



PROCESS FOR REQUESTING LODGERS' TAX FUNDS

A. Application Consideration

The Lodgers' Tax Advisory Board (LTAB) meets on the 3rd Monday of odd numbered months. To be considered for funding, applications must be received no later than the 1st Monday in the odd numbered months (January, March, May, July, September, or November) to be placed on LTAB agenda for review and awarding. LTAB meets on the 3rd Monday of the months listed above.

B. Obtain Application

Applications can be obtained on the city website:

www.aztecnm.gov/advisoryboards.html

or call (505) 334-7606 and request one to be emailed or mailed to you.

C. Eligibility

Any organization that promotes travel and tourism for the benefit of the Aztec area, has an established organization and leadership, can accomplish the scheduled event, and can comply with all applicable conditions is eligible. Decisions will be returned in writing to the applicant indicating approval or disapproval. Approved applications will receive notification of the funding amount, administrative guidelines and any special conditions of funding. If LTAB declines a request, the applicant is allowed to resubmit an application to be considered at the next regularly scheduled meeting.

D. Criteria for Approval

The following guidelines will be used to evaluate proposals:

- Tourism Promotion;
- Innovativeness;
- Funding History;
- Marketing Effectiveness;
- Timeline of Advertising/Marketing Plan;
- Project Business and Marketing Scope;
- Past and Projected Results and Project Evaluation

E. Application Submittals

Only one application per event. Multiple organizations may not apply for the same event.



REPORTING REQUIREMENTS and TIMELINES

A. Event Dates, Cancellations, Changes

All recipients of Lodgers' Tax funds are responsible for completing the scheduled event within the approved time-period upon the application. Changes to event dates must be submitted in writing no less than 30 days prior to the event.

B. Timeline for Funding Requests and Reimbursement Rules

No later than 60 days after the event:

1. The organizer of the event (grant recipient) will submit to the Aztec Finance Department the following:
 - 1) Receipts/invoices that are indicated paid by the vendor;
 - 2) Artwork/images of the advertisements or promotional items; and
 - 3) Proof of payment to the vendors (cancelled checks, Credit Card receipts and/or Statements, or bank statements)
 - 4) Funding for food and/or event operations will not be considered.
2. Event organizers may submit up to three requests for reimbursement toward their grant allotment. A maximum of 75% of the awarded funds may be reimbursed prior to the event date. The final 25% will be reimbursed after the event is complete and final reports submitted.
3. Unless explicitly authorized by LTAB, event promoters may not contract with or authorize payment to themselves, family members, or any entity in which the event promoter has a financial interest to provide SERVICES (services include design, website update, file downloads, etc. Services are typically but not always billable by time). In the instance that the event promoter wishes to use the services of a family member as defined above, the event promoter must obtain and submit three written quotes for the required service unless the event promoter submits documentation showing that a good faith review of available sources was conducted and there are not three available sources for the required service. Advertisement placements in radio, print, etc. do not follow the same rules as they are sole-source media.

Family Members are defined as: Related by blood, adoption, or marriage to the third degree of kinship and includes spouses, parents, children, siblings, grandparents, grandchildren, aunts, uncles, nieces, and nephews.

C. Evaluation Form

An evaluation is required for each event receiving Lodgers' Tax Funds. Evaluations must be returned to LTAB within 60 days of the completion of the event. Award funds will not be 100% reimbursed without complete submission of financial materials and the evaluation form.

D. Expenditures Report

A final report is required within 60 days after the event. Recipients are responsible for filing financial and evaluation reports. After 60 days, applicants will be given a first notification via email and then two weeks later a final notification via certified mail. After the final notification, the award will be cancelled.

E. Branding Requirements

All recipients or Lodgers' Tax funds must list the City of Aztec Lodger's Tax Advisory Board as a Contributor on all advertisements, brochures and other media materials by using the City of Aztec. Logos and guide will be provided at time of award notification.

F. Photo Requirement

After the event, the recipient is required to submit a minimum of two (2) high resolution photos in JPG format of your event to the email address below. The photos may be used for promotion on the City Tourism website and in additional tourism marketing. Please provide a letter (or in email format) from the photographer with permission for usage in digital and print media that states how the photographer wishes to be credited.

G. Submitting an Application

Applications must be received no later than the 1st Monday in the odd numbered months (January, March, May, July, September, or November) to be placed on LTAB agenda for review and awarding. LTAB meets the 3rd Monday of the months listed above.

