

**Southwest Montana Application for Cooperative Funds**

**[info@southwestmt.com](mailto:info@southwestmt.com) 406-846-1943**

**Due to Southwest Montana on March 10, 2022**

**Fill out on line and email to [info@southwestmt.com](mailto:info@southwestmt.com)**

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.

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. Most grants are between \$1000-\$2000.

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

All Tourism Advisory Council rules must be followed (or we get fined and must repay the funds). Most of them are listed below the filled-out part of the application. Some important things to consider: put required language on print pieces; each project has rules to follow; pay close attention on how to pay bills; PROJECT COMPLETIONS need to be filled out as soon as possible after the project is paid. Please have the executive director review print pieces before going to print as it is easier to catch frequent omissions at this time.

**All applications must be filled out online and emailed back to [info@southwestmt.com](mailto:info@southwestmt.com).**

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

Legal Address \_\_\_\_\_

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

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

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

Regional President Maria Pochervina Telephone 406-723-3177

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. Other sources

1. _____	\$ _____
2. _____	\$ _____
<b>TOTAL (should equal total project budget)</b>	<b>\$ _____</b>

**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 \_\_\_\_\_

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

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

**PRINTED MATERIALS**

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).

**Print Projects:** For projects totaling \$5000 or more 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: **And printed in the USA (or whichever 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

**PROJECT BUDGET  
PROJECT NAME**

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

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

# Southwest Montana Cooperative Marketing

## General Guidelines

**(this portion is for your use and does not need to be turned in with the application)**

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.

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 be done online. 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. Full compliance of the rules and regulations must be adhered to to receive the funding. **No project is to be started before the final approval of the board or no money will be awarded. (State Rule)**

### General Guidelines:

Anything \$5000 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.

Checklist: (This is for your use and does not need to be turned in with the application.)

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 \$5000. 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.

\_\_\_\_\_ Email completed application 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:

\_\_\_\_\_ **“Printed for free distribution”** on print publications.

\_\_\_\_\_ As required by state law, 95% of all printing, paper and paper products shall maximize the use of recycled fiber. Either having, **“Printed on recycled paper,”** or the recycled symbol is encouraged.

\_\_\_\_\_ 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.

Two 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.

\_\_\_\_\_ **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.

Events – For second year applications for events the amount rewarded can only be 60% of the first year. And then, 35% for the third year. The idea behind this was to have events become self-sustaining.

## **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.

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.

Social Media – list of placements and responses

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.***