

Warren County Board of Supervisors

RESOLUTION NO. 333 OF 2021

RESOLUTION INTRODUCED BY SUPERVISORS GERAGHTY, MERLINO, BRAYMER, WILD, HOGAN, BEATY AND STROUGH

ADOPTING THE EVALUATION STRATEGY, GRADING CRITERIA AND SCORING SHEET FOR WARREN COUNTY OCCUPANCY TAX GRANT FUNDING

WHEREAS, the Director of Tourism presented to the Tourism & Occupancy Tax Committee a revised Evaluation Strategy, Grading Criteria and Scoring Sheet for Warren County Occupancy Tax Grant Funding, and

WHEREAS, the Tourism & Occupancy Tax Committee has reviewed the criteria and has recommended that the same be advanced to the full Board of Supervisors for consideration, now, therefore, be it

RESOLVED, that the Evaluation Strategy, Grading Criteria and Scoring Sheet for Warren County Occupancy Tax Grant Funding annexed hereto, be and the same hereby is, adopted as the official criteria for Warren County.

**Warren County Occupancy Tax
Grant Funding**

(Special Events or activities)

Evaluation Strategy, Grading Criteria and Scoring Sheet

For use by Tourism and Occupancy Tax Coordination Committee and Tourism Department Staff

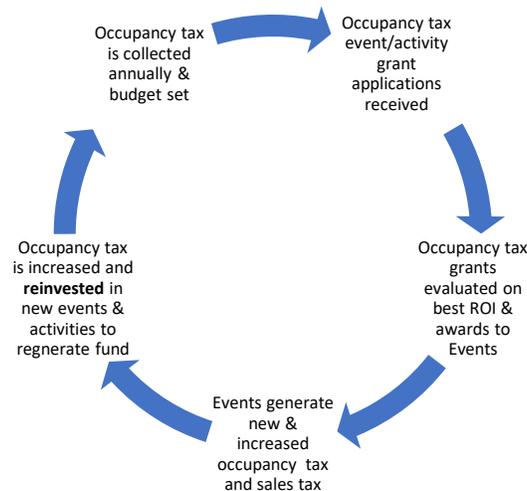
What is Occupancy Tax?

Occupancy tax is a 4% tax collected on all Warren County room rentals of hotels, motels, bed & breakfasts, inns, housekeeping cottages of 4 or more units, tourism facilities (i.e.: campgrounds with onsite RV rentals), as well as Short Term Rentals (STR R367 of 2018, Section 1).

A portion of the Occupancy tax collected in Warren County is appropriated for a grant program to support the region's special events, activities, organizations and tourism assets "through the promotion of tourist activities, conventions, trade shows, special events, and other directly related and supporting activities" as stated in Local Law No. 6 of 2015. (see Occupancy Tax law under Occupancy Tax Information and Forms at <http://warrencountyny.gov/treasurer>).

Historically, Warren County has sought to award grant funding to special events, non-profit groups, local attractions, organizations and tourism assets that demonstrated a significant potential to proactively increase tourism, visitations and overnight stays in the Lake George Area.

Grant allocations and funding decisions shall be viewed as "**investments**" which will pro-actively regenerate future occupancy tax collections, increasing revenue year after year to create a self-funding mechanism, consistently re-investing in itself and creating ROI "return on investment.". Programs, activities and events that can clearly demonstrate their value and benefit to the area shall be prioritized and supported at the county and municipal levels, where appropriate.



