

OREGON TOURISM COMMISSION  
2007-08 MATCHING GRANTS PROGRAM

**GRANT APPLICATION GUIDELINES**

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(Grant Information Worksheet, Grant Application Guidelines and Grant Application Forms are available online at <http://otc.traveloregon.com/grants.cfm>)

**INTRODUCTION**

The mission of the Oregon Tourism Commission (OTC), doing business as Travel Oregon, is “to encourage economic growth and to enhance the quality of life in Oregon through a strengthened economic impact of tourism throughout the state.” OTC has established a program to make grant awards “to eligible applicants for projects that contribute to the development and improvement of local economies and quality communities throughout this state by means of the enhancement, expansion and promotion of the visitor industry.”

**GLOSSARY TERMS**

Here are the definitions to some of the terms you will read in the Grant Application Guidelines and Grant Information Worksheet:

**DMO** = Destination Marketing Organization

An organization whose primary function is to attract visitors to its locale for the purpose of enhancing the local economy through purchase of room nights, food and beverage, retail items, transportation, visitor services, etc. In Oregon, local DMO’s work with their Regional DMO to cooperatively leverage budgets, advertising, services, and information for the benefit of all tourism entities in the region. (See “RDMO” for definition.) You can find your DMO by going to <http://www.traveloregon.com/Explore-Oregon.aspx> (choose your region, then choose the Regional Tourism Associations and/or Local Centers and Chambers of Commerce options.)

**RDMO** = Regional Destination Marketing Organization

Oregon is divided into seven tourism regions; each region has identified one DMO to act as its Regional Destination Marketing Organization. That RDMO partners with the State of Oregon’s Travel Oregon office for the purpose of attracting visitors to that region. (See DMO definition.) The regions can be found on page 3 of the Grant Guidelines or online at: <http://www.traveloregon.com/Explore-Oregon.aspx>.

**RCMP** = Regional Cooperative Marketing Program

This program distributes a portion of the statewide Oregon 1% lodging tax revenues back to each Oregon region to fund the approved strategic marketing plan for that region. The goal of this program is to attract an increased number of new visitors into each region from out of state or internationally, resulting in increased purchases of room nights, food and beverage, retail items, transportation, visitor services, etc. (See “RDMO” definition.) More information on the RCMP can be found online at: [http://otc.traveloregon.com/factsfigs/RCMP\\_update.pdf](http://otc.traveloregon.com/factsfigs/RCMP_update.pdf).

**FUNDS AVAILABLE**

OTC has \$100,000 for investment in the Matching Grants Program during the fiscal year 2007-08 (July 1, 2007 – June 30, 2008). Each applicant may request up to \$10,000 in grant funds with a limit of one grant project request per Matching Grants Program cycle. Applicant must equally match the amount of the awarded grant; up to 50% of the match may be in-kind. (Example: If you are awarded a \$10,000 grant, you are responsible for coming up with \$10,000 in matching funds of which \$5,000 may be in-kind services such as staff time or donated services or materials relevant to your grant project)

## **ELIGIBLE APPLICANTS**

Cities, counties, port districts, federally recognized Tribes and non-profit entities located in Oregon and involved with tourism promotion and development are eligible for grants from the Matching Grants Program. If applicant is a city, county, port district or federally recognized Tribe, applications must be signed by the presiding elected official of the city, county or Tribal government entity managing the project and/or or the chairperson making the application. If applicant is a non-profit entity, applications must be signed by Executive Director and/or CEO and the Board Chair or Board President. Each applicant is limited to one grant project request per Matching Grants Program cycle.

## **ELIGIBLE ACTIVITIES**

Eligible projects include those that provide for improvement or expansion of tourism marketing programs, or development of new tourism programs or products designed to increase tourism from outside the area for greater economic impact to an area or community. Ideally, an increase of room nights to local lodging facilities would be part of your project. Eligible activities for such projects may not involve construction of facilities, or modification of eligible historic structures or items. **Regional Cooperative Marketing Program funds (distributed through Travel Oregon) may not be used as matching funds.** Eligible activities include, but are not limited to, any of the following that represent new efforts, initiatives or offerings, both domestically and internationally (not the continuation or maintenance of existing programs, products or services):

