



# ADMINISTRATIVE INSTRUCTION

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**SUBJECT:** Event Partnerships and  
Interdivisional Charges

**NUMBER:** II-4-21

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## I. Purpose

To establish a sustainable and consistent process for the City to partner with non-City organizations for community events, that includes conditions to be met for event partnership approvals, and ensures recognition the City receives for event partnerships is commensurate to the level of support provided. To determine a reasonable and consistent approach for managing interdivisional costs for City produced and co-produced events.

## II. Scope

This regulation applies to all City departments/divisions when involved in producing, co-producing, sponsoring, participating in, or providing support services for community events.

## III. Definitions

### A. **Event**

A planned occasion that is primarily social, recreational and/or cultural in nature, with promotion, sales or product sampling, if any, clearly secondary activities. For the purposes of this AI, event also includes community outreach occasions designed to solicit community input through an informal event-like social setting (MANGO, Santa Monica Talks).

An event typically occurs one or more consecutive days, one time (park dedication) or periodically, such as annually (National Night Out). An event may also occur on multiple non-consecutive days as a series (Jazz on the Lawn). Each day of a series is counted as a separate event; however, the series may be combined for application, budget, and evaluation purposes.

For the purposes of this AI, an event does not include City functions designed to engage members of the community in the public process through formalized community meetings (Commission meeting, Civic Working Group) or policy development workshops (Downtown Specific Plan). An event also does not include classes, activities, tournaments, workshops, or similar occurring as part of a program (Beach House Monday Fun Days, Santa Monica Classic Tennis Tournament)



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## B. Event Types

### 1. City Produced

A City-produced event is developed and implemented in its entirety by a City department or departments. The City department(s) must have sole responsibility for the event from inception to completion, including concept development, creative direction, funding and fund development, marketing and media relations, and staffing and support services to directly implement the event. *(as defined in Administrative Instruction 11-4-4, Events)*

### 2. City Co-Produced

A City co-produced event is one that has significant City staff involvement in both the planning and the implementation of the event, together with a non-city entity. To be considered an event co-produced by the City, City staff must be involved in all aspects of the event including creative direction, funding and fund development, marketing and media relations, and staffing and support services. *(as defined in Administrative Instruction 11-4-4, Events)*

### 3. City Sponsored

Sponsorship involves an agreement by the City to support a Non-City Event that reasonably relates to the government function that the department/ division performs and advances the programs or services of the supporting City department/division as defined in goals, objectives, mission statements, or master plans. While the City may participate in event planning, the major direction comes from non-City staff or organizations. The City may assist with marketing, and even some staffing at an event, but is not integrally involved in (a) whether the event will take place, (b) ensuring total funding, (c) scheduling, and (d) event design and evaluation.

### 4. Non-City Event

These events are produced by a non-City organization(s).



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## C. Event Reach

### 1. Local Event

These events primarily target and are attended by Santa Monica residents. Event promotion and media coverage is generally limited to local media sources. Benefits Santa Monica (e.g. Jazz on the Lawn, SM Camps Fair, State of the City).

### 2. Regional Event

These events primarily target and are attended by residents of Santa Monica and other Los Angeles County communities. Event promotion and media coverage is broader to cover outlets throughout the County. Benefits are primarily seen locally with limited benefits throughout the region (e.g. Twilight Concert Series, Alt-Car).

### 3. Major Event

These events target and are attended by local, regional, national and potentially even international participants. Media coverage includes national and international forums. Benefits are seen regionally as well as locally, e.g. GLOW.



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## D. In-Kind Support Types

### 1. Fee Waiver

A fee waiver exists when an event producer is provided use of City supplies, services, permits or facilities where a fee or charge is normally assessed but is not charged or is offered at a reduced rate based on the City's decision to co-produce or sponsor an event. The value of the supplies, services, permits or facilities provided is based on the approved fee or charge (e.g. facility rental fees, parking fees, permit fees), or the difference between reduced rates and regular rates.

### 2. Lost Revenue

Lost revenue relates to the value of the income normally received for a facility, program or service, but that is not realized as a result of the event taking place. In many cases, an event or rental fee is charged to compensate for unrealized revenue, however, when an event or rental fee has not been established, the unrealized revenue is considered lost revenue, e.g. loss of parking revenue for use of a parking lot as an event venue when the lot has not been previously established as an event venue (5<sup>th</sup> Street and Arizona parking lot).

