

# KLAMATH COUNTY TOURISM

## TRADITIONAL GRANT PROGRAM APPLICATION



**Date Issued:** September 1, 2019

**Issued By:** Klamath County Finance  
305 Main Street  
Klamath Falls, Oregon 97601  
  
(541) 883-4202

**Applications Due:** 5:00 p.m., September 30, 2019

## I. PROGRAM INTENT

### KLAMATH COUNTY'S MISSION AND GRANTS PROGRAM KEY INITIATIVES

The mission of Klamath County is: "Serving our Citizens through Stewardship." Klamath County has established a program to make grant awards "to eligible applicants for projects that contribute to the development and improvement of communities throughout the county by means of the enhancement, expansion and promotion of the visitor industry."

Grant program applicants may apply for grants of up to \$25,000 per project and may apply for no more than two projects in the same cycle (two cycles will be opened during the year). Each project requires its own application. Applications will be accepted and awarded up to twice per year. Applicants must demonstrate at least a 30% cash match for any grant request of \$3,000 or more. Grant applications of less than \$3,000 do not require a cash match.

### PROGRAM KEY INITIATIVES

*Applicants will need to identify in your application which of Travel Oregon's following key initiatives your project aligns with. (Projects that do not align with at least one of the initiatives below will be ineligible for funding.)*

1. Maximize the economic return on public and private investments in Oregon
2. Drive year-round destination-oriented travel from Oregon's key domestic and international markets by aligning and optimizing local opportunities
3. Develop destination-based products that are in concert with Oregon's natural environment, support the stewardship of the state's resources and its rich history
4. Provide strategic industry professional development and training opportunities

### INVOLVING YOUR DESTINATION MANAGEMENT ORGANIZATION (DMO/RDMO)

Applicants are strongly encouraged to contact their local Destination Management Organization (DMO, Discover Klamath) and Regional Destination Management Organization (RDMO, Travel Southern Oregon) about the grant project idea and request letters of support to enhance their overall application. For-profit entities are required to show support for their project idea from their local DMO or RDMO.

## II. ELIGIBILITY

### ENTITY ELIGIBILITY

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

- Local government
- Port districts
- Federally recognized Tribes
- Non-profit entities registered with the Oregon Secretary of State's Office
- For-profit entities may apply for sales and partnerships for tourism education type grants only. Eligibility will be based on evidence of local destination marketing organization or regional destination management organization support. *\*Letters of support will meet this requirement.*

### ENTITY INELIGIBILITY

Ineligible applicants include those listed below:

- Entities that have a bankruptcy or other financial corruption within the past five years
- Entities that fail to fulfill past grant award requirements within past two cycles (includes: project completion, submission of required grant reporting, proper use of grant funds)
- For-profit entities requesting a sales or partnerships for tourism education type grant without written letter(s) of support from local destination marketing organization or regional destination management organization
- Entities that fail to submit the project idea form to their RDMO or whose application varies substantially from the project idea form.
- Applicants who fail to attend Marketing 101 and Marketing 102 (applications for less than \$3,000 are not required to attend, but are encouraged to do so).
- Officer, agents, employees of the County, as well as entities actively under contract with the county for tourism or economic development related services.

## PROJECT ELIGIBILITY

*Eligible projects or initiatives must provide for the improvement or expansion of the tourism economy in Oregon.*

Project should create an enhancement to the visitor experience in Oregon and is intended to increase the likelihood of visitation from outside the County. Though it is not a requirement, ideally, the project will lead to an increase of overnight stays in local lodging facilities. Partnerships with tourism entities and businesses, economic development and/or government entities are looked upon favorably and strengthen an application.

Initiatives or components that have never been undertaken and will provide significant enhancements or improvements to Oregon's travel and tourism industry are ideal for this grant program.

Preference points are given to projects that are scheduled during the shoulder season (October through May), conducted outside of the Klamath Falls urban growth boundary, and promote family friendliness.

NOTE: If you are new to international marketing or have never worked with global or domestic packaged travel tour operators, it is recommended that you connect with your DMO or RDMO before applying for Sales type grants.

