

# 2018 Proposal Packet Lodging Tax/Tourism Promotion

## Call for Proposals

This packet is for 2018 TOURISM PROMOTION SERVICES to be funded by the Jefferson County Lodging Tax.

If you wish to propose a County or non-profit owned tourism facility or the maintenance/operation of a County or non-profit tourism facility, please contact the Jefferson County Administrator, (360) 385-9100, to discuss the proposal.

Under Jefferson County guidelines, **ONLY NON-PROFIT AND GOVERNMENT AGENCIES ARE ELIGIBLE** to propose services to be funded by the Jefferson County Lodging Tax.

**The Jefferson County Lodging Tax Advisory Committee will only consider complete and signed proposals that include all of the requested information and documents and are submitted and date stamped by the proposal deadline.**

**OCTOBER 13, 2017**

# 2018 Proposal Guidelines

## Tourism Promotion Activities

The Jefferson County Lodging Tax Advisory Committee is accepting proposals from government agencies and non-profit organizations for **tourism-promotion** to be provided during calendar year 2018 and paid for from the County's lodging tax fund. The Committee will make recommendations to the Jefferson County Commissioners following the proposal deadline as part of the County's annual budget development. All decisions for use of the lodging tax will be made by the Jefferson County Commissioners.

**Proposal Deadline: On or before 4:30 p.m. October 13, 2017 (received in County Administrator's Office, not postmarked)**

**Mailing Address:** Jefferson County Lodging Tax Advisory Committee  
County Administrator's Office  
P.O. Box 1220  
Port Townsend, WA 98368

**Delivery Address:** Jefferson County Lodging Tax Advisory Committee  
County Administrator's Office  
1820 Jefferson Street  
Port Townsend, WA 98368

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### General Guidelines

- **Proposals from government agencies or non-profit organizations are to be for tourism promotion during calendar year 2018.** Please refer to Section B of this packet for the definition of "tourism promotion."
- **Proposals must comply with federal, state, and county laws and requirements.** **NOTE:** Jefferson County may not use public funds in any way that can be construed as a gift to an individual or organization.
- Proposals must completely address the questions, and all requested supplemental information must be provided. Incomplete proposals will not be considered by the Lodging Tax Advisory Committee.
- To be considered, **a fully completed and signed original application PLUS SEVEN (7) complete copies with supporting documents** must be received and date stamped at the address and by the deadline listed above.
- The proposal and all documents filed with the County are public records, potentially eligible for release.

**Jefferson County is committed to the non-discriminatory treatment of all persons in the employment and delivery of services and resources.**

# 2018 Proposal Checklist

## Service Proposal for Tourism Promotion Activities

Organization Name \_\_\_\_\_

Event Name, if different \_\_\_\_\_

Proposed Contract Amount: \$ \_\_\_\_\_

**Proposals must completely address the questions, and all requested supplemental information must be provided. Incomplete proposals or proposals submitted after the deadline will not be considered by the Jefferson County Lodging Tax Advisory Committee.**

To be eligible for consideration, your application must be signed, dated, and include the following items **in the listed order**.

Check each item submitted:

\_\_\_\_\_ Signed and Dated Proposal Summary Sheet

\_\_\_\_\_ Section 1 - Itemized list of proposed services and estimated costs.

\_\_\_\_\_ Section 2 - Proposal Questions.

\_\_\_\_\_ Section 3 - Proposed 2018 promotion, facility, event or activity budget.

\_\_\_\_\_ Section 3 - 2017 budget and year-to-date income and expense statement(s).

\_\_\_\_\_ Section 3 - List of names and addresses of the organization's current Board of Directors. Name and contact information for event chairperson, if applicable.

\_\_\_\_\_ Section 3 - Optional work samples such as season brochures, promotional materials, reviews, news/magazine articles, etc (maximum of 5 separate pieces)

To be considered, **a fully completed and signed original application PLUS SEVEN (7) complete copies with supporting documents** must be received and date stamped at the Jefferson County Administrator's Office, 1820 Jefferson Street, P.O. Box 1220, Port Townsend, WA 98368 by **October 13, 2017**.

**Documents submitted to the County are public records, potentially eligible for release.**

# 2018 Proposal Summary Sheet

## Proposal for Tourism Promotion Activities

**Proposal Deadline: October 13, 2017 at 4:30 pm (received, not postmarked)**

**Address To:** Jefferson County Lodging Tax Advisory Committee

**Mailing Address:** P.O. Box 1220, Port Townsend WA 98368

**Delivery Address:** Jefferson County, County Administrator's Office, 1820 Jefferson Street, Port Townsend, WA 98368

Please type (10 point or larger) or legibly print in ink.

