



**Tourism and Occupancy Tax Coordination Committee  
Warren County Tourism Department  
AGENDA  
July 20, 2021**

Committee Members: GERAGHTY, Merlino, Braymer, Wild, Hogan, Beaty, Strough

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- I. Committee meeting called to order by Chairman Geraghty
  - II. Motion to approve minutes of June 22, 2021 Tourism and Occupancy Tax Coordination Committee Meeting.
  - III. Action Agenda/New Business Items: None
  - IV. Discussion Items:
    - a. Report on revenues by Treasurer, Mike Swan
    - b. Previously submitted Occupancy Tax Grant applications for winter events
    - c. Quarterly reports
      - Lake George Regional CVB
      - Cool Insuring Arena
    - d. Granicus Short-Term Rental Compliance, Bruce McCaskill
    - e. Draft – Evaluation Strategy, Grading Criteria and Scoring Sheet
    - f. Draft – Occupancy Tax Grant Application
  - V. Referrals/Pending Items:
    - a. Discussion to continue regarding the Special Event Funding Scoring sheet. (06.03.21) Update: Draft Evaluation Strategy, Grading Criteria and Scoring Sheet document was reviewed, certain changes were suggested; the revised draft is to be re-presented at the next Committee meeting. (06.22.21)
    - b. Draft Occupancy Tax Grant Application was reviewed, certain changes were suggested; the revised draft is to be represented at the next Committee meeting. (06.22.21)
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c. County Attorney directed to prepare an updated municipal agreement and occupancy tax spending guidelines to be presented at the next Committee for review.  
(06.22.21)

VI. Privilege of the floor and public comment

(Please allow for 15-second delay on live stream meetings).

VII. Motion to adjourn

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**Lake George Regional Convention & Visitors Bureau  
Q2 Report for 2021**

Leads	Attendance	Room Nights
15	2,917	4,786
YTD	YTD	YTD
27	20,545	31,104
LY – YTD	LY – YTD	LY – YTD
18	6,745	3,372
Bookings	Attendance	Room Nights
5	237*	151
YTD	YTD	YTD
11	6,955	5,151
LY -- YTD	LY – YTD	LY – YTD
0	0	0
Lost Business (YTD)	Attendance (YTD)	Room Nights
27	6,960	2,683
Pending**	Attendance	Room Nights
29	21,915	31,594
LY – YTD	LY – YTD	LY – YTD
26	12,405	7,741

\*United Nations Youth Envoy had 2000 registered virtual attendees not included in this attendance report.

\*\*Includes rollover of outstanding business leads from previous years for future dates not booked, cancelled and/or postponed.

**April STR Report:** Occ. 36%, ADR \$108.47, Demand 149.3%, Census: 95 properties, and 4,792 rooms.

**May STR Report:** Occ. 46%, ADR \$131.38, Demand 44.4%, Census: 185 properties, and 7,028 rooms.

**June STR Report\*:** Occ. 59.9%, ADR \$173.57, Demand 59.4%, Census: 185 properties, and 7,028 rooms  
(\*run of 28 days)

## MARKET SEGMENTS

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### SALES ACTIVITIES

#### MEETINGS

- 4/15 - Guest speaker Carrie Hillenbrandt, VP Sales & Marketing of BBL Hospitality to discuss yield management and the pandemic.
- 5/20 - Group roundtable/open discussion on updated mask policies, safety procedures being used, operational efficiencies.
- 6/17 - Guest speakers, Sara Mannix of Mannix Marketing, presented "Best Practices for Reputation Management" and Sam Luciano of Fort William Henry shared how Fort William Henry uses reputation automation software to respond to the many outlets.

#### TRADE SHOWS/INDUSTRY EVENTS

- 4/8 - MPI, Global Meetings Industry Day
  - Promotion of meetings industry on LinkedIn
- 4/14 - ESSAE, TripleM Day 3
  - 83 contacts updated
- 5/20 - MPI Upstate NY, Annual Meeting & Board Induction - Cocktails and Connections. Introduction of new MPI Upstate NY Chapter Leaders
  - Interacted with 13 planners, updated 14 contacts
- 6/10 & 11 - NE/SAE 2021 Annual Meeting, June 10th & 11th, Virtual Exhibitor Booth
  - Interacted with 13 planners, updated 31 contacts.

#### SPORTS MARKET SEGMENT

- **Booked:**
  - Lakeside Volleyball: Great Nor'easter 2021, 150 ATTN and 50 RN
- **Leads/Lead Updates from 2020:**
  - Lakeside Volleyball: Great Nor'easter 2021, 150 ATTN and 50 RN
  - Confirmed Diamond Kings, Lake George Summer Invitational, July 30-31, 288 ATTN
  - Confirmed Primetime Lacrosse, Adult and Youth tournaments, July 24 - 25, with 7,000 ATTN and 2,050 RN
  - Confirmed Firecracker Baseball, Battle of the Borders Showcase, July 15 - 17, 450 ATTN and 1400 RN (between LG, Saratoga, Albany areas)
- **Lost:**
  - No lost in Q2
- **Client/Partner Relations:**
  - Field sourcing for Diamond Kings, Prime Time Lacrosse, and Firecracker Baseball
  - Discussions continued:
    - Gaming Insomniacs for an eSport event in October 2021
    - Summit Lacrosse for fall 2021 and summer 2022

