



The Purchasing Memo

Date: January 14, 2026

To: Brian J. Moya, Interim City Manager

From: Randy Randall, TSF Executive Director

Randy Randall
Randy Randall (Jan 14, 2026 13:56:56 MST)

Subject: OTAB Funding Award – Recursos de Santa Fe / SF Magazine

Vendor Name: Recursos de Santa Fe

Munis Vendor Number: 10503

ITEM AND ISSUE:

TOURISM Santa Fe respectfully requests your review and approval of a professional contract in the total amount of \$30,000 –inclusive of GRT for the awarded Occupancy Tax Advisory Board (OTAB) funding support for the advertising to the promotion and management of event Santa Fe Magazine Festival for a term of one year with Recursos de Santa Fe.

CONTRACT NUMBER:

FY26 Munis Contract #3260325

BACKGROUND AND SUMMARY:

Per Resolution 2012-70: Every calendar year TOURISM Santa Fe/Occupancy Tax Advisory Board (OTAB) advertises the acceptance of applications for funding assistance with the support of local events that aid in Santa Fe’s Tourism Industry. The applications are reviewed and then selected by the OTAB Grant Review Panel using a scoring/merit evaluation both oral and written.

PRIOR APPROVALS AND SUPPORTING INFORMATION:

FUNDING SOURCE:

Fund Name/Number: Lodgers Tax Fund/213

Munis Org Name/Number: VSF Programs & Events/2130523

Munis Object Name/Number: Grants & Services/510400

Budget Officer / Designee: *Andy Hopkins* Date: 01/15/2026

Budget Officer Comment/Exceptions: _____

PROCUREMENT METHOD:

The procurement method used was NMSA 1978, Section 13-1-125, Small Purchase



CITY OF SANTA FE

PROFESSIONAL SERVICES CONTRACT

Recursos de Santa Fe - OTAB Funding 2026

THIS CONTRACT is made and entered into by and between the City of Santa Fe, New Mexico, hereinafter referred to as the "City," and Recursos de Santa Fe, hereinafter referred to as the "Contractor," and is effective as of the date set forth below upon which it is executed by the Parties.

RECITALS

WHEREAS, the Chief Procurement Officer of the City has made the determination that this Contract is in accordance with the provisions of the New Mexico Procurement Code (NMSA 1978, 13-1-28 et seq.) pursuant to NMSA 1978, Section 13-1-125, Small Purchase; and

WHEREAS, the Contractor is one of such requisite and qualifications and is willing to engage with the City for professional services, in accordance with the terms and conditions hereinafter set out, and the Contractor understanding and consenting to the foregoing is willing to render such professional services as outlined in the Contract; and

The City and the Contractor hereby agree as follows:

1. SCOPE OF WORK

The Contractor shall provide the following services for the City:

A. The Contractor shall manage the promotion and all advertisements, including social media, for the event: Santa Fe Magazine Festival.

B. Contractor shall develop a concept and design a brochure for the Event including all project materials, printing and distribution of the brochure, and obtaining best prices.

C. Contractor may subcontract with a third party to manage the Event. The subcontractor can only be for a maximum up to \$15,000.

D. Contractor shall provide periodic reports to the Santa Fe Occupancy Tax Advisory Board, at least quarterly listing the expenditures for those periods. Funding provided to the Contractor shall be maintained in a separate account established for the purpose and shall not be commingled with any other money.

2. STANDARD OF PERFORMANCE; LICENSES

A. The Contractor does hereby accept its designation as a professional service, rendering services related to Recursos de Santa Fe/Santa Fe Magazine Festival - OTAB Funding 2026 for the City, as set forth in this Contract. The Contractor represents that Contractor possesses the personnel, experience, and knowledge necessary to perform the services described under this Contract.

B. The Contractor agrees to obtain and maintain throughout the term of this Contract, all applicable professional and business licenses required by law, for itself, its employees, agents, representatives, and subcontractors.

3. COMPENSATION

A. The City shall compensate the Contractor for the services described in the scope of work, the City agrees pay the Contractor a not to exceed total compensation of \$30,000.00 inclusive of New Mexico Gross Receipts Tax levied at the rate of 8.1875%.

B. The compensation represents a maximum amount. The Contractor must notify the City when the Services provided under this Contract approach 90% of compensation total. Services rendered beyond the maximum compensation amount will not be reimbursed unless the Contract is amended in writing prior to the provision of such services.

C. Invoicing and Payment Terms Payment will be made upon the City's acceptance of deliverables and receipt of a detailed, certified invoice from the Contractor. Payments will be sent to the Contractor's designated address. The City shall issue payment in accordance with the timelines required by law. Invoices must be submitted no later than fifteen (15) days after the Contract's termination. Late invoices will not be processed or paid.

D. Extended Payment Terms for Grant-Funded Contracts. For grant-funded agreements, the City may issue payment within forty-five (45) days following submission of an undisputed payment request.

4. TERM

THIS CONTRACT SHALL NOT BECOME EFFECTIVE UNTIL APPROVED BY THE CITY. This Contract shall terminate December 31, 2026 unless terminated pursuant to the Termination and Appropriations articles of this contract. A contract for professional services may not exceed four years, including all extensions and renewals, except as otherwise provided by NMSA 1978, Sections 13-1-150 through 13-1-152 or SFCC 1987, Section 11-13.

5. TERMINATION

- A. Grounds. The City may terminate this Contract for convenience or cause. For contracts within their authority, the City Manager or their designee is authorized to provide the notice of termination, otherwise such notice of termination shall be provided by the Mayor or their designee as authorized by the Governing Body. The Contractor may only terminate this Contract based upon the City’s uncured, material breach of this Contract.
- B. Notice; City Opportunity to Cure.
 - 1. The City shall give Contractor written notice of termination at least thirty (30) days prior to the intended date of termination.
 - 2. Contractor shall give City written notice of termination at least thirty (30) days prior to the intended date of termination, which notice shall (i) identify all the City’s material breaches of this Contract upon which the termination is based and (ii) state what the City must do to cure such material breaches. Contractor’s notice of termination shall only be effective (i) if the City does not cure all material breaches within the thirty (30) day notice period or (ii) in the case of material breaches that cannot be cured within thirty (30) days, the City does not, within the thirty (30) day notice period, notify the Contractor of its intent to cure and begin with due diligence to cure the material breach.
 - 3. Notwithstanding the foregoing, this Contract may be terminated immediately upon written notice to the Contractor (i) if the Contractor becomes unable to perform the services contracted for, as determined by the City; (ii) if, during the term of this Contract, the Contractor is suspended or debarred by the City; or (iii) the Contract is terminated pursuant to Paragraph “Appropriations”, of this Contract.
- C. Liability. Except as otherwise expressly allowed or provided under this Contract, the City’s sole liability upon termination shall be to pay for acceptable work performed prior to the Contractor’s receipt or issuance of a notice of termination; provided, however, that a notice of termination shall not nullify or otherwise affect either party’s liability for pre-termination defaults under or breaches of this Contract. The Contractor shall submit an invoice for such work within thirty (30) days of receiving or sending the notice of termination. *THIS PROVISION IS NOT EXCLUSIVE AND DOES NOT WAIVE THE CITY’S OTHER LEGAL RIGHTS AND REMEDIES CAUSED BY THE CONTRACTOR’S DEFAULT/BREACH OF THIS CONTRACT.*

6. APPROPRIATIONS

The terms of this Contract are contingent upon sufficient appropriations and authorization being made by the Governing Body for the performance of this Contract. If sufficient appropriations and authorization are not made by the Governing Body, this Contract shall terminate immediately upon written notice being given by the City to the Contractor. The City's decision as to whether sufficient appropriations are available shall be accepted by the Contractor and shall be final. If the City proposes an amendment to the Contract to unilaterally reduce funding, the Contractor shall have the option to terminate the Contract or to agree to the reduced funding, within thirty (30) days of receipt of the proposed amendment.

7. STATUS OF CONTRACTOR

The Contractor and its agents and employees are independent contractors performing professional services for the City and are not employees of the City. The Contractor and its agents and employees shall not accrue leave, retirement, insurance, bonding, use of City vehicles, or any other benefits afforded to employees of the City as a result of this Contract. The Contractor acknowledges that all sums received hereunder are reportable by the Contractor for tax purposes, including without limitation, self-employment and business income tax. The Contractor agrees not to purport to bind the City unless the Contractor has express written authority to do so, and then only within the strict limits of that authority.

8. ASSIGNMENT

The Contractor shall not assign or transfer any interest in this Contract or assign any claims for money due or to become due under this Contract without the prior written approval of the City.

9. SUBCONTRACTING

The Contractor shall not subcontract any portion of the services to be performed under this Contract without the prior written approval of the City. No such subcontract shall relieve the primary Contractor from its obligations and liabilities under this Contract, nor shall any subcontract obligate direct payment from the City.

10. RELEASE

Final payment of the amounts due under this Contract shall operate as a release of the City, its officers and employees from all liabilities, claims and obligations whatsoever arising from or under this Contract.

11. CONFIDENTIALITY

Any confidential information provided to or developed by the Contractor in the performance of this Contract shall be kept confidential and shall not be made available to any individual or organization by the Contractor without the prior written approval of the City.

12. PRODUCT OF SERVICE - COPYRIGHT

All materials developed or acquired by the Contractor under this Contract shall become the property of the City and shall be delivered to the City no later than the termination date of this Contract. Nothing developed or produced, in whole or in part, by the Contractor under this Contract shall be the subject of an application for copyright or other claim of ownership by or on behalf of the Contractor.

13. CONFLICT OF INTEREST; GOVERNMENTAL CONDUCT ACT

- A. The Contractor represents and warrants that it presently has no interest and, during the term of this Contract, shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance or services required under the Contract.
- B. The Contractor further represents and warrants that it has complied with, and, during the term of this Contract, will continue to comply with, and that this Contract complies with all applicable provisions of the Governmental Conduct Act, NMSA 1978, Chapter 10, Article 16.
- C. Contractor's representations and warranties in Paragraphs A and B of this Article are material representations of fact upon which the City relied when this Contract was entered into by the

parties. Contractor shall provide immediate written notice to the City if, at any time during the term of this Contract, Contractor learns that Contractor's representations and warranties in Paragraphs A and B of this Article were erroneous on the effective date of this Contract or have become erroneous by reason of new or changed circumstances. If it is later determined that Contractor's representations and warranties in Paragraphs A and B of this Article were erroneous on the effective date of this Contract or have become erroneous by reason of new or changed circumstances, in addition to other remedies available to the City and notwithstanding anything in the Contract to the contrary, the City may immediately terminate the Contract.

D. All terms defined in the Governmental Conduct Act have the same meaning in this section.

14. AMENDMENT

A. This Contract shall not be altered, changed, or amended except by instrument in writing executed by the parties hereto and all other required signatories.

