



Community Vitality and Economic Health Investment Program

Submitted May 3, 2023

Investment in programs, projects, services, and maintenance activities to achieve community vitality, economic health, and environmental sustainability that benefits residents, businesses, and visitors in the North Lake Tahoe region.

Program Introduction

The Community Vitality and Economic Health Program ("Program") aims to invest in programs, projects, services, and limited maintenance activities to achieve economic health, community vitality, and environmental sustainability that benefits residents, businesses, and visitors. In addition, this Program aims to provide a clear and strategic approach to allocate Transient Occupancy Tax ("TOT") and North Lake Tahoe Tourism Business Improvement District ("NLTTBID") assessment funds to promote community well-being and economic growth in the North Lake Tahoe region.

The development of the Program document involved close collaboration and feedback from the four committees, including the TBID Advisory, Zone 1, Transient Occupancy Tax Committee ("TOT"), and Capital Projects Advisory Committee ("CAP"). Each committee participated in four meetings where they vetted program components, provided insights, and contributed to refining the program structure. In addition, we conducted a comprehensive community survey to gather input from residents and stakeholders. This valuable feedback has been incorporated into the Program to ensure it accurately reflects the needs, priorities, and aspirations of the North Tahoe community. The result is a comprehensive and well-considered framework that aligns with the goals and importance of the North Tahoe Community Alliance ("NTCA") and Placer County Board.

This document outlines program elements, criteria, process steps, and guiding documents. All committees referenced above-provided input along with key stakeholders, including potential program applicants.

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Section 1: PROGRAM ELEMENTS

Program Elements

Program elements are divided into four key buckets, including:

Bucket #1 - Sponsorship and Multi-Year Investment Program (“Sponsorship”)

Bucket #2 - Annual Grant Program

Bucket #3 – Out-of-Cycle Investments

Bucket #4 – “Flex Funding” Reserve

Eligibility and Decision-making

The Community Vitality and Economic Health program (“Program”) will refer to the following for guidance and criteria around each program element:

- Community feedback from a regional survey on community priorities
- Public and stakeholder input in public meetings, town halls, or other public outreach efforts
- North Lake Tahoe Tourism Business Improvement District (NLTTBID) Management District Plan priorities
- Measure A Ballot language
- Placer County’s Housing Work Plan
- Placer County’s Housing Element
- Placer County’s Resort Triangle Transportation Plan (RTTP)
- The Tahoe Regional Planning Agency’s Regional Transportation Plan
- Tourism Master Plan (May be updated during Program implementation)
- Program criteria outlined in **ATTACHMENT 1**

Eligible investment opportunities for the Program must fit within one of several categories listed below:

- Workforce Housing

- Economic Development, Transportation, and Other Priorities
- Sustainability and Mitigation of Tourism/Limited Maintenance (enhanced trash service, crossing guards, community outreach, education campaigns, dog waste stations, Etc.)
- Trails

If there are existing funding sources for investment opportunities, additional funds should support the expansion of enhancement of those services during peak periods. For example, the NTCA receives a proposal for additional trash service. In that case, it should be to enhance or expand that service on weekends, holidays, and other periods when visitation is high in the region.

ATTACHMENT 1 outlines Program criteria for Sponsorship, the Annual Grant Cycle, and Out-of-Cycle Investments.

Committee Engagement Process

After applicants submit a proposal for Sponsorship, the Annual Grant Program, or Out of Cycle Investments, NTCA staff will convene a meeting with the chair and vice chair of each participating committee to ensure the investment opportunities outlined in a proposal or Letter of Interest meet minimum standards including response to community feedback, alignment with guiding documents, leveraged funds, and ability to demonstrate a measurable impact. Placer County Executive Office staff in Tahoe may also participate in these initial meetings. Finally, NTCA staff will route proposals to the appropriate committee for review/consideration, as detailed below.

