearing	1591	2013 Annual Conference	02/20/2013	Confirmed	270	No	No	Inn and Sp at Loretto
Native Seed Network	1954	2nd National Native Seed Conference	03/17/2013	Confirmed	620	No	No	Eldorado Hotel & Spa
American Bar Association, DC	2030	ABA-Section of Administrative Law and Regulatory Practice	04/11/2013	Confirmed	92	No	No	Inn and Sp at Loretto
National Conference of State Legislatures	2033	ASLCS Spring Business Meeting	04/18/2013	Confirmed	65	No	No	Hotel St Francis
Center for Action and Contemplation	1877	CAC Intimacy: The Divine Ambush	04/22/2013	Confirmed	1000	No	Yes	Hotel St Francis
You Go Girls Travel	1984	The Summit League	04/22/2013	Confirmed	60	No	No	Inn on the Alameda
Purpose Driven Tours	1979	Spring Tour	04/27/2013	Confirmed	20	Yes	No	Sage Inn
Wilderness & Travel Medicine	1498	Wilderness & Travel Medicine	05/27/2013	Confirmed	1250	Yes	Yes	Eldorado Hotel & Sp
Texas Apartment Association	1965	2013 Executive Committee Retreat	06/06/2013	Confirmed	55	No	No	Inn and S at Loretto
Buhr Family Reunion	<b>1</b> 917	2013 Buhr Family Reunion	06/21/2013	Confirmed	120	No	No	DoubleTre by Hilton
Tade Family Reunion	1952	Tade Family Reunion	07/03/2013	Confirmed	54	No	No	Fort Marcy Hotel Suite
The Ultimate Travel Company	2002	Opera Tour	07/08/2013	Confirmed	50	No	No	Hotel San Fe, The Hacienda a Spa

SAE International	2135	SAE International S-18 Aircraft & Systems Development and Safety Assessment Committee	07/13/2013	Confirmed	141	No	No	La Fonda on the Plaza
American Association of Colleges of Nursing	1982	ARC/RRC Meeting	07/17/2013	Confirmed	125	No	No	Inn and Spa at Loretto
Association of Academic Health Centers	1910	AAHC Senior Administrative/Fiscal Officers (SAFO) Meeting	07/24/2013	Confirmed	155	No	No	Eldorado Hotel & Spa
American Institute of Medical Education	948	2013 Creativity and Madness	07/26/2013	Confirmed	1830	Yes	Yes	La Fonda on the Plaza
Association of Clean Water Administrators	868	ACWA Annual Meeting	08/10/2013	Confirmed	185	No	No	The Lodge at Santa Fe
American Society of Plastic Surgeons	1940	2013 Symposium	08/20/2013	Confirmed	775	Yes	Yes	Eldorado Hotel & Spa
American Institute of Architects	2021	AIA CRAN Symposium 2013	09/11/2013	Confirmed	261	No	No	La Fonda on the Plaza
Optimus Meetings	1920	23rd Annual International Conference on Transport Theory	09/15/2013	Confirmed	290	No	No	La Fonda on the Plaza
Hawaii Dental Association	2119	14th District Caucus 2013	09/19/2013	Confirmed	123	No	No	Eldorado Hotel & Spa
DayTripper Tours	2053	DayTripper Tours - 2013 Balloon Fiesta Tour	10/07/2013	Confirmed	105	No	No	La Fonda on the Plaza
Porsche-West Coast Holiday	2031	West Coast Holiday 356 Registry	10/08/2013	Confirmed	1000	No	Yes .	La Fonda on the Plaza
Society for Pediatric Interventional Radiology	1882	2013 SPIR Meeting	10/10/2013	Confirmed	190	No	No	Inn and Spa at Loretto
American Bar Association, DC	1905	GPSLD Council Meeting 2014	10/23/2013	Confirmed	73	No	No	Inn and Spa at Loretto
The International Encaustic Artists Association	1925	2013 EncaustiCon Annual Conference	10/30/2013	Confirmed	245	No	No	Eldorado Hotel & Spa
National Children's Advocacy Center	2123	CAC Workshop	11/04/2013	Confirmed	90	No	No	Hotel Santa Fe, The Hacienda and Spa
Keystone Symposia	1960	2014 - Keystone Q1 & Q2	02/03/2014	Confirmed	2175	Yes	Yes	Eldorado Hotel & Spa
Keystone Symposia	1962	2014 - Keystone V3 & V4	02/17/2014	Confirmed	2050	Yes	Yes	Eldorado Hotel & Spa

