

# Clackamas County Tourism's Strategic Investment Program

## 2024-2025 GUIDELINES

Clackamas County Tourism (Tourism) is the designated destination organization for Clackamas County, branded as Oregon's Mt. Hood Territory. We are a County Department whose work is guided and directed by the [Tourism Development Council](#), the members of which are appointed by the Board of County Commissioner. Funding for our programs comes from the County's 6% Transient Lodging Tax that was approved by voters in 1991.

### MISSION

Our mission is to enhance the quality of life for residents by optimizing the economic impacts of the tourism industry derived by the County's Transient Room Tax.

As we work towards our mission we engage on issues, consider opportunities and develop plans and strategies looking through a set of lenses, which includes:

- Impact to Visitors, Residents, Partners, and Place
- Global Sustainable Tourism Practices
- Diversity, Equity and Inclusion

In all we do, we endeavor to enhance collaboration between ourselves and our partners, amongst partners, and leverage support from other entities so that we can optimize our impact on three Strategic Outcomes:

- Supporting the tourism industry and asset recovery while responding to evolving conditions,
- Driving visitors to identified areas as informed by the unique needs of individual tourism assets to optimize positive impacts and mitigate negative impacts
- Enhancing the experiences and awareness of Mt. Hood Territory as a desirable destination for visitors and residents

### I. ABOUT THE STRATEGIC INVESTMENT PROGRAM

With our Mission, organizational goals and Strategic Outcomes in mind, we developed the Strategic Investment Program to help us direct investments in

tourism-related projects within Clackamas County that support Three Tourism Pillars contained in our Master plan.

Those being:

- Outdoor Recreation
- Agritourism
- Cultural /Heritage Tourism

For the current program year, \$548,000 is available for eligible projects. The minimum request that will be considered for funding is \$25,000. If you are seeking funding for tourism-related projects that have estimated costs below \$25,000, please reach out to Tourism staff. Requests may be submitted for the full amount of funding available.

## II. FUNDING PRIORITIES

The Strategic Investment Program in FY 2024/2025 provides support for projects that have significant potential to positively impact at least one of the below priorities from a visitor perspective. For purposes of this program, visitors/audiences are primarily defined as those coming from greater than fifty miles away. Examples of projects that would support these priorities are provided below.

	<b>Definition</b>	<b>Examples</b>
<b>Supports Asset Recovery &amp; Resiliency</b>	<p>-Project assists a tourism location or operation impacted by wildfire or other natural disaster.</p> <p>Project improves assets ability to withstand negative impacts based on experiences and new information</p> <p>-Priority given to tourism assets where the visitor experience is still impacted.</p> <p>-Reopens a site or experience closed due to disasters.</p>	<p>- Applicant requests funds to rebuild campgrounds destroyed by wildfires and will incorporate ADA accessibility improvements to campsites and amenities. Project has been approved by the land management agency and will be executed within 18 months</p>
<b>Enhances Assets &amp; Experiences</b>	<p>-Project improves a location or experience currently open to visitors.</p>	<p>Applicant requests funds to make improvements to a boat ramp located along a</p>

	<p>- Project increases visitor access to a site/experience</p> <p>- Elevates one of our three pillars:</p> <ul style="list-style-type: none"> <li>• Outdoor Recreation</li> <li>• Agritourism</li> <li>• Cultural/Heritage Tourism</li> </ul> <p>-Includes new projects that acts as a destination driver.</p>	<p>water trail that creates dedicated loading/unloading areas for non-motorized watercraft that alleviates conflicts with motorized-water craft users and installs infrastructure that allows water trail user to secure craft and equipment while they explore local communities. Project approval of jurisdiction that owns the facility and permits have been obtained.</p>
<b>Improves Accessibility</b>	<p>-Project mitigates barriers for visitors with diverse needs to improve their visitor experience.</p> <p>- Project improves customer service for visitors with diverse needs.</p>	<p>Applicant requests funds to purchase and install interpretive kiosks w/ tactile features, braille and color-blind adapted viewers at a scenic viewpoint. Project was developed with input from relevant accessibility groups and will incorporate current best practices and standards. Applicant has LOP from relevant accessibility groups and project is part of an approved site master plan.</p>
<b>Promotes Alternative Modes of Travel</b>	<p>-Project improves access for visitors traveling without a personal vehicle.</p> <p>- Project improves visitor experience using transit, bicycle, walking or modes of transportation other than personal cars.</p>	<p>Applicant requests funds to complete a phase of a multi-modal path that will link an existing trail system, which will provide non-motorized vehicle access to multiple communities and points of interest. Applicant has approval from all governing bodies along the proposed path, and permitting and</p>

		engineering plans for the project have been secured.
<b>Expands Visitation to New &amp; Underserved Audiences</b>	-Projects that open activities to communities of people with historically lower levels of participation -Projects that broaden the diversity of cultures included in experiences.	Applicant requests funds to create an exhibit at a local museum that will highlight the experiences and contributions of 18th Century immigrant groups to the Oregon Territory whose stories are under-represented in current offerings. Applicant has letter of partnership from a heritage organization recognized as being an authority and representative of the group whose stories will be told, and will work with them on creating content for the exhibit.