### 3. City Resources

City resources includes the value of staff time, volunteers, marketing, equipment use, facilities or other types of support that are not captured in an established fee and the support is provided at no charge (e.g. staff event-planning time, event promotion using City marketing resources such as Seascape). The value of the City resources provided is based on the actual cost of providing the support, or when not available, the equivalent private sector cost. The rate for staff time includes benefits if during normal work hours. If overtime, then benefits are not included.

### 4. Product Contribution

This cost relates to the value of City supplies used at an event or promotional items purchased by the City and provided as "giveaways" to the public at an event, but not paid for from the event budget (e.g. pens, hats, pins).



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**E. External Cash Costs**

These costs relate to charges incurred from outside service providers that the City is required to pay (e.g. entertainment, chair rental, etc.) This also includes funds paid by the City to outside entities for co-producing or sponsoring an event.

**F. Interdivisional Charges**

These charges are for supplies, staffing or services provided by departments/divisions other than the City departments/division producing the event. Charges are generally paid through inter-departmental transfer of funds from the department/division producing the event to the supporting department/division. Additional staffing costs incurred specifically for the event by the producing department/division above and beyond regular work hours (i.e., overtime and as-needed staff hours) are also included within this section.

**G. Event Revenue**

These funds are monies received by the City for production or co-production of an event from grants, sponsorships, donations, entry fees, etc. to help offset costs.

**H. Partner Budget**

This includes the total costs incurred and revenue generated by the non-City event partner. The budget should include in-kind costs similarly to that tracked by the City. The partner and City's combined budgets comprises the total event budget.

**I. Event Participation**

This refers to City staff and/or program participants representing the City when they become involved in Non-City events. Participation may be in the form of providing entertainment, hosting an information booth, being contestants, or representing the City in other ways. The City may be required to pay an entry or other fee for event participation.



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## **J. Public Process**

This refers to the opportunity by which members of the Santa Monica community are able to comment, question, advocate, and/or otherwise influence the decisions of City staff, advisors, and policy makers.

## **K. Organizational Breadth**

### **1. Limited**

These events involve a small segment of the organization and are specific to the goals and objectives of the department/division(s) producing the event. Minimal planning, coordination or support is needed from other City departments/ divisions (e.g. SM Camps Fair, opening events for new facilities).

### **2. Broad**

These events involve a large segment of the organization, and: (1) support the goals and objectives of many City departments/divisions through event participation, and/or (2) involve extensive event planning, coordination or support by many City departments/divisions (e.g. GLOW, Santa Monica Festival, Santa Monica Talks). A broad event requires approval by the City Manager.





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## IV. Policy

General - Recognizing that community events are an integral part of community life and identity, the City may produce, co-produce, sponsor or participate in events that reasonably relate to the work of City departments/divisions and enhance community identity.

### **A. Conditions for City Co-Produced or Sponsored Events**

The following conditions must be met in order for the City to co-produce or sponsor a community event:

#### 1. Event Partnership Criteria

- The event reasonably relates to the government function that the partnering department/division performs, and advances the programs or services of the City department/division as defined in goals, objectives, mission statements, or master plans
- The target audience for the event is in-line with the target audience for the partnering City department/division
- City resources provided are used to directly support the event
- The department/division has the necessary staffing and funds budgeted to co-produce or sponsor the event
- Recognition of the City's support is provided at a level no less than that provided to others who have contributed the same level of support
- Use of the City name/logo and/or program name/logo is to be approved by the City
- The event partner is an incorporated non-profit organization, i.e., 501(c)(3) in good standing with the State of California; or a California certified tax-exempt nonprofit organization; or a public agency; or a committee formally established by City Council or Commission action; or an established club, association or organized group providing services and programs to Santa Monica residents

In addition to meeting stated criteria, a commercial enterprise may only qualify if the event is unique or exceptional and of a recreational, cultural, social services, or educational nature benefiting the Santa Monica community. This exception must be approved by the Department Director of the department considering the partnership

- The event complies with the Americans with Disabilities Act
- The event complies with all Federal and State laws, and all ordinances, rules, and regulations enacted or issued by the City of Santa Monica
- The partnering organization/event does not discriminate on the grounds of race, religious creed, color, national origin, ancestry, age, physical disability, mental disability, medical condition including the medical condition of Acquired Immune Deficiency Syndrome (AIDS) or any condition related thereto, marital status, sex, or sexual orientation
- Additional criteria may be added by the partnering department/division as deemed appropriate for the event (i.e. zero waste, bike valet).