IEEE International Power Modulator & High Voltage Conference	1904	IEEE Int'l Power Modulator & High Voltage Conference	05/31/2014	Confirmed	621	No	Yes	La Fonda on the Plaza
Council for Industrial Boiler Owners (CIBO)	1970	2014 Annual Meeting	10/20/2014	Confirmed	210	No	No	Hotel Santa Fe, The Hacienda and Spa
Renal Physicians Association	2042	Renal Physicians 2014 Fall BOD Meeting	10/24/2014	Confirmed	33	No	No	La Fonda on the Plaza
National Tax Association (NTA)	1842	NTA Annual Conference on Taxation 2014	11/11/2014	Confirmed	388	No	Yes	Eldorado Hotel & Spa
Outdoor Power Equipment Institute	2126	OPEI Annual Meeting 2015	06/21/2015	Confirmed	312	No	No	La Posada de Santa Fe Resort & Spa
American Physical Society	1681	Division of Nuclear Physics 2015	10/25/2015	Confirmed	1400	Yes	Yes	Hilton Santa Fe Historic Plaza
American Real Estate Society	1836	ARES Annual Meeting 2016	04/05/2016	Confirmed	750	No	No	Eldorado Hotel & Spa
Rocky Mountain Mineral Law Foundation	225	RMML 2017	07/17/2017	Confirmed	3890	Yes	Yes	Eldorado Hotel & Spa

Grand Total: SUM: Requested Rooms = 22253

SANTA FE CONVENTION AND VISITORS BUREAU

----- SantaFe.org -----

Prepared On: 01/15/2013 Prepared By: Christine Madden

### \* Production Summary w/o Rep \*

Status	SUM: Re	equested Rooms	
Tentative	1231		
Grand Totals	· · · · · · · · · · · · · · · · · · ·		

Status: Tentative

Account Name	Lead ID	Lead Name	Request Room Block Begin	Status	Requested Rooms	Repeat Business	Convention Headquarter Center Hotel
NACAC-N.A. for College Admission Counceling	2136	NACAC Board of Directors Meeting	06/18/2013	Tentative	61	No	No
Milwaukee Symphony Orchestra	2098	Milwaukee Symphony Orchestra Trip	07/21/2013	Tentative	80	No	Νο
Society for the Scientific Study of Reading	1915	SSSR Annual Conference - 1st Hold	07/16/2014	Tentative	750	No	Yes
Rocky Mountain Society of Orthodontists	415	2016 RMSO/SWSO	09/15/2016	Tentative	340	No	Yes

Grand Total: SUM: Requested Rooms = 1231

SANTA FE CONVENTION

Prepared On: 01/15/2013 Prepared By: Christine Madden

## \* Production Summary w/o Rep \*

Status		SUM: Ree	quested Rooms		
Lost	· · · · · · · · · · · · · · · · · · ·	12194			
Grand Totals		12194			

atus: Lost								
Account Name	Lead ID	Lead Name	Request Room Block Begin	Status	Requested Rooms	Repeat Business		leadquarter lotel
System Planning Corporation	1907	DARPA Living Foundries Kick Off 2012	07/09/2012	Lost	173	No	No	er e e e e e e e e e e e e e e e e e e
Aqua Blue Meetings, LLC	656	2012 CSDA Fall Board & Committee Meetings #1 of 2	09/05/2012	Lost	50	No	No	
Inter Tribal Council of Arizona, Inc.	2008	UST Compliance Training for Owners and Operators	09/10/2012	Lost	10	No	No	
US Department of Transportation - Volpe Center	1912	JWC Committee Meeting	09/19/2012	Lost	205	No	No	
National Hispanic Caucus of State Legislators	1623	National Hispanic Caucus of State Legislators Annual (10th)	11/14/2012	Lost	370	No	No	•
Aqua Blue Meetings, LLC	664	2012 CSDA Fall Board & Committee Meetings #2 of 2	11/28/2012	Lost	50	No	No	
Research Strategies, Inc.	2078	Research Strategies	12/11/2012	Lost	15	No	No	