Applications can be submitted in one of the following ways:

By Mail:

City of Aztec
City Manager's Office
201 W Chaco St
Aztec, NM 87410

By email:

In a single PDF file with all relevant materials enclosed to:

ajaramillo@aztecnm.gov

Drop off at City Hall:

Bring to the City Manager's Office, Monday through Thursday from 7:00 am to 6:00 pm:

201 W Chaco St
Aztec, NM 87410

Applications will not be accepted in person at the Visitor Center.



LODGERS' TAX FUNDS GENERAL CONDITIONS

The City of Aztec Lodgers' Tax Advisory Board invites proposals to promote tourism and related activities. Best funding is available for grant applicants the earlier they apply for their event.

Note: These documents constitute a "Request for Proposals" or RFP. It is a request for an offer. As such, it allows alternate offers or proposals to be considered and the terms and conditions may be subject to negotiations to reach best and final offers. All information requested for submittal should be included with the offer, and exceptions or alternates clearly noted.

A. Non-Discrimination

The City of Aztec does not discriminate on the basis of race, color, national origin, sex, religion, age or disability in the employment or the provision of services. Contractors shall be in compliance with the ADA requirements.

B. Interviews

Interviews will be conducted with all responsible Applicants who submit proposals found to be reasonably likely to be selected for award. Applicants submitting proposals will be afforded an opportunity for discussion and revision after submission and prior to award for the purpose of obtaining best and final offers. The awards shall be made to the responsible Applicant(s) whose proposals are most advantageous in promoting tourism in the City of Aztec.

Proposals shall be evaluated on the basis of demonstrated competence and qualification for the type of service required, and based on the criteria set forth in the request for proposal. LTAB will evaluate all proposals and conduct interviews at the time of their meeting.

The City is under no obligation to conduct any interviews or discussions with an Applicant. This request and all attachments will be considered part of the resultant contract and/or purchase order.

C. Appropriations

The terms of this agreement are contingent upon sufficient monies being made available by the City of Aztec for the performance of this agreement. If sufficient appropriations and authorizations are not made by the City of Aztec, this agreement shall terminate upon written notice being given by the City to the Applicant. The City's decision as to whether sufficient appropriations are available shall be accepted by the Applicant and shall be final.

D. Contacts

If clarifications are needed on the conditions of this proposal, contact the Finance Director's Office at (505) 334-7653.

E. Incurring Cost

Any cost incurred by the Applicant in preparation, transmittal, cancellation, presentation of any proposal or materials submitted in response to this application shall be borne solely by the Applicant.

F. Award

Awards will be made by LTAB.

Notice to Applicant(s): Unnecessarily elaborate responses beyond that sufficient to present a complete and effective response to the solicitations are not desired and may be construed as an Indication of the Applicant's lack of cost consciousness. Unless specifically requested in the solicitation, elaborate artwork, corporate brochures, lengthy narratives, expensive paper, specialized binding, and other extraneous presentation materials are neither necessary nor desired. It is recommended that presentations do not exceed 15 minutes.

The city reserves the right to reject any or all proposals in whole or in part, to waive informalities or technicalities at its option, and to accept the proposal it seems to be in the best interests of the City of Aztec.



LODGERS' TAX GRANT APPLICATION

PART 1. Event Information

Event Name

Event Date(s)

Event Location

PART 2. Organization Information

Name

(As listed on W9)

Event Organizer & Title

Phone Number

Email

Address

Contact Person

(if different than event organizer)

Contact Phone & Email

(for Secondary Person)

PART 3: Project Cost and Funding Request

LTAB Funding Request

(Must match application)

Additional Funding Sources

(Not LTAB funded)

In-Kind Contributions

(List entities & contributions)

Other Sources

(List entities & contributions)

Total Anticipated Event Cost

(Must match application)

Anticipated Number of Volunteers

Anticipated Attendance

(not including staff or volunteers)

PART 4: Criteria

Were you funded previously? Yes No
If YES, what years? _____

How much have you received in previous grants (list year/award amount)?

How many times has your event occurred? Please list years of previous events. If new, just indicate "new":

1. Define/Describe the overall event (*what is happening at the event?*):

2. Please include a specific schedule of events here or attached with your application.

3. Who is your target audience for your event and advertising (*who do you want to attend?*)

4. Describe the regions/cities in which you plan to market your event outside of Aztec?

5. Describe your event assessment/evaluation plans: (*how are you counting your participants, where they are from, their hotel stays, and how you plan to share that assessment with the City*):

6. How does this event benefit the City of Aztec?

PART 5. Plan for Grant Amount Requested

Fill out this chart with your spending plan and the costs for these items. All expense items must be directly related to promotion, advertising and marketing.

