

# SPECIAL EVENT OPERATING EXPENSE APPLICATION PACKET

## TRANSIENT OCCUPANCY TAX APPLICATION INSTRUCTIONS AND CHECKLIST

Salem Cultural and Tourism Promotion Advisory Board  
Fiscal Year 2008-09

### Required for Submission:

1. Applicant must be a 501(c) (3), 501(c) (4) or 501(c) (6) at the time of application submission. A copy of the applicant's current IRS determination letter must be included with the application.
2. Applicant must address eligibility of event under City Charter. Review the charter language below and identify which sub-part best applies to your application. Most special events are best qualified under sub-part (4) as activities, which promote the city for general tourism.

The City of Salem has collected a Transient Occupancy Tax (TOT) since 1974. Commonly known as a Hotel/Motel Tax, it is a nine percent (9%) tax on the nightly rate charged for lodging and is collected by lodging establishments within the Salem city limits. Section 56 of the City Charter specifies how the funds may be used:

- (1) Enhancement and beautification of vehicular and pedestrian entrance-ways to the city;
- (2) Urban beautification generally;
- (3) Improvements to or operation of major tourist attraction or cultural facilities;
- (4) Activities performed directly by the city or through contracts which promote use of Salem for conventions, conferences, seminars or for general tourism.

3. Applicant must provide a summary of all anticipated revenues and expenses for the event. The following is a sample budget.

EVENT BUDGET				
Revenues			Expenditures	
Sponsorship	10,000	Commitment Letter 11/13/07	Permits	5,000
FUN Grant	5,000	Award Letter 10/26/07	Advertising	10,000
Membership Fees	2,000	Due by 01/31/08	Contracts	12,000
TOT	10,000		Contingency	2,000
Total	27,000		Total	27,000

Note: TOT funds will be used for advertising. At time of application, all revenues are estimated.

4. Application criteria and special instructions for FY 2008-09
  - a. One application per category per organization/applicant. Categories include Operating Expense for Facilities, Special Event Operating Expense, and Capital Assets/Improvements to Facilities (Capital Project).
  - b. There are two categories of special event funding – small event with a maximum funding of

\$2,000 and large event with a funding range of \$2,001 to \$7,500.

c. Special Event applications are due no later than 5:00 pm on Friday, December 7, 2007.

5. Submit completed applications in a sealed envelope marked:

**FY 2008-09 TOT Funding Application**  
Cultural and Tourism Promotion Advisory Board  
City of Salem Budget Office, Room 230  
555 Liberty Street SE, Salem, OR 97301

6. Checklist of information required to be included in the application narrative.

## **APPLICANT CHECKLIST**

**REQUIRED OF ALL APPLICATIONS - APPLICATIONS MISSING ANY OF THE BELOW-LISTED REQUIRED MATERIALS WILL NOT BE CONSIDERED FOR FUNDING**

- All applicant/contact information.
- Copy of current 501(c) (3), 501(c) (4) or 501(c) (6) IRS determination letter.
- Summary of event. (*Project Description and Statement of Need, Section 1 of application*)
- Statement of eligibility under charter. (*Project Description and Statement of Need, Section 1 of application*)
- Dates and location of special event. (*Project Description and Statement of Need, Section 1 of application*)
- Special Event budget with all revenues/resources and expenses, including the specific use of TOT funding identified and the percent TOT funding represents of the total budget. (attachment) (*Project Budget, Section 2 of application*)
- Summary of three completed projects/events in past five years. (*Past Performance, Section 3 of application*)
- Evaluation of prior year special event. (*Past Performance, Section 3 of application*)
- Statement of community benefit. (*Community Benefit, Section 4 of application*)
- Measurable outcomes. (*Community Benefit, Section 4 of application*)

**Additional Instructions:** Submitted applications must follow the format on pages 3 and 4 of the application packet. For each section of the application, with the exception of item a in section 2, please submit the response immediately following the question. Item a in section 2 (event budget) should be submitted on a separate page.

