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# REGIONAL COOPERATIVE TOURISM PROGRAM & GUIDELINES

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MAY 6, 2020

Adopted: April 2, 2006  
Adopted: February 11, 2014  
Adopted: October 3, 2016  
Adopted: October 4, 2018  
Adopted: July 31, 2019  
Adopted: May 6, 2020

OREGON TOURISM COMMISSION  
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# OVERVIEW

## 2003 – Passage of HB 2267

On Nov. 27, 2003 House Bill 2267 (HB 2267) became law. This law implemented a 1 percent statewide lodging tax and comprehensively overhauled how Oregon addresses and funds statewide and local tourism marketing efforts. Revenues from the statewide lodging tax are continuously appropriated by the legislature to the Oregon Tourism Commission (OTC). Within the scope of the legislation when passed in 2003, the OTC may appropriate as much as 15 percent of the revenue from the statewide lodging tax to Oregon’s tourism regions for cooperative regional and multi-regional marketing efforts.

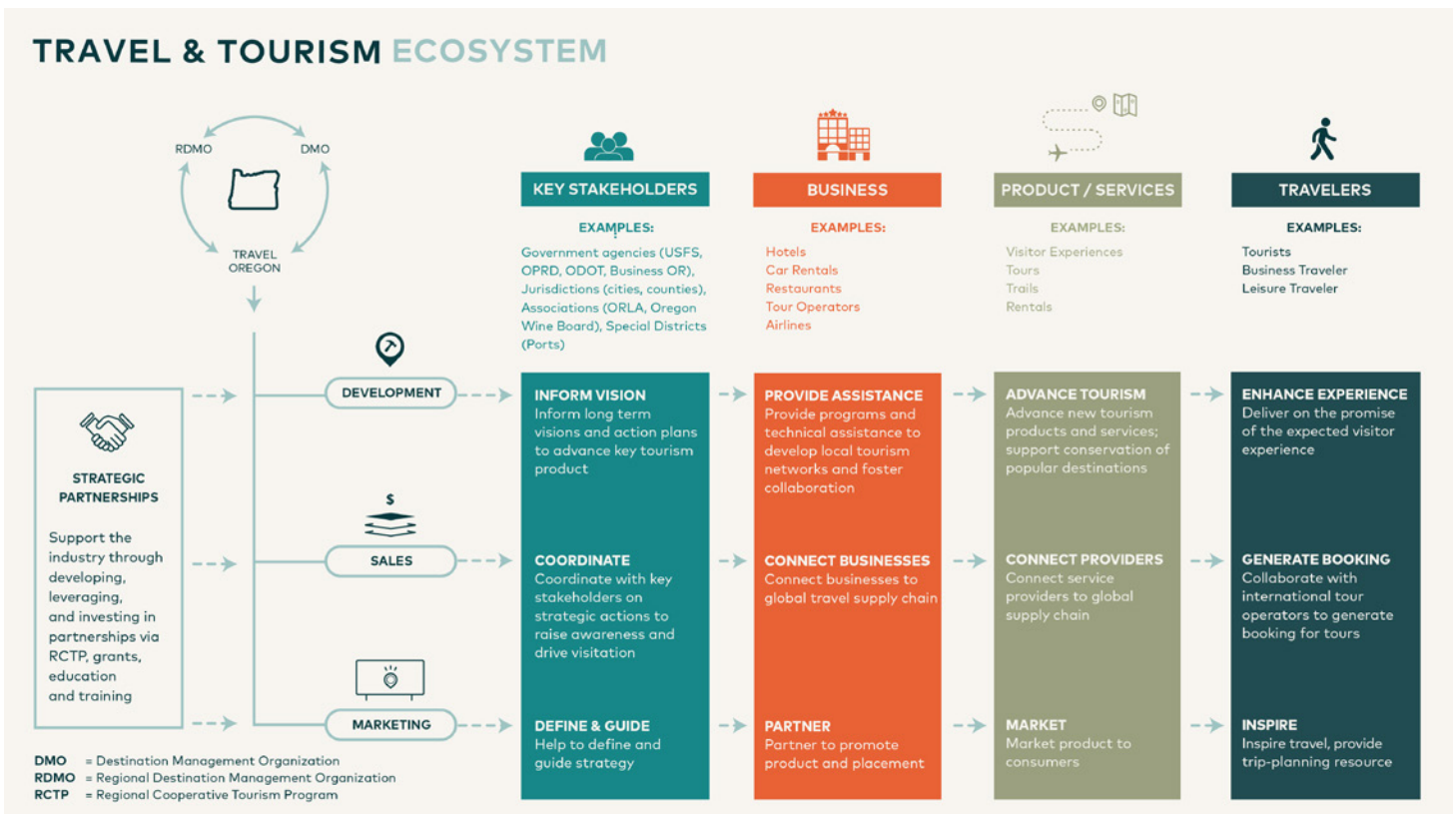
HB 2267 mandated that, “As much as 15 percent shall be used to implement a Regional Cooperative Marketing Program (RCMP). The program shall:

- (A) Require that fund allocations focus on creating new business from out-of-state and international markets;
- (B) Utilize a regional allocation formula that distributes revenue to regions, the boundaries of which are established by the commission, in proportion to the amount of transient lodging tax revenues collected in each region;

- (C) Distribute revenue to recipients that are selected by the commission as organizations able to conduct tourism- related marketing for each region;
- (D) Require that all advertising, publications, CD-ROMs, websites, videos and other tourism promotion materials funded through the regional cooperative tourism marketing program carry the Oregon Tourism Commission logo and marketing tag line; and
- (E) Encourage funding recipients to incorporate design elements from commission advertising and promotional campaigns, such as fonts, images and other design elements.

