

COMPETITIVE GRANT PROGRAM WORK GROUP TAKEAWAYS

TRAVEL OREGON
SEPT. 2016

WE LIKE IT HERE.



YOU MIGHT TOO.

WORK GROUP MEMBERS

Oregon Tourism Commission

- **Don Anway**, Oregon Tourism Commissioner, Neuman Hotel Group
- **Kenji Sugahara**, Oregon Tourism Commissioner, Oregon Bicycle Racing Association

Regional/Destination Marketing

Organizations

- **Alice Trindle**, Eastern Oregon Visitors Association
- **Courtney Ries**, Travel Portland
- **Samara Phelps**, Mt. Hood Territory
- **Jim Austin**, Mt. Hood Territory
- **Marcus Hinz**, Oregon Coast Visitors Association
- **Janis Ross**, Travel Lane County – Eugene Cascades Coast

Agency

- **Gloria Zacharias**, Business Oregon – Infrastructure Finance Division
- **Susan Law**, Federal Highway Administration
- **Shawn Irvine**, City of Independence

Product/Private/NGO

- **Sue Densmore**, Friends of the Oregon Caves and Chateau
- **Liora Sponko**, Lane Arts Council
- **Drew Mahalic**, Oregon Sports Authority
- **James Keller**, Uncorked Studios

BIG QUESTIONS

THESE QUESTIONS WERE ASKED OF THE GRANTS WORK GROUP

Alignment: Strategic Imperatives vs. Grant Program Key Initiatives

- Given Travel Oregon's current strategic imperatives, do the current program key initiatives make sense? Should they be adjusted for better alignment or impact? If so, how? What's missing or should be removed?

Identifying Program Intent

- How can a competitive grants program best serve Oregon's travel & tourism industry?
- What role do grants play for your constituents and organizations?
- How could Travel Oregon grants leverage other agency/organization grant programs?

Eligible Applicants

- *Currently: nonprofit, cities, counties, port districts, federal tribes*
- Should for-profit organizations eligibility to apply for a grant? What are the pro's & con's? If you have specific experience with for profit grant making, be prepared to share!
- Should entities be allowed to submit multiple applications for funding in one cycle? If not, why not? If so, are there any stipulations or expectations to require? Should eligible entities be allowed to access grant funds every year? If not, why not? If so, are there any stipulations or expectations to require?
- Are there reasons that otherwise eligible entities should be disqualified from grant funding eligibility? If so, under what circumstances and for how long?
- Should there be any prerequisites required of applicants prior to submitting an application?

BIG QUESTIONS

CONTINUED

Eligible Use of Funds

- What can Travel Oregon grant money be used for? What uses should be excluded?
- If proposed use of funds do not align with local, regional or state tourism strategies, should proposed use be eligible? How should applicants demonstrate alignment with tourism strategies?

Awarding Funds

- What model(s) for distribution of funds should Travel Oregon consider (reimburse, upfront, interval funding, etc.). Are there any conditions that must be met before any money disbursed?
- What minimum or maximum awards thresholds should be established to best support Oregon's Travel and Tourism Industry? Should applicants be required to have "skin in the game?"
- How long should grant recipients have to use the funds awarded? (currently 12 months)
- Does the complexity/scale of a project, amount requested or other issue related to applicant or proposed use impact this? If so, under what conditions? What thresholds should be applied?

Application and Communication

- How long should the application process be open?
- How can Travel Oregon best be of service to grant applicants before their application is submitted?
- What strategies should Travel Oregon use to ensure transparency and treat all applicants equally?
- What documentation or materials should be required as a part of the application process?

BIG QUESTIONS

CONTINUED

Project Preferences | *Current grant materials list a set of preferences: nature-based outdoor tourism, cycling tourism, culinary & agritourism development*

- Are there additional “preferences” we should indicate to applicants?
- How should preferences be used to better align grant applications with Travel Oregon’s priorities? (Are these differentiators, tie-breakers or requirements?)

Grant Types | *Currently Travel Oregon matching grants are funded as one pool of resource for access by eligible applicants and there are a variety of projects that could qualify for funding.*

- If a tiered approach or small/medium/large grants were adopted, what dollar amounts constitute each tier? Should all grants compete from an advertised pool of available funds or should funding be established by tier or type?
- If there were grant funds made available for various “types” or categories of projects and initiatives, what “types” or categories should be considered?
- For each of the types or categories of grants identified above, what reporting should be required or for each? Would you recommend minimum or maximum award amounts?

The Scorecard | GOALS - FINANCIAL NEED - VIABILITY - IMPACT

- Are these the right categories for scoring? What additional criteria should be on the scorecard?
- How should the various criteria bulleted above be weighted? How should match or “skin in the game” impact scoring?
- Is there a scoring rubric we should consider? What scoring or ranking have you or your organization used in the past?
- How should Travel Oregon play a role in scoring, sorting or screening applications prior to getting to Committee? Should grants be awarded by a purely internal process after receiving external stakeholder feedback (opposite current process)?