Section 2: COMMITTEE ROUTING GUIDELINES

Committee	Funding Source	Investment Priority
Transient Occupancy Tax (TOT) Committee	TOT	1. Workforce housing and transportation
Zone 1 Committee	Assessment Revenue	1. Investment categories outside of housing and transportation, including tourism mitigation, business advocacy, and other Chamber-related activities. 2. All committees may consider housing and transportation investments; however, the

		TOT and CAP Committees should lead in funding within these categories.
TBID Advisory	Assessment Revenue	<ol style="list-style-type: none"> 1. Investment categories outside of housing and transportation, including tourism mitigation, business advocacy, and other Chamber-related activities. 2. All committees may consider housing and transportation investments; however, the TOT and CAP Committees should lead in funding within these categories.
CAP Committee	TOT	Further discussion and coordination are needed; however, capital project investments will be the primary focus.

Section 3: MINIMUM PROGRAM CRITERIA

Minimum Requirements

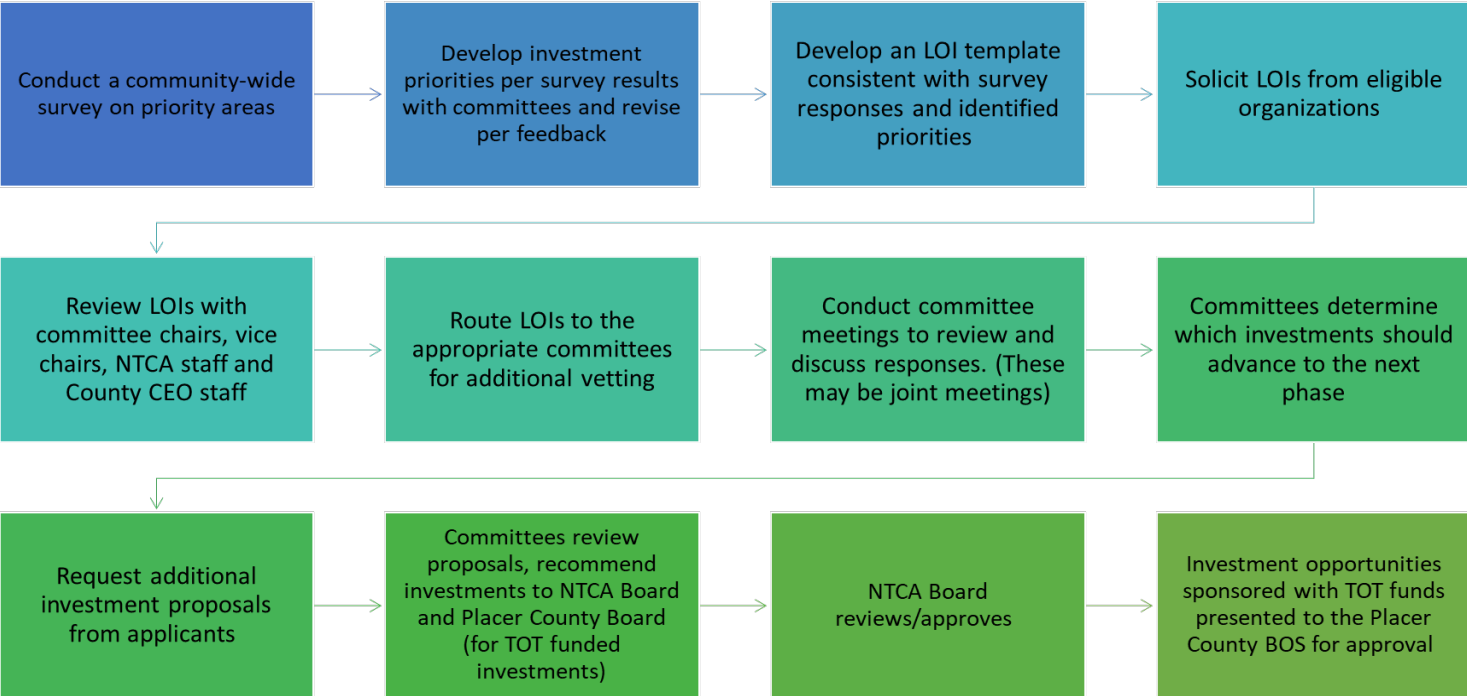
- The applicant is a nonprofit, government agency, or business registered as an LLC, Corp, or B Corp, sole proprietor.
- The applicant provides services or conducts business in the North Lake Tahoe community, including the Placer County portion of the Lake Tahoe Basin, the 267 and 89 corridors, and Donner Summit (For TOT funds only).
- The applicant's proposal is consistent with the preferred investments outlined in a solicitation.
- The investment is in alignment with the Program criteria outlined in **ATTACHMENT 1**.
- The proposal demonstrates public benefit, i.e., all residents within defined boundaries, and is not or would not be considered a gift of public funds.
- Placer County or other agencies do not already fund the investment; however, proposals to enhance or expand the investment are eligible.