To gain tourism industry input on disbursement guidelines for the RCMP funds, the commission held nine meetings in various locations around the state in late 2003. The comments and suggestions heard at these meetings, along with those of the OTC members and staff, and the requirements of HB 2267 were incorporated in the initial guidelines.

As the RCMP unfolded, additional suggestions were brought forward by industry partners and subsequent revisions were made to the program’s guidelines. In January 2006, Travel Oregon hired Pricewaterhouse Coopers (PwC) to analyze the first year’s implementation of the RCMP



program. PwC interviewed nearly two dozen industry partners who were responsible for, or involved in, the implementation of the RCMP in the state's seven tourism regions. In some instances, the interviewees represented statewide tourism industry trade associations and organizations. The results of these interviews, along with the various alternatives proposed by PwC, were reviewed by the OTC; further revisions to the RCMP were proposed. In November 2013, Travel Oregon convened a call with representatives from the then current regional RCMP fund recipients to discuss solutions that would provide certainty to regions for RCMP fund planning. In February 2014, Travel Oregon brought the OTC a recommendation that the RCMP guidelines be revised by using the prior calendar year to determine regional pro-rata share. The change to calendar year allowed Travel Oregon to determine the actual amounts of regional pro-rata share in March and eliminated the use of pro-rata estimates. A few housekeeping changes were also recommended. The revisions were unanimously approved and adopted.

## 2016 – Passage of HB 4146

In March 2016, House Bill 4146 (HB 4146) became law. The law included changing the statewide lodging tax rate from 1 percent to 1.8 percent effective July 1, 2016 until 2020, at which point it will be reduced to 1.5 percent. The bill removed the language referencing “marketing” specifically from the use of regional program money and removed “as much as 15 percent,” replacing it with a fixed 20 percent to implement the regional program. The statutory language for the program was amended and refers to the Regional Cooperative Tourism Program (RCTP). As was the case in 2003, when the statewide lodging tax was first introduced, Travel Oregon sought tourism industry input on the regional program. A survey was conducted that targeted regional stakeholders from January to February 2016. These survey results were collected, and the information was shared out through seven regional gatherings convened in conjunction with the Regional Destination Management Organizations (RDMOs). The individual regional gatherings culminated in a statewide gathering to collectively consider the results of regional industry outreach, to discuss need and map out perceived opportunities. Following the passage of HB 4146, another survey was delivered through Travel Oregon’s industry Listserv to solicit input from Oregon’s tourism industry. This survey focused on Travel Oregon’s general programs of work and included questions about marketing, sales, development, services, the regional program, grants and

communications. Results from this survey were shared with the Oregon Destination Marketing Organization (ODMO) Board and with representatives of each of the seven RDMOs. In addition, Travel Oregon discussed changes necessitated by the passage of HB 4146, including anticipated changes to the RCTP guidelines. Travel Oregon then convened a series of 24 local town hall meetings across the state from January through October 2016 to inform the industry about changes to Travel Oregon programs necessitated by the passage of HB 4146 and to seek additional perspective to inform future planning to better serve Oregon’s tourism industry. Lastly, Travel Oregon convened a work group in August 2016 made up of external industry partners to review the existing RCTP guidelines and give guidance to Travel Oregon staff as the new guidelines were constructed for the OTC’s consideration and adoption.

## STATUTORY REQUIREMENTS – RCTP

### ORS 284.131 (4) (c) (A–E) states:

- (c) 20 percent must be used to implement a Regional Co-operative Tourism Program that:
- (A) Requires fund allocations to focus on creating new business from out-of-state and international markets;
  - (B) Utilizes a regional allocation formula that distributes revenue to regions, the boundaries of which are established by the commission, in proportion to the amount of transient lodging tax revenues collected in each region;
  - (C) Distributes revenue to recipients that are selected by the commission as organizations able to conduct tourism-related marketing for each region;
  - (D) Requires advertising, publications, CD-ROMs, web-sites, videos and other tourism promotion materials funded through the regional cooperative tourism program to carry the Oregon Tourism Commission logo and marketing tag line; and
  - (E) Encourages funding recipients to incorporate design elements from Travel Oregon advertising and promotional campaigns, such as fonts, images and other design elements.

# GOALS OF REGIONAL COOPERATIVE TOURISM PROGRAM (RCTP)

Vision: A better life for all Oregonians through strong, sustainable local economies.

Mission: We inspire travel that drives economic development. Through innovation and partnerships, we share the stories of Oregon's people and places, deliver world-class experiences, strengthen the industry and ensure the preservation of Oregon's way of life and its natural places.

- Maximize the benefits to Oregon's economy from the statewide lodging tax
- Comply with the requirements of HB 2267, HB 4146 and all other applicable law
- Encourage multi-regional and targeted niche marketing
- Foster management of region's tourism resources
- Formalize simple, straightforward RCTP procedures
- Maximize benefits from RCTP funds to the regions
- Leverage Travel Oregon programs
- Deliver consistent messages, outstanding experiences, and efficient use of resources
- Minimize RCTP-related administrative workload on Travel Oregon and the regions
- Ensure RCTP is adaptable in a disaster or emergency
- Ensure Travel Oregon programs are leverageable and adaptable to regionally specific needs

## DEFINITION OF REGIONAL GEOGRAPHY

(For partial counties, zip code delineations are available; see map on page 8.)