# SPECIAL EVENT OPERATING EXPENSE

## TRANSIENT OCCUPANCY TAX FUNDING APPLICATION

Salem Cultural and Tourism Promotion Advisory Board  
Fiscal Year 2008-09

Event/Project Title:	Funding Request: \$
Non-profit applicant:	Tax ID:
Mailing Address:	Phone:
	Fax:
Contact:	E-mail:

<input type="checkbox"/> Small Special Event – maximum funding of \$2,000, scored independent of large event applicants.	<input type="checkbox"/> Large Special Event – funding range of \$2,001 to \$7,500, scored independent of small event applicants.
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**Application Due Date: No later than 5:00 pm on Friday, December 7, 2007.**

### **General Instructions:**

Provide required application information in narrative form. With attachments, application should not exceed a total of six pages. Please provide answers for all questions.

#### **1. Project Description and Statement of Need**

- a. Provide a general description of the planned event. (Summarize the special event in a few sentences or paragraph.)
- b. Statement of eligibility under City Charter. (See attached instructions and checklist for charter language.)
- c. Provide dates and location of special event. Include anticipated dates or timeframe of marketing/outreach if TOT funding is identified for this purpose.
- d. Identify how the special event complements other events.

#### **2. Project Budget:**

- a. Provide an attached budget with all anticipated revenues and expenditures for the event (See attached instructions and checklist for example.)
- b. Identify the specific use of City TOT funds for the event, if known.
- c. What percentage of the total budget are City TOT funds?
- d. How will TOT funds be used to leverage other resources?

- e. In the budget document, indicate the status of other resources (i.e., received, award letter, application made, application to be filed by date, etc.). If other fund sources are not committed at time of application, indicate anticipated sources by category of funding such as sponsorships, grants, or in-kind services.

### 3. **Past Performance**

- a. List three events, which have been successfully completed by your organization in the past five years. TOT funding of the event is not a requirement for reporting. Include the date of the event, anticipated results, actual results, and amount of TOT funding provided, if applicable.
- b. If an event was TOT-funded in a prior year, were funds expended as anticipated in the application? Did attendance and event goals meet anticipated targets in the application?

### 4. **Community Benefit**

- a. Describe any joint ventures or partnerships with other organizations sought for this funding proposal.
- b. Describe any enhanced quality of life or increase in opportunity for tourists in Salem anticipated as a result of this event.
- c. Describe how this event is designed to be available, usable, or appealing to those of diverse backgrounds, ages, and abilities.
- d. Identify a minimum of two anticipated measurable outcomes of the event including attendance estimates.

### **Disqualification Notice**

An otherwise eligible applicant could be disqualified for this grant for failure to comply with Section 56 of the City Charter, failure to meet reporting requirements and deadlines, supplying the Salem Cultural and Tourism Promotion Advisory Board with inaccurate information, or other non-compliance with city contracts.

## **RATING CRITERIA AND SCORE SHEET FOR APPLICATIONS For Applicant's Information Only**

The Cultural & Tourism Promotion Advisory Board will use the following criteria when evaluating competing proposals for funding. Required items will be screened by staff prior to review and scoring by the board.

### **1. Special Event Description and Statement of Need (10 points)**

- a. Does the application provide a summary of the special event? (Required)
- b. Does the special event qualify for funding under the City Charter? (Required)
- c. What is the date and location of the special event? (Required)
- d. Does the special event complement other events?

### **2. Special Event Budget (30 points)**

- a. Is a complete special event budget attached with revenues and expenditures? (Required)
- b. Is specific use of TOT funding identified? (Required)
- c. How much is TOT funding as a percentage of the total event budget? (Required)
- d. Will TOT funds be used to leverage other dollars?
- e. Are other resources or in-kind contributions identified for the event?

### **3. Past Performance (30 points) (Required)**

- a. Are examples of past successful events included with dates, anticipated results, actual results, and amount of TOT funding, if applicable?
- b. If previous special events were funded with TOT dollars, were funds expended as anticipated? Did attendance meet goals in the application?

### **4. Community Benefit (30 points) (Required)**

- a. Does the application encourage partnerships or joint ventures with other organizations?
- b. Will the special event enhance the quality of life for residents or increase opportunities for tourists?
- c. Is the special event available, usable, or appealing to those of diverse backgrounds, ages, and abilities?
- d. Does the application identify at least two measurable outcomes for the event?