Section 4: PROGRAM ELEMENT OVERVIEW

Bucket #1 - Sponsorship and Multi-Year Investment Program

Summary

The North Tahoe Community Alliance (NTCA) Sponsorship and Multi-Year Investment program (“Sponsorship”) supports priority projects, programs, services, or maintenance activities ("Investment Opportunities") that require annual financial support to achieve success and realize community goals over three years (July 1, 2023 – June 30, 2026). Available funding sources include Transient Occupancy Tax and assessments from the NLTTBID. The steps to identify investment opportunities for Sponsorship include the following:



Detail

Community-Wide Surveys

The NTCA will conduct a community-wide survey to inform investment opportunity criteria and help assess priorities within the guiding documents referenced above. The survey results are intended to provide a data point for decision-making and should not be the only

data point used. Committees and the NTCA board should also consider guiding documents and public input. After the NTCA staff compiles survey results, the team will confer with Placer County CEO staff to discuss alignment with county priorities. Then, a request for Letters of Interest (LOI) will be released. A sample LOI is included in **ATTACHMENT 2** of this document. Applicants must complete the LOI, including a summary, budget, matching funds, schedule, and measures of success as defined by the NTCA and implementing agency, i.e., ridership, number of units constructed, number of local workers placed in existing housing, miles of trail built/maintained, reduced wait times for transportation service, Etc.

Eligible investment opportunities must fit within one of several categories listed below:

- **Workforce Housing**
- **Economic Development, Transportation, and Other Priorities**
- **Sustainability and Mitigation of Tourism/Limited Maintenance**
- **Trails**

Vetting Letters of Interest

After applicants submit the LOI, NTCA staff will convene a meeting with the chair and vice chair of each participating committee to ensure the investment opportunities outlined in each LOI meet minimum standards, including response to community feedback, alignment w/ guiding documents, leveraged funds, and ability to demonstrate a measurable impact. Placer County Executive Office staff in Tahoe may also participate in these initial meetings. Finally, NTCA staff will route the LOI to the appropriate committee for review/consideration as detailed below.

Each committee will receive a report on all LOIs received and a justification for sending the LOIs to specific committees or rejecting an LOI. The information will allow the committee to understand the entire landscape of investment opportunities, reasons for eliminating an LOI, and opportunities to collaborate across committees throughout the process.

Each committee will review LOIs and determine which investment opportunity/opportunities to consider for Sponsorship. In addition, the NTCA may schedule joint committee meetings for housing and transportation-related investment opportunities due to the overlap identified above.

Investment opportunities that meet requirements will move to the second stage of vetting, including presentations from applicants to committees. Committees may request additional information from the applicant and review it before committee action. Finally, all committees may convene jointly to review the final list of recommended investment opportunities before submission to the NTCA board of directors.

The NTCA board of directors will consider the recommendations and may invite applicants to attend. Then, the board will take final action on TBID-funded investment opportunities and recommend TOT-funded Investment Opportunities to the Placer County Board of Supervisors.