B. If the City proposes an amendment to the Contract to unilaterally reduce funding due to budget or other considerations, the Contractor shall, within thirty (30) days of receipt of the proposed Amendment, have the option to terminate the Contract, pursuant to the termination provisions as set forth in "Term" herein, or to agree to the reduced funding.

15. ENTIRE AGREEMENT

This Contract, together with any other documents incorporated herein by reference and all related Exhibits and Schedules constitutes the sole and entire agreement of the Parties with respect to the subject matter of this Contract, and supersedes all prior and contemporaneous understandings, agreements, representations, and warranties, both written and oral, with respect to the subject matter. In the event of any inconsistency between the statements in the body of this Contract, and the related Exhibits and Schedules, the statements in the body of this Contract shall control.

16. MERGER

This Contract incorporates all the Agreements, covenants and understandings between the parties hereto concerning the subject matter hereof, and all such covenants, agreements, and understandings have been merged into this written contract.

No prior agreement or understanding, oral or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Contract.

17. PENALTIES FOR VIOLATION OF LAW

NMSA 1978, Sections 13-1-28 through 13-1-199, imposes civil and criminal penalties for its violation. In addition, the New Mexico criminal statutes impose felony penalties for illegal bribes, gratuities, and kickbacks.

18. EQUAL OPPORTUNITY COMPLIANCE

The Contractor agrees to abide by all federal and state laws and rules and regulations, and Santa Fe City Code, pertaining to equal employment opportunity. In accordance with all such laws of the State of New Mexico, the Contractor assures that no person in the United States shall, on the grounds of race, religion, color, national origin, ancestry, sex, age, physical or mental handicap, or serious medical condition, spousal affiliation, sexual

orientation or gender identity, be excluded from employment with or participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity performed under this Contract. If Contractor is found not to be in compliance with these requirements during the life of this Contract, Contractor agrees to take appropriate steps to correct these deficiencies.

19. APPLICABLE LAW

The laws of the State of New Mexico shall govern this Contract, without giving effect to its choice of law provisions. Venue shall be proper only in a New Mexico court of competent jurisdiction in accordance with NMSA 1978, Section 38-3-2. By execution of this Contract, Contractor acknowledges and agrees to the jurisdiction of the courts of the State of New Mexico over any and all lawsuits arising under or out of any term of this Contract.

20. WORKERS' COMPENSATION

The Contractor agrees to comply with state laws and rules applicable to workers compensation benefits for its employees. If the Contractor fails to comply with the Workers Compensation Act and applicable rules when required to do so, this Contract may be terminated by the City.

21. PROFESSIONAL LIABILITY INSURANCE

Contractor shall maintain professional liability insurance throughout the term of this Contract providing a minimum coverage in the amount required under the New Mexico Tort Claims Act. The Contractor shall furnish the City with proof of insurance of Contractor's compliance with the provisions of this section as a condition prior to performing services under this Contract.

22. OTHER INSURANCE

Contractor shall maintain professional liability insurance throughout the term of this Contract providing a minimum coverage in the amount required under the New Mexico Tort Claims Act. The Contractor shall furnish the City with proof of insurance of Contractor's compliance with the provisions of this section as a condition prior to performing services under this Contract.

A. COMMERCIAL GENERAL LIABILITY

Insurance shall be written on an occurrence basis and be as broad as ISO Form CG 00 01 with limits not less than \$2,000,000 per occurrence and \$2,000,000 in the aggregate for claims against bodily injury, personal and advertising injury, and property damage. Said policy shall include broad form Contractual Liability coverage and be endorsed to name the City of Santa Fe their officials, officers, employees, and agents as additional insureds.

B. BROADER COVERAGE AND LIMITS

The insurance requirements under this Contract shall be the greater of (1) the minimum coverage and limits specified in this Contract, or (2) the broader coverage and maximum limits of coverage of any insurance policy or proceeds available to the Named Insured. It is agreed that these insurance requirements shall not in any way act to reduce coverage that is broader or that includes higher limits than the minimums required herein. No representation is made that the minimum insurance requirements of this Contract are sufficient to cover the obligations of Contractor hereunder.

C. Contractor shall maintain the above insurance for the term of this Contract and name the City as an additional insured and provide for 30 days cancellation notice on any Certificate of Insurance form furnished by Contractor. Such certificate shall also specifically state the coverage provided under the policy is primary over any other valid and collectible insurance and provide a waiver of subrogation.

23. RECORDS AND FINANCIAL AUDIT

The Contractor shall maintain detailed time and expenditure records that indicate the date; time, nature and cost of services rendered during the Contract's term and effect and retain them for a period of three (3) years from the date of final payment under this Contract. The records shall be subject to inspection by the City. The City shall have the right to audit billings both before and after payment. Payment under this Contract shall not foreclose the right of the City to recover excessive or illegal payments.

24. INDEMNIFICATION

The Contractor shall defend, indemnify and hold harmless the City from all actions, proceeding, claims, demands, costs, damages, attorneys' fees and all other liabilities and expenses of any kind from any source which may arise out of the performance of this Contract, caused by the negligent act or failure to act of the Contractor, its officers, employees, servants, subcontractors or agents, or if caused by the actions of any client of the Contractor resulting in injury or damage to persons or property during the time when the Contractor or any officer, agent, employee, servant or subcontractor thereof has or is performing services pursuant to this Contract. If any action, suit or proceeding related to the services performed by the Contractor or any officer, agent, employee, servant or subcontractor under this Contract is brought against the Contractor, the Contractor shall, as soon as practicable but no later than two (2) days after it receives notice thereof, notify the legal counsel of the City.

25. NEW MEXICO TORT CLAIMS ACT

Any liability incurred by the City of Santa Fe in connection with this Contract is subject to the immunities and limitations of the New Mexico Tort Claims Act, NMSA 1978, Section 41-4-1, et. seq., as amended. The City and its "public employees" as defined in the New Mexico Tort Claims Act, do not waive sovereign immunity, do not waive any defense and do not waive any limitation of liability pursuant to law. No provision in this Contract modifies or waives any provision of the New Mexico Tort Claims Act.

26. INVALID TERM OR CONDITION

If any term or condition of this Contract shall be held invalid or unenforceable, the remainder of this Contract shall not be affected and shall be valid and enforceable.

27. ENFORCEMENT OF CONTRACT

A party's failure to require strict performance of any provision of this Contract shall not waive or diminish that party's right thereafter to demand strict compliance with that or any other provision. No waiver by a party of any of its rights under this Contract shall be effective unless express and in writing, and no effective waiver by a party of any of its rights shall be effective to waive any other rights.

28. NOTICES

Any notice required to be given to either party by this Contract shall be in writing and shall be delivered in person, by courier service or by U.S. mail, either first class or certified, return receipt requested, postage prepaid, as follows:

<p><u>To the City:</u> Chief Procurement Officer purchasing@santafenm.gov PO Box 909 Santa Fe, NM 87504-0909</p>	<p>Randy Randall TSF Executive Director 201 West Marcy St. Santa Fe, NM 87501 rrandall@santafenm.gov 505-955-6209</p>	<p><u>To the Contractor:</u> Recursos de Santa Fe Owen Lipstein, CEO 795 Camino del Monte Sol Santa Fe, NM 87505 owen@santafemagazine.co 518-567-9524</p>
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29. AUTHORITY

If Contractor is other than a natural person, the individual(s) signing this Contract on behalf of Contractor represents and warrants that he or she has the power and authority to bind Contractor, and that no further action, resolution, or approval from Contractor is necessary to enter a binding contract.

30. NON-COLLUSION

In signing this Contract, the Contractor certifies the Contractor has not, either directly or indirectly, entered into action in restraint of free competitive bidding in connection with this offer submitted to the City's Chief Procurement Officer.

31. DEFAULT/BREACH

In case of Default and/or Breach by the Contractor, for any reason whatsoever, the City may procure the goods or services from another source and hold the Contractor responsible for any resulting excess costs and/or damages, including but not limited to, direct damages, indirect damages, consequential damages, special damages, and the City may also seek all other remedies under the terms of this Contract and under law or equity.

32. EQUITABLE REMEDIES

The Contractor acknowledges that its failure to comply with any provision of this Contract will cause the City irrevocable harm and that a remedy at law for such a failure would be an inadequate remedy for the City, and the Contractor consents to the City's obtaining from a court of competent jurisdiction, specific performance, or injunction, or any other equitable relief in order to enforce such compliance. The City's rights to obtain equitable relief pursuant to this Contract shall be in addition to, and not in lieu of, any other remedy that the City may have under applicable law, including, but not limited to, monetary damages.

33. DEFAULT AND FORCE MAJEURE

The City reserves the right to cancel all, or any part of any orders placed under this Contract without cost to the City, if the Contractor fails to meet the provisions of this Contract and, except as otherwise provided herein, to hold the Contractor liable for any excess cost occasioned by the City due to the Contractor's default. The Contractor shall not be liable for any excess costs if failure to perform the order arises out of causes beyond the control and without the fault or negligence of the Contractor; such causes include, but are not restricted to, acts of God or the public enemy, acts of the State or Federal Government, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, unusually severe weather and defaults of subcontractors due to any of the above, unless the City shall determine that the supplies or services to be furnished by the subcontractor were

obtainable from other sources in sufficient time to permit the Contractor to meet the required delivery scheduled. The rights and remedies of the City provided in this Clause shall not be exclusive and are in addition to any other rights now being provided by law or under this Contract.

[REMAINDER OF PAGE INTENTIONALLY LEFT BLANK]

[SIGNATURE PAGE TO FOLLOW]

IN WITNESS WHEREOF, the Parties have executed this Contract as of the date of the signature by the required approval authorities below.

CITY OF SANTA FE:

CONTRACTOR:

RECURSOS DE SANTA FE

BRIAN MOYA
CHIEF BRIAN MOYA 01/15/2026
INTERIM CITY MANAGER

Owen Lipstein (Jan 7, 2026 22:18:33 MST)
OWEN LIPSTEIN, CEO
DATE: Jan 7, 2026
NMBTIN: 85-0320585

ATTEST:

GERALYN CARDENAS
GERALYN CARDENAS, INTERIM CITY CLERK

Approved to form and legal sufficiency by:

Ruby Crews
Ruby Crews (Jan 8, 2026 08:30:51 MST)
RUBY CREWS, ASSISTANT CITY ATTORNEY

APPROVED FOR FINANCES:

BRIAN MOYA
INTERIM FINANCE DIRECTOR

From: DUTTON-LEYDA, TRAVIS K.
To: SPENCER, SHIRLEY J.; Purchasing DET
Cc: RANDALL, RANDY
Subject: RE: OTAB Contracts
Date: Friday, October 24, 2025 5:11:51 PM
Attachments: image001.png

Greetings,

This determination classifies the scope of work as *Professional Services*. It pertains solely to this classification and does not assess whether the scope of work or procurement method complies with all applicable legal standards. I reserve the right to revise this determination should there be any changes to the scope of work from what was originally submitted. The procurement process must adhere to the policies and procedures outlined by the City of Santa Fe, Central Purchasing, the Procurement Manual, and all relevant state statutes.