To be considered: all questions must be answered; all requested documents provided; this form must be signed and dated; and the original plus seven (7) complete duplicate sets filed by October 13, 2017.

Organization Name \_\_\_\_\_  
 Organization Address \_\_\_\_\_  
 Contact Name \_\_\_\_\_  
 Contact Address \_\_\_\_\_  
 Day Phone \_\_\_\_\_ Evening or Cell Phone \_\_\_\_\_  
 E-Mail Address \_\_\_\_\_  
 Facility/Event/Activity Name (if applicable) \_\_\_\_\_  
 Total Lodging Tax Request: \$ \_\_\_\_\_  
 Estimated 2018 organizational operating budget (Incl. Lodging Tax Funds) \$ \_\_\_\_\_

If asking for funds for a specific event, list other cash funding sources and dollar amounts budgeted for this project. Note: This section is only due for specific event and festival funding requests.	Funding Source	Dollar Amount
		\$
		\$
		\$
		\$
		\$
		\$
Total Project Revenue Budget		\$

Did your organization receive Lodging Tax Funds from the County in 2017? \_\_\_\_\_yes \_\_\_\_\_ no

**I understand that if my organization's proposal for tourism promotion activities is approved by the County that my organization will enter into a contract with the County to provide the contracted services up to the maximum contract amount. I understand that the proposal herein is a public record potentially eligible for public release.**

Sign Name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Print Name and Title: \_\_\_\_\_

## Section 1. Itemized List of Proposed Tourism Promotion Services

Organization (or Event) Name:

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- **In the following space or on a separate sheet of paper, please specify each proposed tourism promotion, facility, event or activity, including quantities and costs (see examples at bottom of page).**

**Examples of how to list your proposed tourism promotion services or event (please be as specific AS POSSIBLE about the services, quantities, the tourism market, distribution method, and cost):**

10,000 promotional rack cards for I-5 corridor from Portland to Bellingham, April - June 2018.....\$1,835

The rack cards will promote an event/hotel/restaurant promotional package.

Design and printing..... \$1,250

Distribution by XYZ Company..... \$ 500

5 hours of staff time at \$17.00 per hour to write copy, edit and proof the cards.....\$ 85

1/3 page black and white event promotional advertisement in XYZ Magazine, July 2018 edition.....\$1,500

XYZ Magazine has 250,000 subscribers in western and northwest states. This 1/3 page ad will be part of a full page advertisement being coordinated by the VCB. XYZ Magazine will match the value of the advertisement with a feature article on Jefferson County and the event in the same edition.

## **Section 2. Proposal Questions.**

*Please confine your answers to no more than one page for each question.*

- 1. Tell us about your promotion, facility, event or activity and why you think it will increase tourists traveling to and staying in Jefferson County.**
  - (Also include a general description of the promotion, facility, event or activity (its purpose, history, etc), and describe your organization's track record.)
  
- 2. If this is a continuing promotion, facility, event or activity, what is the same as or different than 2017?**
  
  
  
  
  
  
  
  
- 3. Describe how you intend to market/promote your promotion, facility, event or activity to potential tourists who reside outside Jefferson County.**
  - a.) If an event, the date of the event:
  
  
  - b.) The timeline for the tourism promotion activity you are proposing (e.g. May through July, 2018)
  
  
  - c.) Target Audience
  
  
  - d.) Promotion methods you intend to use to reach the target audience.
  
  
  - e.) Describe how you will promote overnight stays at Jefferson County lodging establishments.

f.) If you intend to collaborate with another agency or non-profit to provide these services, please state the name of the organization and describe the nature of the collaboration:

**4. How will you measure the effectiveness of your promotion, facility, event or activity?**

**Also, describe how you will document and report to the County the economic impact from your event/facility.** (State law requires the County to report annually to the State Department of Community Development and Economic Trade about the number of lodging stays and economic benefit from tourists generated by use of Lodging Tax proceeds for tourism promotion.)

**5. What economic impact can we expect in Jefferson County from your proposed promotion, facility, event or activity?**

a.) Actual or estimated number of tourists at your event/facility last year (2017):

b.) Estimated number of tourists who will attend your event/facility this year (2018):

c.) Projected economic impact in Jefferson County from your event/facility (e.g. number of tourists who will stay overnight in Jefferson County-based lodging establishments; economic impact for Jefferson County restaurants, community facilities, amenities, events, and businesses).