**Oregon Coast:** Clatsop, Tillamook, Lincoln, Coos, Curry, and the coastal portions of Lane and Douglas counties

**Greater Portland:** Washington, Columbia and portions of Multnomah and Clackamas counties

**Mt Hood/Columbia River Gorge:** Hood River and portions of Wasco, Multnomah and Clackamas counties

**Willamette Valley:** Yamhill, Polk, Benton, Marion, Linn and portions of Lane and Clackamas counties

**Southern Oregon:** Klamath, Lake, Jackson, Josephine, and portions of Douglas counties

**Central Oregon:** Jefferson, Deschutes, Crook and portions of Wasco counties

**Eastern Oregon:** Sherman, Gilliam, Wheeler, Morrow, Union, Umatilla, Wallowa, Grant, Baker, Harney and Malheur counties

Any region wishing to modify its defined boundary should bring that request to the attention of the Travel Oregon CEO, and RCTP staff. Regions are encouraged to have agreement among all parties involved in the proposed regional boundary modification prior to bringing the request to Travel Oregon.

## REGIONAL RCTP RECIPIENTS

### QUALIFICATIONS – REQUIRED

- Eligible applicants include those listed below that are in Oregon and are involved with tourism promotion and development and can conduct tourism-related marketing for each region.
  - Nonprofit entities
  - Government entities
  - Federally recognized tribes
  - For-profit businesses
- The entity must have considerable knowledge of the entire region, strong rapport with regional stakeholders and demonstrate capacity to work with its regional stakeholder base to achieve outcomes that benefit the regional tourism economy. The entity must demonstrate that it can fulfill the requirements of the multi-year RCTP contract.
- The entity must work on behalf of the entire region. Any bias towards portions of region, membership or dues paying businesses is not allowed.
- As it pertains to the RCTP budget, the entity must use RCTP funds to deliver on an approved regional plan intended to benefit the region and the tourism industry without respect to membership standing or dues payments. Entity must be able to verify investing RCTP funds in this manner if requested by Travel Oregon.
- The entity must be able to secure the human and technical resources required to meet stakeholder needs and act in the interest of the tourism industry.
- The entity must have at least two-years marketing, sales OR development experience working within the region.
- The entity must have authority to enter into multi-year contracts with a willingness to comply with all RCTP guidelines and program requirements.
- The entity must have history of ethical business operation and successful organization management.

- I. The entity must have read and understand the program guidelines, agree to comply with those guidelines and respond to an RFQ/RFP or other application process, as may be required by the OTC.
- J. Entity must demonstrate support via documentation from regional stakeholders. Documentation should include letters of support from each category of stakeholder groups listed on page 7.

### **QUALIFICATIONS – PREFERRED**

- A. The entity should be financially stable in order to operate independently of RCTP resources.
- B. RCTP resources should not constitute more than 75 percent of the entity’s entire budget. Consideration will be given for in-kind contribution of time and resources.
- C. The entity should have a full-time staff greater than one full-time employee.
- D. The entity should have demonstrated successful experience working in a complex environment, ability to meet demanding deadlines and manage competing priorities.
- E. The entity should have demonstrated ability to maintain positive working relationships in the target region with a diverse array of partners.
- F. The entity should have demonstrated track record of successfully managing annual budgets larger than \$100,000.
- G. The entity should have demonstrated experience in leveraging multiple sources of funding.
- H. The entity should have the ability to conduct meetings and work with regional stakeholders for at least three out of five days per work week.
- I. The entity should have at least two-years tourism marketing, sales and development experience working within the region.
- J. The entity should designate an accessible office space within the region; adequate to conduct meetings with industry and regional stakeholders. The entity should have the ability to host meetings virtually or by phone when necessary.
- K. Entity should demonstrate that they have a diversity, equity, and inclusion strategy as part of their business practices.

### **EXPECTATIONS**

- A. Recipients have the responsibility to work with a regional stakeholder group and Travel Oregon’s RCTP staff to construct a RCTP plan, implement the RCTP plan, account for the RCTP funds and have, through contract with Travel Oregon, the authority to implement the plan on behalf of the region once the region’s plan is adopted by the OTC or Travel Oregon staff, as determined by the OTC.

