



## **2011 Lodging Tax Fund**

Request for Proposal  
For activities to increase Tourism  
in Burlington

GENERAL INFORMATION  
and  
APPLICATION PACKET

## 2011 Lodging Tax Funds – General Information & Instructions

### Allocation Schedule

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|----------------------|---|
| ➤ August 1, 2010     | 2011 Application Form available and posted on web site    |
| ➤ August 31, 2010    | Application deadline                                      |
| ➤ September 9, 2010  | Advisory Committee to hear applicant presentations        |
| ➤ September 16, 2010 | Advisory Committee to finalize allocation recommendations |

The City of Burlington Lodging Tax Advisory Committee (BLTAC) was established by the Burlington City Council, in accordance with RCW 67.28, and City of Burlington Municipal Code 2.74 to advise and recommend to the Mayor and Council how excise taxes on lodging collected in Burlington should be allocated in order to best increase tourism in the city.

### ***Definitions of terms relating to RCW 67.28***

**Tourism** – economic activity resulting from tourists, which may include sales of overnight lodging, meals, tours, gifts, or souvenirs.

**Tourism promotions** – activities and expenditures designed to increase tourism, including but not limited to advertising, publicizing, or otherwise distributing information for the purpose of attracting and welcoming tourists; developing strategies to expand tourism; operating tourism promotion agencies; and funding marketing of special events and festivals designed to attract tourists.

**Tourism-related facility** – real or tangible personal property with a usable life of three or more years, or constructed with volunteer labor, and used to support tourism, performing arts, or to accommodate tourist activities.

### **Purpose:**

The purpose of this Request for Proposal (RFP) by the Burlington Lodging Tax Advisory Committee is to solicit proposals from those agencies and groups actively engaged in the promotion and enhancement of tourism in the City of Burlington during calendar year 2011.

### **Funding Levels:**

A total of approximately \$150,000 is estimated to be available for 2011. Some funds may be reserved to meet existing tourism-related activities which have been previously approved by the City Council. The City Council has authorized the Lodging Tax Advisory Committee to make recommendations regarding the allocation of the balance of this annual fund. The City reserves the right to reduce or partially fund requests based on recommendations from the advisory committee, review of applications and funds available.

**Project Description:**

Activities which will be considered eligible for assistance include, but are not limited to, those that: increase tourism by advertising, publicizing and distributing information for the purpose of attracting and welcoming tourists; develop strategies to expand tourism; operate tourism promotion agencies; construct tourism-related facilities, and fund, and market events and festivals designed to attract tourists. Funds may also be used for personnel costs for special events and festivals designed to attract tourists.

The expected outcome of such activity is to increase economic activity in the City of Burlington during the year 2011 primarily through overnight lodging of tourists ("heads in beds"), as well as providing meals, the sale of gifts, souvenirs and other items, and construction of tourism-related facilities.

Each application is to develop and outline one project, which meets these requirements and provides an economic benefit to the City of Burlington. The specific amount of the applicant's proposal is open, to be defined by the applicant. The applicant should define alternate levels of funding, indicating as their first priority the maximum amount desired and, as a second priority, the minimum acceptable amount. Some definition of the differences in the level of services to be provided under the two priorities should be included. The establishment of alternate funding levels will allow the advisory committee some latitude in approving projects without the necessity of rejecting one or more projects due to a potential lack of funds.

Specific questions are included in the attached response form to assist the applicant in delineating those matters which are of concern to the advisory committee and which will be part of the selection criteria.

Each project should be submitted as a separate document, thereby allowing for clear understanding of each project.

**Project Management:**

The City of Burlington will issue contracts for approved projects, reimburse expenses, monitor contract compliance, and inform the advisory committee of progress in implementing projects. A condition of the grant award will be that Burlington hotels/motels, including address, phone number and website, must be named in advertising products and on the festival or organization website. Approval for dispersing of funds will require providing copies of advertising and organization/ festival website address that clearly demonstrates compliance. The City Finance Director will act as coordinator of the Request for Proposal process, issuing and receiving the RFP, responding to applicant questions, and notifying applicants as appropriate.

State law requires that local jurisdictions that receive Lodging Tax revenues under RCW 67.28.1816 must submit an annual economic impact report. To assist with this reporting requirement the City of Burlington will require that recipients of City of Burlington Lodging Tax Funds provide the following information related to the funded event:

- Estimated number of tourists, persons traveling over 50 miles to the destination;
- Estimated number of persons remaining at the destination overnight;
- Lodging stays generated by the festival or event;
- Estimated increase in sales (within Burlington City limits) attributable to the event;
- Any other measurements that demonstrate the positive impact of increased tourism attributable to the festival or event.

We ask that you provide this information shortly after your event is complete once you have critiqued your event. If you are using these funds for a year round program we expect your report of the information identified above to be submitted to the City Finance Director by January 31, 2012.