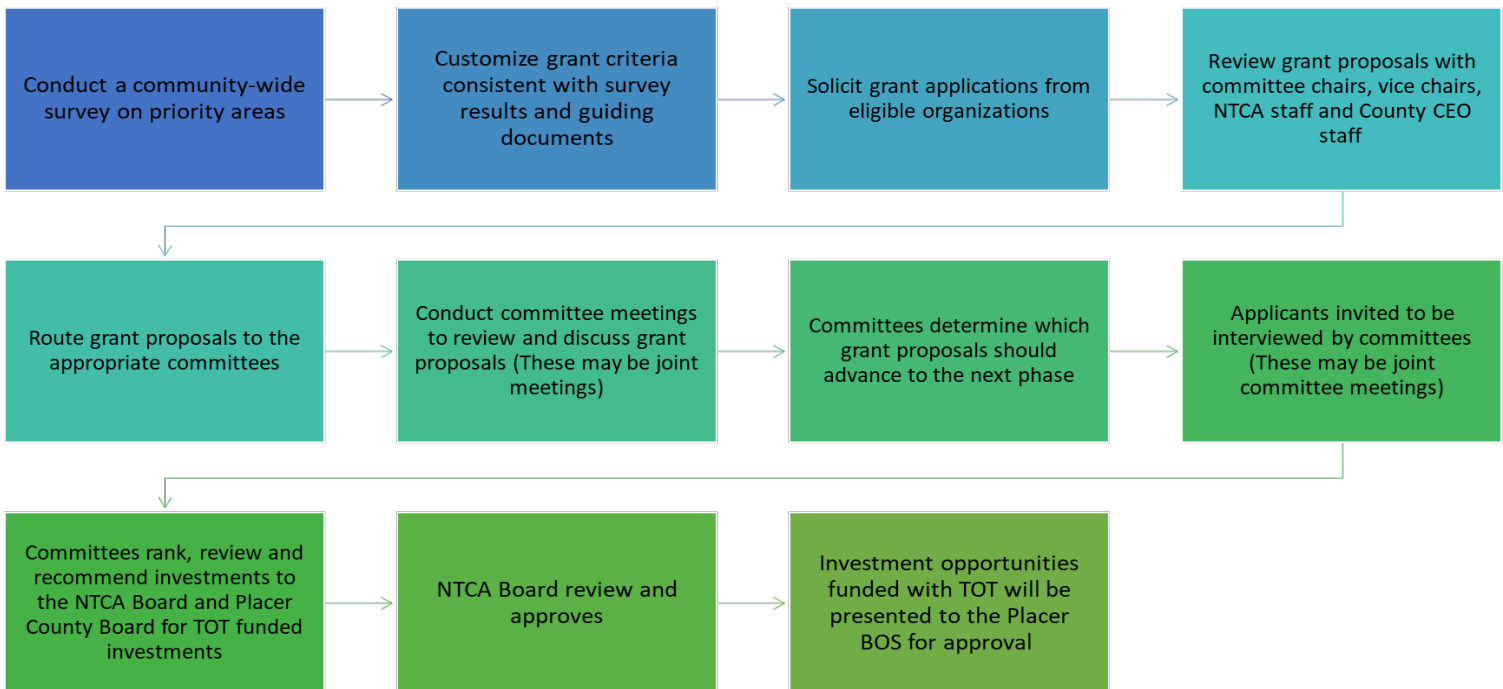
Once approved, the applicant will contract directly with the NTCA and must provide regular updates on status, metrics, unanticipated challenges, schedule updates Etc. Should an Investment Opportunity not meet contract terms, the NTCA may eliminate the investment from the Program and replace it at the discretion of the NTCA Board of Directors with concurrence from the Placer County Board of Supervisors for TOT-funded sponsorships.

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Bucket #2 - NTCA Annual Grant Program

Summary

The NTCA Annual Grant Program supports priority projects, programs, services, or maintenance activities ("Investment Opportunities") that may not be eligible for Sponsorship or do not require multi-year funding support. Available funding sources include Transient Occupancy Tax and assessments from the NLTTBID. The steps to identify investment opportunities for the annual grant program include the following:



Detail

The NTCA will develop grant guidelines that reflect community priorities identified in the annual community survey and feedback from County CEO staff. Then, the NTCA will distribute grant guidelines with a request for grant proposals from government agencies, nonprofits, and businesses.

Grant applications will include a request for proposal summary, budget, matching fund opportunities, schedule, and measures of success as defined by the NTCA and implementing agency, i.e., ridership, number of units constructed, number of local workers placed in existing housing, miles of trail built/maintained, Etc.

Eligible investment opportunities must fit within one of several categories outlined above. The review, routing, and vetting process will follow NTCA's Sponsorship program outlined above.

#3 – Out-of-Cycle Investments

Summary

The NTCA's Out-of-Cycle Investments is for investment opportunities that are not eligible for Sponsorship or are not ready for sponsorship consideration and fall outside the regular grant cycle. A predetermined amount of funding will be set aside. In addition to that listed above, criteria for this Program include a new investment opportunity with community/stakeholder support, matching funds, and community impact. Additionally, investment Opportunities must be consistent with the categories listed above, including community feedback and guiding documents.