- B. A region may request that an entity from another, perhaps adjacent, region implement some or all their RCTP obligations for them. This will not necessarily result in that region no longer being a “tourism region” for the purposes of Travel Oregon’s marketing materials (Official State Visitor Guide, website, etc.). This should only be undertaken to enable efficiencies in the implementation of RCTP plans. If one recipient selects an entity from an adjacent region to implement/administer the RCTP plan, the two organizations will develop a collaborative tourism plan encompassing both regions.
- C. A region may request that Travel Oregon implements their RCTP plan on their behalf.
- D. Failure of a qualified regional recipient being designated by the Oregon Tourism Commission to implement an RCTP plan may result in Travel Oregon implementing that region’s plan on behalf of the region. Failure of a region to develop an approved regional plan may result in those funds originally budgeted to that region not being disbursed, in which case, Travel Oregon will utilize those funds to implement a plan on behalf of that region. Please note that Travel Oregon staff is available to provide facilitation services to any region needing assistance in the RCTP planning process.
- E. Recipients will act as the RDMO on behalf of the region, including performance of all obligations as such, for the duration of contracting period.
- F. The entity selected will be responsible for the collection and submission of all tourism-related content from the entire region into the Oregon Tourism Information System (OTIS). RDMOs are expected to upload new listings and maintain current listing information to OTIS on a quarterly basis each fiscal year. RDMOs do not need to be the exclusive listing provider in their region but need to have an awareness of other entities within their region that are actively providing listings to OTIS, in an effort to ensure regional coverage.
- G. Travel Oregon requires a review of all RCTP funded marketing and sales materials before the materials are published and distributed. Travel Oregon’s staff will complete their review of materials 1 week after receiving them. A Travel Oregon logo/tagline placement requirement document will be made available to RDMO partners. This document will illustrate best practices for logo/tagline inclusion across all media types. This document will be updated to stay current with market trends.
- H. Upon biennial plan approval, RDMOs are required to meet with Travel Oregon departments to discuss plan implementation.

I. When utilizing RCTP resources for new staff positions, RDMOs are required to schedule orientations with Travel Oregon’s departments.

**DESIGNATION OF ENTITY RESPONSIBLE FOR RCTP IMPLEMENTATION**

- A. Following the close of the RFQ/RFP period, a review committee comprised of not more than (four) current Oregon Tourism Commissioners, Travel Oregon staff, and industry members who have no potential or actual conflict will be formed to evaluate the RFQ/RFP responses and make recommendations as an additional input point for the OTC prior to designation of regional recipients.
- B. In accordance with state laws, the Oregon Tourism Commission will designate regional RCTP recipients during a noticed, public meeting for which designation of regional recipients is an agenda item.

**PLANNING CYCLE – STAKEHOLDER DRIVEN APPROACH**

- A. RDMOs will be required to develop and enact two-year tourism plans and engage in a planning cycle on alternating years. The two-year planning cycle will continue for the duration of RDMO contracts. The regional planning cycle will be carried out with the assistance of Travel Oregon RCTP staff.
- B. At the onset of each two-year planning cycle, Travel Oregon will conduct a statewide survey of tourism stakeholders to gain input regarding prior regional plans and to surface regional tourism priorities, identify opportu-

nities and constraints, and to seek regional industry insights on how investments could be maximized within their region. Travel Oregon will collaborate with RDMOs on the content and development of the survey. Travel Oregon will distribute the survey via its communications channels. The survey results and corresponding regional reports (seven) will be provided to RDMOs and regional stakeholders to aid their planning efforts.

- C. During each two-year planning cycle, RDMOs will work with Travel Oregon to schedule and deliver planning work shops within their region. These Regional Stakeholder Gatherings will be structured as an opportunity for tourism stakeholders within the region to interface with the RDMO directly and give their insights on regional priorities. RDMOs will present a draft of their regional plans to regional stakeholders for feedback. Regional plans will be expected to reflect regional stakeholder input where appropriate; priorities sourced from stakeholder input should be reflected in the plans. Stakeholder meetings may occur through online platforms when necessary.
- D. RDMOs will submit two-year plans to Travel Oregon RCTP staff, if designated, for approval. Once Travel Oregon has approved plans, RDMOs will present approved plans back to their regional stakeholders via a public forum or through a digital review process. Final regional plans and presentations are required to be placed on RDMO websites and Travel Oregon’s Industry website.
- E. In the event of an emergency or disaster, RCTP planning timelines can be altered to be responsive to needs on the ground.

**REGIONAL COOPERATIVE TOURISM PROGRAM PLANNING TIMELINE**



## STAKEHOLDERS

A. Each region will form a designated stakeholder group. A defined list of regional stakeholders will be created by Travel Oregon in collaboration with the RDMO for each region. Travel Oregon will collaborate with RDMOs to determine regional stakeholder lists to ensure regional equity, cultural diversity, and a broad cross section of business types are included for each region. Regions are expected to maintain and grow these lists to accurately reflect the composition of their region. RDMOs are required to setup and host a minimum of 2 regional stakeholder meetings per fiscal year. Regional stakeholder groups shall be comprised of the following at a minimum:

- Destination Management Organizations (DMOs) or Chambers of Commerce within region – (5)
- Select leaders from tourism-related businesses – (15)
  - Accommodations
  - Tour operators
  - Guides and outfitters
  - Restaurateurs
  - Visitor transportation providers
  - Bike shops, golf courses, gear rental businesses, etc.
  - Farm-based agritourism businesses: wineries, cideries, breweries, ‘u-pick’ farms
  - Visitor attractions, cultural heritage attractions, interpretive centers, museums, theaters, etc.
- Key land management agencies – (5)
  - United States Forest Service (USFS)
  - Bureau of Land Management (BLM)
  - Oregon Parks and Recreation (OPRD)
  - City and county parks
- Department(s) of Transportation (2)
  - Oregon Department of Transportation (ODOT)
  - Local or regional department of transportation
- Representative from international or regional airport (1)
- Representative from port district (1)
- Representative from educational institution (1)
- Representative from tribal entity (1)
- Representative from Regional economic development organization (1)
- Local Government (1)
- Representative from Oregon Tourism Studio Committee Leads and/or Network Managers (Travel Oregon will supply current list)

- Oregon Regional Solutions staff (optional)
- Business Representatives (optional)
  - Business Oregon Regional Development Officers
  - Small Business Development Centers
- Elected officials (optional)
- Oregon Main Street/ Downtown Association Mangers (optional)

## LEVERAGE & ALIGNMENT

A. 100 percent of RCTP funds must be used toward programs or projects that are in alignment with Travel Oregon’s Strategic Plan, and regional priorities as defined by regional stakeholder base.