#### ASSOCIATION/CORPORATE/SMERF MARKET SEGMENT

- **Booked:**
    - Erika Parker Wedding Room Nights, Roaring Brook Ranch, 20 ATTN and 20 RN, Oct 8-9
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- Hamilton College Reunion, Class of 1986, 35 ATTN and 30 RN, July 23-25
  - United Nations Youth Envoy: 2021 International Youth Conference, 10 ATTN and 40 RN, June 24-29 (2,000 registered for the virtual portion)
  - **Leads:**
    - Erika Parker Wedding Room Nights, 20 ATTN and 20 RN, Oct 8-9
    - Hudson Valley Community College, Summer Meeting, 22 ATTN and 11 RN, June 25-26
    - Colors Company Summer Outing, 100 RN & 100 Attendees, July 2nd
    - Meeting Matchmakers Kosher Group Outing, 150 RN & 150 Attendees, July 4th
    - NEDFA, Summer Conference, 150 ATTN & 265 RN, August 17, 2022- August 19, 2022
    - Warnert, Boat Show/Demo, 100 ATTN & 10 RN, September 7-9, 2021
    - Inner Matrix Systems: 3 Silence Retreats, 150 ATTN and 300 RN (each), Feb 24-27, June 2-5, and Sep 22-25
    - United Nations Youth Envoy: 2021 International Youth Conference 10 ATTN and 40 RN, June 24-29
    - Fourth of July: Film Production Crew, 80 ATTN and 1200 RN, Aug 22 - Sep 6 (5,500 registered for the virtual portion)
    - Ari Stock: Golden Anniversary, 60 ATTN and 150 RN, July 28 - Aug 2
    - New York State County Highway Superintendents Association: NYSCHSA 2024 Summer Conference, 125 ATTN and 390 RN, Aug 24 - 28, 2024
    - Blinker Fluid: 2022 Jeep Invasion, June 16-19, 1,500 ATTN & 500 RN
  - **Lost:**
    - Blinker Fluid: Modern Muscle Car May 21-23. Cancelled due to pandemic gathering restrictions.
    - American Legion Annual Banquet June 4th. Keeping the event in Lake Placid.
    - KAT Group, Securitas International Leadership Conference for 2022. 200 ATTN with 635 RN. Cvent lead, Group decided on another destination.
    - Jason Sherry, 2021 Elvis Festival. 1,200 ATTN with 1,010 RN. Lost to Turningstone Casino
    - NYS Rural Housing Coalition, 2021 Joint Conference of the Rural Housing Coalition of NY and Habitat for Humanity. 150 ATTN with 300 RN. Lost to Oswego.
    - NEDFA, Summer Conference, 150 ATTN & 265 RN, August 17, 2022- August 19, 2022. Lost to Albany (Cvent error in sending to locations other than Albany)
    - Meeting Matchmakers Kosher Group Outing, 150 RN & 150 Attendees, July 4th. No hotel availability
    - Hudson Valley Community College, Summer Meeting, 11 RN & 22 ATTN, No space availability.
    - Colors Company Summer Outing, 100 RN & 100 ATTN. No hotel availability
    - Ari Stock: Golden Anniversary, 60 ATTN, 150 RN; No space availability.
  - **Client/Partner relations:**
    - Jeep Invasion:
      - Mayor Blais, use of CRW Park for the Show & Shine event for Jeep Invasion.
      - Communication started with NYS Police/Warren County Sheriff for the Jeep Invasion
      - Partner Referral: Food Trucks for Jeep Invasion event at Festival Commons: Discussions held with Ed Pagnotta on potentially having a food truck at the Show & Shine event for Jeep Invasion. As of 5/24 they do plan to cater the event
      - Coordinating hand sanitizer for the vendor fair and social areas
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- Sourced a food pantry for a food drive, Salvation Army of Glens Falls and Open Door Mission.
  - Discounts offered: Steamboats, The Great Escape & Splashwater Kingdom
  - Coordination of parking passes with Mayor Blais, added to registration package
  - Food truck solicitation
  - Discussions started for 2022 trail rides location, Hickory Ski Center
- Partner Referral: The Queensbury Hotel - EMS client: sourced Brew Truck; 150 welcome bags
- Partner Referral: rehearsal dinner location
- Ice Castles
  - prepared/presented overview of county-wide Winterfest promotion deck for Hospitality Communications Group / Winterfest committee for future discussions, funding. Site visit with IC scheduled for April 29. 3/4/2021 Zoom call with all neighboring entities of Festival Commons to discuss program (FWH, Steamboat Co., Around the World Golf, Adirondack Pub)
  - Coordinating logistics with DPW for electric, snow plowing, and water, in addition to sourcing housing, staffing/volunteers, and local vendors.
  - Gathering housing info, potential local event manager contacts/resumes
- Disabled Veterans NY Site Visit on April 7, visited The Queensbury Hotel, Six Flags Great Escape Lodge (as well as Holiday Inn Saratoga). Hired a mini-bus for a tour of Lake George/Queensbury/DT Glens Falls. Booked Six Flags Lodge. Group has 2 additional meetings to source for the future.
- Women on Wheels:
  - Creation of pre-event marketing materials; Created Public Relations JotFrom for client(s); 315 welcome bag preparation; Emergency Services outreach; event press release production; social media event promotion; on-site event promotion preparation; Prospect Mountain/DEC permit application information
- Alpha Win Triathlon referrals various aspects of event
- Firecracker Baseball referral additional fields
- Prime Time Lacrosse partner referral for additional fields, Fort Ann Youth Commission
- Rolls Royce Owners' Club referrals for group dining, 300 welcome bags, social media promo
- United Nations Youth Envoy event press release production, distribution; social media event promotion
- Warnert Companies, referral for boat show location to Town of Bolton/Bolton Chamber
- NY Chiefs of Police - Partner Referral to Boathouse Restaurant for Sunday Dinner, restaurant buyout.

## WEDDINGS:

		2016	2017	2018	2019	2020	2021	2022	2023
January	4.0%	33	32	31	31	14	27	36	32
February	4.0%	33	32	31	31	14	27	36	32
March	5.0%	41	40	39	38	17	34	45	40
April	7.0%	57	56	54	54	24	47	63	57
May	11.0%	90	87	85	85	37	74	100	89
June	12.0%	98	95	93	92	41	81	109	97
July	9.0%	74	71	70	69	30	61	81	73
August	11.0%	90	87	85	85	37	74	100	89
September	14.0%	115	111	109	108	47	94	127	113
October	12.0%	98	95	93	92	41	81	109	97
November	6.0%	49	48	47	46	20	40	54	49
December	5.0%	41	40	39	38	17	34	45	40
<b>Total Weddings</b>		<b>818</b>	<b>793</b>	<b>775</b>	<b>769</b>	<b>338</b>	<b>674</b>	<b>905</b>	<b>809</b>

Warren County Weddings Data provided as of May 31, 2021. The Wedding Report, <https://wedding.report/>. Update reports received monthly.

## MARKETING

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### Paid Print

- **Connect Faith Magazine**
  - Audience: National -- Circulation: Print-10,000; Social-5,200; Digital-50,000; Email Database-4,389

### Paid Digital

#### Albany Business Review

- June
  - E-Blast (x1): 24K Sent, 4K Open, 73 Clicked
  - XL Banner Ads: 77K Impressions, 146 Clicks, 2% Click Thru Rate (.8% Industry avg.)

#### Mannix Marketing Affinity Group Advertising

- April
  - Religious Affinity Facebook Marketing: 77,394 Impressions, 60,119 Reach, 1,603 Clicks

#### Northstar Media Group

- April - May
    - Display Ads: 50,000 association/independent meeting planners circ, 213 Impression, 3 Clicks
    - E-Newsletter Content (Organization E-Newsletter): 236K Sent, 60K Opens, 61 Clicks
    - Organization Featured E-Blast: 66K Sent, 18K Opens, 76 Clicked
    - Instagram Takeover, Sent: 42K, Opens: 11K, Clicks: 18 (Unique to LGA)
  - June
    - (4) Email Blast Totals: 104K Opens, 200 Clicks
-

### SMART Meetings

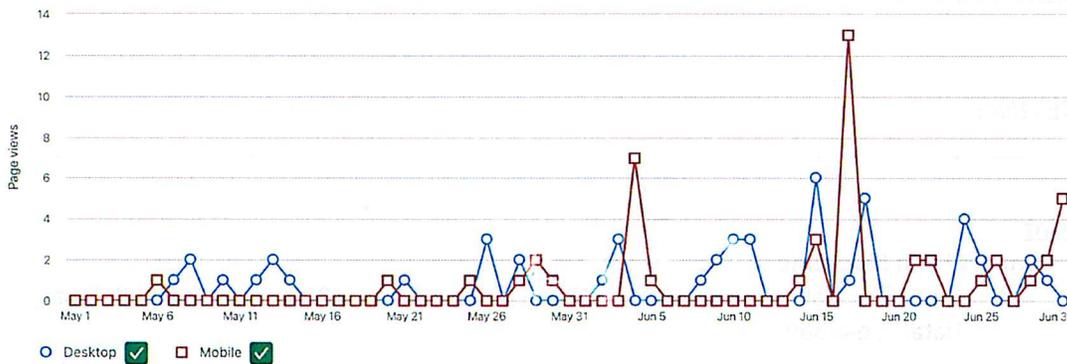
- April Digital Issue: Surprise! Discover the New York You Don't Know
- Digital Advertorial Spotlight
  - Reach (National Average)
    - Page Views: 158,554
    - Unique Readers: 58,314
    - Session Time on Page: 1 minute 45 seconds

### Times Review Media Group (Northfork, Long Island)

- June
  - E-Blast: Sent: 32K, Open: 4,341, Clicks: 793
  - Banner Ads: 88K Impressions, 199 Clicks, Click Thru Rate: .22% (4 x's industry avg.)
  - SEM: 5.8K Impressions, 180 Clicks, 3% Click Thru Rate (2% industry avg.)