Please note:

- Save this email as a PDF and upload it into the corresponding Munis records.
- Check with WorkQuest dba Horizons of New Mexico (vendor # 8673) (mloehman@horizonsofnewmexico.org) *if* this service appears on their approved list.
- If your request includes anything that needs to be reviewed and preapproved by another City Department/Division, please send the same SOW to the corresponding email address and include their response in your packet/Munis.
 - Treasury (Point of Sale Systems) – questions: drsena@santafenm.gov; clromero@santafenm.gov. Request signature from: clromero@santafenm.gov
 - IT components (everything IT) – questions: ereview@santafenm.gov. Request signature from: edcandelaria@santafenm.gov; Copy: zxdushdurova@santafenm.gov; lenobes@santafenm.gov; lfworstell@santafenm.gov
 - Vehicles – questions: fleet@santafenm.gov. Request signature from: dmjaramillo@santafenm.gov
 - Grants – questions: grants@santafenm.gov. Request signature from: evlujan@santafenm.gov
 - Construction, Facilities, Furniture, Fixtures, Equipment, etc. – questions: fmdreview@santafenm.gov. Request signature from: jsburnett@santafenm.gov
 - Emergency Related Purchases – questions oem@santafenm.govand. Request signature from: klmorgan@santafenm.gov
 - Asset over \$5k – questions: accountspayable@santafenm.gov. Request signature from: jxbolden@santafenm.gov
- Ensure that the current and appropriate templates and forms are used, they can be found on the intranet https://intranet.santafenm.gov/finance_1 and OpenGov: <https://procurement.opengov.com/governments/1784201/projects> and documented [procedures/laws/rules](#) are followed.
- When processing this procurement, please ensure the procurement number issued by

Munis and the procurement name are used in the appropriate documents and the subject of emails.

- If you are processing a procurement where the forecasted amount is => \$60k, per NMSA 1978, Section 13-1-117.1, if you aren't using a cooperative or existing contract, you must process an RFP.
- < \$20k per year, one quote is acceptable.
- From \$20k to \$60k per year, if you aren't using a cooperative or existing contract, you must provide 3 quotes in your req. Must use the Munis Bid Module, OpenGov, or Pavilion.
- **Identify your funding source and notify Purchasing.**
It's essential to determine the funding source early, as it impacts the required documentation and contract language. For example, if federal funds are being used, specific federal provisions must be included in both the procurement request and the resulting contract. Notifying Purchasing of the funding source upfront ensures compliance and avoids delays.
- Follow the link below to review existing price agreements, contracts, or cooperative agreements that might be applicable to this request. You might be able to use an existing price agreement/contract to save time and money.
 - Pavilion: Free Cooperative Contract Search for Governments (please work with Purchasing if you think you find an existing or cooperative contract that might work)
- Submit via **Submit Purchase Requests** or the appropriate email address:
 - Determination requests to purchasing_det@santafenm.gov
 - All other requests to purchasing@santafenm.gov

Thank you for submitting this scope of work for my review.

 [Book time to meet with me](#)

Regards,

Travis Dutton-Leyda, City of Santa Fe Chief Procurement Officer
200 Lincoln Avenue
Santa Fe, NM 87501
505-629-8351
tkduttonleyda@santafenm.gov

Vendor Registration Sites and Current Procurement Opportunities:

[Current for Finances Only] <https://santafenm.munisselfservice.com/vss/>

[We Are Live With OpenGov] <https://procurement.opengov.com/portal/santafenm>

[Current] <https://www.withpavilion.com/>

Internal Link: https://intranet.santafenm.gov/central_purchasing_division_cpd



CITY OF SANTA FE
FINANCE

"A journey of a thousand miles begins with a single step" ~ Lao Tzu

From: SPENCER, SHIRLEY J. <sjspencer@santafenm.gov>
Sent: Friday, October 24, 2025 11:14 AM
To: DUTTON-LEYDA, TRAVIS K. <tkduttonleyda@santafenm.gov>; Purchasing DET <purchasing_det@santafenm.gov>
Cc: RANDALL, RANDY <rrandall@santafenm.gov>
Subject: FW: OTAB Contracts

Hi Travis,
Following up on this determination.....
Thanks!

Shirley

From: SPENCER, SHIRLEY J.
Sent: Monday, October 20, 2025 1:48 PM
To: DUTTON-LEYDA, TRAVIS K. <tkduttonleyda@santafenm.gov>; Purchasing DET <purchasing_det@santafenm.gov>
Cc: RANDALL, RANDY <rrandall@santafenm.gov>
Subject: OTAB Contracts

Hi Travis,

I need a determination for FY26 OTAB Grant contracts that happen every year. Can I use the same determination from prior years? See attached.

We have a total of 8 – each between 5k – 40K so they will be small purchases as the procurement method

Here is the scope of work for all contracts:

The Contractor shall provide the following services-for the City:

- A. The Contractor shall manage the promotion, all advertisements including, social media of event: ('Event').
- B. Contractor shall develop a concept and design a brochure for event including all project materials, printing and distributing of the brochure, obtaining best prices.

- C. Contractor may subcontract with a third party to manage the event. Fifty percent of the cost of this contract will be reimbursed to a maximum of \$4,000.
- D. Contractor shall provide periodic reports to the Occupancy Tax Advisory Board (OTAB), at least quarterly listing the expenditures for those periods. Funds provided to the Contractor shall be maintained in a separate account established for that purpose and shall not be commingled with any other money.

Thanks!

Shirley Spencer
Administrative Manager
TOURISM Santa Fe
505-955-6208

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CITY OF SANTA FE, NEW MEXICO

RESOLUTION NO. 2012-70

INTRODUCED BY:

Councilor Wurzbarger
Councilor Ives

A RESOLUTION

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

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

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

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

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

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

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

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

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

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

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

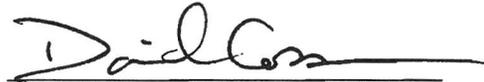
20 **BE IT FURTHER RESOLVED** that prior to the implementation of the plan outlined in this
21 resolution, staff shall:

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

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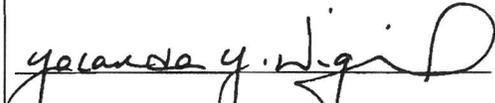
from the CVB Director, any input received from the private sector and
correspondence between City staff and County staff ensuring that the City and
County are working jointly on the plan and the implementation of the plan shall be
presented to the Finance Committee for approval.

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

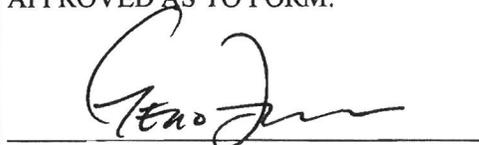


DAVID COSS, MAYOR

ATTEST:


YOLANDA Y. VIGIL, CITY CLERK

APPROVED AS TO FORM:


GENO ZAMORA, CITY ATTORNEY

City of Santa Fe
Occupancy Tax Advisory Board (OTAB)

PROCEDURES & APPLICATION FOR OCCUPANCY TAX
FUNDING ASSISTANCE FOR SPECIAL EVENTS

1. To acquire Occupancy Tax Funding Assistance please complete the attached application. Funding is for 2026.
2. Our address is:
OTAB. c/o TOURISM Santa Fe
201 West Marcy Street
Santa Fe, New Mexico 87501
3. Our office hours are 8:00 a.m.-5:00 p.m., Monday through Friday, except holidays.
4. The purpose of the OTAB funding program is to support marketing efforts of third party non-profit organizational efforts to: 1) Directly increase tourism through new, multi-year events or the expansion of existing multi-year events; 2) fund non-profit efforts to increase the awareness of Santa Fe as a desirable tourism destination by providing non-marketing funding to help build public relations worthy events and activities that provide the potential for high visibility regional and national press exposure that does not, in and of themselves, create significant or immediate direct tourism expansion; 3) fund first time meeting events sponsored by a Santa Fe non-profit organization. Specific funding levels and restrictions are outlined in section 16 for this type of application.
5. Below are the policies of the Occupancy Tax Funding Assistance application for your review. Please read them carefully BEFORE completing the Occupancy Tax Funding Assistance Application. Failure to comply with any of these requests may result in your application not being considered or denied. If you have any questions about the application, you may contact Shirley Spencer at TOURISM Santa Fe, 505-955-6208 or at sispencer@santafenm.gov.

Resolution 2012-70 sets forward the desires of the Governing Body with regard to OTAB grants and directs City staff to fund new, emerging or expanded events each year, for a maximum of three years. The criteria for such events shall include, at a minimum:

- The proposed event ideally shall take place in the shoulder season, outside of the high season months of May through October and holidays. Evaluation takes into consideration the proposed time of the event, days of the week, other events on the calendar and size of proposed event.
- Events during the busier months of the year can be considered, however they will not be given as strong a rating as a comparable event in a shoulder season timeframe. The key is to plan the event for when Santa Fe needs more visitors and not when visitors are already coming to Santa Fe and when lodging is at capacity.
- 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 of The City Different and its "Uncover Your Different" efforts, as demonstrated by TOURISM Santa Fe.
- The events shall exhibit potential to build regional or national excitement, recognition of happenings and brand assets that support creative and cultural tourism in Santa Fe, including but not limited to culture, art, history, food, natural beauty and outdoor activities. Ideally the event that is being proposed should be 4 months out to ensure significant planning time.
- All marketing must be designed to attract overnight stays in lodging facilities and must be targeted to markets more than 100-miles away.

- OTAB funds should not be used to supplement fundraising efforts or goals.
6. Activities shall be integrated with other local tourism related businesses and organizations and demonstrate sustainability beyond the funded period. The organization applying must have an IRS determined non-profit corporation status with a tax identification number or umbrella under a fiscal agent on file. If applicable, a letter from the fiscal agent under which the organization umbrellas must be submitted along with the application and the following qualifying documents:
 - a. **Copy of current Business License** N/A as we're a nonprofit
 - b. **New Mexico State Gross Receipts-Withholding Certificate (CRS-1)** N/A as we're a tax-exempt nonprofit
 - c. **Copy of IRS determination letter acknowledging non-profit status**
 - d. **Proof of Insurance (COI) naming the City of Santa Fe as additionally insured**
This is handled upon event approval
 7. Please submit the Occupancy Tax Funding Assistance application, your current organization budget and event budget, along with nine (9) copies (mailed or delivered) to the attention of the OTAB Administrator at the above stated address for review.