**All projects must fall within one of these project types (Sales, Marketing, Partnerships for Tourism Education or Development):**

### **SALES**

- Event and tradeshow participation
- Event-related transportation (d)
- Tradeshow related production or shipping
- Event hosting or sponsorship fees
- Event bid fees
- Familiarization tour support
- Tour operator support
- International visitor trainings (a)
- Receptive-trade related trainings (b)

*NOTE: If you are new to international marketing or have never worked with global or domestic packaged travel tour operators, it is recommended that you connect with your DMO or RDMO before applying for Sales type grants. FOR-PROFIT entities are only eligible for Sales and Partnerships for Tourism Education type grants.*

### **MARKETING**

- Content development
- Print collateral
- Broadcast media
- Website optimization
- Branding development
- Visitor/Consumer outreach

### **PARTNERSHIPS FOR TOURISM EDUCATION**

(specific to for-profit businesses)

- Travel Oregon conference/training participation

### **DEVELOPMENT**

- Community-based trainings
- Strategic planning
- Feasibility studies – Research studies
- Visitor access improvement
- Mapping

- Wayfinding signage design or construction
  - Technical assistance, including: Grant writers and consulting services
  - Professional development
  - Visitor amenities or infrastructure development (c)
  - Conference or training registration.
- (a) International visitor trainings are encouraged for any applicant but especially those who are new to the international market and considering a sales type project.
  - (b) Receptive-trade related trainings are encouraged for any applicant but especially those who are new to the international market and considering a sales type project.
  - (c) Applications for construction projects must include plan drawings and approval from permitting authorities if required locally.
  - (d) Event-related transportation is defined as intra-event transportation for event attendees and participants.

#### INELIGIBLE PROJECTS AND ACTIVITIES

The following activities are **not** eligible for grants:

- Costs of staff or consultant salaries, mileage or associated fees that are **already** budgeted to execute a particular area of work within an entity;
- Projects that emphasize private profitability and/or investments that could be considered a regular cost of doing business;
- Deferred, regular or ongoing maintenance and upkeep;
- Cannabis or tobacco tourism-related projects;

### **III. DEVELOPING A STRONG APPLICATION**

#### PREFERENCE

Applications should be clearly written and present a strong case for support. Preferences identified that will enhance a grant application's competitiveness include:

- Project goals that align with regional and/or local objectives
- Projects that address a need in the tourism industry and shows potential to generate significant regional and/or local impact

- Community support is evident both through local cash or in-kind match contributors and support letters
- Applying entity has a track record of effective work, evident through strong support letters
- Good planning is evident in the project timeline, budget and sustainability
- Plans for evaluating impact are clear, appropriate and achievable
- Projects that promote diversity and inclusion (accessibility, minority populations or underserved visitor segments)
- Projects that showcase a public/private partnership with Oregon-based small businesses
- Project/events that take place in the shoulder season
- Project/events that take place outside of the Klamath Falls urban growth boundary

#### PROJECT BUDGET

The grant project budget must be submitted using the Excel template provided by Klamath County. Grant recipients are required to keep the project budget updated throughout the lifetime of the grant, unless the project is for professional development training (see Section V. for more information on reporting requirements). A final budget, including documentation for expenses incurred, will be a required upload in the final Grant Accomplishment Report. No more than 80% of the total grant award may be drawn prior to the final report.

#### MATCHING FUNDS

Grant applicants must provide a minimum of 30% cash match of the total amount awarded. Additional match above the required 30% cash match will enhance the overall application. Klamath County funds may not be used as matching funds for any grant application submitted by the recipient of those Klamath County funds. Grant applications for amounts of less than \$3,000 are not required to provide a cash match amount.

#### SIGNAGE

Grant projects that involve signage of any kind require approval letters from each organization or entity involved in permitting or approving signage installation. Evidence of approval must be on official letterhead and be included with any other support letters when submitting the application.

*Applications will not be considered unless evidence of approval has been submitted.*

## PERMITTING

Grant projects that involve permits of any kind require approval letters from the state and/or local permitting authorities. Evidence of approval must be on official letterhead and be included with any other support letters when submitting the application.

## HISTORICAL STRUCTURES

Local, state and federal compliance approval processes need to be followed. Additional documentation may be required depending on the scope of the project. Project or structure must demonstrate being a cultural, historical tourism asset in the community. If applicable, include evidence that the historic structure is part of a certified local government community, designated Main Street area, or local or National Register historic district or place.