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2. Event Partnership Restrictions

Any organization that meets the following, are not eligible for event partnerships with the City.

- Police regulated businesses
- Religious institutions governed by California Constitution art XVI, §5
- Political organizations
- Companies whose business is substantially derived from the sale of alcohol, tobacco or pornography
- Companies that deal in gambling or related enterprises
- Companies that are involved in a lawsuit against the City, or are being prosecuted by any Federal, State, or local authority

3. Fundraising Events

The City may partner on events with a fundraising component benefiting local charities, provided stated Event Partnership Criteria and Restrictions are adhered to.



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## 4. Event Application Assessment Considerations

Organizations interested in partnering with the City must submit an application to the prospective partnering department/division for consideration utilizing a City issued Event Partnership Application Form. Completed applications will be reviewed by the prospective partnering department/ division using the following assessment considerations. A meeting with the event proposer or additional information may be required to further assess the application. The requested department/division will respond to the partnership applicant, within 10 business days of receipt of the application, with information as to when a decision will be made regarding the requested partnership.

- Production viability
- Financial viability
- Project timelines
- Cost vs. benefits
- Ability to meet Event Partnership Criteria (page 9)
- Intended measureable outcomes
- Demonstrated public support for the event
- Level of contribution to the event by co-producing organization
- Level and type of City support requested
- Impact on City resources
- Ability to coordinate partnership among multiple City divisions, if relevant
- Media exposure
- Involvement by others, i.e. sponsors and partners
- Event planning and execution history
- Previous year's event evaluation, if applicable
- For returning events, the event demonstrates new or distinctive features to keep the event fresh and relevant for the community
- The event is especially creative, unique or on the cutting edge, and would bring a new event opportunity that doesn't currently exist in the community
- Any other factors deemed relevant by the prospective partnering department/division



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## 5. Approval Process and Levels of Support

	City Co-Produced	City-Sponsored
Application Form	Recommended a minimum of 90 days in advance	Recommended a minimum of 60 days in advance
Approval Authority	Local Events – Division Head Regional Events – Dept. Head Major Events – CMO and/or Council Broad Organizational Breadth – CMO	Local Events – Division Head Regional Events – Dept. Head Major Events – CMO and/or Council
Approval Instrument	MOU outlining responsibilities and financial obligations of each party	City support provided and recognition received to be specified in a Letter of Understanding for sponsorships valued up to \$1,000, and in a MOU for sponsorships valued over \$1,000
Support Level	N/A	The value of the City's (all departments/divisions) support may not exceed 50% of the event total expenditures

## 6. Denial/Revocation of Event Partnership

The City may deny or terminate an event partnership request based on the following conditions:

- Any of the Event Partnership Criteria are not met (Page 9)
- The event violates any of the Event Partnership Restrictions (Page 10)
- The proposed event conflicts with, duplicates effort of or competes with other events
- The proposed event does not appear to be adequately planned or funded
- Past history with event or event producer was unsuccessful
- MOU or Letter of Understanding, if required, has not been executed
- MOU or Letter of Understanding terms and conditions, if required, are not met
- Community Events Permit conditions, if required, are not met
- The partnering organization has knowingly made false, misleading or fraudulent statement of fact to the City



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7. Post Event Evaluation

Following the conclusion of the event the partnering department/division is responsible for developing an event evaluation in cooperation with the partnering organization. Components for event evaluation shall include:

- Extent to which the event met the Event Partnership Criteria (Page 9)
- Extent to which the event complied with the Event Partnership Restrictions (Page 10)
- Extent to which the event met expectations based on the Event Application Assessment Considerations (Page 11)
- Actual budget and extent to which the event met the required Levels of Support (Page 12)
- Attendance data and participant feedback
- Community feed-back (residents and impacted businesses)
- Description of roles and responsibilities performed by City staff
- Recommendations for the future of the event
- Other components as appropriate to aid in measuring the success of the event and partnership