### **Selection Process:**

Each application will be reviewed by the advisory committee for eligible activities, the effectiveness of its proposed project in meeting the expected outcomes, need, and funding requirements. Upon completion of its review of the written application the advisory committee will request the applicants to make an oral presentation to them in order to more fully understand the proposed project. The advisory committee will use the attached rating form (last page of this packet) as a guide in assisting in their evaluation of the individual proposals. However, regardless of the methods employed by advisory committee, their recommendation will not be subject to review or challenge by the applicant. Those recommendations may be adopted or amended by the Mayor/Council without further notice. All applicants will be notified of the advisory committee's recommendations and Council's final approval of funding.

### **Other Information:**

Insurance: As part of its contract for performance, the city requires contractors to maintain liability insurance in the amount of \$1,000,000 and name the city as an additional insured on its liability insurance policy.

Contract: After Council adoption of the 2011 budget, an agreement will be sent to you for signature. Following return of the signed agreement, it will be scheduled for final approval by City Council.

Payment: Normally, payments are processed twice per month for reimbursement of expenses. The last date to submit documents for reimbursement of 2011 Lodging Tax Funds will be noon Friday January 6, 2012.

Application Form: This packet will be available on the City website ([www.ci.burlington.wa.us](http://www.ci.burlington.wa.us)) as a Word document form. It can be found under Event Calendar, Administration Department or City News Press Releases.

## **SUBMITTAL INSTRUCTIONS**

### **Minimum Criteria**

- Return only section beginning with page #5 of the *Application for 2011 Funding*.
- The proposal should be letter-sized, typed, and stapled once in the upper left corner.
- Proposals must be received by 4:30 p.m. Tuesday, August 31, 2010
- Faxes and electronic mail will not be accepted.

Submit proposals, **one original** signed in ink and **eight (8) copies** to:

Finance Director  
City of Burlington  
833 South Spruce Street  
Burlington, WA 98233

**NOTE: Proposals received after the deadline, even if mailed earlier, will NOT be accepted.**

City of Burlington  
Lodging Tax Advisory Committee

**APPLICATION FOR 2011 FUNDING**

*(Recommend that no more than two (2) additional pages of materials be submitted with application)*

1. **Project Name:** \_\_\_\_\_

2. **Amount of Funding Requested from the City of Burlington \$** \_\_\_\_\_

What percentage of your total project budget does this request for City funds represent?  
\_\_\_\_\_ %

3. **Name and Address of Applicant (Organization):**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Organization or Festival web site address: \_\_\_\_\_

Agency Tax ID Number: \_\_\_\_\_

Form of Organization (Type of Non-profit, etc): \_\_\_\_\_

4. **Contact Person:**

Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

5. **What will funding you may receive from City of Burlington be used for? Be very specific:**

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6. **Description of overall Project, Event, Activity or Festival:**

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Will there be an admission charge for this activity? Yes \_\_\_\_\_ No \_\_\_\_\_

If so, what will be the cost of admission? \_\_\_\_\_

7. **Self Support:**

Will the proposed program, project or event endeavor become self supporting in the future?

Yes \_\_\_\_\_ No \_\_\_\_\_ Please explain how soon you expect to be self supporting or if not; why. \_\_\_\_\_

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8. **Chamber Contact:**

In the past, have you worked with the Burlington Chamber of Commerce and Visitors Information Center to promote your project? If so, explain how this project, program or event and its schedule have been coordinated with the Burlington Chamber of Commerce or other programs, projects or events within the City of Burlington.

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**9. Benefit to City Tourism:**

Describe how this activity attracts, serves and facilitates overnight tourism in the City of Burlington? For example: Does it lodge or feed tourists; promote tourism; provide for the sale of gifts, souvenirs or other items, or provide programs/entertainment for tourism? If so how? Does it provide some other short or long range economic benefit? Will a tourist facility be constructed? Thoroughly define and quantify the expected results of the activity described in question 5, above:

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**10. Event Schedule:**

What is the time frame for this event? When will this event begin and end? If an outdoor activity, are there any weather related constraints?

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**11. Tourism Seasons:**

From the list below, what season will your project enhance tourism in the City of Burlington?

Please indicate the appropriate season.

	<u>Season:</u>	<u>Months:</u>
___	Year-round	(January – December)
___	Off-season	(November – February)
___	Shoulder season	(October or March – May)
___	Near Peak season	(June, September)
___	Peak season	(July - August)

**12. Additional Information:**

Provide any additional information which will assist the Burlington Lodging Tax Advisory Committee in evaluating your project and its benefit to the City of Burlington.

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**13. Project Budget:** (For this proposal only. Not for entire agency)

**Income from sponsorships, grants, donation and admission fees:**

If you are requesting or anticipating receiving funding for this activity from another source, please list each source and amount requested/anticipated. Include requests for hotel/motel taxes you are requesting from other cities/counties (list each request separately).