### Social Media

LinkedIn (Organic): Increased posts and activity (see May to June changes)



### Organic/In-House

Meltwater Report (Organic Media Equivalencies to Paid Ads)

- June Event: Adirondack Jeep Invasion
  - Advertising Value Equivalency for Adirondack Jeep Invasion — June 2021: \$18,457
  - Advertising Value Equivalency for Adirondack Jeep Invasion — Total: \$78,000

### Organic Digital

MeetLakeGeorge.com

- June: 2,294 pageviews, 1462 Unique Pageviews
- 

VisitLakeGeorge.com ([www.visitlakegeorge.com/meetings](http://www.visitlakegeorge.com/meetings))

- April: 368 Pageviews, 280 Unique Pageviews
- May: 366 pageviews, 302 unique pageviews
- June: 838 Pageviews, 685 unique pageviews

### Wordpress Blog:

- June: 252 Views, 130 Visitors

### Segmented E-Blasts

- LGRCVB (Non-Segmented)
    - April: April: 8,080 Sent, 1,943 Opens, Clicks: 2,284
  - Sports Segmented E-Blast
    - April: NA
    - May: 391 Sent, 177 Opens, 5 Clicks; Direct Leads: 1
    - June: 408 Sent, 112 Opens, 6 Clicks
  - Meeting Segmented E-Blasts
    - April: NA
    - May: 2,423 Sent, 576 Opens, 65 Clicks
    - June: 2,429 Sent, 482 Open, 72 Clicks
  - Partner Newsletter
    - April: NA
    - May: NA
    - June: 151 Sent, 75 Opened, 12 Clicks
  - **LGRCVB Radio Ad (local):**
    - April: A2D program, calling local businesses to register themselves and new employees for the 2021 season
    - May: Jeep Invasion promotion with Show and Shine local promotion
    - June: Events coming to the Lake George Area
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LGRCVB Sales & Services Trace Activity April - June

Trace Activity Report for Management

**User:** -- All Users --  
 Amanda May Metzger  
 Christine Molella  
 Christine Thorne  
 Gina Mintzer, CMP, MHA

**Trace Type:** -- All Types --  
 ALL-Account Update - Global  
 ALL-Call - Global  
 ALL-Communication Sent - Global  
 ALL-Covid 19 - Global

**Date Range:** 04/01/2021 06/30/2021

**Display Notes:**  **Display Details:**

Refresh Schedule

**Trace Activities Summary:**

Member/Partner	Meeting Sales	DMO Events
<b>Christine Thorne</b>	<b>Christine Thorne</b>	<b>Christine Thorne</b>
ALL-Account Update 2	Type Not Selected 3	ALL-Communication Sent 144
ALL-Communication Sent 10	ALL-Account Update 1	<b>Total Christine Thorne 144</b>
CVB-Account Update 23	ALL-Communication Sent 109	<b>Megan Seeley</b>
CVB-Advertising/Marketing 4	CVB-Account Update 33	ALL-Communication Sent 734
CVB-Community Development 2	CVB-Advertising/Marketing 3	<b>Total Megan Seeley 734</b>
CVB-Convention Services 2	CVB-Client Follow-Up 12	<b>Total DMO Events 878</b>
CVB-Lead Follow-up 1	CVB-Community Development 3	
CVB-Partner Correspondence 14	CVB-Convention Services 123	
CVB-Trade Show Follow-up 1	CVB-Definite-Resell 8	
<b>Total Christine Thorne 59</b>	CVB-Lead Follow-up 109	
<b>Gina Mintzer, CMP, MHA</b>	CVB-Lost-Prospect 7	
ALL-Account Update 2	CVB-Partner Correspondence 5	
ALL-Communication Sent 7	CVB-Prospecting 2,378	
ALL-Covid 19 2	CVB-Trade Show Follow-up 14	
CVB-A2D Community Dev 1	Mem-Prospect-2nd Time Around 5	
CVB-Account Update 7	<b>Total Christine Thorne 2,813</b>	
CVB-Advertising/Marketing 8	<b>Gina Mintzer, CMP, MHA</b>	
CVB-Client Follow-Up 2	CVB-Client Follow-Up 10	
CVB-Community Development 2	CVB-Convention Services 16	
CVB-Convention Services 1	CVB-Lead Follow-up 4	
CVB-Partner Correspondence 4	CVB-Prospecting 8	
Mem-Member Touch 30	CVB-Trade Show Follow-up 1	
Mem-New Member Admin Tasks 20	Mem-Prospect-2nd Time Around 2	
Mkt-Media Outreach 9	<b>Total Gina Mintzer, CMP, MHA 41</b>	
To-Do 1	<b>Megan Seeley</b>	
<b>Total Gina Mintzer, CMP, MHA 96</b>	CVB-Convention Services 13	
<b>Megan Seeley</b>	<b>Total Megan Seeley 13</b>	
ALL-Communication Sent 145	<b>Roger Allan</b>	
CVB-Account Update 5	CVB-Convention Services 1	
CVB-Advertising/Marketing 1	<b>Total Roger Allan 1</b>	
<b>Total Megan Seeley 151</b>	<b>Total Meeting Sales 2,868</b>	
<b>Roger Allan</b>		
Type Not Selected 9		
ALL-Communication Sent 3		
CVB-A2D Communication 2		
CVB-A2D Community Dev 3		
CVB-A2D Follow Up 4		
CVB-A2D Initial Contact 1		
CVB-A2D Recruiting Call 25		
Trace-RA 4		
<b>Total Roger Allan 51</b>		
<b>Total Member/Partner 357</b>		

## STAFF DEVELOPMENT

- 4/15/21: Cvent, Reach More Meeting Planners w/ Custom Group Business Pages
- 4/22/21: Smart Meetings, Harness the Power of Negotiation to Master Your Post-Covid Events Career
- 4/23/21: Smart Meetings, 2021 Hospitality Predictions
- 4/27/21: Simpleview, Using Send Sites to Attract More Events to Your Destination
- 4/30/21: Simpleview, What's new & Beyond

## COMMUNITY DEVELOPMENT

- Arrival to Departure Program:
  - April-June 51 trained, Adirondack Winery, Lake George Steamboat Co., Lake George Escape. To Date: 135 trained. Designed logo pin to distribute to all certified "Visitor Champions"
- PUSH Sub-Committee: 14 completed the course; Organizing FAM tours for PUSH participants
- Hospitality Communications Group, each Monday
- Economic Recovery Task Force, each Thursday
- **Lakegeorgeishiring.com**
  - Mannix Marketing Facebook Boost (for local employers): Impressions: 198,500K Reach 115K, Clicks: 2771
  - Spectrum Video Campaign: Impressions: 122K, Completion Rate: 76%, Site Views (Clicks): 342
  - Lakegeorgeishiring.com Analytics
    - April: 86,448 Impressions, 42,505 Reach, 832 Clicks
    - May: 207,901 Impressions, 141,617 Reach, 3,382 Clicks
    - June: 198,500K Impression, 115K Reach, Clicks: 2,771 Clicks