- Brochure production and distribution
- Media production and placement
- Informational tourism signage
- Video production and distribution
- Tourism event promotion
- Market research
- Visitor services projects

## **TIMELINES**

Completed electronic Grant Application Forms and supplemental application materials must be received at the OTC/Travel Oregon office by August 20, 2007 at 5:00 pm. Contracts will be sent to grant recipients by October 26, 2007 with a due date of November 9, 2007 for both copies to be signed and returned to OTC. A fully executable contract (both parties have signed) will be returned to grant recipient by November 20, 2007 if contracts are received at OTC by due date of November 9, 2007. Grant recipients may officially begin work on their grant project only after both copies of the contracts have been signed by both parties. Grant project is to be completed by June 30, 2008. See Grant Information Worksheet, page 4, for a detailed timeline.

## **ELECTRONIC GRANT APPLICATION**

An electronic Grant Application Form will be available on the Travel Oregon website beginning early July 2007 (all grant inquiries received by that time will be notified). The Grant Information Worksheet contains the same questions and information that will be required of all grant applicants on the electronic Grant Application Form, so please use the Grant Information Worksheet to gather your answers and information so you will be ready for the electronic application in July. (If you are not submitting your application electronically, you will be able to download a word document application form in early July from the website.) Please review these Grant Application Guidelines before starting work on the Grant Information Worksheet.

- 1- **Cover page:** Fill in information on Grant Information Worksheet Cover Page, page 2
- 2- **Narrative responses:** Questions are in Grant Information Worksheet, page 3. Total responses cannot be longer than four (4) pages maximum, single sided, if submitting a paper application. No limit on pages if submitting via the electronic Grant Application Form.
- 3- **Project budget:** Use sample budget format in Grant Application Guidelines, page 6.
- 4- **Board members:** Self-explanatory.
- 5- **Certified audit, or board-approved financial statement for most recently completed fiscal year:** Self-explanatory.
- 6- **Copy of current IRS tax-exempt determination letter:** Self-explanatory.
- 7- **Letters of support:** Include letters of support for your grant project from community leaders, local tourism industry entities, board members, other organizations or parties involved or affected by this project. Letters from your DMO and/or RDMO are strongly encouraged.
- 8- **Letter or signed statement of financial commitment for the matching funds from each contributing partner:** A letter or signed statement is required from each partner who has agreed to contribute matching funds for this grant. If grant applicant is contributing the matching funds, include a letter signed by the Executive Director or President of the Board.

### FEDERAL TAX ID #

All grant applications must have a federal tax ID # to be considered for the Matching Grants Program. Social security numbers will not be accepted.

### REGIONS & LOCAL/REGIONAL DESTINATION MARKETING ORGANIZATIONS (DMO'S)

OTC has identified seven (7) regions in the state through the Regional Cooperative Marketing Program (RCMP). Please specify the region which is applicable to your grant project. Choose the “state-wide” region on the application, only if your grant project involves statewide partners or impacts the whole state. A map of the regions can be found online at: <http://www.traveloregon.com/Explore-Oregon.aspx>.

**Applicants for matching grant funds must, as a condition for receiving the funds, demonstrate that the project complements and is consistent with existing statewide, regional and local marketing campaigns.** Travel Oregon staff can, at the applicant’s request, work with the applicant to ensure coordination among statewide, regional and local marketing efforts.

Regional DMO contact information is listed below. Regional DMO draft marketing plans can be found online at: [http://otc.traveloregon.com/marketing\\_plans.cfm](http://otc.traveloregon.com/marketing_plans.cfm). Local DMO contact information can be found online at: <http://www.traveloregon.com/Explore-Oregon.aspx> (choose your region, then choose the Regional Tourism Associations and/or Local Centers and Chambers of Commerce options.)

