



# *City of Rockdale*

## **Hotel Occupancy Tax Fund Project/Event Grant Application Packet**

**NAME OF THE ORGANIZATION REQUESTING FUNDS:**

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*Revised as of 2018*

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## Overview of the Application Process

This packet was designed to establish guidelines to apply universally to all events requesting funds from the City of Rockdale in regards to financial support from the City Hotel Occupancy Tax (HOT) Fund. There are stringent requirements in the Tax Code regulating the use of HOT funds. A copy of the applicable sections of the Tax Code has been included in this packet for your review.

The City will review the application and make recommendations to the City of Rockdale City Council regarding approval or denial of the request and give additional comments as to the size of the financial funding request based on estimated economic impact relevant to the request, as well as taking into consideration the need for local community economic impact relevant to the community calendar. The City will work with the applicant to ensure that all necessary documentation is included when presenting to the City of Rockdale City Council. The City of Rockdale City Council will make the final decision on funding the event and at what level.

## Rules Governing Your Application

1. The applicant must present reasonable evidence that the event will directly impact the hotel/convention business AND promote tourism in the City of Rockdale.
2. For any applicant applying for HOT funds to advertise an event, the City requires these funds focus on targeting visitors outside a **50 mile radius** of the City of Rockdale. *Applicant must also attach a copy of their marketing plan for advertising including (1) venue for advertising; what medium (magazine, newspaper, radio etc.); (2) rate card/sheet for said venue (3) expected run date or issue.*
3. After the application process is complete, the applicant may be expected to present an overview to the city manager to evaluate application items such as visitor attendance of the event, hotel selection, and overnight stays directly attributed to the event. If initial estimates upon which the event funding was predicated were not met, the city manager will recommend an amount of reimbursement back to the HOT Fund.

# Process Overview

## **The Pre-Event Funding And Reimbursement Process:**

1. The City of Rockdale reserves the right to decide how funds will be dispensed; annually, quarterly, or monthly.
2. The City of Rockdale reserves the right to decide if **partial** or **all** funding should be reimbursed to the city provided the organization or event did not meet the requirements of said contract.
3. The City of Rockdale reserves the absolute and ongoing right to conduct an audit of anyone receiving HOT Funds to ensure correct use of HOT Funds.

## **The Post-Event Process:**

The Post Event Analysis must include all of the items outlined in the application, including samples of advertisements produced with the use of HOT funds. If the Post Event Analysis and the final accounting of room nights are not received by the due date, the City of Rockdale reserves the right to reject any future application by the organization and to request reimbursement of partial or all HOT Funding.

It is the responsibility of the event to monitor the number of out-of-town guests who stay in City of Rockdale lodging properties in relation to their event. It is strongly recommended to work with the local hotels to ensure proper credit and tracking. Some suggestions for tracking out-of-town guests would be to use a zip code tracking system or tracking through hotels. Please note that stated room nights generated will be subject to an audit by the City of Rockdale.

A hotel list has been included in this packet for your reference in coordinating room blocks and/or directing people to overnight accommodations.

It is extremely important that applications be filled out completely and accurately.

# Support Considerations Checklist

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

Year Applying: \_\_\_\_\_

YES     NO    The event “directly enhances and promotes tourism AND the convention and hotel industry.” (Tax Code, Section 351.101)

YES     NO    The event qualifies under AT LEAST ONE of the following categories:

**(Please circle category number)**

- 1) the establishment, improvement, or maintenance of a convention center or visitor information center
- 2) administrative costs incurred for assisting in the registration of convention delegates or attendees
- 3) advertising, solicitations and promotions that attract tourists and convention delegates to City of Rockdale
  - NOTE: If applying under this category, legitimate media must be utilized IN ADVANCE of the event (examples include direct mail, postage, newspapers, magazines, radio, television, billboards, newsletters, brochures and other collateral material).
- 4) the encouragement, promotion, improvement and application of the arts
  - NOTE: Must be a viable art form (examples include instrumental and vocal music, dance, drama, folk art, creative writing, architecture, design and allied fields, painting, sculpture, photography, graphic and craft arts, motion pictures, radio, television, tape and sound recording)
- 5) the enhancement of historical restoration and preservation projects
- 6) certain expenses, including promotional expenses, directly related to a sporting event where the majority of the participants are tourists that substantially increase hotel activity
- 7) signage for tourism related facilities
- 8) funding transportation systems for tourists

YES     NO    The Post Event Analysis for last year’s event has been previously submitted. (Write “N/A” if you did not receive support last year)

YES    NO   It has been determined how the event will track out-of-town guests, demonstrating that the event will attract tourists that will support the convention and hotel industry. \_\_\_\_\_  
\_\_\_\_\_

YES    NO   The application is filled out thoroughly and completely with all requested documentations attached.

