

Please save file to your hard drive  
before completing the form.

## **CITY OF BOERNE Hotel Occupancy Tax (HOT) Funds**

By ordinance, the City of Boerne approves a local hotel occupancy tax with portions of the fund to be dedicated to support convention and tourism centers, promotional and tourist advertising of the City, promotion of the arts, historical preservation and program support for events and activities that attract tourists to the City of Boerne.

### **I. Use of HOT Funds**

Municipal hotel occupancy taxes are primarily governed by Chapter 351 of the Texas Tax Code. The HOT funds are generated as a result of a person paying for the use or possession, or for the right to the use or possession, of a room in a hotel, motel or bed and breakfast, with a cost of \$2 or more each day, that is ordinarily used for sleeping, not on a permanent basis.

There is a **two-part test** for every expenditure of local Hotel Occupancy Taxes.

**Criteria # 1** Every expenditure must **DIRECTLY** enhance and promote tourism  
AND the convention and hotel industry.

**Criteria # 2** Every expenditure **MUST** clearly fit into one of nine statutorily provided categories.

The nine categories for expenditure of the hotel occupancy tax are as follows:

1. Funding the establishment, improvement or maintenance of a convention center or visitor information center.
2. Paying the administrative costs for facilitating convention registration.
3. Paying for advertising, solicitations and promotions that attract tourists and convention delegates to the city or its vicinity. (1/7 of total funds must be spent on advertising and promoting the city and its vicinity to attract tourist and hotel/convention activity)
4. Expenditures that promote the arts, including 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, and other arts related to the presentation, performance, execution and exhibition of these major art forms.
5. Funding historical restoration or preservation programs.  
Funding may be used to enhance historical restoration and preservation projects or activities or advertising and conducting solicitations and promotional programs to encourage tourists and convention delegates to visit preserved historic sites or museums that are likely to attract tourists and hotel guests (limited to 15% of total funds).
6. Funding certain expenses, including promotional expenses, directly related to a sporting event within counties with a population of under 1 million.
7. Funding the enhancement or upgrading of existing sports facilities or sports fields for certain municipalities.
8. Funding transportation systems for tourists.
9. Signage directing tourists to sights and attractions that are visited frequently by hotel guests in the municipality.

## II. Review Process

The Boerne City Council approved the Boerne Convention and Visitors Bureau Advisory Board to be a permanent board, appointed annually, for the main purpose of providing HOT fund recommendations to the City Council.

The CVB Advisory Board reviews all acceptable applications from individuals, groups and organizations applying for HOT funding. An acceptable application is one that is complete and meets the deadline requirements.

Each group, with an acceptable application, will be scheduled for a date and time to present their request to the Board. At the presentation, the Board may ask questions and seek clarification. A formal presentation is encouraged, however it is not required.

After presentations are made, the Board will make initial funding recommendations. Notification of the initial funding recommendations will be emailed to all applicants. Funding recommendations may be less than the amount requested.

An applicant may appeal the initial funding recommendation. An appeal date will then be set for a second presentation. After all appeal hearings, applicants will be notified by email of the Board's final recommendations. The City Council will receive formal recommendations by the Advisory Board Chairperson, at a regularly scheduled Council meeting, and will make the final decision on the allocation of funds.

After October 1, 2017, when the fiscal year of the City of Boerne begins, the Finance Department will send out formal contracts to successful applicants. After the (1) contracts are signed and returned to the City and (2) an invoice is provided to the City, the organization may receive funds as outlined below:

- Events/Programs occurring prior to December 31 - may receive funds during the first quarter
- Events/Programs occurring after December 31- may receive funds no sooner than 90 days prior to the program
- Ongoing programs - funds will be distributed quarterly in 4 equal payments

Any organization that owes tax dollars to the City of Boerne will not receive funds until their debt is paid.

## III. Dates for 2017 Application Process (2018 Funding)

Wed	January 4	Applications Available <b>Online</b>
Tues	February 28	Application <b>Orientation</b> CVB 4pm
Tues	April 18	<b>Deadline</b> for Application Submittals
Tues	April 25	Application <b>Presentations</b>
Wed	April 26	Application <b>Presentations</b>
Tues	May 2	Notification of <b>Initial Recommendations</b>
Tues	May 9	Deadline to File Applicant <b>Appeals</b>
Tues	May 16	Applicant <b>Appeals Presentations</b>
Fri	May 19	<b>Final Recommendation</b> Letters emailed/mailed
Tues	July TBA	Formal Presentation to <b>City Council</b>
	October	City of Boerne Finance Department sends formal <b>Contracts</b> to successful applicants

# Hotel Occupancy Tax Application

## I. Submitting an Application

Application forms will be available January 4, 2017, online at [www.ci.boerne.tx.us](http://www.ci.boerne.tx.us). After clicking on the City website, go to *Departments, Finance, Hotel/Motel Forms*.

Applicants must submit a completed application and provide required documentation. The application deadline is **Tuesday, April 18, 2017, 5:00pm**.

Completed applications will be accepted online at [jeanette@visitboerne.org](mailto:jeanette@visitboerne.org). Because the City of Boerne is pursuing ways to “go green” and reduce the amount of paper and storage, email is the preferred method of receiving the application and required documents. Applications will also be accepted at the Boerne Convention and Visitors Bureau, 1407 S. Main, Boerne, TX 78006.

Multiple applications from a group will be accepted. Each event/program must have a separate application. Additional supporting materials may be brought to the HOT presentation.