The application is to be completed and submitted, including all attachments, by Friday, September 19, 2025 at 5pm. An oral presentation may be required at a meeting of the grant review panel in October/November before final selections are made. Any applicants failing to submit their application by the scheduled date and time will be required to wait until the next funding cycle to submit a funding request. Grants are awarded annually unless funds are either not used by a grantee or all funds are not awarded at which time a process may reoccur at the discretion of the OTAB, which could include consideration of individual requests, or issue funds to a second tier of applicants.

Applications will be collected and reviewed during the applications cycle. If your application is deemed to meet the criteria with a minimum written evaluation of 30 points, you may be invited to attend an OTAB Grant Review Panel Meeting, to make a presentation. The Grant Review Panel (conflict of interest free) will review the applications/ presentations and may ask questions and discuss the merits of the event with the applicants. Total interview time will not exceed 45 minutes. All OTAB meetings including the Grant Review Meeting are conducted in compliance with the New Mexico Open Meetings Act.

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

EVALUATION CRITERIA – WRITTEN – 60 POSSIBLE POINTS

- a. **Section 1 – Overall Proposal Concept** – Maximum Points Possible: 20
- b. **Section 2 – Marketing Plans** – Maximum Points Possible: 15
- c. **Section 3 – Partnerships** - Maximum Points Possible: 5
- d. **Section 4 - Financial Capability** – Maximum Points Possible: 10
- e. **Section 5 – Outcome and Follow through** - Maximum Points Possible: 10
- f. **Section 6 – Formatting** – The evaluator may deduct up to 5 points

EVALUATION CRITERIA – ORAL – 40 POSSIBLE POINTS

- g. **Concept & Creativity** – Maximum Points Possible: 15
- h. **Value & Impact** - Maximum Points Possible: 15
- i. **Comprehensive Approach and Readiness** – Maximum Points Possible: 10

Total Possible Points: 100 Points

SCORING

The proposal process can be a two-part: a written proposal then an oral presentation. Both parts of the process must be completed, if oral presentations are called, to be considered for funding. The written part is worth 60 points. Applicants scoring less than 30 points in the written evaluation will not have an opportunity to be funded.

9. If the OTAB declines funding an application, the applicant may request that the OTAB Administrator place that item on a subsequent OTAB monthly meeting agenda for further clarification. The Chairman of OTAB approves all requested agenda items for the meeting.
10. If the applicant's request is approved by the OTAB, the OTAB Administrator will then draft a contract of services. This may require the applicant and the Administrator to work together. Due to the time needed for processing the contract, it is very important that the applicant cooperate with OTAB Administrator throughout this process.
11. After the City has approved the contract and the contract is fully executed, a purchase order will be created. The OTAB Administrator will require an invoice upon completion of services for the event. Only those costs incurred after the contract is fully executed may be invoiced for payment. The invoice must include expenditure detail with paid invoices if the grant is for marketing reimbursement.

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

12. Once the Contract has been executed it shall not be altered, changed, or amended except by a written notice to OTAB by the applicant. The OTAB will then hear the request for amendment at its next scheduled meeting and either approve or deny acceptance. If accepted an amendment to the Contract will then be prepared and presented to the City Manager for final approval and signatures.
13. All advertisements and promotional materials for the event must state, "**partial funding was granted by the City of Santa Fe Occupancy Tax**" and have the **Santa Fe Script logo and the Fly Santa Fe logo**.
14. The intent of funding special events from Occupancy Tax proceeds is to bring overnight visitors into Santa Fe and thus increase tourism for the City of Santa Fe. Events must only use Occupancy Tax funds for advertising, promotion, or marketing that targets an audience outside of a 100-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 100-mile radius of the City of Santa Fe. If an event needs to attract a significant amount of Santa Fe residents, then funds from sources other than OTAB must be used for local media purchases. For example, your advertising budget is \$6,000. OTAB awards your organization \$2,500. You would spend the OTAB funding amount (\$2,500) on a media beyond a 100-mile radius of Santa Fe to attract overnight visitors and your remaining advertising budget (\$3,500) on local media

Grants can also be awarded to support high visibility public relations events or activities, which provides seed development funding in support of a sustainable annual event that significantly increase Santa Fe's position as a cultural travel destination through press. The use of this funding has more flexibility such as event development and production and will be evaluated based on benefit from value of earned media. The contract for services for this type of event will be specific in the use of the OTAB funds.

15. OTAB has instituted the following step-down process for funding. No more than 3 years of total funding will be considered. The amounts stated are examples using maximum values.

- a. Year one funding \$40,000 (maximum potential funding)
- b. Year two funding \$30,000 with matching of at least \$15,000 for marketing
- c. Year three funding \$20,000 with other funding of at least \$22,500 for marketing
- d. Year four, no additional funding
 - e. **Second and third year funding does not require a separate application process, however, is not guaranteed. For consideration of funding, the applicant must file a post event report and present results to OTAB at a regular meeting. If oral presentations are called, 2nd or 3rd year applicants will be required to present.**

* For the 2026 funding cycle, there is \$150,000 available.

- 16. For a meeting event grant, the non-profit sponsoring the event must be located in Santa Fe City or County and the anticipated event must be planned to generate a minimum of 200 room nights. An event must not include a weekend unless it is an extension of the main part of the event. Weekend nights cannot be included in the calculation of room nights generated. Meeting events can receive two years of funding, \$5,000 in the first year and \$3,000 in year two. Year two will only be funded if the meeting generates the required number of room nights.
- 17. The Contractor must maintain adequate liability insurance in at least the amount stated in the New Mexico Tort Claims Act. A certificate of insurance must be provided by the Contractor's insurance carrier with the City of Santa Fe named as an additional insured. 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 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.
- 19. All reimbursement information must be categorized per City of Santa Fe Professional Service Agreement approved budget.
 - a. Original invoices must be submitted for payment processing. (Copies of invoices will not be accepted.) Invoices must be dated and marked paid by the event after the signed agreement date.
 - b. Vendor statements will not be accepted instead of original invoices.
 - c. Copy of cancelled checks (front & back) or signed credit card receipts must accompany invoices as proof of payment.
 - d. Copies/clippings of flyers, banners, advertisements (radio, TV, newspaper, magazine, etc.) must accompany each vendor-related invoice.
 - e. Progress payments will be accepted.

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

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

Acknowledgement:

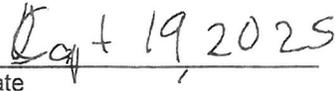
Please sign below acknowledging that you have read and fully understand the preceding document—*Procedures & Application for Occupancy Tax Funding Assistance for Special Events.*

A handwritten signature in black ink, appearing to be 'Oy' followed by a stylized flourish.

Applicant's Signature

Founder and CEO

Title/Position

A handwritten date in black ink, 'Sept 19, 2025', written above a horizontal line.

Date

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

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

What are your proposed dates?

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

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

Will the event use any City owned facilities such as the Community Convention Center? If so, have you verified availability of the space on your intended dates?
2. Is this event being held "off-season or shoulder-season"?
3. Will you be partnering with another organization to put on this event? If YES, please provide the name, email and contact information for the other organization.
4. Have you or will you be applying for other grant funds such as the New Mexico Tourism Department annual grant program? If so, please provide any known details in writing (1/2 page
5. Using a budget format, please include a section devoted to allocation of OTAB funding as to marketing purposes. For high visibility public relations, events please describe in detail how and when you will be spending funds.
6. If this event has received OTAB funding in the past, please state, in detail, what changes and or additions have been made to the event or your organization's promotion of the event that have the potential of increasing the numbers of visitors to the city. Please use the actual figures of visitors and room-nights from your last final report as a baseline and make your projections for this application in relationship to that baseline. Please provide media event media coverage the event receives. The advisory board encourages collaborations and creative solutions to the attraction of new and repeat visitors to the City of Santa Fe and your event.
7. The applicant is required to list the name, title and phone number of any other organizations, including other City of Santa Fe funds, you have been granted or contracted to receive in addition to OTAB funds. Failure to disclose this information with your application may result in denial of funding.
8. **Enclose your organization's budget, expenses and income statement for the last, current, and next year. In addition, include a separate event budget. If this is a first-time event specify your projections and justification for expenditures.**
9. List all paid and volunteer staff positions including total salaries and an organizational chart.
10. Provide a copy of your Marketing Plan that includes public relations along with any existing promotional literature. If this is a first-time event, please provide an example piece.
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.

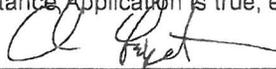
APPLICATION FOR OCCUPANCY TAX FUNDING ASSISTANCE
REQUIRED

*Acknowledgement Certificate:

State of New Mexico

County of Santa Fe

On this 19 day of September, 2025, I Owen Lipstein certify that the information submitted for the Occupancy Tax Funding Assistance Application is true, exact and complete.



Acknowledger's Signature

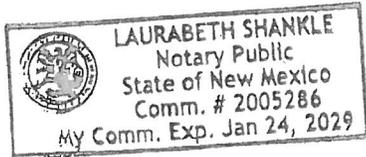
Founder, CEO, Editor in Chief

Title/Position

Subscribed and sworn before me this 19 day of September, 2025

By Owen Lipstein

(Seal)



Notary Public

My commission expires: January 24 2029

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

Answers

Write a brief synopsis (1/2 page) about the event including its purpose and goals. Estimating the economic impact to the city, for example, the number of people & hotel rooms it will sell, length of stay and where guests will be coming from. Be sure to detail how this event will bring visitors between the ages of 35 and 57 to Santa Fe, support increased tourism in the off season and for the City of Santa Fe.

For the last five years, Santa Fe Magazine has interviewed the poets, outlaws, artists, mystics, entrepreneurs, healers, builders, saints, sinners, lovers and lunatics that make this a truly remarkable city. And now the magazine is coming to life with the Santa Fe Magazine Festival, a rollicking three days of interviews, concerts, exhibitions, standup, roundtables, art tours, VIP Dinners, and even a Wild West show!

The new Santa Fe Magazine festival will bring visitors ages 35-65 to Santa Fe through a highly-targeted digital campaign focused on high-income cultural travelers who are likely to return year after year.

We're reaching people who:

- Search "*Santa Fe*," "*What to do in Santa Fe*," or "*Summer festivals*"
- Visit sites like Santa Fe Tourism, Meow Wolf, Canyon Road
- Visit sites like the Aspen and *New Yorker* and *Atlantic* festivals
- Read articles about Santa Fe events or Southwest travel
- Book hotels, Airbnbs, or experiences in the area
- Land at SAF or ABQ.

Our campaign focuses on affluent travelers in cities like Dallas, Denver, Scottsdale, Austin, and NYC (to name a few) who are actively planning art, food, culture, and music-focused getaways. We'll be working with Marcy St. and Guadalupe District to provide discounted meals with local restaurants around the Convention Center, helping showcase what Santa Fe has to offer outside of the festival. We will collaborate with the Santa Fe hotels and restaurateurs, providing packaged information, ticket blocks, and preview learning sessions for local concierges.