B. To optimize alignment within Oregon’s tourism industry, ensure they’re leveraging their work as the RDMO with Travel Oregon’s ongoing strategic imperatives, and to reinforce a cohesive and thorough statewide tourism strategy, the current RDMOs are investing more than 20 percent of their total annual disbursement (RCTP budget) into collaborative programming that is executed in cooperation with Travel Oregon. It is the expectation of Travel Oregon that the mutual commitment to leveraging and aligning programs, messages and budgets will uphold, if not increase, this level (20%) of leveraged investment going forward. Therefore, Travel Oregon will continue to strategically review its menu of investment opportunities and track the level of leveraged investment.

C. RDMOs will be able to select from a menu of investment opportunities that incorporate the core tourism areas of: sales, marketing, destination development, and strategic partnerships.

D. Regions are encouraged to invest in strategies and activities that benefit multiple communities within the region and encompass the full suite of tourism disciplines: sales, marketing, destination development, and strategic partnerships. Regions are encouraged to invest in Oregon Tourism Studio communities and other communities where strategic tourism investments have occurred. Travel Oregon will provide a current list of Oregon Tourism studio communities upon request.

E. Regions are required to set aside 5% of their RCTP allocation per fiscal year for an immediate opportunity fund. These resources can be spent by RDMOs in response to regional disasters, or opportunities that alter their regional tourism economy. Any rollover or unspent resource from this allocation is required to be transferred to the region’s grant or strategic investment fund (item F).

F. Regions are required to develop their own grant or strategic investment fund with a minimum of 10% of their regional allocation per fiscal year. The purpose of this resource is to provide funding for regional projects and programs outside of their organization that will display a strong return on investment. Regions may administer their own grant process or strategic investment fund. If regions cannot administer this process, Travel Oregon's competitive grant staff will provide administrative assistance in developing a grant platform. Regions may designate an external grant/fund manager to administer this process at no more than 10%. For example, if a region's annual RCTP disbursement is \$1,000,000 that region's grant program/ strategic investment fund must be no less than \$100,000, 10% of which can be used on grant/fund administration, that total would be \$10,000

## **MENU OF INVESTMENT OPPORTUNITIES — LEVERAGED PROGRAMMING**

- A. Travel Oregon will develop a list or “menu” of pre-vetted programming and investment strategies that are shown to demonstrate clear benefit for the region and the state. Travel Oregon will collaborate with RDMOs to improve this list so that regionally specific strategies as they pertain to sales, marketing, development, and industry and visitors' services are sourced locally. RDMOs will have autonomy to choose which individual strategies to invest in, but it is the expectation of Travel Oregon that a minimum of 20 percent of total budget be spent on these collaborative investment strategies.
- B. No additional metrics are required when regional entities use their RCTP funds to partner directly with Travel Oregon as the metrics are already included in Travel Oregon's Strategic Plan.
- C. Multi-regional marketing efforts are strongly encouraged. Regions may achieve stronger results by combining resources with other regions. Travel Oregon encourages regional entities to use the multi-regional approach as appropriate to leverage resources.
- D. Regional partners have expressed great interest in having Travel Oregon facilitate gatherings to explore multi-regional opportunities and specific competencies necessary to compete in the marketplace. Therefore,
1. Travel Oregon staff will convene regions collectively to explore multi-regional cooperative opportunities including cooperative marketing opportunities with Travel Oregon.
  2. Travel Oregon will convene regions collectively to pursue timely professional development conversa-

tions regarding earned media, social programming, media planning, etc.

3. Travel Oregon staff will work internally and with the regions to develop a menu of Travel Oregon programs where the regions can propose to invest their allocated RCTP funds.
4. Travel Oregon staff will provide planning timelines, media plans and other information necessary to develop regional RCTP plans in a timely manner.
5. The timeline for presenting RCTP plans will be clearly communicated, therefore allowing Travel Oregon staff to work with each region to identify and agree upon appropriate ROI metrics, allow each region time to prepare their plans to meet those metrics, and to negotiate elements of the regions' RCTP plans prior to the plans going to the OTC for adoption.

E. RCTP funds cannot be spent to market any destination outside of Oregon. However, in the case of a region that may be involved with a joint marketing campaign with destinations in a bordering state, RCTP funds may pay for the relative share of the Oregon regions participation in that campaign.

F. The OTC encourages the use of RCTP funds to leverage Travel Oregon's programs and target markets. A list of those programs is found in Travel Oregon's Strategic Plan: [industry.traveloregon.com](http://industry.traveloregon.com). RDMO's are encouraged to reference Travel Oregon's publicly available draft strategic plan, survey reports, and other materials found on Travel Oregon's industry website to help achieve alignment between regional and statewide initiatives, programming, and priorities.