KEY TAKEAWAYS: PROGRAM INTENT

ALIGNMENT and KEY INITIATIVES

Grant applications for funding of any amount must demonstrate how the proposed use of grant funds aligns with Travel Oregon's key initiatives, objectives or strategies. Applicants will be encouraged and likelihood of approval will be enhanced, if applicants also demonstrate alignment with regional or local priorities.

KEY INITIATIVES

- Travel Oregon will provide clearly stated, key initiatives for program guidelines
- RDMOs will be asked to provide key regional initiatives for program guidelines

PREFERENCE

- Grant projects that demonstrate any number of the following will be given preference in award determinations:
 - Aligns with Regional and/or local priorities
 - Strives to promote diversity and inclusion (accessibility, minority populations or underserved visitor segments)
 - Includes additional match or letters of support
 - Potential to generate significant local or regional impact
 - Addresses Sustainability - natural resource and/or longevity, continuity
 - Demonstrates Elected official or public body commitment to project as a local priority
 - Showcases a public/private partnership with Oregon-based small businesses

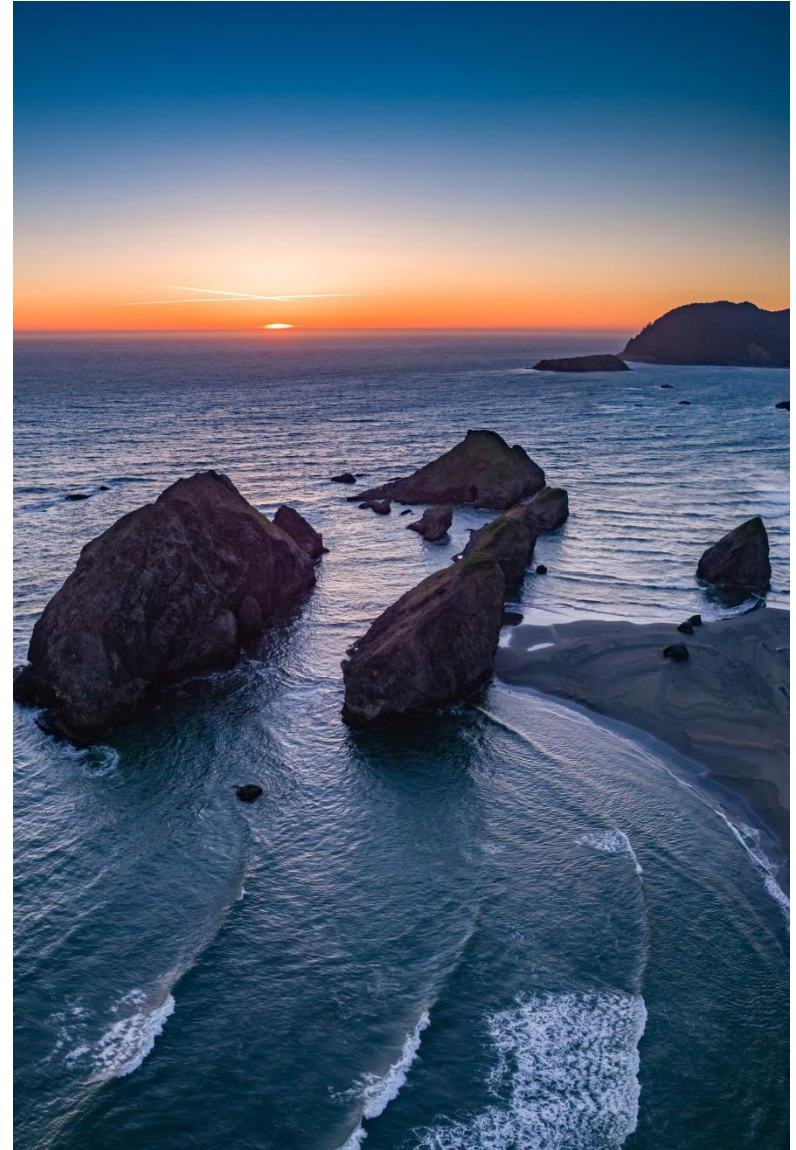
KEY TAKEAWAYS: PROGRAM TIERS

Grants will be identified within one of three funding tiers. Large tier grants are only available if the Oregon Tourism Commission so determines. The amount of grant requested will impact the complexity of the application process, timeline for project completion and cash match required.