							ан 1 - Сан
				the second			
International College of Integrative Medicine	2047	International College of Integrative Medicine	01/04/2013	Lost	40	No	No
American Society of Clinical Pathology	1942	ASCP Board of Certification (BOC) Board of Governors Executive Committee Meeting	01/18/2013	Lost	24	Νο	Νο
National Guard	2027	National Guard-Mobilization Readiness Action Conference -#2HOLD	01/28/2013	Lost	1600	No	Yes
National Lipid Association	651	2013 NLA Clinical Lipid Update (National Lipid Association)	02/20/2013	Lost	500	No	Yes
La Fonda for Kiwanis	1999	Southwest District of Kiwanis	03/01/2013	Lost	0	No	No
International Sherwood Fusion Theory Conference	1687	2013 International Sherwood Fusion Theory Conference	03/15/2013	Lost	247	No	No
Family Leadership	2003	Family Leadership Conference 2013	03/19/2013	Lost	350	No	No
New Mexico State University	2132	National CPM Consortium Mid Year Board Meeting	04/02/2013	Lost	35	No	No
Ashcroft, Inc.	2127	Sales & Marketing Meeting 2013	04/06/2013	Lost	240	No	No
BlueCross BlueShield of Tennessee	1637	2013 Broker Conference	04/11/2013	Lost	375	No	No
American Society of Irrigation Consultants	1932	American Society of Irrigation Consultants 2013 Annual Conference	04/18/2013	Lost	324	No	No
National Guard Enlisted Association	2147	NM National Guard Enlisted Association 2013	04/18/2013	Lost	220	No	No
Federal Business Council	1851	NLIT Summit 2013	05/13/2013	Lost	1150	No	Yes
American Bar Association	2141	Rules and Calendar Committee Meeting	05/16/2013	Lost	36	No	No

American Writer's & Artists, Inc.	2128	The Ultimate Money Making Photography Workship 2013	07/16/2013	Lost	420	Νο	Νο
Property Casualty Insurers Assn of America	1226	2013 Investment Seminar	09/08/2013	Lost	285	No	Νο
International College of Cranio-Mandibular Orthopedics	1845	24th Annual B. Jankelson Memorial Lecture Fourm	09/25/2013	Lost	175	No	No
North America Brain Injury Society (NABIS)	2066	11th Annual NABIS Conference on Brain Injury	10/01/2013	Lost	1050	No	Νο
Emergency Management Accreditation Program (EMAP)	2039	2013 Fall Committee Meeting	10/08/2013	Lost	<b>4</b> 4	Νο	Νο
Tourism Association of NM	2055	2013 TANM Research & Marketing Conference	11/04/2013	Lost	50	No	No
The Association for Legal Career Professionals	1868	NALP Board of Directors Meeting	11/07/2013	Lost	48	No	Νο
Soil Science Society of America	1981	SSSA-Soil's role in Restoring Ecosytem Services	03/08/2014	Lost	227	Νο	No
The Ray E Helfer Society	2068	2014 Ray E. Helfer Annual Meeting	04/04/2014	Lost	470	No	Νο
American Academy of Veterinary Dermatology	1650	AAVD 2014 North American Veterinary Dermatology Forum	04/07/2014	Lost	1080	No	Yes
National Roofing Contractors Association	1872	NRCA Executive Committee and National Roofing Council	04/30/2014	Lost	63	No	No
MAPPS	1278	Summer Meeting 2014	07/04/2014	Lost	468	No	No
Risk Management Association	1997	Risk Management Association 2014 - 2ndHOLD	09/14/2014	Lost	625	No	Yes
Destination Source, LLC	1919	American Public Gas Association Annual Meeting 2015	07/24/2015	Lost	1175	No	Νο

Status: Lost - Subtotal: SUM: Requested Rooms = 12194

Grand Total: SUM: Requested Rooms = 12194

SANTA FE CONVENTION

- SantaFe.org -

Prepared On: 01/15/2013 Prepared By: Christine Madden

## \* Production Summary w/o Rep \*

Status	SUM: Requested Rooms	
Turndown	2255	
Grand Totals	2255	

Account Name	Lead ID	Lead Name	Request Room Block Begin	Status	Requested Rooms		Convention Center	Headquarter Hotel
Leica licrosystems	1963	Annual Sales Meeting	01/13/2013	Turndown	1140	No	No	
Stagnito Media	2174	Hispanic Retail 360	08/04/2014	Turndown	1115	No	No	