Detail

The NTCA will develop and post an application for the Program. NTCA staff, in coordination with Placer CEO staff, will vet and route applications to the appropriate committee/committees. If committees recommend the Investment Opportunity for support, the NTCA board will review the application for consideration. If the funding source is TOT, the Placer County Board of Supervisors must also approve funds that support the application.

#4 – “Flex Funding” Reserve

Summary

The NTCA may set aside a percentage of TOT and TBID funds to support future Investment Opportunities.



Section 5: ATTACHMENT 1 – PROGRAM CRITERIA

Committees will compare all proposals to the criteria outlined below. The NTCA may provide additional measures customized for each program element. All submissions must meet the qualifications outlined below. The Program criteria may be modified if/when the CAP Committee participates in the Program.

Section 1 – Community Vitality (Up to 35 points)

Investments that are focused on the community and the preservation and enhancement of its culture.

- The community identified the proposed investment as a high priority per community survey results.
- For TOT-funded investments, the proposal aligns with Placer County's [Critical Success Factors](#).
- The proposed investment aligns with one or more guiding documents outlined in the Program document on page one.
- The proposed investment has proven demand (community feedback, current metrics demonstrating need or growth).
- Investment monitoring and tracking metrics are sufficient to evaluate the success or adapt as needed.
- Investment demonstrates a commitment to promoting diversity and inclusion within the community by actively engaging underrepresented groups, fostering inclusive community dialogue and/or ensuring equitable access to resources and opportunities.

Section 2 – Economic Health (Up to 35 points)

Investments that facilitate collaboration with local businesses and community stakeholders to positively impact the region's economic health, focusing efforts on fostering a continually thriving community.

- The proposal aligns with community priorities outlined in guiding documents.
- The proposal includes monitoring and tracking metrics sufficient to evaluate the success or adapt as needed.
- The proposal demonstrates that the investment will positively impact the region's economic health.
- The investment supports local businesses, stimulates local spending and increased the community's overall economic activity.
- The proposal demonstrates public benefit, i.e., all residents within defined boundaries, and is not or would not be considered a gift of public funds.

*(The California gift of public funds doctrine set forth in the California Constitution, Article XVI, § 6, prohibits the giving or lending of **public funds** to any person or entity, public or private. "In determining whether an appropriation of state funds or property is to be considered a gift, the primary question is whether the funds are to be used for a "public" or "private" purpose. If they are for a "public purpose", they are not a gift within the meaning of [§6 of art. XVI]. If an expenditure serves a primary public purpose, it is not a gift even if it incidentally benefits an individual)*

Section 3 - Environmental Stewardship (Up to 35 points)

Investments that provide resources and tools to educate stakeholders on sustainable efforts and help people collaborate to preserve our region for generations to come.

- The proposed investment encourages or supports environmental stewardship by visitors and residents to the North Lake Tahoe region.
- The proposed investment provides tools to educate visitors and residents on the region's environmental sustainability activities and opportunities.
- Investments contribute to the long-term health and well-being of the community by promoting environmentally friendly practices and minimizing negative environmental impacts.
- The investment will protect, restore, or enhance natural habitats and ecosystems.
- The investment fosters environmental stewardship, raising awareness of environmental issues, and promotes sustainable behaviors among residents and visitors.

Section 4 – Budget (Up to 20 points)

- The proposed budget has clearly defined expense categories and identified revenue streams.
- The budget admin/overhead expenses are limited to 10 percent.
- The proposed investment has projected funding identified and committed.
- There are adequate provisions for unforeseen expenses or potential changes in the project scope.

Section 5 – Organizational Capacity (Up to 15 points)

- The applicant has demonstrated the ability to implement the proposed project, program, or service.
- The applicant has demonstrated fiscal solvency to ensure its long-term ability to meet financial obligations.
- The organization has staff to support or plans to expand staff capacity to meet sponsorship goals.
- The qualifications, experience and diversity of the applicant team, including management, technical experts and support staff are adequate to complete the proposed investment.

Section 6 - Investment Readiness (20 points)

- Permits, right of ways, impact studies, or associated approvals are complete, and the investment is "shovel ready" or ready to launch.
- If the applicant is not the landowner of a project, the landowner has demonstrated support for the project (a letter of support, agreement, a reference).