**6. Describe your organization's area of expertise. Do you provide a unique service?**

### **Section 3. Background Information about Your Organization**

**Attach the following items to your proposal in the order listed:**

(Note: To be considered by the Committee, all of the listed information must be included with your proposal.)

**Attachments:**

- Proposed 2018 promotion, facility, event or activity budget including income and expenses.
- 2017 Budget and Actual income and expense year to date statement(s).
- List of names and addresses of the organization's Board of Directors as of the date the proposal is filed. Also, if the proposal is for the marketing of an event and there is a chairperson for the event (either volunteer or paid), list that individual's name, address and phone number.
- If you desire, you may provide samples of promotion materials such as brochures or promotional materials (maximum of five).

**Note:** Staff will verify Incorporation status of the non-profit agencies who submit service proposals by checking the Washington Secretary of State's on-line corporation records.



# B. Proposal Information

## 1. Jefferson County's Proposal Process -

The Jefferson County Lodging Tax Advisory Committee solicits service proposals each year. The proposal form is attached, posted on the County's website, [www.co.jefferson.wa.us](http://www.co.jefferson.wa.us) and may also be requested by calling the Jefferson County Commissioner's Office at the Courthouse, (360) 385-9100.

This year, the Committee will review proposals on **Monday, October 30, 2017**. Applicants are asked to attend the October 30, 2017 meeting beginning at 9:30 a.m. in the Commissioners' Chambers in the Basement of the County Courthouse (1820 Jefferson Street, Port Townsend, WA 98368). At that meeting, each proposing agency will answer questions from the Committee regarding their proposal. The Lodging Tax Advisory Committee will make a recommendation to the Board of County Commissioners regarding which proposals to fund, and at what funding levels within available revenues.

The review of the Lodging Tax Advisory Committee recommendations and final decision about how to use the lodging tax monies is made by the County Commissioners.

Each agency will be notified of the status its proposal.

Contracts are prepared by the County and sent to agencies.

## 2. Available Funding for 2018

Organizations submitting proposals should be aware that a total of **\$470,000** in lodging tax awards will be available for allocation to eligible tourism promotion activities through this RFP. (An additional \$10,000 is being reserved for facility expenditures for the Gateway Visitor's Center in 2018.) The \$470,000 in 2018 is higher than the \$425,000 that was in the RFP for the prior year.

County Ordinance 02-0622-98 provides for distribution of Lodging Tax as follows:

- The lodging tax funds are to be used for targeted and/or regional promotion, the operation and maintenance of organizations operating tourist related facilities and their costs for local promotional activities.
- Not more than 25% for the development of tourism related facilities.

## 3. Definitions -

By state law, lodging tax funds may only be used for tourism promotion and the acquisition and/or operation, including maintenance, of tourism-related facilities. The following definitions are copied verbatim from RCW 67.28.080. Note: State law changed in 2007 to include "operation" of tourism events in the definition of "tourism promotion."

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

"Tourist" means a person who travels from a place of residence to a different town, city, county, state, or country, for purposes of business, pleasure, recreation, education, arts, heritage, or culture.

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

"Tourism-related facility" means real or tangible personal property with a usable life of three or more years, or constructed with volunteer labor that is: (a)(i) Owned by a public entity; (ii) owned by a nonprofit organization described under section 501(c)(3) of the federal internal revenue code of 1986, as amended; or (iii) owned by a nonprofit organization described under section 501(c)(6) of the federal internal revenue code of 1986, as amended, a business organization, destination marketing organization, main street organization, lodging association, or chamber of commerce and (b) used to support tourism, performing arts, or to accommodate tourist activities.

## **4. Proposal Evaluation Criteria –**

### **Jefferson County Policy Statement for Use of the Lodging Tax.**

Jefferson County's Lodging Tax Fund will be the primary source of county funding for activities, operations, and expenditures designed to increase tourism. The County does not make any multi-year commitments with Lodging Tax funds. However, service providers are not limited or prohibited from making repeat annual requests of the same nature. The County intends to maintain a reserve in the Fund, and will assess on an annual basis how much of the Fund to appropriate in a given year. The Jefferson County Commissioners have created a Lodging Tax Advisory Committee to conduct an annual process to solicit and recommend Lodging Tax funded services for the County Commissioners consideration. Jefferson County will only consider proposals for use of the Lodging Tax from public and non-profit agencies.

