

APPLICATION FOR SOUTHEAST
MONTANA COOPERATIVE
MARKETING FUNDS



Application MUST be typed. Handwritten applications will not be accepted. Applications should be forwarded to Southeast Montana electronically OR mailed to:

Visit Southeast Montana Office
Brenda@SoutheastMontana.com
815 South 27th St.
Billings, MT 59101
Ph. 406.294.5270

APPLICANT CONTACT INFORMATION

ORGANIZATION NAME _____ PROJECT SUPERVISOR _____
ADDRESS _____ CITY/STATE/ZIP _____
EMAIL _____ TELEPHONE _____

APPLICANT PROJECT INFORMATION

PROJECT TITLE _____
TOTAL BUDGET FOR PROJECT (TAKEN FROM PG. 9) _____
AMOUNT OF FUNDS REQUESTED (NOT TO EXCEED 50% OF TOTAL PROJECT BUDGET) _____

PROPOSED STARTING AND ENDING DATES OF THE PROJECT
(PROJECT MUST BE COMPLETED & COMPLETION REPORT SUBMITTED NO LATER THAN DATE INDICATED ON
CYCLE I/CYLE II TIMELINE ON PAGE 2)

START _____ END _____

Southeast Montana Application for Funding

We are pleased you have requested an application to apply for a Visit Southeast Montana marketing grant. Successful applicants will utilize these funds in accordance with **Southeast Montana's Mission: to increase visitors to Southeast Montana by increasing awareness of our region, showcasing our cultural heritage, developing memorable experiences and educating our residents about the economic benefits of tourism.**

Grants are made available through the lodging tax collected in the Southeast Montana region. For every occupied room night in Montana lodging establishments, guests are taxed 8%. A portion of those funds are returned to Visit Southeast Montana to **promote tourism across the region.**

Cooperative Grant Goals:

Visit Southeast Montana desires to support our tourism partners to increase visitation to their community and increase visitor spend while in region. These grants are cooperative with a 50/50 match required (no in-kind). The intent of this program is to encourage the development of new or expanded marketing projects and/or destination events, thereby increasing the appeal of the community and region while leveraging collective funds.

Granting Cycles and Timelines

Visit Southeast Montana grants are awarded (2) times per year, as funds are available. Visit Southeast Montana operates on a July 1 – June 30 fiscal year, with an annual audit in late August or early September of each year. As such, award recipients are asked to submit Completion Reports and supporting documentation in a timely manner, preferably within 30 days of event or project completion.

Please consider the following grant cycles when applying for cooperative marketing grants:

Cycle I

Grant cycle opens	Dec 15
Grant applications due	Feb 1
Grant Committee meets	on or before Feb. 15
Grant Applicants notified	February 28
Grant Completion Reports Due	September 30

Cycle II

Grant cycle opens	April 15
Grant applications due	June 1
Grant Committee meets	On or before June 15
Grant Applicants notified	June 30
Grant Completion Reports Due	March 30

NOTE: If the designated date falls on a weekend or holiday, the date automatically moves to the next business day.

Deadline

Applications must be received at the Southeast Montana office, 815 S. 27th St. Billings, MT 59101 (PO Box 31177, 59107) or to brenda@southeastmontana.com **by 5:00 p.m. on the date designated above.**

Eligible Applicants

To be eligible for cooperative funding, applicants must meet the following requirements:

- 1) Project must be of a strictly marketing nature to promote an area attraction or event within Southeast Montana tourism region which includes the Crow Reservation and Northern Cheyenne Reservation plus the following counties: Yellowstone; Golden Valley; Musselshell; Treasure; Rosebud; Custer; Prairie; Dawson; Wibaux; Fallon; Carter; Powder River and Big Horn.
- 2) Project must prove an ability to:
 - a. generate visitors from outside the Southeast Montana region;
 - b. book room nights/lodging; or,
 - c. increase visitor spending to the Southeast Montana region.