### Regional Contact Information

Central Oregon	<a href="http://www.visitcentraloregon.com">www.visitcentraloregon.com</a>	541-389-8799
Eastern Oregon	<a href="http://www.eova.com">www.eova.com</a>	541-523-9200
Portland Metro	<a href="http://www.travelportland.com">www.travelportland.com</a>	503-275-9750
Mt. Hood/The Gorge	<a href="http://www.mthoodterritory.com">www.mthoodterritory.com</a>	503-655-8490
The Coast	<a href="http://www.visittheoregoncoast.com">www.visittheoregoncoast.com</a>	541-574-2679
Southern Oregon	<a href="http://www.sova.org">www.sova.org</a>	541-779-4691
Willamette Valley	<a href="http://www.oregonwinecountry.org">www.oregonwinecountry.org</a>	866-548-5018

## **EVALUATION CRITERIA**

Grant applications must be complete and have two different authorization signatures to be considered. Grant applications which are being submitted through the electronic Grants Application Form are looked upon more favorably. Applications must meet the 50% match requirement (half of which may be in-kind), and provide a description of how the project is focused on improvement or expansion of tourism marketing programs, or development of new tourism programs or products designed to increase tourism from outside the area for greater economic impact to an area or community. Ideally, an increase of room nights to local lodging facilities would be part of your project.

Strong applications are those which support the goals and objectives identified in your community's current strategic plan, your regional strategic plan, the Regional Cooperative Marketing Program (RCMP) plans ([http://otc.traveloregon.com/marketing\\_plans.cfm](http://otc.traveloregon.com/marketing_plans.cfm)), and Travel Oregon's Strategic Plan ([http://otc.traveloregon.com/2007\\_09\\_Strategic\\_Plan.pdf](http://otc.traveloregon.com/2007_09_Strategic_Plan.pdf)). Applications will further be considered for funding and ranking based on the following criteria, with a total of 100 points available:

1. Need, such as... What are the resources available to the applicant? What is the applicant's total project budget? Is the project unique?
2. Viability and integrity of the project, such as... Is it clearly tourism development? Will the project work? Is the project too unrealistic? Is it a quality proposal with realistic funding expectations? Is the project sustainable?
3. The potential for economic impact on a community/communities as a direct result of the project, such as... Is the project clearly going to stimulate and generate tourism economic development, in a new or enhanced way?

## **PROCEDURAL OVERVIEW**

The Matching Grants Program Review Committee will evaluate the applications and make recommendations to the OTC for approval at its September 18, 2007 (proposed) meeting. All grant applicants will receive notice by September 24, 2007 informing them of the status of their application. Contracts will be drafted upon approval and mailed to grant recipients by October 26, 2007 for signature. The OTC approves the grant recipients; Travel Oregon (staff to the Commission) administers the grant. Signed contracts are due back to OTC by November 9, 2007. Grant project work may begin once both copies of the contracts have been signed by both parties and an original fully-executed contract is returned to the recipient along with the first disbursement of grant funds.

## **PROGRAM REQUIREMENTS**

ELECTRONIC SUBMISSION OF YOUR GRANT APPLICATION IS STRONGLY ENCOURAGED. Supplemental application items (as identified on page 1 of the Grant Information Worksheet) may be mailed as long as the package is properly marked with the project title name from the electronic cover sheet and the items are in the correct order.

NON-ELECTRONIC GRANT APPLICATIONS MUST BE TYPED USING THE FORM PROVIDED ON THE WEBSITE AND THE NARRATIVE RESPONSES MUST BE NO LONGER THAN FOUR (4) PAGES (SINGLE SIDED). Nine (9) double-sided application packets must all be *3-hole punched*. Application packets must be received by August 20, 2007 at 5:00 pm. The original and the 8 duplicate application packets must be identical.

A MATCH OF AT LEAST 50% OF THE TOTAL GRANT AMOUNT MUST BE PROVIDED BY THE APPLICANT (up to half of the match amount may be in-kind). RCMP funds may not be used for matching funds. A documented letter, or signed statement, of financial commitment for the matching funds is required from each partner who has agreed to contribute matching funds for this grant.

APPLICANTS FOR MATCHING GRANT FUNDS MUST, AS A CONDITION FOR RECEIVING THE FUNDS, DEMONSTRATE THAT THE PROJECT COMPLEMENTS AND IS CONSISTENT WITH EXISTING STATEWIDE, REGIONAL AND LOCAL MARKETING CAMPAIGNS. Travel Oregon staff can, at the applicant's request, work with the applicant to ensure coordination among statewide, regional and local marketing efforts.

Applicants who are awarded a grant by OTC shall enter into a grant contract between OTC and the highest elected official of the county or city, the executive director of the port district, the tribe's chief executive or the chairperson of the non-profit entity.