Grand Total: SUM: Requested Rooms = 2255

SANTA FE CONVENTION AND VISITORS BUREAU

----- SantaFe.org ----

Prepared On: 01/15/2013 Prepared By: Christine Madden

### \* Production Summary w/o Rep \*

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Status	SUM: Requested Rooms	
Lead	32254	
Grand Totals	32254	

Account Name	Lead ID	Lead Name	Request Room Block Begin	Status	Requested Rooms	Repeat Business	Convention Center	Headquarte Hotel
Heath Concerts	2185	Heath - Grizzly Bear HOLD	04/12/2013	Lead	0	No	No	
National Association of State Energy Officials NASEO)	2145	NASEO Regional Meeting -Central/West 2013	05/05/2013	Lead	70	No	No	
Newmarket Iolidays	2181	Newmarket Holidays	05/08/2013	Lead	60	No	No	
Morris Meetings & ncentives	2117	Sysco Idaho	05/16/2013	Lead	45	No	No	
Heath Concerts	2182	PRIMUS - Heath Concerts	05/17/2013	Lead	0	No	No	
NM Academy of lealing Arts	2146	NM Academy of Healing Arts Conference 2013	07/01/2013	Lead	300	No	No	•
Council for hristian Colleges CCCU)	2164	CCCU - New Presidents INstitute/Governance Institute 2013	07/12/2013	Lead	50	No	No	
Meetings To Order, Inc.	2124	Swiss Just/MTO Sales Convention 2013	07/25/2013	Lead	161	No	No	
Vancouver Sun	2180	Vancouver Sun	07/27/2013	Lead	96	No	No	
AGN International North America, nc.	2193	AGN-NA Executive Committee Meeting	08/15/2013	Lead	18	No	No	

							)	
	Interstate Technology Council of States	2130	Interstate Tech Council of States 2013	09/16/2013	Lead	175	No	No
	Pediatric Endocrine Society	2125	Pediatric Endocrine Society Board Meeting 2013	09/24/2013	Lead	30	No	No
	Archaeological Institute of America	2163	AIA Fall Governing Board Meeting 2013	09/24/2013	Lead	93	No	No
	Kent State University College Podiatric Medicine	2176	Kent State University College of Podiatric Medicine	10/08/2013	Lead	744	No	No
•	National Black Public Relations Society	1974	National Conference and Career Fair	10/09/2013	Lead	182	No	No
	LANL-ISM Conference	1980	LANL-ISM Conference HOLD	10/20/2013	Lead	2100	No	Yes
	Tensegrity	<b>2</b> 16 <b>9</b>	Tensegrity HOLD now 2014	02/28/2014	Lead	250	No	Yes
	Spiritual Directors International (SDI)	2049	Spiritual Directors International 2014	04/23/2014	Lead	850	No	No
	Reflexology Association of American	2160	2014 Reflexology Conference	04/30/2014	Lead	170	No	No
	Wilderness & Travel Medicine	1108	Wilderness & Travel Medicine	05/26/2014	Lead	1600	Yes	Yes
	American Institute of Medical Education	2014	2014 Creativity and Madness HOLD	07/26/2014	Lead	1600	Yes	Yes
	American Institute of Architects NM	1081	2014 AIA State Meeting	10/16/2014	Lead	300	Yes	Yes
	Dual Language of New Mexico	2023	La Cosecha 2014 HOLD	11/18/2014	Lead	1600	Yes	Yes
	American Institute of Medical Education	2015	2015 Creativity and Madness HOLD	07/26/2015	Lead	1500	Yes	Yes
	National School Boards Association	2131	NSBA Executive Directors Summer Institute 2015	07/31/2015	Lead	258	No	No
	Los Alamos National Laboratory	2133	LANL-Shipman 2nd HOLD	10/10/2015	Lead	6600	No	Yes
	Los Alamos National Laboratory	2134	LANL-Shipman 1st HOLD	10/16/2015	Lead	6750	No	Yes
	North American Society for the Sociology of Sport	2087	NASSS Conference 2015	11/02/2015	Lead	613	No	Yes
	Association of Defense Trial Attorneys	2186	Executive Council Meeting	11/12/2015	Lead	60	No	No
	Association of Defense Trial Attorneys	2184	2016 Annual Meeting	04/19/2016	Lead	474	No	No