The Visit Southeast Montana Cooperative Grant Committee will determine whether the project meets this criterion. If it does not, the project does not qualify;

- 3) Availability of Southeast Montana resources will determine how many projects and how much will be granted in total annually, based on a July 1 – June 30 fiscal year. The total available will be split equally between (2) grant cycles: Cycle I and Cycle II.
- 4) Applicant organizations cannot be funded for more than two consecutive years. The grants are intended to be for one-time, new or expanding projects and/or events, not part of an annual operating budget/project. Existing projects that strategize expansion or modify to impact visitation will be considered on an individual basis by the Committee.
- 5) The applicant's project must total no less than \$500 and be seeking at least a \$250 grant. No project will be funded for more than \$3,000.
- 6) Applicants shall have an active status as a federally recognized 501 non-profit organization and hold open meetings for public participation or be a recognized tribal government or any other recognized government organization.
- 7) No more than 50% of any (1) line item within the project application may be funded (printing, design, distribution, etc.). No more than 50% of the total project budget may be funded;

- 8) In-kind services shall not be counted as part of an eligible match;
- 9) Administrative expenses are not eligible.
- 10) Funded projects must be finished and Completion Reports, along with supporting documentation (including detailed receipts, invoices and/or proof of payment such as a cancelled check or 'paid" invoice), submitted by the deadline that corresponds with the grant cycle (Cycle I or Cycle II). Projects cannot be extended into the next grant cycle without Committee Approval. Projects that are not submitted and approved by the Grant Report Deadline will be consider incomplete and funds will not be awarded.

Process

- 1) If submitting application by mail or hand delivery, a master copy of the attached application and any supporting documents must be provided to Southeast Montana at the Southeast Montana offices: Attn: Brenda Maas; VISIT SOUTHEAST MONTANA; 815 S. 27th St; Billings, Mt 59101. If submitting application electronically via email, only one copy is necessary: Brenda@SoutheastMontana.com; Fax: (406) 245-7333;
- 2) Cooperative Marketing applications will be reviewed by the Grant Committee and notification will sent according to the schedule outlined under "Granting Period" on page 2;

Committee may request clarification or additional information prior to determining award or denial of application.

- 3) Funds will be allocated upon the Committee's approval and applicants signing the "letter of agreement." NOTE: Allocated is different than disbursement (see #8 Completion Report below).
- 4) Failure to comply with any of the criteria listed here may require full repayment of Visit Southeast Montana monies from the awarded organization.
- 5) Award money will not be retroactive. (i.e.: Visit Southeast Montana will not pay for advertising/promotions/obligations/other contracted for by the applicant prior to grant award date).
- 6) Other rules, regulations, policies, and procedures pertaining to this grant are at the sole discretion of Visit Southeast Montana and the state Tourism Advisory Council.
- 7) Award recipients must provide a project Completion Report, samples of produced pieces and financial documentation (i.e. detailed invoices and proof of payment) to Visit Southeast Montana upon completion of project (prefer within one month of project or event being completed), but not later than date note as Cycle Deadline (on page 3).
- 8) Funds will be disbursed, from Visit Southeast Montana, directly to the awarded organization, within 31 days following the receipt of a satisfactory Completion Report, monetary receipts and supporting documentation as outlined above.

NOTE: Supporting financial documentation should include the original invoice for goods/services plus proof of payment made by grant recipient organization. For example, a cancelled check or invoice marked as "paid" by vendor. Cash transactions are not accepted. Payments on personal credit card statements are not acceptable documentation.

Project Criteria

Supervisors for approved projects must agree to follow the rules and regulations set forth by the State of Montana as well as those of the Visit SEMT Board, as outlined below.

NOTE: These criteria will be updated as the Tourism Advisory Council's Rules and Regulations are updated. This information can be found at:

<https://brand.mt.gov/Programs/Office-Of-Tourism/Resources-for-Tourism-Partners>

Printed Material (Brochures, rack cards, etc.)