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## **B. Approval Conditions for City Participation in Events**

The following conditions must be met in order for the City to participate in a community event:

### **1. Event Participation Criteria**

- The event reasonably relates to the government function that the department/division performs and advances the programs or services of the City department/division as defined in goals, objectives, mission statements, or master plans
- The target audience for the event is in-line with the target audience for the participating City department/division
- The department/division has the necessary staffing and funds budgeted to participate in the event.
- Recognition of the City's participation is provided at a level no less than that provided to others who participate at the same level.
- Use of the City name and logo and/or program name and logo is to be approved by the City.
- The event producer is an incorporated non-profit organization, i.e., 501(c)(3), in good standing with the State of California; or a California certified tax exempt nonprofit organization; or a public agency; or a committee formally established by City Council or Commission action; or an established club, association or organized group providing services and programs to Santa Monica residents.

In addition to meeting stated criteria, a commercial enterprise may only qualify if the event is unique or exceptional and of a recreational, cultural, social services, or educational nature benefiting the Santa Monica community. This exception must be approved by the Division Manager.

- The event complies with the Americans with Disabilities Act
- The event complies with all United States Federal and State of California laws, and all ordinances, rules, and regulations enacted or issued by the City of Santa Monica.
- The partnering organization/event does not discriminate on the grounds of race, religious creed, color, national origin, ancestry, age, physical disability, mental disability, medical condition including the medical condition of Acquired Immune Deficiency Syndrome (AIDS) or any condition related thereto, marital status, sex, or sexual orientation.



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## 2. Event Participation Restrictions

The City will not participate in an event produced by any organization that meets the following:

- Police regulated businesses
- Religious institutions governed by California Constitution art XVI, §5
- Political organizations
- Companies whose business is substantially derived from the sale of alcohol, tobacco or pornography
- Companies that deal in gambling or related enterprises
- Companies that are involved in a lawsuit against the City, or are being prosecuted by any Federal, State, or local authority



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## C. Considerations and Types of Available Support

Description	City Co-Produced	City-Sponsored
Event Size and Hours	Equivalent to City Produced Events: Events of a larger size and longer hours than generally permitted by the Community Events Site Guidelines for a particular event site	Events going through the Community Events process must follow the site-guidelines, others must follow normal venue requirements
Signs and Banners	Equivalent to City Produced Events as stated in 4.08.500 Street Banners Prohibited – Exceptions & 4.68.130 Community Event Temporary Signage	Events going through the Community Events process must follow the Events AI, others must comply with the sign code
Print and Electronic Outreach	Use of in-house promotion resources (Seascape, website, e-newsletters, social media). Outreach materials allowable at City facilities.	Use of in-house promotion resources (Seascape, website, e-newsletters, social media). Outreach materials allowable at City facilities.
Logos	Use of the City logo and/or program logo as determined by the City	Use of the City logo and/or program logo as determined by the City
Cash Contribution	Allocation from the department/division's approved City budget including moneys derived from allowable grants or non—city funding sources	Allocation from the department/ division's approved budget including moneys derived from allowable grants or non—city funding sources  <i>(Organizations receiving a grant or other funds from the City are not eligible for cash contributions for events already supported by the funding)</i>
Fees and Charges for City Services	Equivalent to City Produced events <i>(See Interdivisional Charges)</i>	Regular rates apply. Full or partial fee waivers may be granted as a sponsorship upon approval of the appropriate Department Head. The value of fee waivers and other types of support provided must not exceed sponsorship limits.  <i>(Only educational institutions and City funded non-profit organizations are eligible for a facility rental fee waiver, and only if the City funding provided does not already support the event for which the facility fee waiver is requested.)</i>
In-Kind Support: City Resources	Use of City Resources: i.e. staffing, equipment, supplies <i>(See In-kind Support Values)</i>	Use of City Resources: i.e. staffing, equipment, supplies <i>(See In-kind Support Values)</i>
Parking	<i>See Parking and Bus Transportation (Page 18)</i>	<i>See Parking and Bus Transportation (Page 18)</i>





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## D. Partnership Recognition

### 1. City Sponsored Events

The City will receive recognition for sponsorship of events at a level no less than that received by others providing the same level of support. The type(s) of recognition received is determined by the partnering division. Examples are listed below:

- City participation at event at no additional charge, i.e. info booth
- Announcements of the sponsorship made at the event
- Sponsorship acknowledged in media materials
- Sponsorship acknowledged on print materials promoting the event
- Sponsorship acknowledged on event website, emails and social media used to promote the event

### 2. City Co-Produced Events

The City will receive recognition for co-producing events at a level no less than that received by the co-producing partner. City staff is to be equally involved in approval of messaging for the event.