Our targeted audience are visitors who don't just come once—they fall in love with Santa Fe and return again and again, helping to drive long-term tourism growth.

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

It will take place Thursday-Sunday.

What are your proposed dates?

June 11-14, 2026

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

None

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

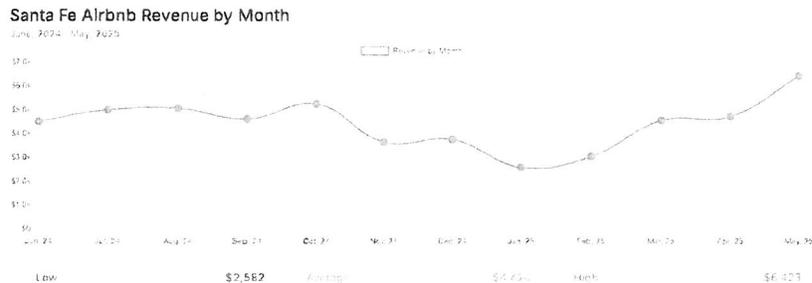
N/A

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

Yes, we have talked with Randy Randall and confirmed that the Community Convention Center is available on our proposed dates.

2. Is this event being held “off-season or shoulder-season”?

The Santa Fe Magazine Festival is being held in June. Though June is in the summer, traditionally June lags behind other summer months in hotel and Airbnb stays. This is why we chose it as our proposed date.



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

No

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

No

5. Using a budget format, please include a section devoted to allocation of OTAB funding as to marketing purposes.

Attached

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

Not applicable

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

None

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

As this is a new organization, we don't have any income statements as of yet. Our projections are attached here. We're going to use \$20,000 for extremely targeted digital advertising campaigns that will hit non-New Mexico prospects. Our budget is based on 1,000 people coming, and we believe that hitting these 3 million people will bring in many more than that.

We will use the other \$20,000 for PR. We've engaged Audrey Rubinstein, and here's a top line bulleted list of her engagement plan:

- Pitching
- Distribution & Clippings
- Media DataBase Clippings
- DeskSide visits
- Press visits
- Strategic Partnerships

Based on her experience and our digital advertising, we're confident that we're going to bring in more than our target of 1,000 attendees.

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

Name	Position	Salary
Owen Lipstein	Founder and CEO	N/A
John Miller	Founder and Creative Director	N/A
Audrey Rubinstein	Public Relations	\$2000/month
Robert Shamo	Event Coordinator	Partnership percentage
Mika Van Winkle	Advertising and Fundraising	Partnership percentage
Tessa Miller	Marketing and Management	\$50/hr
Maggie Fine	Content Editor	N/A
Nikki McCauley	Social Media	\$1000/mo
Veronica Alarid	Bookkeeper	\$50/hr
Greg Wolfe	Audience Management	\$50/hr

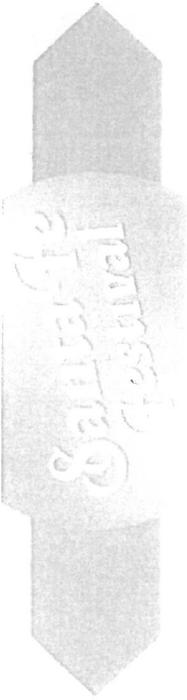
Paco Acosta	Operations	\$50/hr
50-100 Support Staff / Volunteers / Security	50-100 Support Staff / Volunteers / Security	Detailed in budget section

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

Marketing Plan, PR Plan, Example Piece (Landing Page)

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.

The Atlantic Festival, The New Yorker Festival, Santa Fe International Literary Festival



Profit Loss Statement

Revenue		
Admission	\$550,000	
Dinners	\$48,000	
Sponsorships	\$50,000	
Total	\$648,000	
		Expenses
		Hotels
		Flights
		Speakers
		Conference Space
		Audio Visual
		Furniture Rentals
		Labor & Security
		VIP Dinners F&B
		VIP dinner transport
		VIP dinner space
		Swag / Graphics
		Event Insurance
		Public Relations
		Print Marketing
		Digital Marketing
		Misc Expenses
		Total
		\$731,000
		Net -\$95,000

PR Proposal for Santa Fe Magazine Festival

Founders | Owen Lipstein + John Miller

Santa Fe Magazine Festival

PHASE 1:

Gathering Materials/Creating the Story

Duration: 1 month

Interviews: Owen and John

PR and Brand Questionnaire

Development of EPK

Create FAQs

Deliverables:

1. Draft press release to announce launch | Date: mid-September
2. Strategic PR plan with an included timeline within the first two weeks of the contract
3. Electronic and printed press kit
4. Audit of all materials: online presence and social media, and strategic recommendations
 - Gathering all materials related to the company: background, images, past press releases, boilerplate information, news items, video, media relationships of note, and press leads
5. Develop a boilerplate summary of the organization and generate key pitches for 2025-2026
6. Develop long and short lead planning for newspapers, television, podcasts, radio, and magazines
7. Create a press release schedule for the remaining 8 months with plans for Key Announcements
8. Create media run of show for Event
9. Bi-monthly meetings with the principal and the Account director

PHASE II:

Ongoing: 8 Months

PR Campaign PR Scope of Work

Provide Santa Fe Magazine Festival with public relations support, including press release writing, distribution, proactive pitching, representation at desk sides in New York and Los Angeles, media relations at design events throughout the year, and facilitate strategic partnerships

PRESS RELEASE WRITING AND PITCHING

The Metta Agency's copywriting, clean design, and targeted distribution will be monitored and measured for your markets, such as Los Angeles, Denver, Dallas, Chicago, New York, and Asia, as determined by further conversation with Amatoya.

PERSONAL PITCHING

In addition to press release distribution, the Metta Agency will spend 5 hours a week personally pitching local and national media contacts, including but not limited to

- Elle
- Harper's
- The Economist
- T Magazine
- Conde Nast Traveler
- Travel & Leisure
- Vogue
- USA Today
- Washington Post
- New York Magazine
- Elephant Magazine
- 5820
- Mountain Living
- Phoenix Home and Garden
- Sunset
- Mother Jones
- National Geographic
- New Mexico Magazine
- Reader's Digest
- Vanity Fair
- Time Magazine
- Midwest Living
- Smithsonian
- Outside

- **Trade and News**
- CNN

- Associated Press
- Poets and Writers
- Dallas Morning News
- Travel Weekly
- Travel Daily News
- AARP New Mexico
- BBC Tourism
- Eye for Travel
- The Local
- Thrillist

Blogs, Podcasts, Television and Radio

Many more are determined by our conversations and your goals!

DISTRIBUTION & CLIPPINGS PRESS RELEASE DISTRIBUTION

PR News Wire is the #1 global content distribution network and is not the same as CISION Communications Cloud, or Vocus. The METTA Agency opts to work directly with the PR Newswire office in Albuquerque, NM, through our agency account to devise tailored and personalized press release distributions that add value to your organization.

PR Newswire allows us to quickly disseminate a news release over the wire to a specific targeted group of recipients. Whenever possible, we work with the Associated Press to break news.

MEDIA DATABASE & CLIPPINGS SERVICE

The METTA Agency employs Muck Rack as its press database and reporting software. Dubbed the "new standard in PR software," Muck Rack addresses the fact that most PR tools haven't changed since the first directory was published in 1952. Muck Rack is trusted by top-tier journalists, global PR agencies, and Fortune 500 companies, as well as many boutique agencies and entrepreneurs.

DESK SIDES & PRESS VISITS DESK SIDES

Every February or November, the METTA Agency visits NYC for yearly desk sides. When in New York, we meet with editors and journalists every day, over three or four dedicated days.

PRESS VISITS

The METTA Agency assists in the scheduling, housing, and itineraries for visiting media throughout the year. Whenever possible, we seek to tell substantial stories that will reach target audiences and provide a deeper understanding and context of Santa Fe and what's happening in the creative community.

STRATEGIC PARTNERSHIPS

Santa Fe is a unique market where building and maintaining alliances is a key component of your organization's public relations strategy. The METTA agency has long-term relationships in the arts, with cultural organizations and with thought leaders. We naturally serve as a liaison, promoter, and champion of your product and story.

MEASURING RESULTS PR ROI

Total quantity of media placements: provide media hits as they are published, as well as providing a monthly report of coverage.

If Ad Value is important to the organization's board, this value will be included and calculated using 3 x advertising rates and a standard Ad Value Equivalency of \$2 for every 1,000 people reached digitally.

Assessing the voice of the coverage: In addition to summarizing and enumerating the coverage, we will provide a report assessing the tone of the coverage. Whether it is positive, negative, or neutral.

Viral impact: online, media coverage will also include statistics about whether the coverage was shared on social networks and by influencers.

PR Relationship Management: We will provide any and all insights on coverage impacts to your brand's image and business growth, and manage your perception with the press.

Monthly Reporting and Deliverables:

- Monthly PR Clipping and Activity Report
- 1 Press release per month
- 20 hours of personal pitching
- 2x a month strategy calls

ABOUT US

M E T T A is the result of over 17 years of active collaboration with artists, designers, and arts organizations to publicize their creative visions and make invaluable connections within local and international markets. We work with creative people everywhere and represent our clients in a way that authentically engages their target audiences.

Audrey Rubinstein, Principal has worked for over fifteen years in the field of art and culture publicity and content creation.

She is passionate about promoting Native art and culture and helping journalists source unique angles that reflect a modern, inclusive, and intelligent American Southwest. Her number one priority is to enhance and maintain the national and international reputation of Santa Fe as a world-class art and cultural destination.

Rubinstein majored in Journalism and American History at Antioch College in Yellow Springs, Ohio, and received her MFA in Theater: Contemporary Performance from Naropa University in 2009. She left JLH Media, where she was an Account Director for the Georgia O'Keeffe Museum and Santa Fe Indian Market, and formed the METTA Agency, specializing in art and culture in 2017.

Account Director: Ylise Kessler | She will be assisting on an hourly basis

Ylise Kessler is a private art advisor and founder of YLISE KESSLER FINE ART LLC. Established in New York in 1997, our mission has been to provide clients with a focused resource for developing and maintaining art collections by offering leading market experience, art historical expertise, and consummate professionalism. For more than thirty years, YKFA has provided art advisory services for corporations, residential clients, and the architecture and design communities in New York and Santa Fe.

After receiving her BFA from Tyler School of Art, Kessler began graduate work in the inaugural Museum Studies program at F.I.T. Mentored by renowned scholar, critic, curator, and leading art historian, Richard Martin, and co-chair Harold Koda, former curator-in-chief of the Costume Institute at the Metropolitan Museum of Art, Kessler soon realized that she would be better suited to working within the exhilarating contemporary art world of New York than in an institutional position. Shortly thereafter, she founded YKFA and became an independent art advisor.