## **IV. REVIEW OF APPLICATIONS; DECISION TO AWARD**

The application process will open for a one (1)-month window twice per year as funds remain available. Applications will be reviewed and decisions to award will be made based on the following:

- Degree to which grant project aligns with and furthers the identified key initiatives (as defined in Section I. of these guidelines)
- Includes intended outcomes and return on investment for positive economic impact on the community and/or region as a direct result of the project
- Demonstrates clear viability, integrity and long-term sustainability of the project
- Demonstrates that applicant and project meet the eligibility requirements of Section II, and that the application is complete and contains all information required by these grant guidelines
- Supports application enhancements as identified in the Preference section of these guidelines

Klamath County reserves the right to award grants in amounts totaling less than all funds that are available under the Tourism Traditional Grant Program, to award a different amount than is provided in a grant application, to make changes to the Grant Guidelines or to cancel the Tourism Traditional Grant Program in its entirety.

**Incomplete proposals, nonattendance at mandatory meetings, failure to meet the submission deadline or other deficiencies may result in an application being rejected without ranking. Mail delivery, website functionality and office accessibility issues are the responsibility of the applicant and will not influence the submission deadline of 5:00 pm on September 30, 2019.**

## **V. GRANT CONTRACTS**

Applicants who are awarded a grant will enter into a contract with Klamath County, which includes agreements to comply with all guideline requirements and to complete project as approved.

### **INSURANCE REQUIREMENTS**

The County generally requires all parties to a contract to maintain insurance coverage for the duration of the contract related to bodily injury and property damage which may arise out of the operations of the grant recipient or his/her subcontractors, employees, agents, assigns or for anyone whose acts any of them may be liable. Per occurrence coverage amounts should be \$1,000,000 and aggregate cover amount of \$2,000,000. The County does require each organization to name the County as an additional insured and to remit an Accord 25-S certificate of insurance with the contract. If you have questions related to the County insurance requirements, please contact the Risk Manager at 541-851-3693.

### **BUDGET MONITORING; TIMELINES**

Projects will be monitored by Klamath County. Grant recipients shall maintain accurate records and will use provided report templates for submission of all required information. Grant recipient will be required to keep an ongoing, updated timeline and budget throughout the lifetime of the grant. Klamath County may request copies of the working budget throughout the lifetime of the grant. Klamath County will provide access to all reports and additional forms required.

NOTE: Grants for professional development (conference or training participation) do not need to maintain an ongoing budget and timeline. However, grant recipients will be required to submit an initial and final budget and timeline stating anticipated travel costs (on a per diem schedule) and registration costs. Detailed information on required reporting can be found in the Grant Reports section of these guidelines.

### **KLAMATH COUNTY RECOGNITION**

In many areas of Oregon, a regional style guide has been developed for use by tourism businesses and destination marketers. Grant recipients are encouraged to adopt these guidelines in order to better align with the other communication efforts. Klamath County may be available to consult on specific design needs.

Grant recipient shall visibly display on all finished grant projects (publications, websites and other significantly visible project activities) the acknowledgement: *"This project has been funded in part by the Klamath County transient room tax grant program."* Klamath County will work with grant recipient to ensure proper usage and placement of the Klamath County logo pursuant to the Klamath County Logo Usage Agreement (if applicable).



### **Sales Project Types**

Not all sales project types will be able to display Klamath County recognition. For trade-show shipping or participation costs, host bids or tour operator support, Klamath County recognition is not required. For projects that are events, trade-show related production, receptive tour operator trainings, or similar, Klamath County recognition must be displayed on published collateral, if applicable.

### **Development Project Types**

Not all development project types will be able to display Klamath County recognition. For projects such as feasibility studies, research or strategic plans, Klamath County recognition must be displayed on a final published report, if applicable. Do not place Klamath County recognition on wayfinding signage, unless authorized by Klamath County to do so. Grant recipient must submit signage designs to Klamath County for review prior to production and placement. For professional development, technical assistance, or conference participation, Klamath County recognition is not required.

### **PROJECT DESIGN**

Grant recipients shall allow at least two weeks for Klamath County to review the project design and provide feedback (timing will depend on the complexity of the project). Grant recipient must cease further grant project design work until feedback from Klamath County has been delivered. While a grant recipient is not required to make all recommended changes Klamath County may provide, the grant recipient must adhere to all grant program requirements. Required recognition could be different than what is listed below and will be included in grant recipient's contract or determined while working with grant recipient.