Section 7 - Match Requirements (Sliding scale)

In addition, the matching scale differs by organization type, specifically around property tax revenue.

1. Applicants that do NOT receive property tax revenue (nonprofits, businesses, Etc.)

Match Percentage	Points Assigned
>50%	40

50%	25
25%	10
<25%	0

2. Applicants that DO receive property tax revenue (Counties, special districts, other)

Match Percentage	Points Assigned
>50%	25
50%	15
25%	5
<25%	0



Section 6: ATTACHMENT 2 – Sponsorship Letter of Interest Cover Letter

Program Introduction

Thank you for your interest in the NTCA's Sponsorship program ("Sponsorship"). We are excited to learn about your project, program, or service that supports community vitality and economic sustainability in the North Lake Tahoe region.

Please provide the requested information and keep your responses to at most four pages, NOT including this cover letter. A summary of eligible program/project types is outlined below. In addition, please review **ATTACHMENT 1** for detail on sponsorship criteria.

Sponsorship Category Summary

The NTCA seeks to partner with community organizations to support projects, programs, and services in the following categories. Please take note of the preferred investments outlined within each category.

1. Workforce Housing

Preferred investments include the expansion of existing and successful workforce housing programs such as:

- Programs that retain or increase the availability of long-term or seasonal rentals (lease to locals, rental assistance, other.)
- First-time homebuyer assistance programs
- Fee offsets and other efforts to reduce costs during the pre-entitlement and entitlement process
- Assistance with Accessory Dwelling Units (ADUs)
- Deed restriction programs

Other workforce housing preferred investments include adaptive reuse, property acquisition, the planning and construction of workforce housing projects, and new programs not identified above.

2. Economic Development, Transportation, and Other Priorities – Preferred investments include expanded or enhanced public transportation service, micro-transit

service, shuttle service, park and ride, and infrastructure planning/construction within the Resort Triangle, specifically along the SR 89 and SR 267 corridors.

3. **Sustainability and Mitigation of Tourism/Maintenance** – Preferred investments include trash mitigation, traffic-calming measures, crossing guards, and communication/outreach initiatives to visitors. Other maintenance activities include trail and restroom maintenance activities. Each investment should enhance existing services and be provided during peak visitation periods. The NTCA will consider the emphasis on peak visitation periods for new investments.
4. **Trails** – Preferred investments include the planning and construction of new trails that support the Resort Triangle as outlined in the Resort Triangle Transportation Plan, The TRPA's Regional Transportation Plan, and the Placer County Parks and Trails Master Plan.

Submittal Deadline - Please complete the Sponsorship **LOI by June 15, 2023**

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Section 7: NTCA Sponsorship Letter of Interest Application

(This is a sample of only – please use the Survey Monkey or Fillable PDF to submit your LOI)

Legal Name of Applicant: _____

Which best describes your organization:

Nonprofit

Government Agency

Business

Other

Please describe your organization's mission statement, business purpose, or public service provided:

Physical Address: _____

Year 1_____ Year 2_____ Year 3_____

Matching Funds: (Must be 25 percent of the total requested amount).

Year 1_____ Year 2_____ Year 3_____

Please include a line-item budget in the table below. Projected expenses for future years are acceptable. You can submit changes as needed; however, the sponsorship funding amount will not change.

Line Items	Expenses Year 1	Expenses Year 2	Expenses Year 3
TOTAL EXPENSES			
TOTAL MATCH			
TOTAL REQUESTED			

Please provide detail on matching funds. Please also include detail on funds that may not be committed by other funders but may be secured if Sponsorship is successful.

Please describe how the proposed investment aligns with the preferred investments outlined in the cover sheet and the Program Criteria in Attachment 1.

Please describe how the public will benefit from the proposed investment.

Please provide details on how you will monitor the investment and what metrics you'll use to assess success, i.e., the number of rentals unlocked for the workforce, number of units constructed, miles of trail built, etc.

Please provide a summary of the investment schedule. This may include hours of operations, project phases, and intended completion date.