## **STAFFING:**

- A. RDMOs may use no more than 30 percent of their annual disbursement (budget) on hiring departmental staff (as it applies to areas of RCTP investment strategy), human resources, and other administrative needs. Departmental staff is defined as: individuals who are issued a W2, and who are not working under a professional service contract or agreement.
- B. Regional recipients may request additional RCTP money be invested into contract labor if activities, actions, and strategies deem it necessary. This allowance of additional contract labor may not contribute to any costs related to RDMO departmental staff. The determination of this request will be on a case-by-case decision.



## REPORTING & METRICS

- A. Travel Oregon will assess compliance and performance of RDMOs planning and programming through:
  - 1. Annual reviews with RDMO
  - 2. Annual financial reports to be completed by RDMO
  - 3. Quarterly in-region consultations with RDMO
  - 4. Biennial regional stakeholder feedback via survey
- B. Regions will be assessed on metrics associated with specific activities and strategies outlined in their plans.
- C. Regional performance will be assessed based on the return on investment as it pertains to specific strategies and tactics and alignment with regional stakeholder input.
- D. Regional plans and reports will be transparent and viewable on Travel Oregon's Industry website. A strong effort will be made to ensure these performance measures are easy to comprehend.
- E. All RCTP related funds must be spent by RDMOs by the completion of the two-year contract and plan cycle. All unused and unbudgeted funds will be returned to Travel Oregon to use at its discretion on RCTP programming and in-region strategic investments. Carrying forward funds into future biennia is not allowed without prior written approval from RCTP staff.
- F. The RCTP plans must include goals and objectives, as well as ROI metrics. These metrics will be provided by Travel Oregon in collaboration with the RDMO. Efforts will be made to utilize broadly recognized and standardized performance measures such as those included in Travel Oregon's Strategic Plan.
- G. Designated RDMOs will be required to complete and supply to RCTP staff quarterly financial information including budget vs: actual totals for each RCTP investment/programming area.

## CONTRACTS, REPORTING & FUNDING

- A.
  - 1. Travel Oregon will inform actual RCTP funding amount to designated RDMOs by March 31 for upcoming fiscal year
  - 2. For approved plans, RDMOs may submit invoices for the full fiscal year funding on or after July 1 of corresponding fiscal year.
  - 3. Travel Oregon would prefer transfer to occur via wire. Designated RDMOs are responsible for updating bank/wire information

- 4. Travel Oregon RCTP staff reserves the right to reduce and or postpone release of funds if current state of regional plan / deliverables is not satisfactory.
- B. Determination of regional pro-rata share of RCTP funds will be based on lodging tax collections from the preceding calendar year.
- C. No cash or in-kind match of RCTP funds is required at this time.
- D. Regions are required by law to incorporate Travel Oregon's tagline and/or logo on all RCTP funded marketing and sales materials and are encouraged to follow Travel Oregon's style guide and direction.
- E. Each regional entity selected to implement the RCTP is contractually granted the authority to carry-out the program on the region's behalf. But the contracted DMOs, once the plans are adopted by the Travel Oregon staff and the Commission, are authorized and empowered to implement the plan.
- F. Travel Oregon and the regions will evaluate the current RCTP procedures periodically. Amendments will be made at the OTC's discretion.
- G. A regional entity can submit amendments to their approved RCTP plan to RCTP staff at Travel Oregon for review and approval. Amendments to the plan will also include any unexpended funds that are the result of original budget amounts that were over actual costs.
- H. Travel Oregon staff are authorized to negotiate elements of each region's RCTP plan and, if necessary, reject elements of proposed plans that won't achieve the ROI metrics agreed upon.
- I. Information regarding the OTC's travel market mix, demographics, strategies, marketing/development objectives, and metrics can be found in the Travel Oregon's Strategic Plan on [Industry.Traveloregon.com](http://Industry.Traveloregon.com).

## REQUEST FOR QUALIFICATIONS OR PROPOSALS

- A. Travel Oregon will enact a Request for Qualifications or Request for Proposals cycle that will determine the recipients for RCTP disbursements for up to six years. This cycle will be comprised of 2-year contracts that mirror the biennium.



## ADDENDUM

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### Oregon Tourism Information System (OTIS)

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The Oregon Tourism Information System (OTIS), is a collaborative platform used for sharing and maintaining Oregon's tourism related points of interest. OTIS unifies the efforts of the tourism industry, helping to streamline content management and communication. As tourism leaders in your region, the RDMO is looked to as the main OTIS user for each region.

The entity selected will be responsible for the collection and submission of all tourism-related content from the entire region into the Oregon Tourism Information System (OTIS). RDMOs are expected to upload new listings and maintain current listing information on a quarterly basis each fiscal year. In an effort to ensure regional coverage, RDMOs do not need to be the exclusive listing provider in their region but need to have an awareness of other entities within their region that are actively providing listings to OTIS.

#### How to Access OTIS

Accessing OTIS requires a user account. If you don't have an OTIS account, you may register for one at <https://otis.traveloregon.com>. If you are unsure if you already have an account, please reach out to Cecilia Suvagian at [OTIS@traveloregon.com](mailto:OTIS@traveloregon.com).

We also recommend understanding what and how other DMOs and/or community organizations in your region are managing content in OTIS. This will help to minimize duplication of efforts. Travel Oregon can provide a list of OTIS users in your region. At a minimum, Travel Oregon would like each RDMO to have an understanding of who in their region is actively providing listings via OTIS. If there are gaps in listing information, the region should be the resource to provide that listing information.