Notification of dates and times of presentations, appeals or any changes that may occur, will be made by email and/or phone. **Applicants are responsible for providing email addresses / phone numbers that will allow them to be contacted expediently.**

## II. Contact Information

Legal name of Organization requesting funds [Click here to enter text.](#)

Organization Mailing Address [Click here to enter text.](#)

E-Mail [Click here to enter text.](#)

Phone [Click here to enter text.](#)      **Mobile** [Click here to enter text.](#)

Name of Primary Contact [Click here to enter text.](#)

Title of Primary Contact [Click here to enter text.](#)

Mailing Address of Primary Contact [Click here to enter text.](#)

E-Mail [Click here to enter text.](#)

Phone [Click here to enter text.](#)      **Mobile** [Click here to enter text.](#)

### III. Organization Type

This Organization Is:  Private  Non-Profit/Tax Exempt  Other [Click here to enter text.](#)

Tax ID# [Click here to enter text.](#)

Type of Organization (IRS Code) [Click here to enter text.](#)

What is the Mission of your Organization? [Click here to enter text.](#)

Year Organization was [Click here to enter text.](#)

Number of full time staff [Click here to enter text.](#)

Number of part time staff [Click here to enter text.](#)

Number of volunteers [Click here to enter text.](#)

### IV. Required Information to be Submitted with Application

- Budget for the proposed event/program, including all revenue sources and expenditures
- Organization financial statements from previous two years
- Articles of Incorporation
- By-laws
- Board Members - names and titles

**V. Name of Event/Program** [Click here to enter text.](#)

Purpose of the Event/Program [Click here to enter text.](#)

### VI. Previous HOT Funding

Has the Organization previously received HOT funding from the City of Boerne?

[Click here to enter text.](#) Yes or No

If Yes, what year(s) and for what purpose? [Click here to enter text.](#)

### VII. Previous Events/Programs Organized

List major events/programs that this Organization or Applicant has organized and hosted.

[Click here to enter text.](#)

Additional information such as schedules, financial statements, articles or other relevant information

regarding these events/programs may be provided during the Board presentation. [Click here to enter text.](#)

**VIII. Is this request for an event?** [Click here to enter text.](#) Yes or No  
*If your request is not for an event, please continue on to Section IX.*

Has this event been held previously? [Click here to enter text](#) Yes or No.  
 If Yes, please complete the following:

Date(s) Held	Location	No. of Participants, Spectators, Visitors	How Verified?	# of Boerne Hotel Rooms Booked	How Verified?
<a href="#">Click here to enter a date.</a>	<a href="#">Click here to enter text.</a>				
<a href="#">Click here to enter a date.</a>	<a href="#">Click here to enter text.</a>				
<a href="#">Click here to enter a date.</a>	<a href="#">Click here to enter text.</a>				
<a href="#">Click here to enter a date.</a>	<a href="#">Click here to enter text.</a>				
<a href="#">Click here to enter a date.</a>	<a href="#">Click here to enter text.</a>				
<a href="#">Click here to enter a date.</a>	<a href="#">Click here to enter text.</a>				

Will this be a ticketed event? [Click here to enter text.](#) (Yes or No)

Price of ticket/ admission/ entry fee \$[Click here to enter text.](#)

Description of participants / teams (geographic or qualifying information, by invitation only, etc.)

[Click here to enter text.](#)

**IX. Please complete Section IX if this application is NOT for an EVENT.**

Date of completion for proposed program: [Click here to enter text.](#)

Is the request to promote the arts? [Click here to enter text.](#) (Yes or No)

If yes, please explain [Click here to enter text.](#)

Is this request to fund historical restoration or preservation? [Click here to enter text.](#) (Yes or No)

If yes, please explain [Click here to enter text.](#)

## **X. Economic Impact**

Please describe how this event/program will increase tourism or have an economic impact on the City of Boerne. [Click here to enter text.](#)

How will this event/program generate overnight stays in Boerne lodging? [Click here to enter text.](#)

How much Hotel Occupancy Tax is projected to be generated in Boerne by this event/program?

# rooms [Click here to enter text.](#) X # nights [Click here to enter text.](#) X room rate [Click here to enter text.](#) X tax \$ 0.07 = \$ [Click here to enter text.](#)

How is this information estimated/verified? [Click here to enter text.](#)

What local businesses are being used to accomplish this project? [Click here to enter text.](#)

Please list any additional Co-Sponsors of the Project. [Click here to enter text.](#)

## **XI. Marketing & Media Coverage**

What date will promotion and marketing of this event/program begin? [Click here to enter text.](#)

Please describe the marketing plan for this project. Include information on print ads, radio, television, distribution of posters, brochures, flyers, etc. Samples may be brought to the presentation and are not required with the application. [Click here to enter text.](#)

## **XII. HOT Fund Amount Requested**

[Click here to enter text.](#)

Describe in detail how HOT funds will be used, if awarded? [Click here to enter text.](#)

Please bring any supporting information about your organization, event or program to the Board presentation. It is not required to be included with the application.

If this request for funding is denied, will the program continue? Yes or No [Click here to enter text](#)

Comments

[Click here to enter text.](#)

### **XIII. Post Event/Program Report**

*A Post Event/Program Report is required to be submitted within 60 days of completion of the event/program. The completed form may be emailed to [Jeanette@visitboerne.org](mailto:Jeanette@visitboerne.org) or delivered to the Boerne Visitors Center, 1407 S. Main, Boerne, Texas, 78006. Failure to submit a Post Event/Program report could affect future funding recommendations for HOT funds.*

***I understand the Texas State limitations placed on use of Hotel Occupancy Tax funds, and certify that the requested funds will be used only for purposes described in this application or as approved by the City. I understand the use of HOT funds is subject to audit.***

Name Click here to enter text.

Title Click here to enter text.

Date Click here to enter text.