## IN THE COMMUNITY

- 4/7/21: Women In Business meeting
  - 4/7/21: LGRCVB Monthly Meeting
  - 4/15/21: LGRCC&CVB Mixer, Hike with Jackson
  - 4/19/21: Board of Supervisors Monthly Meeting- GM presented on the LGRCVB past, present, and plans for the future
  - 4/27/21: NE/SAE Think Tank, Group discussion regarding meetings: Hybrid, In-person, Virtual
  - 4/28/21: LGRCC&CVB Lunch & Learn, Bike Share Program
  - 4/28/21: Began coordinating a luncheon with partners and meeting planners for May 20th
  - 5/5/21: Women In Business meeting
  - 5/13/21: LGRCC&CVB In-Person Mixer. Lake George Steamboats
  - 5/6/21 & 5/13/21: Discussion meetings for NYS DMO/CVB Luncheon to be held on August 12th in Latham, 12 DMO/CVBs with 40-50 meeting planners expected
  - 5/20/21: LGRCVB Monthly Meeting: Best Practices Roundtable
  - 6/2/21: Women In Business meeting
  - 6/7/21: Discussion regarding NYS DMO/CVB Luncheon to be held on August 12th in Latham, 12 DMO/CVBs with 40-50 meeting planners expected
  - 6/17/21: LGRCVB Monthly Meeting: Best Practices for Reputation Management
  - Weekly: Hospitality Communications Group; Economic Recovery Task Force
  - Post Star, Times Union, News Channel 10, WNYT Channel 13, other interviews
  - County Committee meetings, Board of Supervisors Meeting
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# COOL INSURING ARENA

June 23, 2021

To: Warren County Board of Supervisors

From: Jeff Mead, General Manager

Re: Quarter 3 Report and Recap of Quarter 2

Quarter 2 of 2021 was again affected by State Mandated closings for arenas. June 2021 allowed the arena to start to operate with guests inside.

## June 2021 Events

June 5-6	Bolton Dance Academy Recital	1300 attendees
June 12	Dance Dimensions—Colonie, NY	240 attendees
June 20	Clifton Park Dance—competition	260 attendees
June 24	South Glens Falls Graduation	expected 2000 attendees
June 25	Queensbury Graduation	expected 2500 attendees
June 26	Glens Falls Graduation	expected 1500 attendees
June 27-July 1	Dance Explosion 700 hotel rooms sold in Warren county mid-week due to this event	expected 3000 attendees

Quarter 3 July, August, September

We lay the ice down in August for numerous hockey camps, clinics, and 2 tournaments. The camps will bring people from the Capital Region and Vermont to Warren County. The tournaments bring teams from the Northeast and Capital region for 2 weekends.

September 2, 3, 4, 5

Upstate NY Firefighters Expo

3 day rental of the arena for an expo for firefighters and equipment. 40-50 vendors will display products and over 1000 attendees have been sold to date. Hotel rooms will be rented. Final numbers will be sent once we can confirm the amount of rooms sold.

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We have another confirmed event in late September that will sell over 750 hotel rooms. We are not yet able to announce publicly this event.

We have a concert on hold for September. Once confirmed, we will announce and add to Quarter 3.

Thank you for your continued support of the Cool Insuring Arena and Adirondack Civic Center Coalition.

# Host Compliance

Comprehensive Short-Term Rental Compliance Monitoring Solution for Government



**INDUSTRY FACT:**

**1.6M+**

unique rental units in the US

“ We’re able to stick with the staffing we’ve had because Host Compliance does the lion’s share of the short-term rental enforcement work.”

- Jon Michael, Metro Zoning Administrator, Nashville, Tennessee

## Challenges

The number of short-term vacation rental listings, through websites such as Airbnb, has grown 15x since 2011. Without strategic regulations and effective enforcement, short-term vacation rentals can bring safety, noise, trash, and parking problems - as well as impact long-term housing affordability and neighborhood character.

Many communities struggle to define and enforce regulations that preserve community character and keep neighborhoods safe while ensuring revenue collection. Manually identifying and monitoring short-term vacation rentals as they continue to grow in number is nearly impossible.

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## What If You Could...

- ✓ **Understand the scale and scope** of short-term rentals in the community and hold non-compliant hosts accountable?
- ✓ **Recoup critical revenue** that would be lost to non-compliance?
- ✓ **Establish an even playing field** for all types of lodging businesses and reduce the impact on community character?

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## Trusted, Comprehensive STR Compliance Monitoring

Using AI and machine-learning, Granicus Host Compliance provides the data that manual enforcement solutions cannot, reduces the hours spent managing compliance, and provides up to 20 times return on investment with recouped tax, permit, and fee revenues.

## FEATURES & SERVICES:

### Address Identification

Monitor 60+ vacation rental websites through big data & artificial intelligence

### Compliance Monitoring

Automate identifying non-compliant properties and streamline outreach efforts related to non-compliance.

### Mobile Permitting & Tax Collection

Customize registration & tax collection processes and make them accessible online.

### 24/7 Hotline

Allow neighbors to report, prove, and resolve non-emergency short-term rental related problems in real-time, any day, at any hour.

### Rental Activity Monitoring

Automatically initiate audits of operators who under-report taxes or exceed regulations.

### Consulting Services

Draw on the deep experience of our team working with hundreds of cities, counties, and state governments.

“ Nobody had an all-in-one solution like Granicus’ Host Compliance software.”

- Zak Kelley, Special Project Manager, Nashville, Tennessee

## With Host Compliance You Can...

- ✓ **Get the visibility you need** to better understand your STR listings quickly and cost-effectively.
- ✓ **Recover up to 20x more revenue** from the STR market by increasing regulatory tax and permit compliance.
- ✓ **Save staff time** by automating time-intensive tasks like monitoring STR platforms and communicating with non-compliant properties.
- ✓ **Make auditing financially viable** through smarter identification of operators who under-report taxes or exceed rental frequency and rental-cap regulations.

## Customer Success



Nashville attracts millions of visitors each year. As a result, Nashville’s STR market exploded to support the increase in tourism. Suddenly, the famous honky-tonks weren’t the only hosts to late night parties – so were STRs.

Granicus’ Host Compliance software addressed all of Nashville’s pain points. Not only did it provide high rates of address identification, but it provided an all-in-one solution for communicating with hosts and providing an online portal for them to register and pay taxes.



**90%+**

compliance among STRs



**\$2.8M**

increase in collected tax first year



**5,700**

STR units



**10X**

Return on investment using Host Compliance

## GET INSPIRED

[See more customer successes](#)



More than 4,500 government agencies use Granicus to modernize their online services, web presence, and communications strategies. We offer seamless digital solutions that help government actively reach, inform, and engage citizens on the first unified civic engagement platform for government.



# Nashville, Tennessee

How the Finance Department Increased Tax Collection by \$2.8 Million with Host Compliance



5,700

Units

90%+

Compliance

\$2.8

Million  
Increase

10x

ROI

## OVERVIEW

Nashville's Finance Department was struggling to collect accurate taxes from over 4,500 short-term vacation rentals (STRs) without an effective system to identify STR addresses and owners.