- 1) The Visit Southeast Montana logo and web site www.SoutheastMontana.com shall appear on all printed materials.
- 2) Acknowledgement of partnership on collateral: "Produced with support from Visit Southeast Montana Tourism with Accommodations Tax Funds."
- 3) Include the line "Printed in (name of the country such as USA or Canada, etc.) for free distribution."
- 4) Any publication that contains advertising shall contain a ratio of at least 50% editorial and no more than 50% advertising.
- 5) All print projects shall include "Alternative accessible formats of this document will be provided upon request." It is the applicant's responsibility to ensure compliance.
- 6) 95% of all printing, paper and paper products shall maximize the use of recycled fiber. Project shall contain "Printed on recycled paper" or use the recycled symbol. "Recycled" means, in this case, the paper used should have some recycled content, if possible and feasible.
- 7) A minimum of three original or faxed bids for printing must be provided to Visit Southeast Montana if the printing will total \$1,999 or more.
- 8) State in your bid letters to printers that bids must be inclusive of all costs, including design, printing, and freight to destination stated in your print bid. Specific type of paper required, brightness, and any folding required. Any additional charges not part of the original bid will be the responsibility of the applicant. Inform the printer that the bids must be good for 90 days.
- 9) Instruct your printer to send a proof to Visit Southeast Montana prior to the actual printing of the piece. This may be forwarded via email in .jpg or .pdf

format to Brenda@SoutheastMontana.com (3-5 day lead time is appreciated).

- 10) Fund recipients must provide copies of print products along with invoices to Southeast Montana upon completion.
- 11) Fund recipients must provide an explanation of the evaluation mechanism used and the results. Results should document both cost effectiveness and project effectiveness.

Print Advertising

- 1) The Visit Southeast Montana logo and web site www.SoutheastMontana.com shall appear on all printed materials.
- 2) All print ads shall be coded to provide a means of evaluation through inquiry tracking.
- 3) Fund recipients shall provide a copy of the actual ad (tear sheet) placed along with the magazine cover from every publication in which ad space was purchased to Visit Southeast Montana.
- 4) Fund recipients must provide a summary of inquiries generated by each publication and cost per inquiry. Cost per inquiry (CPI) equals cost divided by number of inquiries.
- 5) Fund recipients must provide an explanation of the evaluation mechanism used and the results. Results should document both cost effectiveness and project effectiveness.

Television and Radio Advertising

- 1) When appropriate, the word "Montana" and/or "Visit Southeast Montana" shall be stated on all audio tracks;
- 2) Visit Southeast Montana logo shall be visible in all TV productions;
- 3) An affidavit of the media buy (ad spot), along with a copy of the audio/video tape must be provided to Visit Southeast Montana;
- 4) Fund recipients must provide an analysis of response if the advertising was a call to action. If the advertisement was not intended to generate responses, describe the method of evaluation;
- 5) Fund recipients must provide an explanation of the evaluation mechanism used and the results. Results should document both cost effectiveness and project effectiveness.

Film/Video Projects

- 1) Montana, spelled out in its entirety, shall appear at first glance on all visual mediums and shall be stated on the sound track;
- 2) A minimum of three original or faxed bids must be provided to Visit Southeast Montana;
- 3) A distribution plan shall be included;
- 4) Any project greater than 60 seconds must include the line "Produced with Accommodations Tax Funds.";
- 5) Fund recipients must provide a copy of the film or video upon completion;

- 6) Fund recipients must provide an explanation of the evaluation mechanism used and the results. Results should document both cost effectiveness and project effectiveness.

Constructed Billboards

- 1) The following documentation shall be submitted to Visit Southeast Montana prior to commitment of funds:
 - i. Written approval from the Department of Transportation for location;
 - ii. Written permission from landowner to construct a board;
 - iii. Signed agreement from the applicant on method of maintenance.
- 2) Fund recipients must provide a photo or layout of the final board;
- 3) Fund recipients must provide an explanation of the evaluation mechanism used and the results. Results should document both cost effectiveness and project effectiveness.

Visit Southeast Montana Application for Cooperative Marketing Funding

Applications will be graded on a point system. Each section listed below is weighted with the number of points shown. The applications with the highest number of points out of a possible 200 will receive funding. The Visit Southeast Montana Cooperative Grant Committee will determine the amount of funding each successful application receives.

As a reminder, these funds are dedicated to projects that elevate an attraction or event in an effort to increase visitation from outside the Visit Southeast Montana region.

1. Please provide a clear, concise and complete narrative description of this project. Provide enough information so that all who review can readily envision the project. Include details of:
 - print projects (the number to be printed, size, distribution plan and percentage of advertising vs editorial);
 - print ads (publications, size, fulfillment plan);
 - billboards (the traffic count on highway, location);
 - broadcast ads (stations, area of coverage, length of spot and fulfillment process);
 - digital advertising (impressions, reach, geotarget/target market);
 - social media (reach, engagement and other evaluation parameters).
 - Include any art or visuals if available.

No more than 500 words. **(60 Points)**

2. How does your project build on our regional assets and enhance our regional brand identity based on these brand pillars **(20 points)**:
 - Outdoor Recreation
 - Historic Significance
 - Western Authenticity
 - Dinosaur Adventures
 - Crow & Northern Cheyenne Culture
3. Please provide a description of the anticipated economic benefit of this project such as increased visitation, increased length of stay, and/or how the appeal of our region will be elevated. The goal is to attract out-of-region and/or out-of-state visitors who will bring new funds to the local economy. **(30 Points)**

For example, if an event draws visitors from more than 3 hour-drive away, they will likely spend the night. Use "average daily spend" data from ITRR as a multiplier to estimate economic impact. See the Resource List at end for links.

4. Please identify your target market for this project. Does this reach travelers outside of your immediate area and/or those already visiting your area? For example, are you specifically targeting visitors from western North Dakota? From Western Montana, from Minnesota? Or, define the demographics of your target market (for example, outdoor enthusiasts and their families or history buffs). **(30 Points)**
5. How will you evaluate the success of this project? Keep in mind that you must submit your evaluation on this basis at the ending date of your project, so be realistic and specific.

For example, we will increase attendance by X; increase trackable room nights by X. Or, we will track attendees using electronic signup/registration using tool like Eventbrite, and our goal is to have XX% from outside of Visit Southeast Montana region. **(30 Points)**

See Attachment B – Sample Report

Suggestion: Consider Survey Kits from ITRR located at: <https://itr.uvm.edu/survey-kit/default.php>

6. Indicate the project's timeline to Visit Southeast Montana. Be aware that funding is allocated but not disbursed until a satisfactory Completion Report and supporting documentation (as outlined above) are both received and approved. **(10 Points)**
7. In closing...please provide any other comments you would like to have considered that relate to this project application. **(5 Points)**
8. Complete the budget form on page 6. **(10 Points)**
9. An additional 5 points will be rewarded if the application includes all required elements and is presented in an easy-to-follow format **(5 Points)**

COOPERATIVE MARKETING PROJECT BUDGET

(Administrative and Operational Expenses are not eligible)

	Visit Southeast Montana	Applicant	Total Cost
1) Print Advertising			
Creative			
Placement			
2) Television Advertising			
Creative			
Placement			
3) Radio Advertising			
Creative			
Placement			
4) Travel Promotion Literature			
Printing (Printing over \$1,999 requires 3 bids)			
Layout Design			
Distribution			
Freight			
5) Billboards, Social Media			
Creative			
Placement			
6) Film/Video			
Creative			
Placement			
7) Professional Services			

	Visit Southeast Montana	Applicant	Total Cost
8) Other (_____)			
TOTAL	\$ _____	\$ _____	\$ _____

**VISIT SOUTHEAST MONTANA COOPERATIVE MARKETING PROGRAM
CERTIFICATE OF COMPLIANCE and CHECKLIST**

The following items must be answered "YES" to be considered and approved for funding: Please submit this page with your application.

- | YES | NO | |
|-----|-----|---|
| () | () | 1. I certify this application and attachments are correct to the best of my knowledge. I am aware that, if approved, this application becomes an agreement. |
| () | () | 2. I understand that the Montana Department of Commerce reserves the right to audit the project both for performance and accounting. |
| () | () | 3. I understand that I may not commit these funds until after the authorized approval of the project. Visit Southeast Montana will inform me in writing when and if the application has been approved and funding allocated. |
| () | () | 4. I understand that budget line items can only be adjusted 15%. Total marketing funds will be provided only in the amount approved by Visit Southeast Montana. |
| () | () | 5. I understand Southeast Montana has the right to deny any payment if the organization does not meet eligibility guidelines or if the organization is not complying with approved program in a timely manner, as outlined in the Grant I/II Cycle Timeline. |
| () | () | 6. It is understood that the organization will in no way represent itself as Visit Southeast Montana Tourism. |
| () | () | 7. When project is completed, I will send Visit Southeast Montana one hard copy of the finished project, or one electronic copy. (i.e. copies of brochures, tear sheets, TV and radio affidavits, scripts. Only one picture of billboards or copy of video is required.) |
| () | () | 8. I will submit a project completion/evaluation report upon completion of project as required by the Tourism Advisory Council in the format required. |
| () | () | 9. I have attached a copy of our federally recognized 501 (C) non-profit status. |
| () | () | 10. I have included all required attachments as stipulated under "Project Criteria;" including a copy of three print bids if I am requesting funds for printing along with a copy of my specifications sent to bidders with the request for bids. |
| () | () | 11. I will instruct my printer to send a proof to Visit Southeast Montana prior to the actual printing of the piece via email in .jpg or .pdf format to Brenda@SoutheastMontana.com |
| () | () | 12. I understand that I am to pay any project bill to the vendor, even if Visit Southeast Montana is sharing costs. Visit Southeast Montana will reimburse the recipient organization upon receipt of satisfactory Completion Report and supporting documentation, including proof of payment, within one month of receipt of satisfactory Completion Report, as outlined in the Grant I/II Cycle Timeline. |

Project Supervisor (signature required)

Date

Signature/DATE Project Authorized by Visit Southeast Montana

Signature/Date of Visit SEMT representative acknowledging awarding of grant

ATTACHMENT A: RESOURCE LIST

Link to 2016 Montana Brand Study, which includes useful information the Montana Office of Tourism uses to identify target markets, top experiences desired by potential visitors, niche markets and the like. Located at: https://marketmt.com/_shared/Marketing/docs/brand-research.pdf

The Institute for Tourism and Recreation Research (ITRR), located at the University of Montana, collects and reports on visitor data, including an annual report on the economic impact of tourism. See this link for more information: <https://itr.uvm.edu/>

Links to Survey Kits can be found here: <https://itr.uvm.edu/survey-kit/default.php>

Feel free to reach out to Visit Southeast Montana (brenda@southeastmontana.com) if you have questions about research and data collection.

ATTACHMENT B: SAMPLE REPORT

SUMMARY OF PROJECT/EVENT:

Brief description (from application)

METRICS TO MEASURE SUCCESS (example):

We planned to distribute 500 fliers, place paid media on X channels for XXXX impressions and distribute X public service announcements with goal of having 350 more attendees at event X than we did in 2022.

RESULTS:

Describe the actions taken (based on narrative above) and results. For example: We place paid media on Facebook and Instagram using these parameters (describe geographic, other demographics). The ads received XXXXX impressions and XXX engagements. We also distributed XXX fliers in xxx-geographic region and shared public service announcements with X outlets (i.e. radio stations; newspapers; own social media channels; etc.).

As a result, attendance at event X increase by 335 from the previous year. Although we were a bit short of our goal, we do consider a XX% increase successful. Overall, we are pleased with the results and are especially happy to note that all local lodging facilities (motels and campgrounds) were filled over the weekend and local businesses noted an increase in traffic/sales.

BUDGET:

Include the budget as fund requested: actual by line items (as shown on page 9-10) along with invoices and paid receipts that demonstrate the 50/50 cost split.