1.1 STRATEGY

With Occupancy Tax historically generating \$4- 4.9M annually in revenue and continued demand increasing year-to-year, the goal is to create a comprehensive strategy which will align and complement the overall tourism growth goals and objectives of Warren County by incorporating the following objectives: Driving overnight visitors, bolstering amenities that support visitation, increasing regional visibility, fostering strong community/hospitality and business partnerships, enhancing the local quality of life, increasing regional employment opportunities and developing a "self-funding" mechanism which will continually regenerate occupancy tax year over year. Three tenets are implemented under this strategy:

1. **Transparency of process** – Utilize a clear communication strategy for the award application process and produce a streamlined and equitable evaluation/decision-making process. Award funding allocations based on value (financial and in-kind), merit, regional economic benefits and opportunity for future occupancy tax growth.
2. **Accountability of investments** – Mandate that all applicants receiving funding provide a complete application, which will include: description of funding usage will ensure compliance with overall strategy and eligible expenditures, comprehensive

budgets for anticipated expenditures, complete marketing plans/timelines, detailed description of events/activities or programs and overall impact to the region economically, as well as added community, promotional/marketing benefits. Do not accept or review incomplete applications. Applicants may be invited to present their application formally in-person/virtually to the Tourism and Occupancy Tax Coordination Committee and answer Q & A.

3. **Evaluation of return on investment** – Mandate all occupancy tax awardees provide “post-event performance reports” within 60 days of the events to determine overall regional impact and ensure funding requests meet appropriate eligible and ineligible criteria. All occupancy tax recipients are subject to county audit. Post event performance reports shall include a one-page evaluation of the event, growth year-to-year (if annual event), final budget, final marketing plan/analysis, marketing reach/demographics, properties used in the region, number of room nights, zip code analysis of attendees, total number of attendees, locations where Lake George Area brand was used, displayed and/or mentioned and provide examples of funding support that helped expand the visibility and visitations of the Lake George Area.

To determine application and event/activity value, a comprehensive set of criteria has been developed to extensively evaluate the future “investment” of occupancy tax funding in events, activities and programs and require more accountability for funds expended. If the ultimate goal is to increase the occupancy tax fund year after year, ensuring that the investments are sound and vetted, this strategy will guarantee a stronger return on investment.

1.2 APPLICATION EVALUATION CRITERIA

- The completeness of the application information (including all reporting on prior year results for those who received county and local funding in prior years).
 - The expected direct economic impact of the special events or activities on Warren County. The degree to which the special events or activities are likely to draw diverse overnight visitors to Warren County.
 - The impact of special events or activities on the image and marketing of Warren County as a dynamic and unique destination and potential for collaborative marketing opportunities.
 - The prior success and managerial track record of special events or activities.
 - The degree to which the special events, activities, organizations are supported by other community partners. Applications should reflect financial support from other local partners, as occupancy tax grants should not and cannot be the sole source of funding for any special events or activities.
 - The impact special events or activities will have on the quality of life of the region, including charitable partnership opportunities and philanthropic attributes.
1. **ECONOMIC IMPACT** – is this “investment” one which will generate future occupancy tax funding through the increase of overnight guests and increase sales tax revenue
 - a. High Impact vs Low Impact event: Does the event or activity draw a significant number of overnight guests and/or day trippers?
 - b. “Peak vs. Off Peak Season”– Given the seasonality of the Lake George Area and the desire to increase overnight guests and visitors year-round, heavier weights should be considered for organizers who produce events in the “off peak” season” October to May, with heavier emphasis on winter months (Dec-March) and who clearly demonstrate a significant return on investment.
 - c. Can the visitor/attendee numbers be quantified and if so, how is this demonstrated? Does the organizer indicate how they will collect the data (attendees, room nights, zip codes, properties used, survey?)
 - d. Are the expenditures within the guidelines for permissible expenses?
 - e. Is the event for profit or non-profit?
 2. **SOUNDNESS & FISCAL STABILITY OF THE EVENT** – does the budget submitted by the applicant provide clear delineations of expenses and revenues to support the event? How reliant is it on public versus private funding?
 - a. Does the event or activity also receive additional funding support from other municipalities and how much?
 - b. Does the event or activity actively seek community partnerships/sponsorships to provide financial support and what percentage?
 - c. Does the event or activity charge a fee and what percentage of that revenue is re-invested into the event year over year?
 - d. If it is an annual event or activity, has it added new components or marketing year over year to attract new visitors?
 - e. Does the event or activity demonstrate an effort to collaborate with the local businesses and hospitality partners (packages, incentives, deals, etc.)?
 - f. Is the event or activity a “good fit” for the community? Can it offer additional community or philanthropic benefits such as a fundraiser for a local charity, skills clinics to local residents, food drive for regional food bank, etc.?
 - g. Does the event or activity create a “domino economic effect” benefit to the community at large?
 3. **EVENT MARKETING** – does the marketing plan submitted by the applicant clearly outline defined strategies and opportunities for attracting overnight visitors and visitors from out of county and is the plan well thought out and comprehensive?
 - a. Does the marketing of the event or activity offer opportunities to align with current Warren County tourism marketing initiatives or does it provide a significant benefit by expanding the reach beyond the current county promotions?
 - b. Do the promotions clearly target overnight visitors?