Amount requested or anticipated:	Source:	Date funding to be announced.
\$	Admission Fees	N/A
\$	Donations	N/A
\$	Reserves	N/A
\$		
\$		
\$		
\$		
\$		
\$		

\$ \_\_\_\_\_ Total Income requested/anticipated

**Expenses:**

For this ACTIVITY	Total
<b>Personnel:</b> (salaries & benefits)	\$
<b>Administration:</b> (office expenses including copies, rent, janitor, utilities, phone, taxes office supplies, etc)	\$
<b>Marketing/Promotion:</b>	\$
<b>Travel:</b>	\$
<b>Consultants:</b> (specify below)	\$
<b>Construction:</b>	\$
<b>Other Activities:</b> (specify below)	\$
<b>TOTAL EXPENSES:</b>	\$

Explanation of consultant costs or other activities listed above: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**14. Can you operate this project with reduced funding from the City of Burlington?**

Yes \_\_\_ No \_\_\_\_ If yes, list priorities below.

Priority 1 (full) funding: \$ \_\_\_\_\_

Priority 2 (partial) funding \$ \_\_\_\_\_

Explain the project differences in the amount listed as funding priorities 1 and 2:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**15. Project Critique** (Mandatory for requests that have been funded with Lodging Tax grants from Burlington in prior years.)

If the proposal seeks to continue or expand an existing program, project or event which has received City of Burlington Lodging Tax funds in the past, provide detailed information regarding how these funds have been utilized before, and how they have generated overnight lodging sales. This question must be completed in total prior to any consideration to fund this request.

Has your project received Burlington Lodging Tax funds in prior years? Yes \_\_\_ No \_\_\_\_

If yes, please provide a copy of your project critique with this request as a separate page and answer question 16 below.

**16. Information regarding prior year's project.**

A. How many participants and spectators attended last years activity? \_\_\_\_\_

B. Total expenses for last year's program. \$ \_\_\_\_\_

Total revenues generated from spectator fees/admission. \$ \_\_\_\_\_

Total cash donations and sponsorships (excluding City of Burlington) obtained for last years activity. \$ \_\_\_\_\_

Did you create a year-end reserve for this project? \$ \_\_\_\_\_

C. How many days did your event occur. \_\_\_\_\_

D. Did you follow your work plan as described in last year's application? Yes or No

Please explain \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(Use additional pages if necessary)

**17. Application Certification:**

The applicant here certifies and affirms; 1. That it does not now, nor will it during the performance of any contract arising from this application, unlawfully discriminate against any employee, applicant for employment, client, customer, or other person who might benefit from said contract, by reason of age, race, color, ethnicity, sex, religion, creed, place of birth, or degree of handicap; 2. That it will abide by all relevant local, state and federal laws and regulations and; 3. That it has read the information contained in the Instruction pages 2, 3 and 4 and understand and will comply with all provisions thereof.

Certified By: (signature) \_\_\_\_\_

(print name) \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**Evaluation and Ranking**

The Burlington Lodging Tax Advisory Committee will review the applications, hear applicant presentations and make recommendations to the City Council for funding allocations. In the review of applications, the Lodging Tax Advisory Committee will recommend preference to those proposals which (1) coordinate marketing efforts as established through a collaborative effort between the City of Burlington and the partnership of the Burlington Chamber of Commerce and Visitor Information Center, (2) demonstrate the opportunity to increase overnight lodging during the "shoulder-season" and "off-season", as opposed to the peak tourist season, (3) leverage additional funds beyond City of Burlington Lodging Tax funds, and (4) demonstrate an ability toward eventual self sufficiency within three years.

**Considerations:**

Money allocated to projects is expected to result in a return of economic investment to the City. Not-for-Profit organizations will be given preference. Does organization have the ability to increase its revenues, either by raising fees, charging for admissions, brochures? Projects during October – May (the off-season) are encouraged. Matching funds are not required but organizations with multiple sources of funds are encouraged.

# City of Burlington

## Request for Funding – Rating Form 2011 Lodging Tax Fund

Project _____	Amount Requested _____	Organization _____
<b>CHECKLIST:</b> Project Budget _____ % of Matching Fund _____ Event Date(s) _____ Previous Award _____	Project is: Complies with RCW _____ Grant Application Complete _____	<u>Please Circle:</u> New or Continuing _____ Yes or No _____ Yes or No _____

### RATING CRITERIA

- A. Does this project promote and enhance tourism in Burlington? High **(6-10)** Medium **(3- 5)** Low **(0- 2)** \_\_\_\_\_
- B. Is there a general Tourism Benefit? Primarily to the City **(6-10)** or to the County **(0-5)** \_\_\_\_\_
- C. Promote Lodging: No \_\_\_\_\_ Yes \_\_\_\_\_  
*If yes time of year: All Year (5), Nov, Dec, Jan, Feb (4), Oct, Mar, Apr, May (3), Jun, Sep (2), Jul, Aug (1)*  
*If no: (0)* \_\_\_\_\_
- D. Potential to extend lodging stay **(0-5)** \_\_\_\_\_
- E. Is this a new project or an expansion/change to an existing project that will bring new/additional visitors to the community? **(0 - 10)** \_\_\_\_\_
- F. Have funds been requested from other sources? No **(0)** Yes **(1 - 10)** \_\_\_\_\_
- G. Is the proposal well structured? **(0-10)** \_\_\_\_\_

### TOTAL POINTS \_\_\_\_\_

### COMMITTEE RECOMMENDATION

\$ \_\_\_\_\_

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_