Projects will be monitored by OTC, and grant recipients shall maintain records sufficient for monitoring. The grant contract shall include all timelines that must be observed by the grant recipient.

When necessary, amendments may be made to the grant agreement by mutual agreement of the grant recipient and OTC, such that:

1. Items subject to amendment may include, but are not limited to, substantial alteration of cost, scope, location, objectives, or timeframe of the approved activities or project funded by the grant; and
2. Failure by a grant recipient to gain prior approval from OTC for substantial changes may be a cause for sanctions as delineated in OAR 123-062-0060 (to be made a part of the contract).

## **OREGON TOURISM COMMISSION STRATEGIC PLAN**

Grant applicants need to describe how their grant project fits into OTC's Strategic Marketing Plan. The areas of focus are: 1) Maximize the return on public and private investments in tourism. 2) Drive year-round travel from visitors in our domestic target audience and lengthen their average stay by encouraging them to be destination-oriented in this state. 3) Drive online marketing leisure visitors to Oregon from our primary international target markets: Germany, UK, Japan, Mexico, Canada, and European and Asian feeder markets. 4) Provide leadership and support through collaboration with local, regional, national, tribal and private-industry tourism entities. More details can be found at:

[http://otc.traveloregon.com/2007\\_09\\_Strategic\\_Plan.pdf](http://otc.traveloregon.com/2007_09_Strategic_Plan.pdf) - see page 5)

## **OREGON TOURISM COMMISSION RECOGNITION**

Grant recipients shall conspicuously display that the project is being funded through a grant from the Oregon Tourism Commission on all finished grant projects. Brand Oregon style guides and Travel Oregon's logo and tagline (Oregon. We Love Dreamers.) will be utilized on publications and other significantly visible project activities. Travel Oregon will furnish camera-ready artwork for this purpose as requested by grant recipient. For more details: <http://otc.traveloregon.com/logos.cfm>.

## **GRANT REPORTS**

### **1. Mid-Project Report**

A mid-project update report on the progress of your grant project. Any changes must be included (changes in scope of the project, delays, extensions that you anticipate, etc.). Use form provided by OTC. Due to OTC by March 14, 2008.

### **2. Grant Project Status Form**

A grant project report on your efforts, which accompanies documentation of your completed grant project. Three copies of your grant project (example: brochure), a picture (example: visitor kiosk panel), a pdf, etc. must be included as proof that your grant project is complete. Use form provided by OTC. Due to OTC by June 30, 2008.

### **3. Accomplishment Report**

A grant project accomplishment report including all details in measuring success a few months after grant project is completed. Use form provided by OTC. Due to OTC by August 29, 2008.

### **4. Final Grant Project Report**

A final report on your grant project and its measure of success is due twelve months following the grant completion due date. Use form provided by OTC. Due to OTC by June 30, 2009.

## **GRANT FUNDS DISBURSEMENT**

Any grant funds not used as approved shall be returned to OTC pursuant to the grant contract.

Projects must be completed within the grant period stated at the time of the grant's contract.

First disbursement of 50% of the project grant funds will be sent to grant recipient with fully-executed contract. The signed contracts are due to OTC by November 9, 2007.

Second disbursement of 40% of the grant project funds will be sent to grant recipient once the Mid-Project Report is received and approved. The Mid-Project Report is due to OTC by March 14, 2008.

The final 10% disbursement of the grant project funds will be sent to grant recipient upon receipt and approval of the Grant Project Status Form due on June 30, 2008.

## **WHO TO CONTACT IF YOU HAVE QUESTIONS**

**All correspondence including applications, contracts and reports need to be sent to:**

Oregon Tourism Commission/Travel Oregon, Attention: Matching Grants Program, 670 Hawthorne Avenue SE, Suite 240, Salem, OR 97301.

**All questions to:** Carole Astley, Tourism Development Manager or Michelle Westerberg, Tourism Development Assistant, (503) 378-8850 or [grants@TravelOregon.com](mailto:grants@TravelOregon.com).

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**FICTIONAL SAMPLE BUDGET: Use this format for your grant project**

Please Note: This is only a sample form. Your grant project budget's individual income and expense items will vary, and should include as much detail as possible. "Total Income" and "Total Expenses" must be identical to have a balanced budget.

