



## **TOURISM DEVELOPMENT PROGRAM For Capital Improvement Projects**

PROCEDURAL GUIDE AND APPLICATION FOR COOPERATIVE AGREEMENTS

*Applicable for: January & July 2020  
Applications Revised: 2019*

## TABLE OF CONTENTS

I. MISSION STATEMENT	3
II. ELIGIBLE RECIPIENTS	3
III. GENERAL GUIDELINES	3
IV. DEADLINE	3
V. SPECIFIC GUIDELINES	4
VI. PURPOSE OF FUNDING	5
VII. USE OF FUNDS	5
VIII. FUNDING SIZE	5
IX. PROCEDURES FOR APPROVAL/EVALUATION CRITERIA	6
A. SUBMISSION OF APPLICATION	6
B. PRELIMINARY ELIGIBILITY REVIEW	6
C. NOTIFICATION OF DEFICIENCIES	6
D. EVALUATION PROCEDURES	6
X. APPROVAL AND FUNDING PROCEDURES	7
XI. REVIEW AND FOLLOW-UP	8
Forms	
• Form A	9
• Form B	10
• Form C	11

This procedural guide does not provide rights to the applicant, but is provided as a general guide to the procedures and requirements of the Tourism Development Program.

Revised 3/19

## **I. MISSION STATEMENT**

The mission of the Monroe-West Monroe Convention and Visitors Bureau of Ouachita Parish is to attract conventions and tourist to the area. The CVB's Board of Directors is authorized by state law to expend funds for advertisements; promotion; publications of information; marketing of fairs and festivals; **construction of museums; equestrian/livestock centers and sports facilities; additions to civic and convention centers and for other economic development purposes in Ouachita Parish.**

The mission of the Tourism Development Program of the Monroe-West Monroe Convention and Visitors Bureau is intended to provide for the development, growth, and enhancement of tourism and conventions in Ouachita Parish, including but not limited to sports, festivals, and other special events including the arts & humanities.

## **II. ELIGIBLE RECIPIENTS**

Tourism Development funding will be approved by the Monroe-West Monroe Convention and Visitors Bureau Board of Directors to existing 501 (c) organizations in compliance with the procedures in this Tourism Development Program. Applicants and the project must be located within Ouachita Parish. The application must be completely filled out and have enclosed all required documentation.

## **III. GENERAL GUIDELINES**

This program provides funds for qualified applicants submitted by eligible organizations. All applications recommended for funding by the Tourism Development Committee are subject to final approval by the Monroe-West Monroe Convention and Visitors Bureau Board of Directors. All funding decisions are made with consideration of the best interest of developing the Tourism Industry in Ouachita Parish. If an organization receives funds from the Monroe-West Monroe Convention and Visitors Bureau for a certain program in one year, that does not in any way guarantee that a request from the same program will be funded in future years. Funding awards may differ from funding requested. All organizations can only receive one grant in a calendar year for funding.

Grant recipients may use allocated funds only for such purposes stated in the proposals approved by the Monroe-West Monroe Convention and Visitors Bureau Board of Directors. Reallocation of funding for purposes other than those specified in the proposal shall require prior written approval of the Monroe-West Monroe Convention and Visitors Bureau Board of Directors.

## **IV. DEADLINE**

Organizations which are applying for funding from the Monroe-West Monroe Convention and Visitors Bureau shall submit their applications by **January 10 or July 10 by 5:00 pm** of each calendar year. If the 10th falls on a Sunday, the application is due in the Convention & Visitors Bureau office on the following business day. The proposals should follow the process outlined by these procedural guidelines. Recipients will be notified within 45 days after application deadlines.