Additional consideration will be given for projects that:

- Demonstrate positive impact to more than one community
- Include the involvement of multiple partners.
- Have a 10% or greater cash match (based on requested funds)
- Occur in an unincorporated area of Clackamas County

**NOTES**

1) For proposals that **Expand Visitation to New and Underserved Audiences:** Project **MUST** include coordination and involvement with members of relevant groups/communities. Letter of Partnership must be included with the application to be eligible for consideration.

2) For proposals that **Improve Accessibility:** Project **MUST** include coordination and involvement with members of relevant groups/communities. Letter of Partnership must be included with the application to be eligible for consideration.

3) **Capacity:** Recognizing the effort needed to execute larger, more involved projects, or phases of a project, proposals seeking funding for capacity will be considered if

they include defined scopes of work specific to the project with deliverables that can be completed within 18 months.

4) **Indirect Costs:** Clackamas County Tourism will allow up to 15 percent (15%) indirect costs. If you are seeking indirect costs, they must be included as a line item in the budget template.

### **III. ELIGIBILITY**

#### **ENTITY ELIGIBILITY**

Eligible applicants include entity types listed below whose project benefits the greater public interests of tourism development within Clackamas County.

##### **Eligible applicants include:**

- Non-profit organizations (with evidence of tax-exemption)
- Federally recognized tribal entities
- Cities, counties and special districts
- State and federal agencies

##### **Ineligible applicants include:**

- Private, for-profit entities
- Entities that have a bankruptcy or other financial discrepancies within the past five years.
- Entities that fail to fulfill past grant award requirements within the past three years (includes: project completion, submission of required grant reporting, proper use of grant funds).

#### **PROJECT ELIGIBILITY & REQUIREMENTS**

To be eligible, projects must meet the criteria listed below.

- Aligns with at least one of our Pillars - Outdoor Recreation, Agritourism and Culture/Heritage.
- Aligns with at least one Program Funding Priority
- Includes letters of partnership from additional external partners if named in application
- Has clear and detailed budget specific to proposed project (scope of work).
- Can be completed within 18 months of funding.
- Demonstrates long-term sustainability of the project.
- Includes documentation of approval from land management agencies or other agencies that have authority over project site.
- Capacity to complete projects or defined project phases within 18 months IF milestone, deliverables or outcomes are detailed in application.

## INELIGIBLE PROJECTS, ELEMENTS AND ACTIVITIES

The following are not eligible for consideration:

- Entities requesting funding for projects with no written letter(s) of support from partners identified in the application. (Letters of Partnership).
- Entities requesting funding for events or entertainment at events.
- Projects to expand visitation of new or diverse audiences that do not include collaboration with members from within the identified community.
- Entities requesting funds solely for research purposes, feasibility studies or master planning.
  
- Capital Fundraising Campaigns
- Staffing, consultants, mileage or other associated costs that are *already* budgeted to execute a particular area of work within an entity.
  
- Costs associated with a project incurred prior to application submission.
- Deferred, regular or ongoing maintenance of existing facilities, assets or attractions.

### **IV. HOW TO APPLY**

Strategic Investment Program applicants may apply for grants on an annual basis if in good standing with regards to past award requirements.

Applications are accepted via an online grant portal. Users must set up an account to apply. Applicants may access the applications through this link.

There is no match requirement, however priority points will be given for leveraged cash support. The grant application period opens on September 9, 2024 and will close on October 9th. An organization may submit one application for consideration. Applicants may create user profiles and access the application at:

<https://omht.us/StratInvestAp>

Application requirements include:

- A completed online application
- Proof of eligible entity (tax-exempt letter, EIN)
- Letters of partnership

- Documentation from land management agencies (when applicable)
- A detailed budget (using template provided)
- Permits/approvals (when applicable)

There will be three informational webinars offered for parties interested in submitting and application: August 28, 2024, at 9 a.m. September 5, 2024, at 1:30 p.m. and October 1, 2024, at 7:00 p.m.