**Applicant Name: Visitor Lake Convention and Visitors Bureau**  
**Project Name: Visitor Lake Sustainable Tourism Plan**

	Cash	In-Kind
<hr/>		
<b>INCOME</b>		
Visitor Lake CVB	\$0.00	\$0.00
Visitor Lake Cooperative Marketing Partners (Listed individually)		
Visitor Lake Museum	\$0.00	\$0.00
Visitor Lake Mountain	\$0.00	\$0.00
Visitor Lake Chamber of Commerce	\$0.00	\$0.00
Visitor Lake Convention and Visitors Bureau	\$0.00	\$0.00
Holiday Motel	\$0.00	\$0.00
OTC Matching Grants Program Funds	\$0.00	\$0.00
Other (listed individually)	\$0.00	\$0.00
	<hr/>	<hr/>
	\$0.00	\$0.00
<b>TOTAL INCOME:</b>		<b>\$00.00</b>
<hr/>		
<b>EXPENSES</b>		
Sustainable Tourism Consultant	\$0.00	\$0.00
Printing (meeting notices, materials)	\$0.00	\$0.00
Etc...	\$0.00	\$0.00
	<hr/>	<hr/>
	\$0.00	\$0.00
<b>TOTAL EXPENSE:</b>		<b>\$00.00</b>
<hr/>		

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**FICTIONAL SAMPLE GRANT PROJECT TIMELINE**

Please note that this is only a sample timeline. Your grant project timeline should include all Grant Timelines listed on page 5 of the Grant Information Worksheet.

**Applicant Name: Visitor Lake Convention and Visitors Bureau**  
**Project Name: Visitor Lake Sustainable Tourism Strategic Plan**

<b>August 20, 2007</b>	<b>Visitor Lake Sustainable Tourism Plan electronic Grant Application Form and supplemental grant information due to OTC</b>
<b>September 18, 2007</b>	<b>OTC scheduled to approve Matching Grants Program recipients</b>
<b>September 24, 2007</b>	<b>Receive notification on grant status from OTC</b>
<b>October 15, 2007</b>	Visitor Lake Sustainable Tourism Committee kick-off meeting to discuss preliminary timeline/community walk-through/community workshops to discuss plans that will officially begin once fully-executed contract is received from OTC on or before Nov. 20
<b>October 26, 2007</b>	<b>Grant contracts sent out by OTC</b>
<b>November 9, 2007</b>	<b>Signed grant contracts due to OTC</b>
<b>November 20, 2007</b>	<b>Fully executed contract &amp; 50% of grant funds disbursement sent to Visitor Lake by this date – work on grant can officially begin!</b>
<b>November 21, 2007</b>	Visitor Lake sustainable tourism committee gets contract out to consultant so work can officially begin on Sustainable Tourism Plan
<b>November 28, 2007</b>	Community Action Plan Workshop
<b>December 10, 2007</b>	Community Fund Development Workshop
<b>January 5, 2008</b>	Visitor Lake Sustainable Tourism Committee meeting
<b>February 10, 2008</b>	Community Action Plan Follow-up Workshop
<b>March 14, 2008</b>	<b>Mid-Project grant report due to OTC</b> (note any changes to scope, budget, etc.). Second grant funds disbursement of 40% will be sent by OTC after report received and approved
<b>April 7, 2008</b>	Community Fund Development Follow-up Workshop
<b>May 15, 2008</b>	Final Visitor Lake Sustainable Tourism Committee meeting to wrap up final details
<b>June 9, 2008</b>	Sustainable Tourism Strategic Plan implemented and goals successfully met.
<b>June 20, 2008</b>	After-hours reception where Sustainable Tourism Committee will unveil strategic plan work done to date and what lies ahead in the future plans to the Visitor Lake community, regional tourism partners, Travel Oregon, etc.
<b>June 30, 2008</b>	<b>Grant project completion deadline /Grant Project Status Form due to OTC</b>
<b>August 29, 2008</b>	<b>Accomplishment Report due/Final grant funds disbursement of 10% sent after report received and approved by OTC</b>
<b>June 30, 2009</b>	<b>Final Grant Project Report due</b>

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