During the advisory's early years, Kessler placed works by leading blue-chip and emerging artists Frank Stella, Lynda Benglis, Jeff Koons, and John Chamberlain. Ylise Kessler Fine Art has since expanded to include modern and post-war masters such as Picasso, Matisse, O'Keeffe, and de Kooning, and as well as contemporary and historic Native American art and Southwestern regional works.

HOW WE WORK

In close coordination with Santa Fe Magazine, the Metta Agency will market and promote your product, key spokespeople, artist collaborations and other assets—locally, nationally and internationally through a variety of media, including but not limited to print, radio, digital articles, blogs, television, social media, using a combination of press releases, proactive pitches, press visits, earned editorial articles, social media and curated events.

BIDDER QUALIFICATIONS

Clients have enjoyed placements in the following publications: (and more)

- Vogue Magazine
- The Independent
- The Guardian
- Harper's Bazaar
- The NY Times
- T Magazine
- The Wall Street Journal
- The Dallas Morning News
- Cowboys and Indians
- The Associated Press
- The BBC
- FASHION Magazine, Canada
- How to Spend It?

CURRENT & ANNUAL PR CLIENTS

- Santa Fe Indian Market
- SWAIA Native Fashion Week
- The International Folk Art Market
- Santa Fe Symphony
- Zeitgeist Dance Theatre
- Cancer Foundation for New Mexico

TESTIMONIALS

"Audrey Rubinstein helped us launch ELOISA restaurant in Santa Fe and continued to manage our public relations efforts for the following year. In that year, we received national coverage in top tier publications including T Magazine, Vogue, Los Angeles Magazine and Latina Magazine; we were named one of the 21 Best New Restaurants by Eater.com and nominated for a James Beard Award. She is fun to work with and gets great results. —

Chef John Rivera Sedlar

"It is a real pleasure to work with Audrey Nadia Rubenstein. Her creativity, knowledge, caring and high degree of professionalism have led us to new opportunities for exposure and helped our business make valuable connections. We appreciate Audrey, she is an asset to our business.

Jed & Samantha Foutz. Gallery Owners, Shiprock Santa Fe

"Audrey Nadia is extremely intelligent, dependable, skillful. She approaches all that she does with tenacity, drive, and humor. And... she is really cool.

Tom Cates Founder, The Land/an art site

REFERENCES

- Liz Rees. Cofounder Shelby House + Spirited Goods T: 212-464-8636

- John Rivera Sedlar: Executive Chef and Founder of ELOISA. T: 323-574-9394
- Jed & Samatha Foutz: Owners of Shiprock Santa Fe T: 505-803-5799

Colleagues

Walt Borton: Publicist and Communications Strategist 505-577-0301

- Suzanne Sakalaris: Communications Strategist | Artisan Communications 505-490-9116

BUDGET

Terms and Fees:

Monthly: \$2,000 plus NM GRT

PR Retainer Fee: based on need | \$125 per hour 15 hour account work

Muck rack fee: \$200

2,000 a month and percentage upside

additional Costs:

Press release distribution: \$375 per release.

Term: 8 Months at will contract (30-day no-fault notice)

- TBD Event Management and private press previews included
- Access to account rep and principal, Monday- Friday 8 am to 5 pm and by appointment Bi-monthly client meetings with team to review and revise objectives

Invoicing and Payment:

The METTA Agency invoices clients upon the commencement of the contract agreement and the 15th day of the month thereafter.

After 30 days, unpaid invoices are charged a 1.5% fee.

Festival Digital & Social Marketing Plan

Marketing Launch: December 2025 (soft start), hard push from January 2026 through June

Primary Goal: Reach 3 million people

Channels: Facebook, Instagram, programmatic display, geofencing, search and site retargeting

Key Targets:

- Anyone who searches “Santa Fe,” “What to do in Santa Fe,” “Summer festivals”, etc.
- Anyone who visits websites for Santa Fe Tourism, Meow Wolf, Canyon Road, New Yorker Festival, Aspen Festival, etc.
- Anyone who visits our website or Pasa, New Mexican, New Mexico, Trend, Table, etc.
- Anyone who looks for or books travel to Santa Fe
- Anyone who looks for or books hotels/Airbnbs/experiences in Santa Fe
- Anyone who lands at SAF or ABQ
- Anyone who visits the Plaza, Canyon Road, or other key destinations in Santa Fe
- Anyone who reads an article online about Santa Fe events, tourism, or summer activities

Phase 1: Strategy & Creative Development (September–November 2025)

1. Messaging Pillars Development

- Develop core themes: Santa Fe arts/culture, unique festival experiences, summer travel, etc.
- Create 5 messaging pillars around the themes

2. Visual Asset Creation

- Host 2–3 shoots with local artists, musicians, or chefs speaking at the festival
 - Video examples
 - [Edible Wayward Baking.mp4](#)
 - [High Street Deli Reel.mp4](#)
 - [Bien Nacido Reel.mp4](#)
 - During video shoot, take photos for static image ads and posts
- Collect visuals that we’ve used in the magazine
 - Santa Fe landscapes, architecture, markets, and cultural moments
 - Close-ups of art, food, music instruments, hands painting, etc.
- User-generated content from Canyon Road shoots

3. Landing Page Setup

- SEO-optimized landing page with pixel tracking
- Event signup CTA (“Get Updates” or “Earlybird discounts”)

4. Strategic Partnership Exploration

- Potentially partner with hotels to help advertise (e.g. posters in their spaces, social collaborations, Merch and ticket sales)

Phase 2: Awareness Campaign (December 2025–February 2026)

1. Ad Channels Activated

- Facebook & Instagram Ads: Carousel, video, and story formats
- Display Programmatic Ads: Retarget static images across art, travel, food sites

2. Targeting Tactics: Geofencing

- Target key feeder cities (LA, Dallas, Phoenix, Denver, Austin, NYC)
- Geofence art fairs, foodie events, music festivals

3. Targeting Tactics: Search Retargeting

- **Demographics:** Ages 25–65, annual income \$100K+, college-educated
- **Behavioral:** People who've recently searched for Santa Fe, southwest travel, or summer festivals
- **Keywords:** Santa Fe art festival, Southwest art, Native American art, Contemporary art Santa Fe, Art gallery Santa Fe, Art markets New Mexico, Santa Fe artists, Indian Market Santa Fe, Folk art Santa Fe, Art collectors events, Santa Fe music festival, Live music New Mexico, Outdoor concerts Santa Fe, Indie music festival, Music in the plaza Santa Fe, Summer music events Southwest, Culinary festival New Mexico, Santa Fe food festival, Santa Fe things to do, Santa Fe events June, Santa Fe events July, Visit Santa Fe, Summer festivals Southwest, Santa Fe vacation, Weekend trips from Phoenix / Denver / Austin / LA, Summer travel New Mexico, Southwest road trip, Best cultural festivals USA, Artist residencies Santa Fe, Creative retreats Southwest, Art and wellness retreats, Art festival sponsorship
- **Tourist-Specific:** People who are looking to book flights or experiences in Santa Fe, get info from hotel websites, booking sites (e.g. Expedia), airline sites
- **Geofencing:** every zip code in Santa Fe, specific locations in other areas around NM, festivals going on in spring (Lit festival, Spring Festival, etc.)

4. Targeting Tactics: Website Retargeting

- When someone clicks on the ad on Facebook/Instagram, they will be served the ad again at a later date if they don't convert (pixel-based retargeting)
- When someone is on our website, our competitors' websites, or other relevant websites, they'll be served the ad

5. Organic Social Media

- Announce the festival, include an early bird discount / holiday gift

Phase 3: Engagement + Optimization (March–April 2026)

1. Retargeting Optimization

- Create lookalike audiences from website visitors, people who interacted with social ads, people who purchase and serve the ads to them as a new segment

2. Organic Social Media - Phase 2

- Introduce festival headliners, food vendors, installations
- Behind-the-scenes content and artist interviews

- Encourage shares with contests or hashtag campaigns

Phase 4: Conversion Push (May–Festival Date)

1. Ticket Sales Advertising
 - Use urgency: “Tickets are flying,” “Last chance for VIP,” “Weekend passes almost gone”
 - Countdown clocks in video and carousel ads
2. Local Awareness Surge
 - Target residents in NM + surrounding regions
 - Promote local discounts if applicable, family-friendly features
3. Tourist Itinerary Ads
 - Carousel ads: “Your Perfect Weekend in Santa Fe” (festival + lodging + galleries + food)
 - Partner with tourism board or hotels for cross-promotion

Phase 5: In-Festival & Post-Event (During + After)

1. Live Social Coverage
 - Real-time posting (stories, reels, on-the-ground content)
 - Partner with influencers to go live or post experiences
2. Merchandise Deals
 - Retarget attendees for merchandise or future events
 - Collect user-generated content (UGC) for future campaigns
3. Performance Review & Learnings
 - Track CTR, conversions, ticket sales, ROAS
 - Optimize audiences and placements for 2027

Social Media Overall

Phase	Role of Social	Tactics
Awareness	Reach & Introduce	Interest-based targeting, storytelling content
Engagement	Excite & Educate	Festival previews, artist/vendor highlights, interactive posts
Conversion	Drive Sales	Urgency-based ads, ticket offers
In-Festival	Real-Time Buzz	Reels, stories, share influencer content
Post-Event	Build Loyalty	Recap videos, UGC

Budgeting & Scaling Recommendations

- **January Spring:** 500K impressions/month for 6 months is \$39K
 - \$4.85 CPM

- **Social:** A combination of organic posting, boosted posts, and advertising on Instagram and Facebook
 - \$100/month for boosted posts should reach around 5K people/month
 - Analyze after 1 month for potential ramp-up to larger spend
 - \$2K/month for advertising on Instagram and Facebook will reach up to 180 million people depending on targeting
 - Analyze after 1 month for potential ramp-up to larger spend

City of Santa Fe
Occupancy Tax Advisory Board (OTAB)
2026 Score Sheet

Applicant SF Magazine Reviewer BB

EVALUATION CRITERIA – WRITTEN – 60 POSSIBLE POINTS

a. • **Section 1 – Overall Proposal Concept -**

Did the applicant write a brief synopsis (1/2 page) about the event including its purpose and goals? Was there an estimate of the economic impact to the city, for example: the number of people & hotel rooms it will sell; length of stay and from where guests will be coming? Was there detail on how this event will bring visitors between the ages of 35 and 57 to Santa Fe and support increased tourism in the off-season?

Maximum Points Possible: 20. Score: 14

b. • **Section 2 – Marketing Plans –**

Did the applicant provide a detailed marketing plan? Were media placements in appropriate markets? Did the applicant address "off season" preference?