## **V. SPECIFIC GUIDELINES**

**All Applicants must submit 6 (six) copies of their application on 3-Hole punched paper with the following inclusions:**

### **1) Form A –**

- a) Name and address of organization
- b) Listing of the Board of Directors of organization
- c) Officers of the Board of Directors of the organization – President and Treasurer

### **2) Form B –**

- a) Budget for Proposed Project– general budget information, a sample
- b) Attachment of detailed construction cost budget

### **3) Form C—**

- a) Attendance Information/Estimate- History from past usage of rooms related to facility or potential growth in hotel rooms to be utilized.
- b) List of potential events and the participants/attendance with capital improvements investment requested
- c) Signature of the person filling out the application

### **4) Statement of Funding Purposes – Up to 3 pages**

- a) Describe the purpose, scope and significance of proposal with particular emphasis on the tourism impact (Up to 3 pages typed and double spaced)
- b) Plans for building or improvements should be included.

### **5) 5 Year Strategic Plan – Up to 5 pages**

- a) **A strategic plan for the organization that includes the project for which the grant is intended**
- b) **The plan should include any and all future construction projects or capital improvements intended in the near future for the organization’s facilities and their purposes**
- c) **The plan should include the scope of work and goals for the organization over the next 5 years**

### **7) Matching Fund Information – 1 page**

- a) Summary of how the funds will be matched and expanded ( 1 page typed and double spaced format)

### **8) Marketing Plan**

- a) How the capital improvements will be marketed to generate additional visitors to Ouachita Parish (Up to 2 pages typed and double spaced)
- b) Marketing Expense Plan– A breakdown of how the capital improvement will be marketed to increase hotel occupancy, i.e. brochures, billboards, television, events that can increase in attendance/participation and/or new events that can be held.

## **7) Financial Information**

- a) certification of the organization's tax-exempt status
- b) current financial statement
- c) a copy of the tax return from the previous year
- d) An operating budget from the organization for the current fiscal year- This should detail all revenues, including revenues from sponsorships and other funding sources, as well as all of the organization's expenditures.
- e) Results of an independent audit, if requested (This would be at the expense of the applicant, if requested).

**Note:** You must provide 6 copies of your application. Identify the grant applicant and Capital Improvement Project on the cover page. All blanks must be filled in on the application to be considered.

## **VI. PURPOSE OF FUNDING**

A Tourism Development Proposal must provide for the growth of the Tourism Industry in Ouachita Parish. Emphasis will be given to proposal requests that directly and indirectly maximize the number of visitors who come to our area, especially if overnight accommodations are needed. Proposals showing the fastest and highest return on the investment will be given the highest priority. Also proposals must improve the overall quality of life for the citizens of Ouachita Parish.

## **VII. USE OF FUNDS**

Requests of Tourism Development funding can be for any of the following areas:

1. Survey and planning expenditures for developing and revitalizing an existing tourist oriented attraction.
2. Capital improvements of new or existing tourist oriented attractions.
3. Special projects deemed to be of a community wide tourism interest.

## **VIII. FUNDING SIZE**

There is no dollar amount restriction for the amount of funds made to one organization. Each year the amount of money to be awarded through the Monroe-West Monroe Convention and Visitors Bureau Proposal Program will be determined by the budgetary process and approved by the Monroe-West Convention and Visitors Bureau Board of Directors.

**\*\*For the January 10, 2020 grant application deadline, grants must be submitted to the Monroe-West Monroe Convention & Visitors Bureau temporary office located at: 212 Walnut Street, Suite 100 in Monroe.**

## **IX. PROCEDURES FOR APPROVAL/EVALUATION CRITERIA**

### **A. SUBMISSION OF APPLICATION TO MONROE-WEST MONROE CONVENTION AND VISITORS BUREAU**

The application for a proposal must be submitted to the Monroe-West Monroe Convention and Visitors Bureau during regular office hours by **January 10 or July 10 by 5:00 pm** of the year for consideration by the Tourism Development Application Committee. The fiscal year for the Monroe-West Monroe Convention and Visitors Bureau runs from January 1 to December 31.

### **B. PRELIMINARY ELIGIBILITY REVIEW**

The application will be deemed to have been made upon receipt by the President/CEO of a completed application with all required documentation and exhibits. The President/CEO shall determine if the application is complete and eligible for consideration under the status and rules of the Tourism Development Program.