#### How to Manage Content in OTIS

Once you have an OTIS user account, it is recommended you conduct an initial review of existing data for your region. After reviewing the data, you will be able to identify where there are gaps or where duplicate content exists. We recommend prioritizing the addition of and/or updating of marquee attractions, key tourism related businesses and events listings in your area.

There are a variety of approaches you can take to creating and updating your OTIS content.

You may choose to update listings by their respective category (Types) such as Restaurants, Museums, Parks or by consolidated groupings (Collections) such as Food & Drink and Attractions. If you are focused on listings for your region, management of multiple types can also be done by grouping listings by individual Cities or Regions.

Listings may be created or edited individually. Larger quantities of new listings may be added to OTIS via OTIS' bulk upload function.

At this stage we recommend determining what content governance looks like for your organization. How frequently can your realistically audit and review your listings?

Listings may be audited for accuracy at any time, however setting up a regular schedule for review can be helpful (e.g. review all Restaurant listings for accuracy on a quarterly basis) to ensure your listings are up to date.

You can also have multiple users in your region that update their city or sub-regional listings. We would anticipate the RDMO to be aware of these users and continue to provide listings for any gap areas. If you would like to host a training for users in your region please reach out to Cecilia at [OTIS@traveloregon.com](mailto:OTIS@traveloregon.com).

#### How OTIS Can Power Your Website

Did you know that OTIS listings can be pulled into your website?

OTIS was built with open source software, and its powerful API enables distribution of listing content to multiple platforms and devices. If you are interested in OTIS content appearing on your website, please reach out to Kate Jorgensen ([Kate@TravelOregon.com](mailto:Kate@TravelOregon.com)) for more information. Organizations that have integrated OTIS with their websites include Willamette Valley Visitors Association, Oregon's Adventure Coast, Visit McMinnville, Visit Seaside and Washington County Visitors Association.

#### Still have questions?

Please do not hesitate to reach out to Cecilia Suvagian at 971.717.6188 or [OTIS@traveloregon.com](mailto:OTIS@traveloregon.com).

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<sup>1</sup> Please note that the Oregon Wine Board (OWB) is the authority on Wine & Winery listings in OTIS. OTIS receives listing updates from OWB's database daily. Additionally, Travel Oregon partners with the Oregon Restaurant & Lodging Association (ORLA) to maintain listings for lodging properties.

<sup>2</sup> An API is a set of requirements that governs how one application or website can "talk" to another..

## Marketing and Sales Materials

Travel Oregon requires a review of all RCTP-funded marketing and sales materials before the materials are published and distributed.

Please submit materials and/or social media plan to Kate Sappell (ksappell@traveloregon.com) *and* Mark Senffner (mark@traveloregon.com). Travel Oregon’s staff will complete their review of materials one week after receiving them.

Travel Oregon logos and mini styleguide can be downloaded at: [http://barberstock.com/collection/traveloregon/bw\\_logos](http://barberstock.com/collection/traveloregon/bw_logos)

### 1. Print Marketing and Physical Projects

Printed materials and physical projects must clearly show the Travel Oregon logo and additional wording: “Funded in part by Travel Oregon.” Use of the Travel Oregon logo must be submitted to Travel Oregon for review prior to finalizing a published piece.



Example advertisement



Funding attribution with Travel Oregon logo.

### 2. Web and Social Media

The Travel Oregon logo is required for standard banner ads. The linked webpage or landing page should also contain the Travel Oregon logo.

For social media, it may be more innovative to tag TO and show us as a content sponsor. See the example below. In this example, the Port of Portland added Travel Oregon as a partner for the ad below and it shows that Travel Oregon is helping to sponsor this content. This can be done for Facebook and Instagram.



Bring your jokes and hijinks to Director Park, April 19th from 11am-3pm. You could win two free, roundtrip tickets to London.

On Twitter, it is required to tag Travel Oregon.

## Regional Strategic Investment Fund or Regional Grants

To create catalytic and impactful tourism projects and investments outside of the RDMO/DMO realm, RDMOs are required to setup and administer their own Regional Strategic Investment Fund or Regional Grants Program. RDMOs are required to invest a minimum of 10% of the RCTP disbursement received from Travel Oregon into this Regional Strategic Investment Fund or Regional Grants Program.

Regions may select two primary ways of funding tourism projects and investments through either a Regional Strategic Investment Fund or Regional Grants Program. The Regional Strategic Investment Fund pathway allows for RDMO partners to make precise investments in areas of importance to the region. The Regional Grants Program pathway allows for the RDMO partners to setup a more traditional grant program. Both pathways are acceptable and have their own positives and negatives. If rollover exists from year one of either type of programming, regions are expected to roll that amount into the year two funds.

It is the desire of Travel Oregon that stakeholders are made aware of how your region intends to distribute these resources. Once the RDMO has designated which pathway is most appropriate for their region, RDMOs are required to send communications to stakeholders about their processes and how stakeholders can leverage said process.

It is expected that RDMOs will report to the RCTP team in quarterly consultation meetings on how this resource is utilized. Specifically, where investments are made, or grants are delivered out of the Regional Strategic Investment Fund or Regional Grants Program. The goal of this communication is to make Travel Oregon departments aware so they are better able to support and develop synergies for regional projects and programs.