### 3. Use of Logos

The City logo is to be used on outreach and other relevant materials for City produced, co-produced and sponsored events. Program logos, if desired, and grantee recognition is to supplement the City logo and not replace it, even if the program logo contains elements of the City logo. Use of the City logo is to comply with the [Formatting Guidelines](#) in the Graphic ID folder on CityWideShare.



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## E. Parking and Bus Transportation

Exceptions from these guidelines require authorization by the City Manager and/or City Council. The value of parking fee waivers or bus passes must be stated in a MOU or Letter of Agreement and tracked for reporting purposes.

Target	Parking	Big Blue Bus	Example
Major	Event Rates	Regular Rates	GLOW
Regional	Event Rates	Regular Rates	Alt-Car
Local	Regular Rates	Regular Rates	Tongva Park Cultural Event

1. City Produced and Co-Produced Events: Parking Validations and Bus Fare Waivers
  - a) Parking validations are available to attendees of local or regional events with free admission and open to the general community:
    - 1) when a private parking lot/structure is made available at minimal or no cost to the City and/or an adjacent City parking lot regularly offers free parking. i.e., Santa Monica Festival, Airport Art Walk
    - 2) in accordance with Administrative Instruction 11-4-14, Parking Validations
  - b) In coordination with Big Blue Bus, free bus passes may be offered to attendees of local or regional events that have free admission and are open to the general community:
    - 1) Community outreach occasions designed to solicit community input through an informal event-like social setting, i.e., MANGO, Santa Monica Talks
    - 2) on the route serving the event location. Passes are eligible during hours immediately surrounding and encompassing the event. i.e., National Night Out, Santa Monica Festival, Family Bike Fest
  - c) In coordination with the Big Blue Bus, free bus passes are available to event workers, talent, and designated officials or guests.
2. City Sponsored Events Bus Fare Waivers
  - a) In coordination with Big Blue Bus, free bus passes may be offered to attendees of local or regional community events when riding the SM BBB on the route serving the event location, when attendees are volunteers providing a public service directly benefitting the City. The event must be free and open to the general community. Passes are eligible during hours immediately surrounding and encompassing the event. i.e., Beach Clean



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## F. Interdivisional Charges: City Produced and Co-produced Events

### 1. Limited Organizational Breadth

Departments/divisions that produce or co-produce events with limited organizational breadth will be responsible for reimbursing support departments/ divisions for costs and services as described below. When the cost is to be charged, the supporting department/division is to ensure the services provided are done so at the most cost effective manner possible. When the costs and services are not charged, support departments/divisions are responsible for providing the event producing department/division with the value of the costs and services not charged, for budgeting purposes.

#### a) Staff Time

- Costs for staff time are charged to the requesting department/division when the work is done outside of the employee's normal work hours, thereby resulting in an additional expenditure of City funds.
  - Overtime pay to an employee for working the event when they normally would not be working at that time
  - As-needed employee working extra hours to assist with the event
  - Staff time is to be charged at the hourly rate or over-time rate, as applicable, excluding benefits (base rate)
  - The difference between the base rate and regular rate (includes benefits) is considered in-kind support and is to be provided to the producing department/ division for budgeting purposes, as a fee waiver.
- The value of the planning hours and hours worked on event day during a person's normal work shift are considered in-kind City Resources and are to be provided to the producing department/division for budgeting purposes, but not charged. The value of these hours is to include benefits.
- Producing departments/divisions will also track their own staff planning and event day costs for budgeting purposes to be classified as in-kind City Resources costs. The value of the hours is to include benefits if during normal work hours. If overtime, then benefits are not included.