Maximum Points Possible: 15. Score 14

c. • **Section 3 – Partnerships –**

Did the applicant take into consideration competing or leveraging of other events with overlapping dates? n/a

Maximum Points Possible: 5. Score: 5

d. • **Section 4 – Financial Capacity –**

Has the applicant applied for other grant funds? Did the applicant provide a detailed budget and do the financial allocations appear appropriate?

Maximum Points Possible: 10. Score 10

e. • **Section 5 – Outcome and Follow through –**

Did the applicant address whether they had received prior O.T.A. B. funding? Did the applicant provide what changes and or additions have been made to the event or the promotion of the event that has the potential of increasing the numbers of visitors to the City?

Maximum Points Possible: 10. Score 10

f. • **Section 6 – Formatting –**

Was the application well presented, easy to understand and readable?

The evaluator may deduct up to 5 points. Score -1

Total Possible Points: 60

Total Score 52

Upon completion email to sjspencer@santafenm.gov

2025 O.T.A.B Grants

City of Santa Fe
Occupancy Tax Advisory Board (OTAB)
2026 Score Sheet

Applicant SF Magazine Festival Reviewer R. De Oll

EVALUATION CRITERIA – WRITTEN – 60 POSSIBLE POINTS

a. • **Section 1 – Overall Proposal Concept -**

Did the applicant write a brief synopsis (1/2 page) about the event including its purpose and goals? Was there an estimate of the economic impact to the city, for example: the number of people & hotel rooms it will sell; length of stay and from where guests will be coming? Was there detail on how this event will bring visitors between the ages of 35 and 57 to Santa Fe and support increased tourism in the off-season?

Maximum Points Possible: 20. Score: 20

b. • **Section 2 – Marketing Plans –**

Did the applicant provide a detailed marketing plan? Were media placements in appropriate markets? Did the applicant address "off season" preference?

Maximum Points Possible: 15. Score 10

c. • **Section 3 – Partnerships –**

Did the applicant take into consideration competing or leveraging of other events with overlapping dates?

Maximum Points Possible: 5. Score: 0

d. • **Section 4 – Financial Capacity –**

Has the applicant applied for other grant funds? Did the applicant provide a detailed budget and do the financial allocations appear appropriate?

Maximum Points Possible: 10. Score 5

e. • **Section 5 – Outcome and Follow through –**

Did the applicant address whether they had received prior O.T.A. B. funding? Did the applicant provide what changes and or additions have been made to the event or the promotion of the event that has the potential of increasing the numbers of visitors to the City?

Maximum Points Possible: 10. Score 5

f. • **Section 6 – Formatting –**

Was the application well presented, easy to understand and readable?

The evaluator may deduct up to 5 points. Score _____

Total Possible Points: 60

Total Score 40

Upon completion email to sjspencer@santafenm.gov

2025 O.T.A.B Grants

City of Santa Fe
Occupancy Tax Advisory Board (OTAB)
2026 Score Sheet

Applicant Santa Fe Magazine Reviewer David A. Carr

EVALUATION CRITERIA – WRITTEN – 60 POSSIBLE POINTS

a. • **Section 1 – Overall Proposal Concept -**

Did the applicant write a brief synopsis (1/2 page) about the event including its purpose and goals? Was there an estimate of the economic impact to the city, for example: the number of people & hotel rooms it will sell; length of stay and from where guests will be coming? Was there detail on how this event will bring visitors between the ages of 35 and 57 to Santa Fe and support increased tourism in the off-season?

Maximum Points Possible: 20. Score: 5

b. • **Section 2 – Marketing Plans –**

Did the applicant provide a detailed marketing plan? Were media placements in appropriate markets? Did the applicant address "off season" preference?

Maximum Points Possible: 15. Score 9

c. • **Section 3 – Partnerships –**

Did the applicant take into consideration competing or leveraging of other events with overlapping dates?

Maximum Points Possible: 5. Score: 0

d. • **Section 4 – Financial Capacity –**

Has the applicant applied for other grant funds? Did the applicant provide a detailed budget and do the financial allocations appear appropriate?

Maximum Points Possible: 10. Score 5

e. • **Section 5 – Outcome and Follow through –**

Did the applicant address whether they had received prior O.T.A. B. funding? Did the applicant provide what changes and or additions have been made to the event or the promotion of the event that has the potential of increasing the numbers of visitors to the City?

Maximum Points Possible: 10. Score 5

f. • **Section 6 – Formatting –**

Was the application well presented, easy to understand and readable?

The evaluator may deduct up to 5 points. Score _____

Total Possible Points: 60

Total Score 24

Upon completion email to sispencer@santafenm.gov

2025 O.T.A.B Grants

City of Santa Fe
Occupancy Tax Advisory Board (OTAB)
2026 Score Sheet

Req = \$40,000
June 11-14

Applicant Santa Fe Magazine Reviewer JOEDAN GUEANTHER

EVALUATION CRITERIA – WRITTEN – 60 POSSIBLE POINTS

a. • **Section 1 – Overall Proposal Concept -**

Did the applicant write a brief synopsis (1/2 page) about the event including its purpose and goals? Was there an estimate of the economic impact to the city, for example: the number of people & hotel rooms it will sell; length of stay and from where guests will be coming? Was there detail on how this event will bring visitors between the ages of 35 and 57 to Santa Fe and support increased tourism in the off-season?

Maximum Points Possible: 20. Score: 18

b. • **Section 2 – Marketing Plans –**

Did the applicant provide a detailed marketing plan? Were media placements in appropriate markets? Did the applicant address "off season" preference?

Maximum Points Possible: 15. Score 15

c. • **Section 3 – Partnerships –**

Did the applicant take into consideration competing or leveraging of other events with overlapping dates?

Maximum Points Possible: 5. Score: 5

d. • **Section 4 – Financial Capacity –**

Has the applicant applied for other grant funds? Did the applicant provide a detailed budget and do the financial allocations appear appropriate?

Maximum Points Possible: 10. Score 8

e. • **Section 5 – Outcome and Follow through –**

Did the applicant address whether they had received prior O.T.A. B. funding? Did the applicant provide what changes and or additions have been made to the event or the promotion of the event that has the potential of increasing the numbers of visitors to the City?

Maximum Points Possible: 10. Score 10

f. • **Section 6 – Formatting –**

Was the application well presented, easy to understand and readable?

The evaluator may deduct up to 5 points. Score _____

Total Possible Points: 60

Total Score 56

Upon completion email to sjspencer@santafenm.gov

2025 O.T.A.B Grants

**City of Santa Fe
Occupancy Tax Advisory Board (OTAB)
2026 Score Sheet**

Applicant SF Magazine Reviewer Sam Gerberding

EVALUATION CRITERIA – WRITTEN – 60 POSSIBLE POINTS

a. • **Section 1 – Overall Proposal Concept -**

Did the applicant write a brief synopsis (1/2 page) about the event including its purpose and goals? Was there an estimate of the economic impact to the city, for example: the number of people & hotel rooms it will sell; length of stay and from where guests will be coming? Was there detail on how this event will bring visitors between the ages of 35 and 57 to Santa Fe and support increased tourism in the off-season?

Maximum Points Possible: 20. Score: 8

b. • **Section 2 – Marketing Plans –**

Did the applicant provide a detailed marketing plan? Were media placements in appropriate markets? Did the applicant address "off season" preference?

Maximum Points Possible: 15. Score 10

c. • **Section 3 – Partnerships –**

Did the applicant take into consideration competing or leveraging of other events with overlapping dates?

Maximum Points Possible: 5. Score: 5

d. • **Section 4 – Financial Capacity –**

Has the applicant applied for other grant funds? Did the applicant provide a detailed budget and do the financial allocations appear appropriate?

Maximum Points Possible: 10. Score 3

e. • **Section 5 – Outcome and Follow through –**

Did the applicant address whether they had received prior O.T.A. B. funding? Did the applicant provide what changes and or additions have been made to the event or the promotion of the event that has the potential of increasing the numbers of visitors to the City?

Maximum Points Possible: 10. Score 5

f. • **Section 6 – Formatting –**

Was the application well presented, easy to understand and readable?

The evaluator may deduct up to 5 points. Score -1

Total Possible Points: 60

Total Score 30

Upon completion email to sjspencer@santafenm.gov

2025 O.T.A.B Grants

City of Santa Fe
Occupancy Tax Advisory Board (OTAB)
2026 Score Sheet

Applicant SF MAGAZINE Reviewer RIK BLYTH

EVALUATION CRITERIA – WRITTEN – 60 POSSIBLE POINTS

a. • **Section 1 – Overall Proposal Concept -**

Did the applicant write a brief synopsis (1/2 page) about the event including its purpose and goals? Was there an estimate of the economic impact to the city, for example: the number of people & hotel rooms it will sell; length of stay and from where guests will be coming? Was there detail on how this event will bring visitors between the ages of 35 and 57 to Santa Fe and support increased tourism in the off-season?

Maximum Points Possible: 20. Score: 15

b. • **Section 2 – Marketing Plans –**

Did the applicant provide a detailed marketing plan? Were media placements in appropriate markets? Did the applicant address "off season" preference?

None

Maximum Points Possible: 15. Score 12

c. • **Section 3 – Partnerships –**

Did the applicant take into consideration competing or leveraging of other events with overlapping dates?

Maximum Points Possible: 5. Score: 3

d. • **Section 4 – Financial Capacity –**

Has the applicant applied for other grant funds? Did the applicant provide a detailed budget and do the financial allocations appear appropriate?

Maximum Points Possible: 10. Score 7

e. • **Section 5 – Outcome and Follow through –**

Did the applicant address whether they had received prior O.T.A. B. funding? Did the applicant provide what changes and or additions have been made to the event or the promotion of the event that has the potential of increasing the numbers of visitors to the City?

NEW event!

Maximum Points Possible: 10. Score 8

f. • **Section 6 – Formatting –**

Was the application well presented, easy to understand and readable?

The evaluator may deduct up to 5 points. Score 4

Total Possible Points: 60

Total Score 49

Upon completion email to sjspencer@santafenm.gov

2025 O.T.A.B Grants

Festival Score Sheet

Applicant SF Magazine Reviewer Sam G

EVALUATION CRITERIA – ORAL – 40 POSSIBLE POINTS

g. • Concept & Creativity -

Did the presentation demonstrate a well thought out event? Based on the presentation, would the event likely be a draw for visitors to Santa Fe between the ages of 35 – 56? Is the event particularly reflective of Santa Fe or does it address a newness and uniqueness that will stand out from other destinations? Did the presentation demonstrate particularly creative ways of engaging its audience? Were the marketing plans demonstrative of creative uses of media or partnerships?

Maximum Points Possible: 15. Score 12

h. • Value & Impact –

Did the presentation convince you that the event will draw visitors to Santa Fe during periods of low occupancy (see chart)? Does the size of the event appear to be significant enough to have economic impact for the city of Santa Fe?

