



# Travel Penticton Society 2019 Grant Program

## 1 INTRODUCTION

Funding for festivals, events and marketing initiative grants are administered by the Travel Penticton Society.

## 2 PROGRAM GOALS

To leverage marketing funds from the Travel Penticton Society and the private sector to maximize the potential for increased visitation and growth in the tourism industry. Travel Penticton encourages new events in the community, which foster marketing to new product sectors and visitor demographics.

## 3 GUIDELINES

- Projects must attract visitors from **outside of the Penticton Metropolitan Area** (Naramata, Okanagan Falls, Kaleden, Apex Mountain) and **increase tourism visitation and spending**.
- This is a cost sharing program - **a maximum of 50% Matching funding** will be provided to each successful applicant (taxes are not leveraged as part of this funding model).
- Travel Penticton encourages programs in the community that **foster interest from new product sectors and new visitor demographics, particularly in the shoulder seasons (late Fall, early Spring)**.

## 4 ACTIVITIES AND EXPENSES

Program funding is intended to support new or expanded research-based marketing activities primarily in short-haul markets (BC, Alberta, and Washington).

The use of funds can be divided into a number of categories or marketing tactics. These relevant and measurable activities should be designed to target a specific visitor profile and/or stimulate business activity by encouraging visitation during both 'on and off-peak' travel times.

### 4.1 Eligible Activities

- **Paid Advertising** – Print Newspaper/Magazine, Radio, Television
- **Digital Advertising** – Paid Search Engine Marketing, Paid Social Media, Display Advertising, Native Advertising
- **Print Collateral** - Brochures, Rackcards, Flatsheets, Guides, Maps, Brand Alignment
- **Consumer-Focused Asset Development** - Written Content, Photography, Video, Project Microsite or Landing Page.
- **Market Research** - Consumer Shows, Travel Media Relations

## 4.2 Ineligible Activities

- **General Administrative Costs** – Including salaries, office expenses, rent and other normal costs of business.
- **Application Submission Costs** – Any costs associated with developing and submitting applications for funding.
- **Costs associated with Developing Strategic Plans** – Includes new and existing events.
- **New Brand Development** – Design of new logos, re-branding of existing marketing materials.
- **Website** – Any maintenance, design and/or hosting (not directly related to the festival, event or project).
- **Travel Costs** - Other than to consumer shows.
- **Capital Costs** - Including equipment or software purchases, any capital costs associated with marketing tactics (such as billboard or signage installation, vehicle leasing, brochure display racks), Rental or lease of equipment or facilities.
- **Contra or in-kind contributions** - including but not limited to: accommodation, transportation, meeting space, admissions and passes, etc.

## 5 FUNDING

### 5.1 Terms of Funding

Submissions must be received electronically via email by the Travel Penticton Society no later than **4:30pm PST on November 30, 2018** to be eligible for funding. On rare occasions, applications may be accepted outside these dates, on a first-come, first-served basis, subject to availability of funds.

- Applicants are eligible to apply for up to 50% in matching funding from Travel Penticton. This is a cost-shared program; Applicants must contribute 50% or more towards the total project budget (excluding taxes).
- All successful applicants will receive a Funding Notification letter upon approval of their application, as well as an Agreement (contract) which outlines the obligations of each party.
- Once your application is approved, funding will be distributed throughout the year in 3 payments:
  - 50% payment will be made upon signing of the contract.
  - 35% payment will be made following an **Interim Review\***.
  - 15% will be paid upon completion of approved marketing tactics and submission of **Post Project & Financial Report\*\***.
- Funding is contingent upon:
  - The total amount of funds available.
  - Adherence with the Travel Penticton Society Memorandum of Understanding and Partnership Agreement (attached); and

- Your organization's status remaining in good standing.
- If your event is ticketed you must provide complimentary passes for key Travel Penticton staff and our Board of Directors (the number of passes provided will be at your discretion).

*\* An Interim Review will be conducted 2 months prior to project/event start date.*

*\*\* Post Project & Financial Reports are due 30 days after project/event completion.*

## 5.2 Funding Payment

- If cash flow challenges are expected based on the payment timing, please contact program staff to discuss options.
- The second payment of 35% of the funds will not be released until the Interim Review is complete to the satisfaction of Travel Penticton.
- If an applicant fails to provide a Post Project Report, the final payment of 15% of the funds will not be released and will result in applications being rejected in subsequent years. Flexibility in this process may be acceptable in extraordinary situations.
- Travel Penticton will require the return of any unspent funds or funds spent on ineligible activities within 30 days of project completion or notification.
- You must provide copies of receipts to support any funding claims.

## 6 APPLICATION PROCEDURES

### 6.1 Approval Process

Applications will **only be received electronically via email** until **4:30pm PST on November 30, 2018** using the Travel Penticton **Application Form provided**. Applications will be evaluated by a committee comprised of members of the Travel Penticton Board of Directors and the Executive Director. Travel Penticton will have the ultimate decision on any application. Applicants may be contacted by the Grant Funding Committee to consider changes to their application to better meet program requirements and criteria.

The applicant must be prepared to present a business case to the Travel Penticton Board of Directors.

Travel Penticton reserves the right to select and approve project proposals which best meet the objectives and requirements of the program and demonstrate the greatest potential to meet program goals and objectives.

Applications will be **reviewed in December, 2018**. Funding **notification letters will be issued by January 14, 2019**. The designated lead applicant listed in the application will be notified of the funding decision.

## 6.2 Funding Notifications and Shared Cost Agreements (Contracts)

Travel Penticton will issue a Funding Notification letter once applications have been approved. Typically, all Funding Notifications will be issued by January 14, 2019. Travel Penticton will also require a formal signed contract, known as a Shared Cost Agreement. **All successful applicants will be required to formally enroll as member of the Travel Penticton Society at a cost of \$199 for the year** (this fee will be automatically deducted from your initial funding cheque).

## 6.3 Program Execution Changes

Any changes to the application will need to be approved by Travel Penticton. All changes must be approved by Travel Penticton in order to be deemed an eligible expense. Marketing activities undertaken that have not been approved or are not identified in the contract are not eligible for funding.

## 6.4 Feedback

Travel Penticton will provide constructive feedback to applicants with the intent that applications can best meet program guidelines.

## 6.5 Project Reporting

An Interim Review will be conducted prior to the 2nd payment by no later than 2 months prior to project/event start date. Travel Penticton will provide a report outlining media coverage for the event/project being funded based on specific search criteria.

A Post Project Report must be submitted 30 days after project/event completion in order to receive final payment of funding. Recipients will report on the actual results of the marketing project.

The Post Project Report must also include a detailed list of suppliers and expenses that equal the total amount of funds approved for the marketing project in a format stipulated by Travel Penticton along with a copy of the receipts.