SMALL: Under **\$20,000** - Simplified application, minimum 10% cash match required

MEDIUM: \$20,000 - \$100,000 - Similar to current, minimum 25% cash match required

LARGE (if available): Over **\$100,000** - World class asset, driver of out of state or international visitors, minimum 50% cash match required



KEY TAKEAWAYS: ELIGIBILITY

ORGANIZATIONAL ELIGIBILITY

Eligible applicants include those listed below that are doing business in Oregon and can demonstrate direct work with or in support of improving the economic impacts of Oregon's travel and tourism industry:

- Cities and Counties
- Port Districts
- Federally recognized tribes
- Non-profit entities
- For-profit entities may apply for Sales type grants, trainings and professional development

KEY TAKEAWAYS: ELIGIBILITY

ELIGIBLE PROJECT TYPES

All grants must be new projects or initiatives, with the intended meaning to allow for enhancements or Improvements. Deferred, regular or ongoing maintenance and upkeep will not be eligible. Grant applicants will select a “type” of project in application process based on proposed use of funds. By allowing for specific types, Travel Oregon grant guidelines may be tailored to the unique nature of one type of project from another. Project type designations will approximate Travel Oregon program areas. An additional benefit to project designation by type is allowing Grant Review Committees to consider funding equity by both geographic region and type of project.

MARKETING

Marketing type uses include, but are not limited to: production, print collateral, broadcast, social, web, mobile, content, branding, visitor/consumer outreach, Co-Ops.

DEVELOPMENT

Development type uses include, but are not limited to: Community-based trainings, strategic planning, concept planning, feasibility studies, research, visitor access improvements, mapping, wayfinding signage design or construction, interpretation, development of visitor amenities or infrastructure,

SALES

Sales type uses include, but are not limited to: Events, trade show participation, trade-show related production or shipping, hosting and sponsorship fees, bid fees, fam support, tour operator support, international visitor trainings, receptive-trade related trainings.

INDUSTRY SERVICES

Industry Services type uses include, but are not limited to: Technical Assistance, professional development, conference and trainings (individual), visitor center improvements excluding structural.

KEY TAKEAWAYS: APPLICATION PROCESS

TIMELINE

SMALL GRANTS

- Grant cycle opens **up to 6x per year**
- 30-day application period
- Must be complete within a **12-month** timeframe

MEDIUM GRANTS

- Grant cycle opens once **every 2 years**
- Must be complete within a **24-month** timeframe

LARGE GRANTS

- Grant cycle open based on **OTC determination**
- Multi-year awards allowable
- Must be complete within a **10-year** timeframe

MATCH

SMALL GRANTS

- 10% cash match required

MEDIUM GRANTS

- 25% cash match required

LARGE GRANTS

- 50% cash match required

**Additional cash match included in budget, any in-kind and local support will enhance overall application*

KEY TAKEAWAYS: APPLICATION PROCESS

SMALL GRANTS

1-STEP

- No pre-application requirements

Simple Online Application

Includes

- Narrative Questions
- Project Idea
- Project Budget
- Project Timeline
- Proof of Eligibility
- Approval letters*
- 10% Cash Match

MEDIUM GRANTS

Pre-Application

- Grant Project Idea
- Project goals & outcomes
- Proof of eligibility

Travel Oregon Feedback

Online Application Includes

- Narrative Questions
- Project Budget
- Project Timeline
- Organization's financials
- Support Letters (1-min)
- Approval letters*
- 25% Cash Match

LARGE GRANTS

Open upon OTC Determination

Application Packet

- Narrative Questions
- Project Budget
- Project Timeline
- Proof of Eligibility
- Letter of Commitment to cash match
- 2-years of detailed financials
- Demonstrable ROI, Impact and Metrics clearly articulated
- Generates Out-of-State, International or provides for world-class asset
- Support Letters (3-min)
- Approval letters*

KEY TAKEAWAYS: AWARDS DECISIONS

SMALL GRANTS

- **Cross-functional internal agency team** provides award recommendations to Travel Oregon CEO
- Informed by RDMO review and ranking
- Funds available until exhausted on an annual cycle

MEDIUM GRANTS

- **External Review Committee** will convene to make decision on awards
- Informed by RDMO review and ranking
- Funds available once per biennium

LARGE GRANTS

- Applicants will be **required** to make a presentation to the Oregon Tourism Commission
- **Review Committee** includes 2-4 current Oregon Tourism Commissioners and CEO or designee will convene to make recommendation on awards to full Commission

KEY TAKEAWAYS: REPORTING

SMALL GRANTS

- *Modification Request* for budget line items that change by **10%** or more
- *Mid-Project Report* **for grants over \$10,000** (6 months)
- *Accomplishment Report* (12 months)

MEDIUM GRANTS

- *Modification Request* for budget line items that change by **10%** or more
- *Mid-year Report* (or mid-project if completion is less than year)
- *Annual Report* (or upon completion of project)
- *Final Measurement of Success Report* (12 months after completion)

LARGE GRANTS

- *Modification Request* for budget line items that change by **10%** or more
- *Mid-Year Report* (6 months into year)
- *Annual Report* (every 12 months)
- *Accomplishment Report & OTC Presentation* (upon project completion)

THANK YOU