## **V. REVIEW OF APPLICATIONS**

### **DECISIONS TO AWARD**

Award recommendations will be made based on scoring applications against the stated criteria. All eligible applications will be reviewed by a Grant Review Committee comprised of partners from within Clackamas County's tourism ecosystem. The committee will make funding recommendations to the Tourism Development Council for consideration and approval.

NOTE: Awards of \$150,000 or more will need to be brought before the Board of County Commissioners for processing. This will result in a longer distribution timeline.

### **GRANT CONTRACTS**

Applicants who are approved for funding will enter into contract with Clackamas County. Contracts will include an agreed upon Scope of Work consistent with what was submitted in the application, including identified deliverables, agreed upon timelines; program terms, conditions, and guideline, and additional standard County required contract provisions. Applicants who are approved for funding will need to be registered with the [Oregon Corporation Division](https://sos.oregon.gov/business) (sos.oregon.gov/business) before a contract can be entered into.

### **BUDGET MONITORING & TIMELINES**

Projects will be monitored by Clackamas County Tourism staff. Grant recipients shall maintain accurate records and will use provided report templates for submission of all required information. Grant recipients will be required to keep an ongoing, updated timeline and budget throughout the lifetime of the grant. Tourism reserves the right to request copies of the working budget throughout the lifetime of the grant.

Clackamas County Tourism will provide all forms required.

## PROJECT SCOPE OF WORK

Grant recipients must adhere to project design and deliverables in the agreed upon Scope of Work contained in award agreements. Recipients must receive approval from Clackamas County Tourism staff before changes to the project are made.

## REPORTING & PROJECT CLOSURE

Grant recipients will be required to submit quarterly Status Reports as well as a Final Report that will be due within 3 months of project completion.

The Final Report shall include an accounting of how funds were expended.

All required reports will be submitted through the grant management system.

Any funds not used as approved shall be returned to Clackamas County.

Failure to submit reports, reply to communications from Clackamas County Tourism staff, or return unused or inappropriately expended funds, may result in ineligibility to apply for future grant programs.

## GRANT TIMELINE

Online grant webinar 1	August 28, 2024; 9 a.m.
Online grant webinar 2	September 5, 2024; 1:30 p.m.
SIP Program cycle opens	September 9, 2024
Online grant webinar 3	October 1, 2024; 7 p.m.
Online application closes 5:00 p.m. Pacific Time	October 9, 2024
Grant application status notification	December 12, 2024
Award Processing Period	December 15, 2024-March 15, 2025
First disbursement of funds issued	Mid-April 2025

## CONTACT INFORMATION

Questions about this program may be sent to [Funding@mthoodterritory.com](mailto:Funding@mthoodterritory.com)



## VI. APPLICATION SCORING

Each application is scored on set criteria outlined in the rubric. Applications can earn a maximum of 100 points in each of the following categories.

<u>Program Priorities</u>	(Pts)
Tourism Impact	8
Visitor Accessibility	8
Visitation Driver	8
Overnight Stay Potential	8
Benefit to Visitors	8
Program Alignment	8
Project Plan	16
Project Readiness	6
Budget	4
Sustainability	4
Impact on tourism	6
Leverages Support of other partners	4
Impacts more than one community	4
Located in an unincorporated area	4
Cash match	4

## VII. APPLICATION TERMINOLOGY

**Community** – includes incorporated communities within Clackamas County (cities), as well as unincorporated “urbanized” areas of Clackamas County such as North Clackamas, Welches and Government Camp.

**Foundant** – Foundant is the grant software system used for accepting and managing applications.

**Tourism-Project** – this refers to the development or enhancement of a place, item, or experience that enhances the visitor’s experience.

**Visitor-Facing** – any function, service, or feature that directly interacts with the tourist or visitor. This may include, but not be limited to, physical amenities, information services, signage and wayfinding, and interactive elements regularly or consistently accessible to the public.

**Accessibility** – this refers to the capacity to ensure that tourism/visitor products/services and environments are easily and equally usable and enjoyable by all people regardless of their physical, cognitive, sensory, or other abilities.

**Assets** – tangible or intangible resources that attract visitors to a destination and contribute to the overall experience.

**Partner** – a public, private, or nonprofit entity that commits to supporting project activities and outcomes.

**Scope of Work** – a description of work to be performed and/or /items to be purchased with funds if awarded. This will be incorporated into a funding contract if approved.

**Letter of Partnership** – an endorsement letter, on organizational/company letterhead, that outlines support of and role and responsibility in project or program that is applying for grant funding. For the purposes of this grant program, any entity from underserved audiences that are included as a programmatic element in the proposal must provide written endorsement of the projects in the form of a letter of partnership.

**Underserved Audiences** – specific groups of people who have historically had fewer opportunities or face barriers in accessing and enjoying tourism experiences.