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Section 8: ATTACHMENT 3 – Cover Letter and Application for Out-of-Cycle Investments

The purpose of Out of Cycle Investment under the Program is to address emergent needs and time-sensitive projects that arise outside the annual grant cycle. This bucket enables the North Tahoe Community Alliance and the Placer County Board to respond swiftly and effectively to unforeseen challenges or capitalize on unique opportunities that align with the Program's strategic goals and priorities.

By offering funding for out-of-cycle investments, the Program ensures that organizations and projects in the North Lake Tahoe region have access to financial support when they need it most. In addition, this flexibility allows the community to address pressing issues, such as workforce housing, transportation, tourism mitigation, and other related priorities, on time, contributing to the long-term sustainability and growth of the region.

In addition, Out-of-Cycle Investments promote innovation and adaptability by encouraging organizations to develop creative solutions to emerging problems or seize opportunities that may significantly impact the community's vitality and economic health. By fostering a proactive approach to addressing the evolving needs of the North Tahoe region, the Out of Cycle Opportunities bucket plays a vital role in creating a thriving and sustainable community for residents, businesses, and visitors alike.

To be considered for Out of Cycle Investment funds, please complete the online application on the NTCA's website. If your proposal meets the Program criteria outlined in the Program document, your submission may be considered by one of several NTCA committees for available TBID or TOT funds.



Section 9: NTCA Out of Cycle Investment Funds Application – (Will be available online when program element launches)

[Organization Name or Applicant's Name]

[Organization or Applicant's Address]

[City, State, ZIP Code]

[Email Address]

[Phone Number]

[Date]

[Street Address]

[City, State, ZIP Code]

Subject: Application for Out-of-Cycle Investments

Please complete the required information below:

Organization/Applicant Information:

- a. Organization/Applicant Name:
- b. Organization/Applicant Address:
- c. Organization/Applicant Email:
- d. Organization/Applicant Phone Number:
- e. Organization/Applicant Website (if applicable):
- f. Brief description of the organization or individual applicant (max 100 words):

Project/Initiative Overview:

- a. Proposal Title:
- b. Brief description of the investment (max 200 words):
- c. Timeframe for the investment implementation:
- d. Total Investment cost:
- e. Amount requested from Bucket #3 – Out-of-Cycle Investments:
- f. List other funding sources (secured or anticipated) for this project/initiative:

Alignment with Program Priorities:

- a. Explain how the investment aligns with Program priorities, including workforce housing, transportation, tourism mitigation, or other related priorities (max 300 words):

Outcomes and Impact:

- a. Describe the expected outcomes and impact of the investment on the North Lake Tahoe community (max 300 words):
- b. Explain how the investment addresses an emergent need or time-sensitive opportunity (max 200 words):

Evaluation and Reporting:

- a. Describe the methods you will use to evaluate the success and impact of the investment (max 200 words):
- b. Outline the reporting process and frequency for updating the North Lake Tahoe Community Alliance on investment progress (max 200 words):



Section 10 – Percent Allocation Across “Buckets”

The following table reflects the recommended allocations across buckets from the TBID Advisory, Zone 1 and TOT committees. The funding amounts will change when future revenue projections are included for sponsorship funds. These are guidelines and may be revised across buckets in future years.

The following guidelines should be considered when evaluating percent allocations across buckets:

1. Allocate the majority of funds to Bucket 1 (Sponsorship) and Bucket 2 (Annual Grant Program); and,
2. Ensure the flex funding reserve (Bucket 4) is adequate to support sponsorship investments if costs increase, allow for the allocation of additional funds across buckets, and ensures funds are available if revenue projections are inaccurate; and,

3. Emphasize Sponsorship by allocating the majority of funds to Bucket #1.

Buckets	TOT	TBID Zone 1 & TBID Advisory
1- Sponsorship	\$ 2,340,000	\$ 2,100,000
2- Grant Program	\$ 1,820,000	\$ 1,680,000
3- Out of Cycle	\$ 520,000	\$ 126,000
4- Reserve (Flex Fund)	\$ 520,000	\$ 364,000
Total	\$ 5,200,000	\$ 4,270,000
1- Sponsorship	45%	50%
2- Grant Program	35%	40%
3- Out of Cycle	10%	3%
4- Flex Funding	10%	7%
Total	100%	100%

FY 23.24 TOT funds available	TBID Total
\$ 5,200,000	\$ 4,200,000