All projects and programs funded with Regional Strategic Investment Fund or Regional Grants Program resources need to adhere to the branding guidelines mentioned within this document in the Marketing and Sales Materials component of this document.

## Immediate Opportunity Fund

Regions are required to set aside 5% of their RCTP allocation per fiscal year for an immediate opportunity fund. These resources can be spent by RDMOs in response to regional disasters, or opportunities that alter the regional tourism economy. Any rollover or unspent resource from this allocation is required to be transferred to the region's grant or strategic investment fund each year.

The IOF is setup to be responsive to specific regional needs and/or crisis. The intent of this resource is not to fund run-of-the-mill tourism programming.

## Grant/Strategic Investment Tips

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### Width vs. Depth

Wide impact means that the project may serve many people in a minimal way. Deep impact may mean that the project serves a few people but with high quality outcomes. We hope to see projects that demonstrate meaningful impact that also align with local initiatives.

### Right-Size Your Application

Less is best. Short and simple applications are much more convenient for the applicant and easier for you to manage. Are there questions on your application that are getting duplicate answers? You may be able to remove one of those questions if that's that case.

### Don't Collect It If You Can't Connect It

Are there questions on your application or report forms that include information that you never use? If so, lose it! Collect information that shares the outcomes you need and use in your reporting of these dollars.

### Collect Testimonials

Testimonials can be used to share the impact of your grant dollars or investment with just a few sentences from the awardee. You can collect these in a final report or in an email ask to your awardee/recipient. There is opportunity in using these testimonials to share the impact of your funding.

### Kick-Off Events

If awarding grants, consider inviting awardees to a "kick-off event" that allows for networking, celebrating their award, and sharing of project ideas. This could also be an avenue for providing them with their initial grant check or the grant agreement.

## Designate Impact Of Funds

Collecting data on what your region is funding with a direct investment, or a grant will allow you to share the story of your funding trends.

- Enhance: an improved experience
- Expand: something that doesn't exist
- Promote: marking an asset

## Timeline Check-Ins

Review project timelines and find key dates that would allow for a good check-in point. You never know what you'll learn. Intentional check-ins provide opportunities for project contacts to communicate setbacks and/or successes to you, which leads to fewer surprises down the road.

## Travel Oregon Grants Contact Info

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# ADDENDUM - EMERGENCY MANAGEMENT AND DISASTER RESPONSE

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## OVERVIEW

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- RDMOs may pivot regional plan investments in the event of an emergency or disaster. Emergency management and disaster response activation will be determined by Travel Oregon staff, under the governor's direct declaration of an emergency. This declaration will initiate an emergency operating environment and puts into effect the protocols listed within the Emergency Management & Disaster Response Addendum.
- RDMO partners are to inform Travel Oregon of the emergency or disaster, and the on the ground needs for recovery.

### Leverage & Alignment

- To optimize alignment within Oregon's tourism industry in recovery, ensure RDMOs leverage their work with Travel Oregon's ongoing strategic imperatives, and to reinforce a cohesive and thorough statewide tourism strategy, RDMOs are encouraged to increase the suggested leveraged programming percentage to 30% alignment. It is critical that Travel Oregon and RDMOs work in collaboration on projects and investments that have a demonstrable return on investment for Oregon's tourism industry and Oregon's communities. Leveraged programming with Travel Oregon will occur through a revised and targeted Menu of Investment Opportunities that incorporates programming specific to parts of the regional tourism economy that has been affected by disaster. RDMOs are encouraged to select from this adapted Menu of Investment Opportunities.
- RDMOs are permitted to rollover RCTP funds biennium to biennium in the event of an emergency or disaster. Clear documentation around rollover of resource to the next biennium must be provided to Travel Oregon.
- RDMOs may proactively reallocate resources for rollover to ensure organizational stability and business continuity. These allocations may be drawn from regional staffing and administration budgets, and regional investment portions of budget.

- RDMOs are permitted to support local industry including DMOs recovery; may be upon the recommendation of stakeholders according to gaps identified in the first wave of programs established at federal, state and local levels, if such gaps emerge.
- It is at the discretion of RDMOs to engage in a Regional Grants or Strategic Investment Fund with RCTP resources. The provision to set aside 5% for the Immediate Opportunity Fund will be waived in the event of an emergency or disaster.

### Staffing

- RDMOs may use up to 40% of their annual disbursement (budget) on hiring departmental staff (as it applies to areas of RCTP investment strategy), human resources and other administrative needs. As local capacity potentially diminishes due to disaster related effects, ensuring stability within the regional layer of operations will be increasingly important.
- RDMOs may choose to increase staffing and administration in response to the disaster related needs of their region and stakeholders.

### Expectations

- RDMOs will work collaboratively with Travel Oregon to determine an appropriate response to managing and uploading Oregon Tourism Information System (OTIS) content throughout the fiscal year. The requirement to upload on a "quarterly basis" is paused given the ever-changing dynamics on the ground during times of disaster. The responsibility of updating OTIS can occur on a less regimented schedule until conditions on the ground stabilize.

## TYPICAL RCTP PLAN – CURRENT PROGRAMING RATIOS

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## EMERGENCY RESPONSE – PROGRAMING RATIO

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## EMERGENCY RESPONSE w/ REGIONAL GRANTS – PROGRAMING RATIO

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