American Society of Limnology and Oceanography	2195	ASLO Summer Meeting 2016 HOLD	06/03/2016	Lead	3350	Yes	Yes	•
Society for Pediatric Dermatology	2118	42nd Annual Meeting	07/04/2016	Lead	655	No	No	
Dual Language of New Mexico	2006	La Cosecha 2016 HOLD	11/01/2016	Lead	1500	Yes	Yes	

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Grand Total: SUM: Requested Rooms = 32254

## Travel 2013

# MARCH

Sales Blit March 3	tz-Chicago 1-8, 2013	Chi	cago, IL	Buy-In: TBD (based o	n number of participants	)
Name Name	CVB Staff		СVВ			
	rmers Union 1-3, 2013	Springfield,	MA		;	
Name Name	Christine Madden		СVВ			
AND	ion Showcase – Mar 14 1-15, 2013	Washington, DC Washington, DC		2,897.50 includes 1 plus . (based on number of par	3 more allowed at 375.00 ticipants)	AND Sales Blitz-DC
Name Name	Chris Madden		СVВ	······		
			APRIL			· · ·
FAM April 15	18, 2013			l seek comp rooms, comp B buys airline tickets	meais etc	
Name Name	CVB Staff		CVB			

# APRIL CONT'D

Sales Blitz-Dallas April 29-May 3, 2013	Dallas, TX	Buy-In: TBD (based on number of participants)
Name CVB Staff Name	CVB	
	M	<b>AY</b>
Destination Showcase-Chicago May 8, 2013	Chicago, IL	Booth Cost: 2,897.50 includes 1 plus 3 more allowed at 375.00 each
Name CVB Staff Name	CVB	
Sales Blitz-Denver May 13-16, 2013	Denver, CO	Buy-In: TBD (based on number of participants)
Name CVB Staff Name		
		NE
FAM June 3-9, 2013		Will seek comp rooms, comp meals etc CVB buys airline tickets
Name CVB Staff Name	CVB	
POW WOW June 9-13, 2013	Las V <b>egas, N</b> V	Note: Attending with ACVB
Name CVB Staff Name		

		· ·			
FAM		Will seek comp rooms, co	mp meals etc		
July 29-August 1, 2013		CVB buys airline tickets			
Name CVB Staff Name	CVB	· · · · · · · · · · · · · · · · · · ·			
	AU	GUST			
Sales Blitz-Minneapolis	Minneapolis	Buy-In: TBD (based on nu	mber of participants)		
August 5-9, 2013					
Name CVB Staff	CVB				
Name					
Sales Blitz-Chicago	Chicago, IL	Buy-In: TBD (base	ed on number of participants)		
August 19-23, 2013		·			
NameCVB Staff	CVB				
Name					
	SEP	TEMBER			
FAM	Will seek comp rooms, comp meals etc				
September 16-19, 2013		CVB buys airline tickets	· · · · · · · · · · · · · · · · · · ·		
Name CVB Staff Name	CVB				

JULY

### 3

# OCTOBER

FAM October 21-24, 2013	Will seek Comp rooms, comp meals etc CVB buys airline tickets					
NameCVB StaffName	CVB					
	NO	VEMBER				
Sales Blitz-DC November 11-15, 2013	Washington, DC	Buy-In: TBD (based on number of participants	)			
Name CVB Staff Name	CVB					





## O.T.A.B. Report

November-December 2012

Jim Luttjohann Executive Director

### Hotel, motel site tours:

No new activity due to Holidays and Strategic Planning efforts

### Meetings with civic leaders:

Recent meetings have included Albuquerque CVB Director with Regional Agritourism partners and one-on-ones with both City Manager and Councilor Wurzburger.

### Other meetings/events:

- AFSCM Training on new handbook
- Albuquerque CVB on joint tradeshow work
- Chavez Security on Contracts and requirements for events at CCC
- City Council Meetings
- City Finance office on OTAB fund balance and standard CVB accounting
- City of Santa Fe Parking Division on Underground garage capacity, cleanliness and fleet vehicles
- City of Santa Fe, Human Resources on temp hires and seasonal hires
- Creative Santa Fe on Plaza to Plaza project
- Creative Team and Ad Agency meetings
- Creative Tourism DIY opportunities
- Drury Hotel Sales & Marketing Director
- Fairmont Santa Fe Holiday Reception
- Green Lodging/Santa Fe watershed organizing committee
- Guest appearance on Mayor's radio show
- International Trade Committee (formerly Asia Work Group) meetings
- Lodgers Association Luncheons providing tourism updates

Executive Director Report to OTAB, January 30, 2013

- Met new GM from Inn on the Alameda
- Railyard Depot reopening ceremony
- Region 5 tourism meetings and Holiday Reception
- Santa Fe/Buffalo Thunder race organizers
- SHOOT Santa Fe Film Meetings
- Staff Holiday Potluck
- State Office of Tourism on International Tourism
- TANM Research and Marketing Conference, Albuquerque
- Transit Advisory Board meetings and retreat
- Various Interview panels for HR hires in Arts Commission and CVB/CCC

### Operations:

Staff meetings continue to focus on safety training, team building and communicating from each team sector to the others. Manager meetings have focused on a few critical fixes (website, training on CRM, BEOs).

We have hired a temporary CSM while we have a staff member out on FMLA. Her name is Camilla and she is doing a fine job for us.

We have two seasonal positions currently posted for Janitorial and Convention Specialist.

We have interviewed applicants for vacant position as an administrator in the Arts Commission office. Interviews for the Director permanent position are planned for late January or early February.

### Strategic Planning Update:

- 1. Strategic Planning process: SWOT form was sent multiple times to SFCVB Partners via a link in the partner newsletters. (Complete)
- 2. Emails with SWOT form sent to a larger body of stakeholders by staff members (Complete)
- 3. Results parsed into common categories like marketing, operations, communications, branding etc. (Complete)
- Convene a working session with key stakeholders for presentation of top focus areas gleaned from the SWOT exercise and prioritization of focus areas (Complete)
- 5. Convene four or five focus groups based on same for future committee structure and brainstorming (In-process with Visitor Experience and Destination Marketing completed)
- 6. Each focus group will go through exercises of applying key recommendations from the Radcliff report's Executive Summary (Ongoing)
- 7. Survey same with key word exercises, deeper questions about structure and change (Complete)

Executive Director Report to OTAB, January 30, 2013

- 8. Staff exercise applying DMAI measurements to objectives and goals that support all of the above and determined focus areas (February)
- Throughout this process work with OTAB to recast roles, expectations and representative membership to be a DMO advisory board more in keeping with industry best practices (Ongoing)
- 10. Present plan for adoption (February-March)
- 11. Implement Plan

### OTAB:

Ski n Brew. Following our last meeting City Council recommended funding the entire \$25,000 they had originally sought from OTAB. Following that, the organizers withdrew application sighting lack of adequate time frame for promotion of the events. They hope to revisit for 2014.

### New O.T.A.B Funding Process:

The online application form has been taken down per recommendation at last meeting.

Please see the attached current revision to process and application.

Once we have finalized the new process, I will present it to Finance Committee for adoption before going live.

Following our last meeting information was forwarded to the Mayor and City Manager for appointments of a committee to advise the creation of the new process. At that time I was asked to revisit some key elements including annualized application period, holding off on appointments in lieu of establishing a grant review committee instead and for me to work on the process and the existing OTAB subcommittee to come up with recommendations for new process and forms.

Some areas of clarification that I need are:

- 1) Is it the intent to fund the same events for multiple years (3) or is it the intent to fund 3 new events per year or is it to do both, so that we have a running three year seed of multiple new events?
- 2) Need a clear articulation of "off season" is it to be based on defined months (September through April) or is it to be based on occupancy in a given month (anything under xx% based on previous years)?

### Sports Tourism:

Following a similar process I ask that you send me a handful of names of those we might convene for an initial conversation about formation of a Sports Tourism development team. To date I have received no recommendations, but I have come up with the following:

- TBD Parks dept.
- Bette Booth, Chair, Parks & Open Spaces Committee
- Joseph Karnes, Santa Fe Buffalo Thunder Race
- Willard Scott, Santa Fe Century Race
- Bob Ward, REI and IMBA
- Geno Zamora, Santa Fe City Attorney and helped found New Mexico Sports Authority
- LTAB Meetings

At your direction, I would like to invite them and all of you that are interested to join in a focus group discussion on Sports Tourism and the CVB Strategic Plan.

Upcoming activities:

- State Appropriations Committee Meeting, February 1, Santa Fe NM
- WACVB Board Meeting (joining board), February 7-8, Phoenix, AZ
- LTAB Meeting, February 25, Santa Fe, NM
- Transit Advisory Board meeting, February 25, Santa Fe NM
- E

Respectfully submitted,

Jim Luttiohann

Executive Director