- c. Does the event or activity provide co-marketing opportunities with Warren County tourism to increase brand awareness in unique ways through guerilla marketing tactics, brand activations or other opportunities?
- d. Does the event or activity add PR value and enhanced visibility to the region?
- e. Is the event or activity a “signature event” (annual/large scale/established/well attended and known) and does it provide opportunities for Warren County to co-brand?

1.3 SCORING

To assess the true impact and value of the event/activity requesting county funding support, the following criteria will be evaluated against the Occupancy tax funding applications. **MAX TOTAL POINTS: 100**

1. Completeness and comprehensiveness of application submissions. *Incomplete applications WILL NOT be reviewed or accepted.*
2. **ECONOMIC IMPACT:** Commitment to the overall economic impact of tourism development in Warren County. *Is this “investment” one which will regenerate future occupancy tax through increased overnight guests and increase sales tax? Does the event occur in peak or off-peak season? Is it an annual or multi-day event? (35 points)*

(Pick and/or options from to identify which kind of event this is)

- a. “Signature Event” (annual/large scale/established/well attended and known): 15,000+ estimated room nights and/20,000+ day visitors **(20 points)**; or
 - b. High Impact Visitors: 6,000-14,999 estimated room nights and/or 15,000+ day visitors **(15 points)**; or
 - c. Medium Impact Visitors: 1000-5,999 estimated room nights and/or 5,000+ day visitors **(10 points)**; or
 - d. Low Impact Visitors: < 1000 estimated room nights and/or 2,500 +/- day visitors **(5 points)**
 - e. Is the event in a “non-peak” season (Oct-May)? **(5 points)**
 - f. Event demonstrates how it will quantify total number of attendees and overnight guests **(5 points)**
 - g. Is the event an multiple day event? **(3 points)**
 - h. Is the event non-profit? **(2 points)**
3. **SOUNDNESS & FISCAL STABILITY OF THE EVENT** – The applicant provided a comprehensive and detailed budget outlining all expenditures and income, has a clear event objective and identifies all external sources of income. **(MAX 35 points)**
 - a. Specific income/expenditures clearly identified on budget, including estimates **(10 points)**
 - b. No clear budget provided or detailed **(0 points)**
 - c. Requesting funding from other municipalities **(0 points)**
 - d. Receiving funding from community partners/sponsors **(5 points)**
 - e. Annual event with clear demonstration of adding new components to attract new visitors **(5 points)**
 - f. Event identifies opportunities for local hospitality partnerships (i.e.: hotel packages, incentives, “dine-around”) **(5 points)**
 - g. Event provides philanthropic/community-oriented component (fundraiser for local charity, skills clinics for local residents, donations collected for regional food bank, etc.) **(5 points)**
 - h. Does the event allow for profit sharing? **(5 points)**
 4. **EVENT MARKETING** – The applicant provided a comprehensive marketing plan which outlines strategies and opportunities for attracting visitors from out of county and over 75-miles. Marketing plan is thorough and detailed, and outlines opportunities to reach new audiences, align with Warren County Tourism marketing initiatives and expand area reach and visibility. **(MAX 30 points)**
 - a. Provided clear, well defined marketing plan with clear strategies to reach and engage overnight visitors through all promotions **(10 points)**
 - b. No clear marketing/promotional plan provided **(0 points)**
 - c. Demonstrates marketing reach beyond Warren County **(5 points)**