Note: The items listed within this budget are the only reimbursable items after funds are awarded. Modifications to your plan may only take place with regards to variation in dates of publication. Items not listed within the application at the time of approval will not be reimbursed. The Lodgers Tax Advisory Board reserves the right to deny funding of specific items within this budget during their recommendation to the City Commission. You may attach a separate sheet in lieu of filling out this page. Remember that you must include artwork for all promotional items at the time of application.

Advertising and Marketing Plan

	Category	Description	Projected Expense
A D V E R T I S I N G	Brochures	_____	_____
	Direct Mail	_____	_____
	Magazines	_____	_____
	Newspapers	_____	_____
	Posters	_____	_____
	Social Ads	_____	_____
	Radio	_____	_____
	TV	_____	_____
	Creative Designs	_____	_____
	Production	_____	_____
O T H E R	Printing	_____	_____
	Postage	_____	_____
	Other (specify)	_____	_____
	Other (specify)	_____	_____
	Other (specify)	_____	_____
	Other (specify)	_____	_____
GRAND TOTAL (Must Match Application)			

PART 6: Financial Disclosure Checklist

As per the attached City Code, all applicants for Lodgers' Tax funds must submit the following information:

Completed Advertising Plan and Event Budgets for Event/Special Activity/Project

Updated IRS Form W-9 Request for Taxpayer Identification Number and Certification

PART 7: Assurances and Certifications

I/We certify that I/we am/are authorized to act on behalf of the organization making this application and that the statements herein are complete and accurate to the best of my knowledge. If funded, we will keep a clear and accurate accounting of how the funds were used. We will evaluate the use of funds as required and approved by the City of Aztec, and will deliver an evaluation report to the City no more than (60) days after the event completion.

Print your name and title: _____
Signature: _____
Date: _____

PART 8: Lodgers' Tax Proposal Letter of Transmittal

The undersigned certifies that they have read and understand the above general conditions and that they accept these conditions and submit the attached proposal in full compliance with these conditions and the applicable proposal specifications. In submitting this proposal, the Applicant represents that the Applicant has familiarized themselves with the nature and extent of the request for proposals dealing with Federal, State, and Local requirements which are a part of these request for proposals. The Applicant will comply with all applicable federal and state laws, local ordinances, and the rules and regulations of all authorities having jurisdiction over the services being proposed.

Evaluations and financial statements are a requirement of the proposal and must be submitted in a timely manner, but no later than sixty (60) days after the event or project is completed. Failure to submit appropriate reimbursement materials and accurate evaluation statements may jeopardize future awards.

Name of Firm on W9 _____
Authorized Signature _____
Print Name _____
Title / Position _____
Date _____
Complete Address _____
(Street, City, State, Zip) _____
Telephone _____ Fax _____ Email _____



LODGERS' TAX GRANT ADVERTISING AGREEMENT

Fill out the top portion and organization agreement.
A signed copy will be returned upon approval of the grant.

The undersigned understands and agrees that the funds awarded by the Lodgers Tax Advisory Board to promote the following event in the City of Aztec, New Mexico:

Event Name _____

Event Date(s) _____

Organization Putting on Event _____

Contact Person for Event _____

Phone _____

Email _____

Post Event Report Due Date _____

The undersigned understands and agrees that the Lodgers' Tax awarded by the City of Aztec can only be used for advertising, publicizing, promoting and marketing of the above named event and agrees to use City of Aztec logos in their materials.

The undersigned further understands and agrees that the Lodgers' Tax funds awarded will not be advanced by the City of Aztec, but that upon submittal of PAID RECEIPTS with proof of payment and appropriate artwork/proofs/copy by undersigned to the City of Aztec, the City of Aztec will reimburse undersigned for the advertising, publicizing, promoting and/or marketing expenses incurred.

Authorized Signature _____

Date _____

===== Internal Use Only =====

Motioned by: _____ Seconded by: _____

Approved Denied Date: _____

Amount Awarded: _____



LODGERS' TAX EXPENDITURES REPORT

Advertising and Marketing Plan

	Category	Description	Actual Expense
A D V E R T I S I N G O T H E R	Brochures	_____	_____
	Direct Mail	_____	_____
	Magazines	_____	_____
	Newspapers	_____	_____
	Posters	_____	_____
	Social Ads	_____	_____
	Radio	_____	_____
	TV	_____	_____
	Creative Designs	_____	_____
	Production	_____	_____
	Printing	_____	_____
	Postage	_____	_____
	Other (specify)	_____	_____
Other (specify)	_____	_____	
Other (specify)	_____	_____	
Other (specify)	_____	_____	
GRAND TOTAL			