Maximum Points Possible: 15. Score 15

i. • Comprehensive Approach and Readiness –

Did the presentation demonstrate a wide view on the part of the applicant(s)? Is there consideration of not only the success of the event, but community benefits? Did the presentation demonstrate a seemingly successful combination of strategy, management, financial capacity and creativity?

Maximum Points Possible: 10. Score 9

Total Possible Points: 40 Points

Total Score: 36

Recommendations to applicant: _____

SCORING

The proposal process is two-part: a written proposal then an oral presentation. Both parts of the process must be completed to be considered for funding. Applicants scoring less than 30 points in the written evaluation and 70 points overall will not have an opportunity to be funded.

Score Sheet

Applicant Santa Fe Magazine Reviewer David A. Carr

EVALUATION CRITERIA – ORAL – 40 POSSIBLE POINTS

g. • **Concept & Creativity** -

Did the presentation demonstrate a well thought out event? Based on the presentation, would the event likely be a draw for visitors to Santa Fe between the ages of 35 – 56? Is the event particularly reflective of Santa Fe or does it address a newness and uniqueness that will stand out from other destinations? Did the presentation demonstrate particularly creative ways of engaging its audience? Were the marketing plans demonstrative of creative uses of media or partnerships?

Maximum Points Possible: 15. Score 12

h. • **Value & Impact** –

Did the presentation convince you that the event will draw visitors to Santa Fe during periods of low occupancy (see chart)? Does the size of the event appear to be significant enough to have economic impact for the city of Santa Fe?

Maximum Points Possible: 15. Score 12

i. • **Comprehensive Approach and Readiness** –

Did the presentation demonstrate a wide view on the part of the applicant(s)? Is there consideration of not only the success of the event, but community benefits? Did the presentation demonstrate a seemingly successful combination of strategy, management, financial capacity and creativity?

Maximum Points Possible: 10. Score 8

Total Possible Points: 40 Points

Total Score: 32

Recommendations to applicant: _____

SCORING

The proposal process is two-part: a written proposal then an oral presentation. Both parts of the process must be completed to be considered for funding. Applicants scoring less than 30 points in the written evaluation and 70 points overall will not have an opportunity to be funded.

\$40 request

June 11 -

Score Sheet

Applicant SF Mas Festival Reviewer R Randall

EVALUATION CRITERIA – ORAL – 40 POSSIBLE POINTS

g. • **Concept & Creativity -**

Did the presentation demonstrate a well thought out event? Based on the presentation, would the event likely be a draw for visitors to Santa Fe between the ages of 35 – 56? Is the event particularly reflective of Santa Fe or does it address a newness and uniqueness that will stand out from other destinations? Did the presentation demonstrate particularly creative ways of engaging its audience? Were the marketing plans demonstrative of creative uses of media or partnerships?

Maximum Points Possible: 15. Score 12

h. • **Value & Impact –**

Did the presentation convince you that the event will draw visitors to Santa Fe during periods of low occupancy (see chart)? Does the size of the event appear to be significant enough to have economic impact for the city of Santa Fe?

Maximum Points Possible: 15. Score 10

i. • **Comprehensive Approach and Readiness –**

Did the presentation demonstrate a wide view on the part of the applicant(s)? Is there consideration of not only the success of the event, but community benefits? Did the presentation demonstrate a seemingly successful combination of strategy, management, financial capacity and creativity?

Maximum Points Possible: 10. Score 10

Total Possible Points: 40 Points

Total Score: 32

Recommendations to applicant: _____

SCORING

The proposal process is two-part: a written proposal then an oral presentation. Both parts of the process must be completed to be considered for funding. Applicants scoring less than 30 points in the written evaluation and 70 points overall will not have an opportunity to be funded.

Sohn Miller
Owen Lipstein
Tessa Miller

Score Sheet

\$40K Request
June 11-14, 2024

Applicant Santa Fe Magazine Reviewer Jordan Guenther

EVALUATION CRITERIA – ORAL – 40 POSSIBLE POINTS

g. • Concept & Creativity -

Did the presentation demonstrate a well thought out event? Based on the presentation, would the event likely be a draw for visitors to Santa Fe between the ages of 35 – 56? Is the event particularly reflective of Santa Fe or does it address a newness and uniqueness that will stand out from other destinations? Did the presentation demonstrate particularly creative ways of engaging its audience? Were the marketing plans demonstrative of creative uses of media or partnerships?

26 Events
over 3 days
Reaching
Early 50's

Maximum Points Possible: 15. Score 15

h. • Value & Impact -

Did the presentation convince you that the event will draw visitors to Santa Fe during periods of low occupancy (see chart)? Does the size of the event appear to be significant enough to have economic impact for the city of Santa Fe?

Good to
4?

Maximum Points Possible: 15. Score 15

i. • Comprehensive Approach and Readiness -

Did the presentation demonstrate a wide view on the part of the applicant(s)? Is there consideration of not only the success of the event, but community benefits? Did the presentation demonstrate a seemingly successful combination of strategy, management, financial capacity and creativity?

Meditations
Sand Bats
Virtual Date
Virtual Immersive
Experiences

Maximum Points Possible: 10. Score 10

Total Possible Points: 40 Points

Total Score: 40

Recommendations to applicant: _____

SCORING

The proposal process is two-part: a written proposal then an oral presentation. Both parts of the process must be completed to be considered for funding. Applicants scoring less than 30 points in the written evaluation and 70 points overall will not have an opportunity to be funded.

Score Sheet

Applicant SF Mag Festival Reviewer BB

EVALUATION CRITERIA - ORAL - 40 POSSIBLE POINTS

g. • Concept & Creativity -

Did the presentation demonstrate a well thought out event? Based on the presentation, would the event likely be a draw for visitors to Santa Fe between the ages of 35 - 56? Is the event particularly reflective of Santa Fe or does it address a newness and uniqueness that will stand out from other destinations? Did the presentation demonstrate particularly creative ways of engaging its audience? Were the marketing plans demonstrative of creative uses of media or partnerships?

Maximum Points Possible: 15. Score 15

h. • Value & Impact -

Did the presentation convince you that the event will draw visitors to Santa Fe during periods of low occupancy (see chart)? Does the size of the event appear to be significant enough to have economic impact for the city of Santa Fe?

Maximum Points Possible: 15. Score 15

i. • Comprehensive Approach and Readiness -

Did the presentation demonstrate a wide view on the part of the applicant(s)? Is there consideration of not only the success of the event, but community benefits? Did the presentation demonstrate a seemingly successful combination of strategy, management, financial capacity and creativity?

Maximum Points Possible: 10. Score 9

Total Possible Points: 40 Points

Total Score: 39

Recommendations to applicant: _____

SCORING

The proposal process is two-part: a written proposal then an oral presentation. Both parts of the process must be completed to be considered for funding. Applicants scoring less than 30 points in the written evaluation and 70 points overall will not have an opportunity to be funded.

Score Sheet

Applicant SF MAGAZINE Reviewer RIK BRYN

EVALUATION CRITERIA – ORAL – 40 POSSIBLE POINTS

g. • **Concept & Creativity** -

Did the presentation demonstrate a well thought out event? Based on the presentation, would the event likely be a draw for visitors to Santa Fe between the ages of 35 – 56? Is the event particularly reflective of Santa Fe or does it address a newness and uniqueness that will stand out from other destinations? Did the presentation demonstrate particularly creative ways of engaging its audience? Were the marketing plans demonstrative of creative uses of media or partnerships?

Maximum Points Possible: 15. Score 13

h. • **Value & Impact** -

Did the presentation convince you that the event will draw visitors to Santa Fe during periods of low occupancy (see chart)? Does the size of the event appear to be significant enough to have economic impact for the city of Santa Fe?

JUNE 11-14, 2026

Maximum Points Possible: 15. Score 13

i. • **Comprehensive Approach and Readiness** -

Did the presentation demonstrate a wide view on the part of the applicant(s)? Is there consideration of not only the success of the event, but community benefits? Did the presentation demonstrate a seemingly successful combination of strategy, management, financial capacity and creativity?

Maximum Points Possible: 10. Score 8

Total Possible Points: 40 Points

Total Score: 34

Recommendations to applicant: SHOULD BE GOOD!

SCORING

The proposal process is two-part: a written proposal then an oral presentation. Both parts of the process must be completed to be considered for funding. Applicants scoring less than 30 points in the written evaluation and 70 points overall will not have an opportunity to be funded.

Occupancy Tax Advisory Board (OTAB)

Committee Members

Rik Blyth, Chairman, Lodgers

Carlos Medina, At Large

Sam Gerberding, Lodgers

Bonnie Bennett, Tourism Related

Ray Sandoval, Tourism Related

Vacant, Santa Fe County

OTAB is a tax advisory board that recommends grant awards from the lodgers' tax revenue to nonprofits that help market Santa Fe for tourism purposes. The OTAB Committee meets monthly on the fourth Friday of each month.

[Click here for the OTAB Application.](#)

The OTAB 2026 grant application is open from July 1, 2025, and will close on September 19, 2025, at 5:00 p.m.

Required in person OTAB presentations will be scheduled for October 9th and/or 10th of 2025 at the Santa Fe Convention Center Admin. Conference Room, 201 W. Marcy St. Santa Fe, NM 87501.

Event Criteria

Ideally, the proposed event shall take place during the shoulder season of Santa Fe's tourism calendar: January - April, November, and December, excluding holidays. The evaluation also considers the days of the week, other events on the calendar, and the size of the event.

Events at other times of the year can be considered. However, they will not be given as strong a rating as a comparable event in the shoulder season timeframe. Funding and planning of the events shall be public/private partnerships that seek to attract tourists younger than 56 that are on message with TOURISM Santa Fe.

The events shall exhibit the potential to generate strong overnight lodging business or build regional or national excitement, recognition of but not limited to culture, art, history, food, natural beauty, and outdoor activities. Ideally, the event that is being proposed should be four months out to ensure significant planning time.

OTAB funds should not be used to supplement fundraising efforts or goals.

Applicant Criteria

Applying organizations must have an IRS-determined nonprofit corporation status with a tax identification number or umbrella under a fiscal agent on file.

- Copy of current Business License
- New Mexico State Gross Receipts-Withholding Certificate (CRS-1)
- Copy of IRS determination letter acknowledging the nonprofit status
- Proof of Insurance as indicated on item number 13 of the application

Applicants will submit the funding application and supporting documents, including the pre-event budget breakdown, along with 11 copies mailed or delivered to the attention of the OTAB Administrator at

For questions regarding OTAB or OTAB funding, please contact Shirley Spencer, Administrative Manager, at 505-955-6208 or sjspencer@santafenm.gov.



Signature: *Erika Quintana*

Email: efquintana@santafenm.gov