- d. Demonstrates opportunities to expand/align event marketing reach above and beyond current county tourism initiatives to reach new audiences and visitors through brand activations, guerilla marketing or other means **(10 points)**
- e. Provides co-branding opportunities to increase regional visibility to new audiences **(5 points)**

OCCUPANCY TAX APPLICATION SCORING SHEET

MAX TOTAL POINTS: 100

Please review criteria and apply weights to applicable criteria & points.

Do not add points if the application criteria does not apply. Use max points if meets/exceeds expectations. Use lower points than max if less than meets criteria. The final total score will be collectively decided by the Occupancy Tax Committee.

Please total each of the 3 sections and final total at the end.

1. Completeness and comprehensiveness of application. ALL APPLICATIONS MUST BE COMPLETE OR NOT ACCEPTED

2. **ECONOMIC IMPACT:** Commitment to the overall economic impact of tourism development in Warren County.

Is the event a:

“Signature Event” (annual/large scale/established/well attended and known): 15,000+ estimated room nights and/20,000+ day visitors _____ (max. 20pts); or

High Impact Visitors: 6,000-14,999 estimated room nights and/or 15,000+ day visitors _____ (max 15pts); or

Medium Impact Visitors: 1000-5,999 estimated room nights and/or 5,000+ day visitors _____ (max 10pts); or

Low Impact Visitors: < 1000 estimated room nights and/or 2,500 +/- day visitors _____ (max 5pts)

Is the event in a “non-peak” season (Oct-May)? _____ (max 5pts)

Event demonstrates how it will quantify total number of attendees and overnight guests _____ (max 5 points)

Is the event an annual/multi day event? _____ (max 3 points)

Is the event non-profit? _____ (max 2 points)

_____ (35 MAX)

3. **SOUNDNESS & FISCAL STABILITY OF THE EVENT** – The applicant provided a comprehensive and detailed budget outlining all expenditures and income, has a clear event objective and identifies all external sources of income

Did the applicant provide:

Specific income/expenditures clearly identified on budget, including estimates _____ (max 10 points)

No clear budget provided or detailed _____ (max 0 points)

Requesting Funding from other municipalities or ticket sales _____ (max 0 points)

Receiving funding from community partners/sponsors _____ (max 5 points)

Annual event with clear demonstration of adding new components to attract new visitors _____ (max 5 points)

Event identifies opportunities for local hospitality partnerships (i.e.: hotel packages, incentives, “dine-around”) _____ (max 5 points)

Event provides philanthropic/community-oriented component (fundraiser for local charity, skills clinics for local residents, donations collected for regional food bank, etc.) _____ (max 5 points)

Profit-sharing opportunities _____ (max 5 points)

_____ (35 MAX)

4. **EVENT MARKETING** – The applicant provided a comprehensive marketing plan which outlines strategies and opportunities for attracting visitors from out-of-county and over 75-miles and clearly identifies opportunities to reach new audiences, align with Warren County Tourism marketing initiatives and expand area reach and visibility.

Did the applicant:

Provide a clear, well defined marketing plan with clear strategies to reach and engage overnight visitors through all promotions _____ (max 10 points)

No clear marketing/promotional plan provided _____ (max 0 points)

Outline clear marketing and promotional strategies _____ (max 5 points)

Demonstrate opportunities to expand/align event marketing reach above and beyond current county tourism initiatives to reach new audiences and visitors through brand activations, guerilla marketing or other means _____ (max 10 points)

Provide co-branding opportunities to increase regional visibility to new audiences _____ (max 5 points)

_____ (MAX 30 TOTAL)

TOTAL POINTS AWARDED: _____

NOTES/COMMENTS/RECOMMENDATIONS:
