

# Southwest Montana Application for Cooperative Funding

The Southwest Montana Cooperative Marketing Program is designed to allow organizations to promote an area or event on a cooperative basis with a non-profit tourism-related organization. The intent of this program is to encourage the development of new or expanded marketing projects, thereby increasing the tourism appeal of the region or city.

Business/Organization (must have active status as a non-profit organization):

Address:

County:

Phone:

Authorized by: \_\_\_\_\_ (Signature of Southwest Montana Executive Board Member required.)

Project must be valued at \$500 or more and Southwest Montana can provide up to but not more than 50% of the total marketing budget or any line item within the project.

10 copies of this typed application must be turned into the Executive Board Member who in turn presents it to the Southwest Montana Board.

**Print Projects:** Please attach bid specs and three, written original bids. (Bid specs must include size, stock, number of copies, style & color, if applicable) Must include the following credit line: Produced **with Accommodations Tax Funds**. Also, the two following statements need to be made: **“Alternative accessible formats of this document will be provided upon request.” And printed in the USA( or which ever country it was printed in) for free distribution.**

As required by state law, 95% of all printing, paper and paper products shall maximize the use of recycled fiber, and must be indicated either by **“Printed on recycled paper” or the recycled symbol.**

**Montana, spelled out in its entirety,** must appear at first glance on all printed mediums.

**TV:** Please attach buy; schedule and rotation. Script copy. Stations and reach. Must meet 150 GRP/week requirement. Call for confirmation.

**Print Advertising:** Please attach placement and production cost; ad size; placement vehicle/newspaper, magazine, etc.; date of placement and circulation; color or b/w.

**Other:** Please provide specific details.

**All applications must be approved by Southwest Montana of Montana, Inc. and by Tourism Advisory Council prior to commitment of funds.**

Please contact the Southwest Montana office at 846-1943 if you have any questions or if you need more information.

## General Guidelines

Each year Southwest Montana apportions a part of their annual budget to Cooperative Marketing. The fiscal year is from July 1 to June 30 which means the new monies are available in July. The total cooperative marketing amount is divided equally among the nine counties so each has the same amount to work with. During the January meeting any amount of cooperative funds not awarded by this time is then put into a big pot and anyone qualifying for funds has a chance to apply for it.

To qualify for funds, each organization must be nonprofit and registered with the state. They must provide a 50-50 match and in-kind services do not qualify. Applications should preferably be done on line. If that is not available the application is required to be fully typed.

Applications will be reviewed by the executive board and then presented to the general board. When the application is approved it is then sent to Travel Montana who will present the application to the Audits and Applications Committee of the Tourism Advisory Board. When they give their approval then the application is successfully awarded the money following full compliance of the rules and regulations. **No project is to be started before the final approval of the Tourism Advisory Council or no money will be awarded.**

### General Guidelines:

Anything \$500 and over must go out for bids. At least three bids must be obtained and a copy of the bid specification as well as original bids (fax bids now accepted) need to be kept at the Southwest Montana office. RFP's have different regulations, please ask at the Southwest Montana office for more specifics.

All applications must have an evaluation method and a completion report must be turned in at the conclusion of the project. Guidelines are set up for this in the extended rules and regulations.

Applications are due 30 days prior to the next Southwest Montana meeting. Each project must have the executive board member's signature from the corresponding county. Ten copies of each application are to be sent in to the Southwest Montana office.

### Checklist:

- \_\_\_\_\_ Application is typed out.
- \_\_\_\_\_ Budget sheet is attached.
- \_\_\_\_\_ Budget line items must follow the 50% limit on a line item basis.
- \_\_\_\_\_ Bids are included where needed.
  - A. A minimum of three original or faxed bids must be obtained for any printing costs or projects of more than \$500. These bids must be dated and must remain on file at the organization office.
  - B. All bid requirements must be met for reprint projects.
  - C. All potential bidders must receive identical project specifications in standard format and must provide a closing date and time. This spec sheet is to be submitted with the original bids.
  - D. By law, bids must include delivery costs, and your specs need to require the bidders to state rates as FOB.
  - E. Bid must be awarded to lowest, qualified bidder.
- \_\_\_\_\_ Executive Director from your county signed the application.
- \_\_\_\_\_ Send in 10 Copies to Southwest Montana
- \_\_\_\_\_ **Print advertising**
  - \_\_\_\_\_ Specifics are included.(publication, size, b&w or color, dates, cost)
  - \_\_\_\_\_ Codes for each publication put on the ads for tracking purposes.)
  - \_\_\_\_\_ Montana, spelled out in its entirety must appear at first glance on all print advertising.

Two tear sheets of each advertisement are required for all magazine and newspaper advertisements as well as anything similar. (Tear sheets are the whole page the advertisement is on including the date at the top of the sheet.) The front cover of magazines must also be turned in with the tear sheet. Pictures will be needed for billboards and similar projects.

### \_\_\_\_\_ **Printed Materials** (brochures etc.)include:

\_\_\_\_\_ The word Montana must be spelled out in its entirety, must appear at first glance on all printed material.

\_\_\_\_\_ Printed material must include the following credit lines:

\_\_\_\_\_ **“Produced with Accommodations Tax Funds”**

\_\_\_\_\_ **“Printed in the [insert name of country where printed] for free distribution”** on print publications.

\_\_\_\_\_ All print projects **must include** the federally mandated Americans With Disabilities Act language, “**Alternative Accessible formats of this document will be provided upon request.**” It is the responsibility of the sponsoring organization to insure compliance in cooperative projects. (This simply means that if someone is blind or cannot read for any reason, you can provide the information in audio or video form, or more in reason, someone will read the brochure to the person.)

\_\_\_\_\_ As required by state law, 95% of all printing, paper and paper products shall maximize the use of recycled fiber. If the print project uses recycled material, it must include either, “**Printed on recycled paper,**” or the recycled symbol.

\_\_\_\_\_ Since the law states that revenue shall be used for “tourism promotions and promotion of the state as a location for the production of motion pictures and television commercials,” printed material shall only include activities and services that are beneficial to the traveler and film production/promotion as determined by the Audits/Applications Committee.

Credit lines by publishers and printers may be included only on the inside of travel guides and the back panel of brochures. All other items are excluded. Credit lines can include only the business name, not an address or phone number, in a point size (font) no larger than the lodging facility use tax credit line.

Four copies of each printed piece are to be turned in with the project completion reports. If your address is included on the brochure, you must use a coded box or room number for tracking purposes.

\_\_\_\_\_ **Visitor Information Center Applications** – all VICs requesting funding must be non-profit tourism related organizations.

\_\_\_\_\_ If the VIC currently exists, it must be open at a minimum of 24 hours per week or a total of 300 hours within the Memorial Day to Labor Day time period. The lodging facility use tax revenue may be provided only to fund travel counselor manager/staffing.

\_\_\_\_\_ Requests for funding must be accompanied by visitation figures and staffing for the previous two years or the first year of operation for the months that funding is being requested.

\_\_\_\_\_ Number of hours open, Number of hours funded by Bed Tax Dollars

\_\_\_\_\_ Payroll information included

\_\_\_\_\_ If the VIC is new, the VIC must be staffed a minimum by one travel counselor for a minimum of 24 hours per week or a total of 300 hours within the Memorial Day to Labor Day time period. Funding may be requested for travel counselor manager/staffing only. Requests for funding must include anticipated visitation figures for the funding period and method used to estimate visitation.

\_\_\_\_\_ VIC signage must include the words “Visitor Information.”

\_\_\_\_\_ the VIC will be responsible for an evaluation at the end of the staffing period.

\_\_\_\_\_ **Radio/Television ads** meet specific regulations. (minimum spots, times, dates, cost)

\_\_\_\_\_ Montana must be stated on all audio tracks produced which include speaking when appropriate.

\_\_\_\_\_ All television advertising must be placed with an average minimum of 150 gross rating points per week for a minimum of five consecutive days. Cable television buys must include a minimum of 50 spots per week also for a minimum of five consecutive days.

\_\_\_\_\_ An affidavit of media buy must be on file at the organization upon completion of the project.

\_\_\_\_\_ Radio advertising must be placed with a minimum of seven spots per day for a minimum of three days per station. Ads should be placed on at least two stations in a market, unless only one is available, or unless target demographics strongly indicated the use of a specific station. Spot buys must avoid the hours of 7:00 PM – 6:00 AM.

\_\_\_\_\_ Public Service Announcements (PSAs) production costs would be allowed with the following provisions:

- a) PSA must be demonstrably for a project or event that is of a tourism nature;
- b) PSA must be a length that is readily useable by the broadcast media (10,15, or 30 second);
- c) PSA cannot have content that makes it a promotion for a private enterprise;
- d) A run sheet must be provided for the PSAs if available.

\_\_\_\_\_ A copy of the audio / video tape must be on file at the organization.

## **HOW TO PAY BILLS:**

Cooperative partners are to present original invoices to the regional organization for payment. In the case of invoices in an amount of \$100 or less, the cooperative partner may pay the bill in full, and submit a copy of the invoice and check to Southwest Montana for 50% reimbursement.

In case of invoices in an amount of more than \$100, follow these instructions:

- A. Do NOT send any payment directly to vendor.
- B. Send original invoice with your portion of the payment (made out to the vendor to Southwest Montana.
- C. Southwest Montana will send in your payment with the Southwest Montana match to the vendor.

When making payments for the projects, the organization is to pay for their portion of the bill, then send their check along with the original bill to the Southwest Montana office. Southwest Montana then will pay the match and send both payments in to the vendor.

Final evaluations should be sent in soon after the project has been completed.

## **TAC FUNDING GUIDELINES**

### **Program Requirements**

Southwest Montana may provide up to but not more than, 50% of any one line item within a project application. Under no circumstances may Southwest Montana provide more than 50% of the total budget or any line item within the project.

Cooperative Marketing funds are to be used solely for marketing projects. Administrative expense is not eligible.

All guidelines/rules/contracts to which Southwest Montana must adhere are relevant and required for the cooperative partner.

Billboards may be constructed as a Cooperative Marketing project provided the following documentation has been submitted to Southwest Montana prior to commitment of funds.

- ++ Written approval from the Department of Transportation for location.
- ++ Written permission from landowner to construct a board.
- ++ Signed agreement from the funding entity on method of maintenance.

Cooperative partners are to present original invoices with their matching checks to Southwest Montana for payment. Southwest Montana may not in any case release checks to a cooperative partner.

Cooperative projects are not to be implemented until all requirements for final approval have been met and approval is received in writing from the Department of Commerce.

All Cooperative Marketing projects are subject to an annual review of compliance.

Evaluation must be completed for each project. Evaluation must include but is not limited to the following:

Print advertising – copy of actual ad placed with magazine cover or photocopy of the same from every publication in which space was purchased.

Television – submission of tape with affidavits of media purchased.

Print Pieces – three pieces of each, distribution summary.

Financial sheet for the project.

Events operations, items for resale, prizes, banners, floats, decorations, program booklets, entry forms, promotional items and financial sponsorships are not eligible expenditures.

# Application for Southwest Montana Cooperative Marketing Funds

Please type:

Organization Name(s) \_\_\_\_\_ Telephone \_\_\_\_\_

Legal Address \_\_\_\_\_ City \_\_\_\_\_ Zip Code \_\_\_\_\_

Project Supervisor \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Zip Code \_\_\_\_\_

Regional President Mike Strang Telephone 660-0812

Tourism Region Southwest Montana

Project Title \_\_\_\_\_

Total Budget for Project (taken from attached detailed budget) \$ \_\_\_\_\_

Percentage of Cooperative Funds Requested \_\_\_\_\_% Dollar Amount of Cooperative Funds Requested \$ \_\_\_\_\_

Proposed starting and ending dates (maximum 1 year) : From \_\_\_\_\_ To: \_\_\_\_\_

Funding Source (Outline in detail sources from which funds are to be provided):

- |   |            |
|---|------------|
| a. Regional/CVB funds                     | \$ _____ * |
| b. Memberships                            | \$ _____   |
| c. Advertising Revenue                    | \$ _____   |
| d. Cash on Hand                           | \$ _____   |
| e. Other (please list)                    |            |
| 1. _____                                  | \$ _____   |
| 2. _____                                  | \$ _____   |
| 3. _____                                  | \$ _____   |
| TOTAL (should equal total project budget) | \$ _____ * |

## **Cooperative Marketing Application**

1. Narrative description of this project. Include how the project is executed.
2. Anticipated economic benefit of this project (i.e. increased visitation, length of stay, how project will increase appeal of region as a travel destination, etc.)
3. Target market for this project.
4. Method of Project Evaluation

**PRINT ADVERTISING**

Publication \_\_\_\_\_ Issue \_\_\_\_\_

Edition \_\_\_\_\_ Size of Ad \_\_\_\_\_ Color \_\_\_\_\_

Publication \_\_\_\_\_ Issue \_\_\_\_\_

Edition \_\_\_\_\_ Size of Ad \_\_\_\_\_ Color \_\_\_\_\_

Publication \_\_\_\_\_ Issue \_\_\_\_\_

Edition \_\_\_\_\_ Size of Ad \_\_\_\_\_ Color \_\_\_\_\_

Publication \_\_\_\_\_ Issue \_\_\_\_\_

Edition \_\_\_\_\_ Size of Ad \_\_\_\_\_ Color \_\_\_\_\_

**RADIO AND TELEVISION ADVERTISING (Circle the correct medium)**

City of Location \_\_\_\_\_ Area of Coverage \_\_\_\_\_

\_\_\_\_\_ Length of Spot \_\_\_\_\_

Weeks of Play \_\_\_\_\_ Play Times \_\_\_\_\_

City of Location \_\_\_\_\_ Area of Coverage \_\_\_\_\_

\_\_\_\_\_ Length of Spot \_\_\_\_\_

Weeks of Play \_\_\_\_\_ Play Times \_\_\_\_\_

City of Location \_\_\_\_\_ Area of Coverage \_\_\_\_\_

\_\_\_\_\_ Length of Spot \_\_\_\_\_

Weeks of Play \_\_\_\_\_ Play Times \_\_\_\_\_

**PRINTED MATERIALS**

Publication \_\_\_\_\_ Quantity \_\_\_\_\_  
Color \_\_\_\_\_ Paper Stock \_\_\_\_\_  
# of Pages or Folds \_\_\_\_\_ Size \_\_\_\_\_  
Ad Sales (Yes or No) \_\_\_\_\_ Percentage \_\_\_\_\_  
Distribution Plan (areas & method) \_\_\_\_\_  
\_\_\_\_\_

Publication \_\_\_\_\_ Quantity \_\_\_\_\_  
Color \_\_\_\_\_ Paper Stock \_\_\_\_\_  
# of Pages or Folds \_\_\_\_\_ Size \_\_\_\_\_  
Ad Sales (Yes or No) \_\_\_\_\_ Percentage \_\_\_\_\_  
Distribution Plan (areas & method) \_\_\_\_\_  
\_\_\_\_\_

Publication \_\_\_\_\_ Quantity \_\_\_\_\_  
Color \_\_\_\_\_ Paper Stock \_\_\_\_\_  
# of Pages or Folds \_\_\_\_\_ Size \_\_\_\_\_  
Ad Sales (Yes or No) \_\_\_\_\_ Percentage \_\_\_\_\_  
Distribution Plan (areas & method) \_\_\_\_\_  
\_\_\_\_\_

Publication \_\_\_\_\_ Quantity \_\_\_\_\_  
Color \_\_\_\_\_ Paper Stock \_\_\_\_\_  
# of Pages or Folds \_\_\_\_\_ Size \_\_\_\_\_  
Ad Sales (Yes or No) \_\_\_\_\_ Percentage \_\_\_\_\_  
Distribution Plan (areas & method) \_\_\_\_\_  
\_\_\_\_\_

Please list any additional information, which you believe justifies and documents the effectiveness of your project(s).

**REGION/CVB PROJECT BUDGET  
PROJECT NAME**

	State Tourism Funds		Other Funds		Total
<b>PROFESSIONALSERVICES:</b>					
	\$0	+	\$0	=	\$0
	\$0	+	\$0	=	\$0
	\$0	+	\$0	=	\$0
	\$0	+	\$0	=	\$0
	\$0	+	\$0	=	\$0
	\$0	+	\$0	=	\$0
	\$0	+	\$0	=	\$0
<b>TOTAL</b>	<b>\$0</b>		<b>\$0</b>		<b>\$0</b>

<b>MARKETING/ADVERTISING:</b>					
	\$0	+	\$0	=	\$0
	\$0	+	\$0	=	\$0
	\$0	+	\$0	=	\$0
<b>TOTAL</b>			<b>\$0</b>		

<b>TRAVEL:</b>					
Personal Car	\$0	+	\$0	=	\$0
Commercial Transportation	\$0	+	\$0	=	\$0
Meals	\$0	+	\$0	=	\$0
Lodging	\$0	+	\$0	=	\$0
Vehicle Rental	\$0	+	\$0	=	\$0
<b>TOTAL</b>	<b>\$0</b>		<b>\$0</b>		<b>\$0</b>

<b>OTHER:</b>					
		+	\$0	=	
		+	\$0	=	
		+	\$0	=	
		+	\$0	=	
		+	\$0	=	
		+	\$0	=	
		+	\$0	=	
		+	\$0	=	
	\$0	+	\$0	=	
<b>TOTAL</b>					

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<b>REGION/CVB</b>	<b>PROJECT</b>				
<b>TOTAL</b>		<b>\$0</b>	<b>+</b>	<b>\$0</b>	<b>\$0</b>

**Montana Tourism Cooperative Marketing Funds Program  
Certificate of Compliance**

The following are self-explanatory and are required to be fully completed by the applicant.

Yes    No

- |     |     |   |
|-----|-----|---|
| ___ | ___ | The organization understands that the Montana Department of Commerce reserves the right to audit the project both for performance and accounting.   |
| ___ | ___ | It is understood that no commitment of Southwest Montana will be made until after the authorized approval of the project.   |
| ___ | ___ | It is understood that budget line items can be adjusted up to 15% and that total marketing funds will be provided only in the amount approved by Southwest Montana and the Department.  |
| ___ | ___ | It is understood that the Department has the right to deny any payment of any invoice if it is found that the organization does not meet eligibility guidelines; or that the organization is not complying with the approved program. |
| ___ | ___ | It is understood that the organization will in no way represent itself as the Department or Gold West Country.  |

I certify that the application and its attachments are correct to the best of my knowledge. I am aware that, if approved this application becomes an agreement.

\_\_\_\_\_  
Project Supervisor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Southwest Montana

\_\_\_\_\_  
Date