The Fund will ONLY be used for the following purposes:

1. The promotion of emerging or on-going tourism events, facilities, and activities by government or non-profit agencies so as to attract and draw tourists to unincorporated Jefferson County from outside Jefferson County.
2. Operation of a tourism promotion agency (such as a visitor and convention bureau);
3. The marketing of special events and festivals designed to attract tourists to unincorporated Jefferson County from outside Jefferson County.
4. Capital and/or operating costs for tourism facilities owned by a public entity or a non-profit organization as defined in State law RCW 67.28.080.1(7) – *Tourism Related Facility*.
5. Administrative costs to support tourism events, facilities and activities.

## **Other Criteria.**

**HIGH PRIORITY** will be given to tourism activities that ~

- Promote Jefferson County and/or events, activities, and places in the County to potential tourists from outside Jefferson County.
- Have demonstrated potential or high potential from the Committee's perspective to result in overnight stays by tourists in lodging establishments within the unincorporated areas Jefferson County.
- Have demonstrated potential or high potential from the Committee's perspective to result in documented economic benefit to Jefferson County.
- Have a demonstrated history of success in Jefferson County, or are proposed by a group with a demonstrated history or high potential of success with similar activities.
- Minimize duplication of services where appropriate and encourage cooperative marketing and/or includes an element of cooperation or partnership.
- Provide, maintain, operate, or enhance County-owned tourism facilities or infrastructure.

## **LODGING TAX ADVISORY COMMITTEE REVIEW CONSIDERATIONS ~**

In developing its recommendations, the Committee considers:

- The estimated amount of lodging tax receipts for the coming year provided by the County Administrator's Office.
- Thoroughness and completeness of the proposal.
- The relationship of proposed services to the areas of high priority identified by the Committee.
- Percent of the proposal request to the event/facility promotions budget and overall revenues.
- Percent of increase over prior year Jefferson County Lodging Tax funded proposal if any.
- Projected economic impact within the unincorporated Jefferson County, in particular projected overnight stays to be generated in lodging establishments in the unincorporated areas of Jefferson County.

- Requirements in State law for use of the tax, and the definitions in State RCW 67.28.080 for “tourism,” “tourist,” “tourism promotion,” and “tourism-related facility.”
- The applicant’s history of promotion success, reporting history and financial stability.
- Committee member general knowledge of the community and tourism-related activities.

**NOT CONSIDERED are requests for ~**

- Services to be provided beyond calendar year 2018.
- Proposals from for-profit businesses (however, a government or nonprofit agency contracting with the County may itself contract with for-profit businesses as third-party vendors).
- Promotional activities that reach a target audience solely located within Jefferson County.

**NOTE:**

1. On February 2, 2006, the State of Washington Attorney General’s Office issued Opinion #AGO 2006 #4, which clarifies that a municipality may **NOT provide advance payment** to private organizations for tourism promotion. Payment must occur after the services have been performed and documentation in keeping with the contract is submitted to the County.
2. The County may not pay for donated or volunteer services or pay more than the actual cost incurred by the contracting agency to provide the service.

## **5. Background Information –**

### **Jefferson County’s Lodging Tax.**

The Lodging Tax is an excise (sales) tax authorized by State law in RCW 67.28, *Public Stadium, Convention, Arts and Tourism Facilities*.

In 1998, the State Legislature amended Chapter 67.28 of the Revised Code of Washington (RCW) to allow local governments to assess an additional 2% tax on lodging for tourism promotion and/or tourism-related facilities (sometimes referred to as “the new 2%”). In April 1999, the County Commission, by Ordinance, increased the County’s Lodging Tax from a 2% to a 4% tax as allowed by RCW 67.28.

### **Jefferson County’s Lodging Tax Advisory Committee.**

Per RCW 67.28.1817, the State requires that local governments collecting the Lodging Tax establish a Lodging Tax Advisory Committee consisting of at least five (5) members:

- The Chair – a member of the County Commission or their designee
- 2 members – representing the lodging industry
- 2 members – representing activities authorized to be funded by said tax

The Committee's role is advisory in nature, with the Committee's purpose being to advise the County Commissioners. The Committee must select the candidates from amongst the applicants applying for use of revenues and provide a list of such candidates and recommended amounts of funding to the County Commissioners for final determination.

In 1998, the Jefferson County Commissioners created such a Committee, and asked the Committee to establish an annual process to solicit and review proposals for tourism services eligible for lodging tax funding. Committee members are appointed by the County Commissioners as part of the County's regular advisory committee appointment process.

**For additional information, contact ~**

County Administrator  
Jefferson County Courthouse  
1820 Jefferson Street  
PO Box 1220  
Port Townsend, WA 98368  
Ph: 360-385-9100; Fax: 360-385-9382  
e-mail: [pmorley@co.jefferson.wa.us](mailto:pmorley@co.jefferson.wa.us)

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