### **Marketing Project Types**

All marketing project types must submit project design to Klamath County for review prior to finalizing a published piece.

### **GRANT REPORTS**

All required reports may be submitted through Klamath County's online grant management system or in paper to the Klamath County Finance Department.

### **Grant Accomplishment Report and Final Budget**

Project must be completed within nine (9) months of the signed agreement date and the Grant Accomplishment Report submitted to Klamath County within 60 days of the event completion date. The final budget along with copies of detailed project expenses must be uploaded as part of the report. No further reimbursement will be provided after submission of this report.

NOTE: Grants for conference or training attendance do not require a Grant Accomplishment Report or final budget. However, recipient must submit a post-conference testimonial on the value of attending the conference or training.

NOTE: Sales Type Grants for tradeshow attendance do not require a Grant Accomplishment Report or final budget. However, recipient must submit a post-tradeshow report that includes the ROI and outcomes which may include leads generated, or other results as appropriate.

#### GRANT FUNDS DISBURSEMENT

Recipients are eligible to receive up to 80% of the awarded funds through a reimbursement system, upon invoice and with documentation of expenses with 20% reserved for final reporting. These funds may only be used for costs related to the project and clearly identified in the grant budget. Grant funds will not be released in advance of an expenditure. Expenses incurred prior to the effective date of the signed grant agreement are not eligible for reimbursement. Any grant funds not used as approved in the grant application budget shall not be disbursed by Klamath County pursuant to the grant contract. Projects must be completed within the approved grant timeline (outlined above). Final disbursement of funds including the 20% reserve will be sent once the project is complete and the Grant Accomplishment Report and final budget have been submitted, reviewed and approved by Klamath County.

You may submit reports earlier than required dates if your project timeline allows. Failure to submit reports by their deadline may result in ineligibility for any future grant programs offered by Klamath County.

**NOTE: Klamath County will not reimburse a grant recipient for any costs associated with a grant project that are incurred before a grant contract has been signed.**

#### **GRANT TIMELINE**

Below is the timeline for Fall Cycle of the 2019 Klamath County Tourism Traditional Grants

- August 23, 2019—Press Release regarding upcoming Grant Application Cycle
- September 1, 2019 – Application period opens
- September 10, 2019 (3-4 p.m.) – Marketing 101 Class  
Location: Klamath County Government Center Room 214 (**required attendance by grant applicants**)
- September 30, 2019 (5 p.m.) – Grant application period closes, deadline for submissions
- October 8, 2019 (3 p.m.) –Tourism Grant Review Panel (TGRP) meets
- October 9, 2019 (10 a.m.) – Board of Commissioners consideration of TGRP recommendations
- October 22, 2019 (3-4 p.m.) – Marketing 102  
Location: Klamath County Government Center Room 214 (**required attendance by grant recipient**)
- October 25, 2019 (5 p.m.)– Tourism Traditional Grants signed contract due to Klamath County
- November 12, 2019 (8:30 a.m.) – Board of Commissioners business meeting to sign agreements

## **GRANT APPLICATION CHECK LIST**

Access the 2019 Klamath County Tourism Grant Program Application [ONLINE](#).

- Klamath County Homepage>Departments>Finance Office (under Administrative Services)>Tourism Grant Program>Traditional Tourism Grant Program
- Or you may simple click the Tourism Grants Button at the bottom of the Klamath County Homepage and select Traditional Tourism Grant Program.
- View the application questions before you begin
- Essay style answering. Contact the Klamath County Finance office at (541) 851-3652 for troubleshooting or Discover Klamath at (541) 882-1501

Before beginning the paper or online application, we encourage applicants to gather all information and/or documents required to submit the application:

- Proof of Federal Tax ID
- Entity's Federal W-9 Form
- Project Budget
- Project Timeline
- Project Support Letters – 3 required
- Signage Documentation: Evidence of approval from all parties involved
- Proof of insurance
- Logo usage agreement, if required
- Marketing type projects: If producing collateral you must describe your distribution plan and associated budget costs
- Infrastructure Development: If your project involves construction you must include plan drawings and approval from permitting authorities if required locally