#### b) Outside Service Provider Costs

- Outside Service Provider costs incurred by a supporting department/ division will be reimbursed by the department/division producing the event. i.e.,
  - Bike Valet Service Operator
  - Barricade Rental



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c) Fee Waivers

- Subject to Council resolution, fees will be waived for the department/division producing the event, when the fee charged is to cover staff time used to perform a service during normal work hours. The value of the fee waiver is to be provided to the producing department/division for budgeting purposes, i.e.,
  - Temporary Use Permit
  - Community Events Permit Fee
  - Community Events Administrative Fee
  - Fire Tent/Canopy Permit Fee
  - Building and Safety Permit
  - Big Blue Bus Detour Plan
  - Temporary Traffic Control Plan
  - Temporary No Parking Signs Application Fee
  - Delivery of Trash, Food, and Recycling Containers (Local Events)
- Fees or charges will be waived for the department/division producing the event, and the value provided to the producing department/division for budgeting purposes, when the fee or charge is to cover unrealized revenue. i.e., Metered Parking Space Charges
- Fee waivers will not be granted for print shop and mailing services
  - Event postcards, flyers, programs, etc.
  - Neighbor Notification Fees
- Complete fee waivers will not be granted when the purpose of the fee is to cover the cost of an Outside Service Provider plus City staff time. Partial fee waivers may be charged to only cover the cost of the Outside Service Provider's charge. An "at cost" rate will be created to cover only the direct cost paid to the outside services provider, i.e.,
  - Trash and Food Container Rental/Disposal Fee
  - Temporary No Parking Signs

2. Broad Organizational Breadth

Interdivisional support costs for City produced and co-produced events with broad organization breadth will be addressed on a case-by-case basis by the City Manager's Office with regards to which interdivisional costs will be absorbed by the supporting department/division or paid by the producing department/division. Fundraising and sponsorship efforts, where appropriate, should aim to cover the full event cost, when possible.



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## V. Procedures and Responsibilities

### A. City Produced Events

Procedure	Responsible Person(s)
1. Submit a Community Event application and/or facility permit application, as required, and obtain necessary permits using established procedures.	City department(s)/division(s) producing event
2. Track all expenditures and revenue associated with production of event including in-kind costs, fee waivers, staffing, sponsorships, etc.	All City departments/divisions involved in production or support of event
3. Within 30 days of event conclusion, prepare a post event evaluation including an actual event budget	City department/division producing event with input from support departments/ divisions
4. Submit a copy of the actual event budget to the Administration and Planning Services Division of CCS for reporting purposes	City department/division producing event



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## B. City Co-produced and City Sponsored Events

Procedure	Responsible Person(s)
1. Event Partnership Application submitted to City department/ division that is being requested as a partner, a minimum of 90 days in advance for co-produced events and a minimum of 60 days in advance for city-sponsored events	Non-City organization desiring a partnership with the City
2. Respond to non-city organization within 10 business days as to when a decision regarding the proposed partnership will be made	City department/division requested as a partner
3. Enter into a MOU or Letter of Understanding outlining terms and responsibilities of the partnership	Non-City organization and partnering City department/division
4. Submit a Community Event application and/or facility permit application, as required, and obtain necessary permits using established procedures.	<ul style="list-style-type: none"><li>• City co-produced events: City department/ division and/or non-city organization partner</li><li>• City sponsored events: non-city organization</li></ul>
5. Track all expenditures and revenue associated with production, co-production, or sponsorship of event including in-kind costs, fee waivers, staffing, and sponsorships, etc.	Non-city organization partner and all City departments/divisions involved in production or support of event
6. Upon event conclusion, prepare a post event evaluation including an actual event budget	Partnering City department/division with input from support departments/ divisions and non-city organization partner
7. Within 30 days of event, submit a copy of the actual event budget to the Administration and Planning Services Division of CCS for reporting purposes	Partnering City department/division



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VI. Event Partnership Support Documents and Forms

Support documents, forms, and templates to be used to aid in implementation of this Administrative Instruction are to be made available on the City's intranet and/or website, as appropriate. Examples include:

- Event Partnership Application Form
- Event Proposed Budget Form
- Event Partnership Memorandum of Understanding Template
- Post Event Evaluation Form
- Event Actual Budget Form

VII. Authorized By

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Rick Cole  
City Manager