**Please note: All items must be completed before the application can be submitted.**

# Event Support Application

## **Organization/Business Information**

Today's Date: \_\_\_\_\_ Event Date: \_\_\_\_\_

Name of Organization/Business: \_\_\_\_\_

Address

City

State

Zip

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

Contact Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Status of organization:    Non-Profit                      Private/For Profit                      Govt. Agency

*Circle the one that best describes your organization*

Tax ID #: \_\_\_\_\_

Purpose of your organization/business:

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## **Event or Expenditure Description**

*Please answer all items that apply to your request.*

Name of your event/expenditure:

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Website address of your event/expenditure:

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Date(s) of event/expenditure:

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How will the funds be used to directly enhance and promote tourism AND the hotel and convention industry in the City of Rockdale?

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Funds to be paid:     Reimbursement only     Advance Total     Advance Partial \$ \_\_\_\_\_  
*(Check one)*

List other means of financial support including in-kind support

Name	Amount to receive

Primary location of event/expenditure:

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Number of total persons expected to attend this event/expenditure:

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Number of persons expected to visit event or expenditure monthly/yearly:

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Approximate number of people attending/visiting event or expenditure will stay overnight in local hotels, motels or bed & breakfasts?

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**List host hotel or hotels that currently have a block of rooms for this event: Organization must provide proof of listing or link of hotels on advertising and website.**

Hotel	# of Rooms Blocked	Room Rate
Americas Best Value Inn		
Budget Inn		
Days Inn		
Kountry Inn		
Quality Inn		
Rainbow Courts		
Regency Inn		
Other:		

***Required Attachments:***

Check all documents that are attached along with the application

- P&L from previous year's program
- Projected budget for entire program
- Itemized, detailed list of expenditures relevant for HOT revenue use
- Advertising / Marketing Plan, including target audience
- List of Board of Directors with contact phone numbers
- Event planning timeline, if applicable
- Schedule of activities relating to your event/expenditure
- Copy of Tax Exempt certificate, if applicable

# Funding Request Overview

Amount Requested: \$

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Amount Granted In Past For Same Event Or Expenditure: \$

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Which Expenditure Category From Page 4 Is Most Relevant To Your Project/Event?

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# HOT Fund Grant Application Packet Form

Please return completed application with necessary attachments and signature to the City of Rockdale Tourism Committee located at 505 W. Cameron Ave., Rockdale, Texas 76567 no later than 60 days prior to event or project.

I have read the HOT Tax Fund Grant Application Process including the Rules Governing the Application and the Reimbursement Process.

I fully understand the HOT Tax Fund Grant Application Process, Rules Governing the Application and the process established by the City of Rockdale. I intend to use this grant for the aforementioned event/project to forward the efforts of the City of Rockdale in directly enhancing and promoting tourism and the convention and hotel industry by attracting visitors and hotel guests from outside City of Rockdale into the city.

I understand that if I am awarded a HOT Fund Grant, any deviation from the approved project or from the rules governing the application may result in the partial or total withdrawal of the HOT Fund Grant or a requirement to refund any and all funds received.

I understand that this Organization will reimburse the City of Rockdale no later than 60 days from Post Event Report if funded room nights are not met.

***Business/Organization Name:*** \_\_\_\_\_

\_\_\_\_\_  
***Applicant's Signature***

\_\_\_\_\_  
***Date***

# City Staff Recommendation

*City Staff Representative Recommended Grant Amount:*

\$

Date of Payment:

Conditions of Grant:

*City of Rockdale Approval*

*City of Rockdale Designee:* \_\_\_\_\_

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

## Post Event Analysis

*This Form Must Be Completed And Returned To The City of Rockdale City Manager No Later Than 60 Days Following Your Event Along With All Proof Of Advertising And Hotel Room Night Pick Ups.*

### Event Information

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

Event Dates: \_\_\_\_\_

### Event Expected And/Or Final Outcome

Attendance: \_\_\_\_\_

Hotel Room Nights by Hotel (Subject to Audit):

Rainbow Courts: \_\_\_\_\_ Budget Inn: \_\_\_\_\_ Regency Inn: \_\_\_\_\_

Days Inn: \_\_\_\_\_ Quality Inn: \_\_\_\_\_ Kountry Inn: \_\_\_\_\_

America's Best Value Inn: \_\_\_\_\_ Other: \_\_\_\_\_

**TOTAL:** \_\_\_\_\_

The above accounting of our Special Project/Event is accurate and true to the best of my knowledge.