## SITUATION

The Finance Department couldn't collect taxes from STRs when they didn't know who owned them, where they were located, or how many nights they were being rented a month.

## SOLUTION

Granicus' Host Compliance software addressed all of Nashville's pain points. Not only did it provide high rates of address identification, but it provided an all-in-one solution for communicating with hosts and providing an online portal for them to register and pay taxes.

## RESULTS

The Finance Department stated in a Citizen Centric Report that there was a \$2.8 million increase in short-term rental revenue collections in their first year of using the Host Compliance software.

## MUST HAVE SOLUTION

Host Compliance

“ Short-term rentals are different than hotels. With hotels, you have an auditable trail. Host Compliance gives us that auditable trail. We can make sure we are collecting taxes fairly.”

-Zak Kelley, a Special Project Manager



## **Warren County Occupancy Tax Grant Funding**

**(Special Events or activities)**

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### **Evaluation Strategy, Grading Criteria and Scoring Sheet**

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



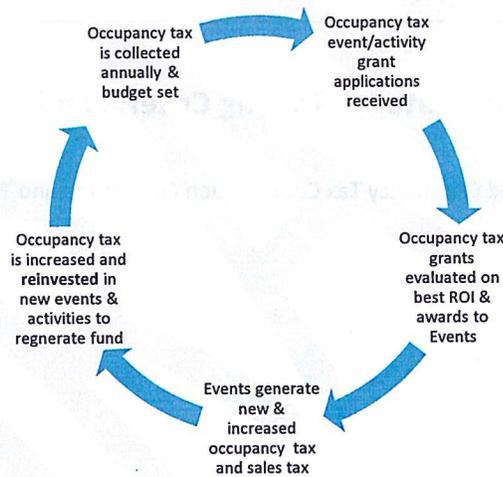
### What is Occupancy Tax?

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. **TOTAL POINTS: 135**

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? (MAX 65 points)*
  - a. "Signature Event" (annual/large scale/established/well attended and known): 15,000+ estimated room nights and/20,000+ day visitors **(20 points)**
  - b. High Impact Visitors: 6,000-14,999 estimated room nights and/or 15,000+ day visitors **(15 points)**
  - c. Medium Impact Visitors: 1000-5,999 estimated room nights and/or 5,000+ day visitors **(10 points)**
  - 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 30 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)**
  - i. Does the event provide a discounted community ticket? **(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)**
  - 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

**TOTAL POINTS: 135**

*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.

*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)  
 High Impact Visitors: 6,000-14,999 estimated room nights and/or 15,000+ day visitors \_\_\_\_\_ (max 15pts)  
 Medium Impact Visitors: 1000-5,999 estimated room nights and/or 5,000+ day visitors \_\_\_\_\_ (max 10pts)  
 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)

\_\_\_\_\_ (65 MAX TOTAL)

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)  
 Opportunity to offer discounted tickets to local community \_\_\_\_\_ (5 points)

\_\_\_\_\_ (MAX 40 points TOTAL)



**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:

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**Warren County Occupancy Tax  
Grant Funding  
(Special Events and Activities)**

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**Application 2021-22**

**To be completed by those requesting special event or activity funding**



Thank you for applying for a Warren County Occupancy Tax Funding Grant. We look forward to partnering with your organization and working collaboratively to help drive tourism to our beautiful destination. We hope you find this information helpful and please feel free to reach out to us with any questions you may have or for additional guidance. Contained in this packet, please find the following:

1. Application Rules and Guidelines
2. Checklist
3. Application
4. Appendices –
  - a. Appendix A – Logo Usage Requirements & Agreement Form
  - b. Appendix B – Eligible and Ineligible uses of Occupancy Tax Funding
  - c. Appendix C – Economic Impact Visitor Survey – Visitor Questionnaire
  - d. Appendix D – Marketing/Advertising Plan Form
  - e. Appendix E – Event Budget Form

**To ensure that your application complies with all requirements, please review the application rules, eligibility, guidelines and deadlines carefully, complete all sections and submit supporting documentation, as requested. Please note that all applications are subject to FOIL (Freedom of Information Law) requirements.**

**Incomplete applications and those that do not include the supporting documentation will not be reviewed for consideration, regardless of previous awards.**

#### **APPLICATION CHECKLIST**

- A **COMPLETE**, signed application which includes a brief one-page detail of your event
- A comprehensive budget which includes ALL sources of income and expenditures
- A comprehensive and detailed marketing plan
- IRS letter or documentation indicating 501-c-3 (non-profit) or 501-c-6 (not-for-profit) status (if applicable)
- A signed logo usage agreement

#### **POST EVENT CHECKLIST** (these will be required to receive grand reimbursement)

- A complete and properly executed County Voucher
- A one-two page Performance (post event) Report
- A complete budget indicating final expenditures from the event with all applicable receipts
- A final marketing plan with copies of all advertisements and promotions where Visit Lake George logo and name was used, applicable invoices, indicating marketing and promotional opportunities related to the event.

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For any questions related to the occupancy tax application, requirements or process, please contact Kristen Hanifin, Tourism Development and Events Coordinator at 518-761-6369 or email [hanifink@warrencountyny.gov](mailto:hanifink@warrencountyny.gov)



## Rules and Guidelines

### **I. Background**

Warren County currently collects a 4% occupancy tax on all overnight tourism accommodations in the County. This tax is levied on customers of hotels, motels, bed & breakfasts, inns, housekeeping cottages with four or more units and tourism facilities (i.e. campgrounds with onsite RV rentals) as well as short-term (STR) vacation rentals.

The purpose of this tax, as outlined by Occupancy Tax law under [Occupancy Tax Information and Forms](#) is to promote and increase tourism in Warren County and its municipalities "through the promotion of tourist activities, conventions, trade shows, special events and other directly related and supporting activities."

Projects which only incidentally further tourism and primarily benefit residents are not eligible for occupancy tax grant funding.

### **II. Applicant Eligibility**

Eligible applicants may be an individual, non-profit organization, or for-profit business requesting funding in support of a multi-day (more than one day) special event, sporting event, activity or tourism-related initiative which will produce a significant impact to overnight guest stays and visitations.

All non-profit applications are required to provide IRS 501-c-3, or 501-c-6 documentation indicating their non-profit status or not-for-profit status.

### **III. Schedule**

#### **III. Schedule ROUND 1 – "Off-Peak" Season Awards**

*Application available for events for Oct. 2021-May/ 2022 available **September 1, 2021***

*Applicant Q & A period: Sept..1-30, 2021 (applicants can call 518-761-6369 or email [hanifink@warrencountyny.gov](mailto:hanifink@warrencountyny.gov) with any questions about the application process)*

*Application due date: **October 1, 2021** (all applications **MUST** be received by 5pm COB. Late applications will not be accepted.)*

*Application committee review: **October 4-15, 2021***

*Applicant presentations (in person recommended, ZOOM option available) **October 18, 2021***

*Final Awards **November 1, 2021** (for fiscal Nov. 2021-April 2022 – subject to final budget fund availability)*

#### **ROUND 2 – Annual/Seasonal Awards**

*Application available for events for June-September 2022 available **November 1, 2021***

*Applicant Q & A period: **Nov. 1-30, 2021** (applicants can call 518-761-6369 or email [hanifink@warrencountyny.gov](mailto:hanifink@warrencountyny.gov) with any questions about the application process)*

*Application due date: **December 6, 2021** (all applications **MUST** be received by 5pm COB. Late applications will not be accepted.)*

*Application committee review: **Dec 7-31, 2021***

*Applicant presentations (in person recommended, ZOOM option available) **January 2022 (TBD)***

*Occupancy tax funding award **January 2022 (TBD)** (for fiscal May-October 2022 - subject to final budget fund availability)*



#### IV. Rating Criteria and Evaluation

The Committee will consider the following when evaluating funding requests:

- Completeness and comprehensiveness of application submissions.
- The expected direct economic impact of the special event or activity on Warren County tourism.
- The impact of the special event or activity 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 the special event or activity.
- The completeness of the application information (including all reporting on prior year results for those who received county and local funding in previous years).
- The degree to which the special event or activity is 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 support for any special event or activity.
- The degree to which the special event or activity is likely to draw diverse overnight visitors to Warren County.
- The impact of the special event or activity will have on the quality of life of the region, including charitable partnership opportunities and philanthropic attributes.

#### V. Application Rules, Grant and Award Guidelines

Warren County Occupancy Tax Grant Funding requests are reimbursable only. If funding is requested prior to the special event or activity, grants will be evaluated/awarded by the Tourism/Occupancy Tax committee and will only permit up to 50% of the expenditures to be dispersed with appropriate documentation. Funding is selective and based on the application your organization submits. Funding grant recipients are subject to county audit to ensure compliance of expenditures.

1. This application must be completed in its entirety in order for the special event or activity to be considered for funding. If any portion of the application is incomplete, it will not be reviewed or considered.
2. The applicant(s) must present reasonable evidence that the special event or activity will increase overnight visitations in Warren County and that the increase is consistent with the level of funding requested.
3. All applications MUST include a comprehensive budget (**APPENDIX E**) outlining event and marketing expenditures, revenue expected, detailed marketing plan (**APPENDIX D**), and IRS 501-c-3 or 501-c-6 designation (if applicable). Previously county-funded events must include past year's event "post-event report," history of local hotel usage, geographic data of attendees, (where attendees stayed, how many room nights used) broken down by property name, and total number of rooms attributed to the event.
4. All expenditures must adhere to the ELIGIBLE AND INELIGIBLE USES OF OCCUPANCY TAX FUNDING Guidelines as outlined in **Appendix B**. *If your special event or activity received occupancy tax funding in the current/prior year and your request is for an amount larger than that award amount, please explain specifically in your description, how the requested increase will result in positive economic impact to Warren County.*
5. Funding awarded through this grant does not cover promotional items for sale (i.e.: t-shirts, caps, etc.) that will generate revenue. The grant will reimburse items that are purchased and given away for free as part of an advertising strategy promotion of the event.



## VI. Funding Award Requirements

To be within occupancy tax grant guideline compliance, the County requires the following:

Event organizers are encouraged to keep track of overnight stays that are directly attributed to their event and work in collaboration with local hospitality partners to gather this data. This information will be required for the post-event report, including determining what percentage of attendees were overnight and which visited beyond a 75-mile radius. Event managers may use the attached *Visitor Survey (Appendix C)* or a survey of their own to gather this quantitative data, including zip codes.

Active marketing campaigns for events are recommended to begin no less than 90 days prior to the event.

Warren County Tourism's website ([www.visitlakegeorge.com](http://www.visitlakegeorge.com)) and logo **must** be listed on event websites, printed materials and on all social media, online, or television advertising to the event or activity receiving funding. Tag us on Facebook @thelakegeorgearea and on Instagram and Twitter @lakegeorgearea, #MYLGArea throughout the marketing campaign. Hyperlink your online advertising to the URL [www.visitlakegeorge.com](http://www.visitlakegeorge.com). Please be sure to adhere to all *Logo Usage Requirements (Appendix A)* and contact Warren County Tourism for specific questions or details.

Radio/television advertisements,(60 seconds or more), must recognize Warren County as an event sponsor and should be verbally recognized in advertisements "*brought to you in partnership by Warren County and Visit Lake George Area.*"

If awarded, recipients must acknowledge funding support and partnership from Warren County and are highly encouraged to extend invitation and include Warren County in future press/media events related to the event/activity supported.

All events producing programs, directories, magazines or publications used for the event must provide Warren County Tourism with one (1) full page of free advertising in the event publication and must provide required specifications within 60 days of special event or activity, or sooner for production.

If awarded, the recipient is highly encouraged to primarily target outside of Warren County and to encourage overnight visitations through their promotions.

If awarded, the recipient shall coordinate the issuance of all licenses and permits required and ensure that all applicable licenses and permits and insurance certificates have been issued and acquired and shall further ensure that all licensees or permittees have obtained required insurance coverage and submitted proof of such coverage at least ninety (90) days prior to the event. The recipient shall have the obligation of compliance with Federal, State and Local Laws in connection with the special event or activity occurring in connection therewith.

If awarded, the recipient must provide the County with the following to receive funding and reimbursement:

- a. A General Liability Insurance certificate naming the County as an additional insured (90) ninety days before the contract date. The wording on the certificate should read as follows:

***"Warren County, its Board, Officers and Employees are named as additional insured on a primary, non-contributory basis."***



- b. The recipient agrees, shall provide and maintain, or cause to be provided and maintained, a comprehensive general liability event insurance naming the county as additional insured in the amount of not less than One Million Dollars (\$1,000,000) per occurrence (\$2,000,000 aggregate) for personal injury, death, or property damage arising out of the event or event activities or event organizer acts or omissions.
- c. The recipient shall further require all participating organizations, clubs, and other entities to likewise provide insurance coverage naming the event organizer and the county as additional insured.
- d. Concessions selling alcoholic beverages shall provide an insurance policy specifically including coverage for liquor law liability in an amount of not less than Five Hundred Thousand Dollars (\$500,000). Said certificate of insurance for liquor law liability shall be required only in the event that liquor is to be sold or otherwise dispensed during the event. Certificates and/or other evidence of such insurance, as may be required by the county, shall be delivered to the County Attorney's Office ninety (90) days prior to the commencement of the event, except that certificates and/or other evidence of insurance for third-party vendors or concession shall be delivered to the County Attorney three (3) days prior to the commencement of the event. All insurance policies issued hereunder that name the county as an additional insured under such policy must be an insurance policy from an A.M. Best rated secured New York State licensed insurer, and contain not less than a ten (10) day notice of cancellation clause.
- e. The recipient shall secure Workers Compensation insurance and Disability insurance for the benefit of such employees engaged under the event as are by law required to be insured by the event organizer under the provisions of the Workers' Compensation Law and New York State Disability Law. Proof of Workers Compensation and Disability insurance shall be in the form(s) approved by the Workers' Compensation Board. The event organizer is to provide the county, upon request and prior to the event commencing, with Certificates of Insurance evidencing that the above requirements have been met. In addition to the foregoing, the county may, at any time, request a copy of the insurance policies providing the coverage required herein and the SPONSOR shall, within ten (10) days, furnish copies of said policies
- f. Warren County reserves the right to conduct a full audit on all occupancy tax grant recipients to ensure compliance with all Occupancy Tax Grant Funding policies, procedures and regulations.

**VII. Post Event Performance Report (these are requirements for award reimbursement)**

Within 60 days of the final day of the event/activity supported, organizers are required to provide the following information for reimbursement:

1. A complete and properly executed County Voucher.
2. A one-two page summary detailing the success of the special event/activity, number of attendees, number of room nights, hotels used and future plans/dates for next year's event, including quantitative results. Event manager must use reasonable efforts to collect zip codes/track geographic, demographic data of attendees.
3. Receipts for all event-related bills (please note, these must fall under the ELIGIBLE USES OF OCCUPANCY TAX guidelines, as outlined in **Appendix B**. INELIGIBLE USES will not be reimbursed.
4. Summary of Visitors' Surveys conducted at the event/activity and one-page report summarizing details of surveys.
5. Final budget indicating all expenditures and revenues (**APPENDIX E – updated by applicant**).



6. Final marketing plan with back-up documentation such as copies of ads, screenshots of social media/website, invoices, insertion orders or other proof indicating marketing and promotional opportunities associated with the event. **(APPENDIX D – updated by applicant).**

DRAFT



### APPLICATION FORM

**INSTRUCTIONS:** Please complete the ENTIRE application and include **ALL items on the page two check list**. Incomplete applications, areas left blank and applications that do not submit all required materials will be considered incomplete and **WILL NOT be reviewed or awarded**. All event budget, financial and marketing information will be used solely for application evaluation purposes and will not be shared outside of the county evaluating committee.

**Amount of Occupancy Tax Funding Requested: \$** \_\_\_\_\_

### CONTACT INFORMATION

Name of Applicant/(s)Organizer(s)/ Main Point of Contact \_\_\_\_\_

Address: \_\_\_\_\_

Email/Cell phone: \_\_\_\_\_

Estimated Event Duration (including set-up/clean up times): \_\_\_\_\_

Anticipated Number of Attendees \_\_\_\_\_

Anticipated Number of employees/staff (inclusive of vendors and contractors): \_\_\_\_\_

### EVENT INFORMATION

Name of Event: \_\_\_\_\_

Date & Time of Event: \_\_\_\_\_

- Peak Season (June-September)
- Off-Peak (October-May)

Location of Event: \_\_\_\_\_

Which category BEST describes your event (check one):

- High Impact: 6,000-14,999 estimated room nights and/or 15,000+ day visitors
- Medium Impact: 1000-5,999 estimated room nights and/or 5,000+ day visitors
- Low Impact: < 1000 estimated room nights and/or 2,500 +/- day visitors

#### **Event Detail:**

Brief one page detail of your event. *(If this request is for an annual event and you have received Occupancy Tax grant funding in the past, please also provide history details from the previous year's event including total attendance, total room nights, any new initiatives that were used to increase visibility or attendance, including new marketing initiatives. If this application is for a new event, please include one page detail of the event, anticipated attendance and past history in other locations, including successes, if applicable.) Please feel free to attach a separate page, if you require more space.*

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




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Type of Event:  For Profit                       Non-Profit (501-c-3)                       Not-for-Profit (501-c-6)  
 New Event                       Annual                       Multi-Day                       Multi-week/month

How long has this event been in existence: \_\_\_\_\_ Date started: \_\_\_\_\_

If a multi-year event, what new marketing, promotions and/or activities have been added to enhance the event and increase attendance? *Feel free to attach a separate sheet.*

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Total number of attendees projected? \_\_\_\_\_ Previous year's attendees? \_\_\_\_\_

How will you track attendance and room nights?  
 \_\_\_\_\_  
 \_\_\_\_\_

Number of day visitors projected? \_\_\_\_\_

How did you determine this percentage (surveys, zip codes, etc.)?  
 \_\_\_\_\_  
 \_\_\_\_\_

Number of overnight guests projected? \_\_\_\_\_

How did you determine this percentage (surveys, zip codes, etc.)?  
 \_\_\_\_\_  
 \_\_\_\_\_

Number of overnight accommodations used in previous year? \_\_\_\_\_

Average length of stay per guest? \_\_\_\_\_

How did you determine total number of overnight rooms?  
 \_\_\_\_\_  
 \_\_\_\_\_

Do you work/or anticipate working with a third-party company, CVB or other entity to help gather your special event/activity data and manage housing? If so, please provide name, and contact information.



**FISCAL STABILITY OF THE EVENT/ACTIVITY REQUESTING FUNDING**

Amount of Occupancy Tax Funding Requested: \$ \_\_\_\_\_

Ticketed event:  YES Price of tickets: \$ \_\_\_\_\_  NO

Does this event provide an opportunity for local discounted community tickets?  YES, Price of tickets: \$ \_\_\_\_\_  NO

Total Cost to be borne by the organizer for the event: \$ \_\_\_\_\_

Total amount that the organizer has calculated that needs to be raised to fund/support the event that is currently not available or expected to be available is \$ \_\_\_\_\_

**Budget (see Appendix E)**

Anticipated Total Cost of the Event (attach COMPLETE budget showing anticipated expenditures and revenue. Please highlight the expenditure breakdown for which you are seeking funding. *Failure to provide a complete budget will result in the application being disqualified.* \$ \_\_\_\_\_

Anticipated total revenue from the event: \$ \_\_\_\_\_

Clearly identify the special event/activity objectives. (i.e.: *the purpose of this event is to create a unique car show which will attract car aficionados from across the Northeast. The purpose of this activity is to create a stronger cultural asset in the region.*) Attach additional pages if necessary

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

Previously funded by Warren County Occupancy Tax?  YES (amount & # of years): \$ \_\_\_\_\_ # of yrs. \_\_\_\_\_  
 NO

What other non-municipal sources of funding/sponsorships do you anticipate to fund/operate the event/activity?  
\_\_\_\_\_  
\_\_\_\_\_

Previously funded by other local municipalities:  YES (amount & # of years): \$ \_\_\_\_\_ #of yrs \_\_\_\_\_  
Municipality? \_\_\_\_\_  
 NO

If the event receives Warren County Occupancy tax funding, is it willing to consider profit-sharing, and if yes at what threshold and what percentage point? \_\_\_\_\_

Will the proceeds from the event benefit any other organization or does the event provide an opportunity to support a local charitable organization or group?  YES (what %/\$ amount) \_\_\_\_\_  NO

Please describe community benefit opportunity if answered YES to the previous question:

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



**EVENT MARKETING & PROMOTION**

**Marketing Plan (See Appendix D)**

Please attach a complete marketing plan and timeline for execution/campaigns to promote your event. Provide details such as how you plan to market your event (print, radio, social media, TV, public relations), where you will place your promotions and advertisements, and what types (posters, flyers, postcards, etc.). Please also include anticipated costs. **Failure to provide a complete marketing plan/timeline will result in the application being disqualified**

When do you anticipate beginning promotion of your event? (pls note that all events awarded funding are highly encouraged to begin promotion of event no less than 90 days prior to event) \_\_\_\_\_

What percentage of your marketing budget is being allocated to outside of Warren County? \_\_\_\_\_

What geographic areas do you anticipate your marketing reaching (specify local, regional, state, national?)  
\_\_\_\_\_  
\_\_\_\_\_

Who is your target audience and/or demographic? \_\_\_\_\_

**PERMITS AND LICENSES** – please note that in certain cases and with county/municipal- owned properties, certain licenses and permits will be required.

Do you need assistance with the permitting/licensing process?  YES  NO

What permits and licenses are anticipated for your event? (if unsure, please email [hanifink@warrencountyny.gov](mailto:hanifink@warrencountyny.gov) for further clarification)  
\_\_\_\_\_  
\_\_\_\_\_

**SAFETY AND LAW ENFORCEMENT NEEDS (police, fire, EMT, Public Health, DPW, Office of Emergency Services)**

Do you require these services?  YES, if yes, what services and when? Explain.  NO

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

Have you consulted with the appropriate local agencies regarding the public safety impacts of your event?  YES  NO

**COMMUNITY AWARENESS**

Are there any other major events in the region which may conflict with your selected event dates?  YES  NO

List: \_\_\_\_\_

*If awarded funding, we reserve the right to request a modification to the date should there be a conflict with other events scheduled prior to your event.*



**AFFIRMATION**

I have read the "Warren County Application Guidelines," agree to abide by them and attest that all information provided in the Warren County Funding Application is truthful and accurate.

\_\_\_\_\_  
Signature of Responsible Party

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Organization

DRAFT



**APPENDIX A**

**LOGO USAGE REQUIREMENTS & LOGO USAGE AGREEMENT**

The Warren County Tourism Logo must appear prominently in all advertising and publicity (both written and/or electronic) in order to receive Special Event Marketing Funding.



**LOGO APPLICATION/PRINTING INSTRUCTIONS:**

- **PLACEMENT:** Logo must be separated from other elements by a minimum of .25 inches. The logo must be easy to read by viewer.
- **ONE-COLOR PRINTING:** The entire logo prints 100% black with no screens. Alternatively, the logo may print reversed (knocked out) of any background color to white. No other colors allowed.
- **FOUR-COLOR PRINTING:**  
Logo prints 100% with no screens. No color changes allowed.

Please contact Peter Girard at [Girardp@warrencountyny.gov](mailto:Girardp@warrencountyny.gov) for specific logo files.

**AFFIRMATION**

I, \_\_\_\_\_, as representative for \_\_\_\_\_ (organization), agree, that I will adhere to all logo guidelines, as designated by Warren County.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



**APPENDIX B**

**ELIGIBLE AND INELIGIBLE USES OF OCCUPANCY TAX FUNDING FOR COUNTY WIDE EVENTS \*\***

**ELIGIBLE USES OF EXPENDITURES**

- Paid advertisements: print, radio, television and Internet advertisements, email campaigns, social media campaigns promoting events, attractions, activities, packages, conventions, sporting events, tradeshow, encouraging overnight stays
- Outdoor signage/banners/billboards
- Posters/flyers/brochures
- Design, production and placement of out-of-county advertising
- Fireworks displays
- Event-related postage for direct mail campaigns
- Rental or fee of traveling/special exhibits
- Promotional items promoting the event
- Re-enactors, musicians, entertainers, umpires for games
- Maps, free guides tours of regional area, bicycle routes, snowmobile trails
- Hosting/bid fees
- Venue rental, EXCLUDING any and all county/municipal-owned properties
- Event-related rentals & expenditures (tents, chairs, tables, etc.)
- Portable toilets/handwashing stations/COVID-related expenditures
- Promotional videography, photography promoting the event
- Signage/advertising on trolley/bus promoting the event
- Advertising in trade journals
- Paid brochure distribution
- Production of promotional materials
- Hanging banner ads
- Public relations to promote event
- Insurance
- Event security/emergency Services
- Event-specific website design/development/updates
- Event-specific directional signage
- Event-specific logo design
- Event-specific external marketing services

**INELIGIBLE USES OF EXPENDITURES**

- Payroll/salaries
- Staff hotel/meals
- Staff travel expenditures
- Alcohol
- Staff mileage
- Annual operating, administrative, and maintenance costs
- Awards to participants
- Capital programs
- Set up/clean-up of event
- Volunteer stipends

**\*\* Please note: This is not an all-inclusive list and expenditure approval is at the discretion of the Warren County Tourism and Occupancy Tax Committee, Legal and County Auditor.**



**APPENDIX C**  
**ECONOMIC IMPACT VISITOR SURVEY - Visitor Questionnaire**

EVENT NAME: \_\_\_\_\_ EVENT DATE: \_\_\_\_\_

What is your zip code? \_\_\_\_\_

What was the PRIMARY reason for your trip to the Lake George Area?

- Special Event \_\_\_\_\_       Vacation/Leisure       Visit friends/relatives  
 Business/Convention       Sporting Event       Other: \_\_\_\_\_

How did you travel to the Lake George Area?

- Car       Bus tour/group       Other: \_\_\_\_\_

How many nights did you stay in the Lake George Area? \_\_\_\_\_ Nights      \_\_\_\_\_ Day Trip Only

Where are you staying while in the Lake George Area?

- Hotel/Motel       Vacation Rental/Condo (STR)       With Friends/relatives  
 Bed & Breakfast       Campground       Other: \_\_\_\_\_

Name of Accommodation (if willing to provide)? \_\_\_\_\_

In addition to this event, what other activities did you participate in while in the Lake George Area?

- Shopping       Dining       Outdoor Recreation (hiking, biking, rafting, etc.)  
 Beach       Cultural & Arts       Evening Activities (fireworks, etc.)  
 Other: \_\_\_\_\_

Is this your first time coming to the Lake George Area?     Yes, would you return? \_\_\_\_\_     No

How did you hear about the Lake George Area ?

- Event promotion/advertisement       Friends/family       VisitLakeGeorge.com  
 Radio       Hotel/motel/campground staff       Other \_\_\_\_\_  
 Lake George Area newsletter, Lake George Area social media, (website bullet above)

Thank you for participating in our survey!!!



**APPENDIX D**

**MARKETING/ADVERTISING PLAN FORM** *(required)*

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

Event Date (and rain date if any): \_\_\_\_\_

Event Type: \_\_\_\_\_

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

*Please fill in this form in detail with Estimates and submit at time of application. An updated and detailed Marketing plan form will be REQUIRED after the event as part of the Post Event Final Report. Please feel free to use your own spreadsheet.*

	<u>Estimated</u>	<u>Actual</u>
Print Ads	\$ _____	\$ _____ Newspaper (indicate which) _____
	\$ _____	\$ _____ Magazine (indicate which) _____
	\$ _____	\$ _____ Brochure (indicate distribution) _____
	\$ _____	\$ _____ Direct Mailer (indicate distribution) _____
	\$ _____	\$ _____ Other print advertising: _____
Digital Ads	\$ _____	\$ _____ Google Display/Search Engine Marketing
	\$ _____	\$ _____ Facebook
	\$ _____	\$ _____ Instagram
	\$ _____	\$ _____ Other social media _____
	\$ _____	\$ _____ Purchased email lists
	\$ _____	\$ _____ Other digital advertising _____
Billboards/Outdoor Advertising		
	\$ _____	\$ _____ Billboard/banner
	\$ _____	\$ _____ Poster
	\$ _____	\$ _____ Other Outdoor Advertising
Other Advertising Expenses		
	\$ _____	\$ _____ Radio, TV (indicate stations)
	\$ _____	\$ _____ Creative Design
	\$ _____	\$ _____ Other advertising expenses

**\*\* In addition, please provide separate sheet outlining timeline of when marketing efforts will begin/end), where/who they will reach (geographic/demographics) and opportunities (if any) for collaborative marketing with Warren County Tourism.**

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**TOTAL EVENT MARKETING/ADVERTISING EXPENSES**      \$ \_\_\_\_\_ (estimated)      \$ \_\_\_\_\_ (actual)



