

City of Santa Fe
Occupancy Tax Advisory Board (O.T.A.B.)

**2015 PROCEDURES & APPLICATION FOR LODGERS TAX
FUNDING ASSISTANCE OF SPECIAL EVENTS**

1. To acquire Lodgers Tax Funding Assistance please complete the attached application.
2. Our address is:
O.T.A.B. c/o Tourism Santa Fe
201 West Marcy Street
Santa Fe, New Mexico 87501
3. Our office hours are 8:00 a.m.-5:00 p.m., Monday through Friday, except holidays.
4. Below are the policies of the Lodgers Tax Funding Assistance application for your review. Please read them carefully BEFORE completing the Lodgers Tax 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 Tourism Santa Fe at 505-955-6211.
5. Please be sure to read Resolution 2012-70 at the end of this application prior to completing the application. The pertinent part of the Resolution directs City staff to work jointly with Santa Fe County to develop a process and criteria to use existing funds, to fund up to three new or emerging events each year, for a minimum of three years. The criteria for such events shall include, at a minimum:
 - The events shall take place in the off-season or shoulder season of Santa Fe's tourism calendar - define
 - Funding and planning of the events shall be public/private partnerships that seek to attract tourists younger than 56 that are on message with Santa Fe's overall marketing efforts as demonstrated by the Tourism Santa Fe
 - The events shall exhibit potential to build national excitement, recognition of happenings and brand assets that support creative and cultural tourism in Santa Fe, including but not limited to culture, art, history, food, natural beauty and outdoor activities
6. Activities shall be integrated with other local destination marketing organizations (DMO) and demonstrate sustainability beyond the funded period. The organization applying must have an IRS determined non-profit corporation status with a tax identification number or umbrella under a fiscal agent on file. If applicable, a letter from the fiscal agent under which the organization umbrellas must be submitted along with the application and the following qualifying documents:
 - a. **Copy of current Business License**
 - b. **New Mexico State Gross Receipts-Withholding Certificate (CRS-1)**
 - c. **Copy of IRS determination letter acknowledging non-profit status**
 - d. **Organization's State of New Mexico Non-Taxable Transactions Certificate**
 - e. **Proof of Insurance as indicated on item number 13 of this application**
7. 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 is to be completed and submitted, including all attachments, by March 1, 2015. An oral presentation may be required at a meeting of the grant review

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 question needs to be answered.**

12. 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. The applicant must submit an **invoice** for payment to the O.T.A.B. Administrator. The applicant also needs to submit 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 19).
13. Once the Contract has been executed it shall not be altered, changed, or amended except by a written notice to 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.
14. All advertisements and promotional materials for the event must state that **"partial funding was granted by the City of Santa Fe Lodgers Tax"**.
15. The intent of funding special events from Lodgers Tax proceeds is to bring overnight visitors into 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 outside of a 50-mile radius of the City of Santa Fe. If an event needs to attract a significant amount of Santa Fe residents, then funds from sources other than O.T.A.B. must be used for local media purchases.
Example: Your advertising budget is \$6,000. O.T.A.B. awards your organization \$2,500. You would spend the O.T.A.B. funding amount (\$2,500) on media outside of Santa Fe and your remaining advertising budget (\$3,500) on local media.
16. The purpose of the funds is to seed marketing in support of a sustainable annual event. In the case of instances that an event is funded for more than one consecutive year, the O.T.A.B. will then institute the following step down process. The amounts stated are examples using maximum values.
 - a. Year one funding \$30,000
 - b. Year two funding \$15,000 with matching of at least \$15,000 for marketing
 - c. Year three funding \$7,500 with other funding of at least \$22,500 for marketing
 - d. Year four, no additional funding
17. 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.
18. Contractor agrees to defend, indemnify and hold harmless the City of Santa Fe, OTAB members, and the Tourism Santa Fe for all losses, damages, claims or judgment, execution, actions or demands whatsoever resulting from the Contractee's actions or inactions as a result of the event.

APPLICATION FOR LODGERS TAX FUNDING ASSISTANCE

Date of Application: _____

Applicant's Name & Title: _____

Contact's Name (if different) _____

Organization's Name: _____

Organization's Address: _____

Event Name: _____

Check Box: New Event ☐ Existing Event ☐

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

Year	Amount
_____	\$ _____
_____	\$ _____
_____	\$ _____

Event Location Address: _____

Phone Numbers: (office) _____ (cellular) _____ (fax) _____

Contact's Numbers: (if different) (office) _____ (fax) _____ (cellular) _____

E-Mail Address: _____

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

City of Santa Fe Business License Number _____

Amount Requested: \$ _____

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

APPLICATION FOR LODGERS TAX FUNDING ASSISTANCE

***Acknowledgement Certificate:**

State of _____

County of _____

On this _____ day of _____, 20____, I _____ certify that the information submitted for the Lodgers Tax Funding Assistance Application is a true, exact, and complete.

Acknowledger's Signature

Title/Position

Subscribed and sworn before me this _____ day of _____, 20____

By _____

(Seal)

Notary Public

My commission expires _____

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

***Pre and Post Event Budget Report Form**

Total Revenue generated from room sales: \$ _____

Total number of Attendees

- (tickets sold, registered guests, public) _____

Total number of Participants

- (out-of-town vendors/volunteers working event) _____

- **The Pre- and Post-Event Budget needs to be completed and attached to your final report. Your final report should include a one- to two-page summary of your event with the following information.**
 - **Total ticket sales**
 - **Number of out of town attendees**
 - **How the event compared, both to your application estimates and to any prior year's events, in the number of people attending**
 - **Revenue generated**
 - **Please summarize the marketing and publicity strategies used to promote your event and the City of Santa Fe. 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.