\_\_\_\_\_  
*Authorized Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Printed Name*

\_\_\_\_\_  
*Title/Responsibility*

Return this form, supporting documentation and check (if applicable) to:

**City of Rockdale**  
City Manager

505 W Cameron Ave.  
PO Box 586  
Rockdale, Texas 76567

# ❖ FOR CITY STAFF USE ONLY ❖

## SCORE SHEET FOR HOT FUND APPLICATIONS

A “*Two Part Test*” is considered in evaluating each funding request.

Part 1: Does every expenditure of hotel taxes put “heads in beds” or promote the city’s hotel industry?

Part 2: Does every expenditure of hotel taxes fall into one of the nine statutorily authorized categories listed below in Part 2?

Thus, if an event or project puts “Heads in Beds” or meets Part 1, it cannot receive hotel tax money unless it also fits into one of the 9 categories, Part 2. The request must meet both parts of this scoring or test.

### Part 1

Score 0 – 50: \_\_\_\_\_

Each expenditure must directly enhance and promote tourism and the convention and hotel industry. Does the request or application’s intent result in marketing or advertising that puts “Heads in Beds”?

- Has this event taken place in Rockdale before or this project resulted in “Heads in Beds”? If yes, when and how often?



YES\_\_\_\_ NO\_\_\_\_

- What is the number of Tourists staying the night in a local Hotel?

NUMBER OF TOURISTS\_\_\_\_\_

- For every HOT dollar spent on an event or project, \$10.00 in gross revenue must be realized by the hotels that collect the HOT funds. What is the expectation for the number of room nights to be sold for this event or project? For example, if an event is a community picnic, parade or other similar event, it is not likely to attract tourists and hotel guests and would not be eligible for HOT funding. \*

ANTICIPATED NUMBER OF ROOM NIGHTS\_\_\_\_\_

ANTICIPATED GROSS REVENUE\_\_\_\_\_

**PART 1 TEST, Continued**

- Will the funded event be held at a venue that will attract tourists and hotel guests? For example, an event held at a local school may be less likely to attract tourist than if it is held at a local performing arts venue, museum, or civic center.

**YES**\_\_\_\_ **NO**\_\_\_\_

**Part 2**

**Score 0 – 50:** \_\_\_\_\_

Does the expenditure of HOT funds address at least one of the following?

1. Funding the establishment, improvement or maintenance of a convention center or visitor information center. (The facility must be primarily used to host conventions and meetings. “Primary used” in the context would mean that 50% of the bookings for the facility are the host conventions or meetings that directly promote tourism and hotel/convention industry). Holding a local community meeting or function in the facility does not qualify. Attendees must stay at local hotels.

**YES** \_\_\_\_ **NO** \_\_\_\_

2. Are the HOT funds to be used for administrative costs that are incurred for assisting in the registration of convention delegates or attendees?

**YES** \_\_\_\_ **NO** \_\_\_\_

3. Are the HOT funds being used for advertising, solicitations, and promotions that attract overnight tourists to Rockdale?

**YES** \_\_\_\_ **NO** \_\_\_\_

4. Are the HOT funds to be used for promotion of the arts? Does this expenditure exceed 15% of HOT funds spend in total for the arts or more than 1% of the cost of a room for this type of event?

**YES** \_\_\_\_ **NO** \_\_\_\_

**PART 2 TEST, Continued**

5. Are the funds to be used for historical restoration or preservation programs?

**YES** \_\_\_\_\_ **NO** \_\_\_\_\_

6. Are the funds to be used for certain expense, including promotional expense directly related to a sporting event where the majority of the participants are tourists that substantially increase hotel activity?

**YES** \_\_\_\_\_ **NO** \_\_\_\_\_

7. Funding for transportation systems for tourists. Transportation must be from the hotel for hotel guests only to the event venue, other hotels in the city or any designated tourist destinations in the city.

**YES** \_\_\_\_\_ **NO** \_\_\_\_\_

8. Signage directing tourist to sights or attractions that are visited frequently by hotel guests in Rockdale.

**YES** \_\_\_\_\_ **NO** \_\_\_\_\_

**TOTAL SCORE: \_\_\_\_\_ POINTS**

\*Calculation:

265 total hotel rooms in Rockdale

City Council approved \$30 per night per room

$265 \times \$30 = \$7,950$  max for one night

Subject to Hotelier validation