**ONLY COMPLETE APPLICATIONS WILL BE CONSIDERED FOR FUNDING.**

### **C. NOTIFICATION OF DEFICIENCIES**

In the event that an incomplete application is received, and the Tourism Development Application Committee is interested in the project, the President/CEO or a designee shall notify the applying organization, specifying the deficiencies. The deficiencies shall be corrected within fifteen days of the applicant's receipt of notification, or the applying organization will be ineligible for the upcoming funding period.

### **D. EVALUATION PROCEDURES**

The evaluation of the application shall be undertaken in accordance with the standards and requirements set forth in this Application and Procedural Guide. Applications which in the judgement of the Monroe-West Monroe Convention and Visitors Bureau Tourism Development Committee meet the mission, purpose, and requirements set forth in the Application and Procedural Guide shall be submitted to the Board of Directors for final approval.

The decision to award funding will be based on the project's contribution toward developing tourism in Ouachita Parish. Funding to local organizations will be based on:

- 1) Contribution to creating overnight stays in Ouachita Parish
- 2) Matching Funds -Organizations with **matching funds** will be given priority consideration.
- 3) The ability to meet the goals described in the marketing plan
- 4) Potential for growth of the Tourism Industry

## **X. APPROVAL and FUNDING PROCEDURES**

If the Monroe-West Monroe Convention and Visitors Bureau Board of Directors approve an application for Tourism Development funding, it shall issue an award letter from the President/CEO to the applying organization stating:

- 1) The name of the organization receiving funding
- 2) The amount of funding
- 3) Obligation statement for the receiving organization.
- 4) Any requirements of usage of the funding specified by the Board of Directors.

All funding requires a 2/3 approval by the Tourism Development Committee before submitting to the entire Board of Directors and a simple majority approval of the entire board members present before funds can be allocated.

If the Tourism Development Application is approved for any funding, the organization agrees to the following by accepting the grant:

- 1) Signage during construction must acknowledge the contribution of the Monroe-West Monroe Convention and Visitors Bureau, as appropriate to the grant awarded.
- 2) All verbal and visual marketing materials for the capital improvement must include “visit [monroe-westmonroe.org](http://monroe-westmonroe.org)”.
- 3) CVB logo must be used on any marketing materials, such as fliers, banners, invitations, websites, convention promotions, e-mail, t-shirts, and media advertisements and announcements. The organization will provide a follow-up report within 60 days after the completion of the event or project.

Once funding is approved, you must return the signed award letter and grant agreement to the Convention and Visitors Bureau **within 30 days**.

75% of the approved amount will be issued to the organization upon receipt of a letter of requesting funds with proper documentation that funds are committed to this project, i.e. invoices, copies of checks, etc. for expenses incurred for the project. **If award is over \$100,000, a cooperative endeavor agreement is required.**

Grant recipients may use allocated funds only for such purposes stated in the proposals and as approved by the Monroe-West Monroe Convention and Visitors Bureau Board of Directors. Reallocation of funding for purposes other than those specified in the proposal shall require prior written approval of the Monroe-West Monroe Convention and Visitors Bureau Board of Directors.

## **XI. FINAL REPORT AND REVIEW**

In an effort to see that proposals are completed in a timely fashion, each recipient will submit for the Tourism Development Committee a brief follow-up report once the project is complete. The final report should include:

- 1) Letter requesting final 25% of approved funding
- 2) Form D – Final budget –compare proposed to actual budget
- 3) Overall summary of the event/project and its status
- 4) Copies of all marketing materials recognizing the support of the CVB (proof of use of CVB logo, etc.)
- 5) Photos of the capital improvement

The follow-up report and Form E should be submitted to the Convention and Visitors Bureau within **60 days** of completion of the project or event. The remaining funds will be released upon approval of the Board of Directors. If the organization does not request the remaining funds within one year of the award date, the organization forfeits the amount and it will be reincorporated into the Tourism Development Fund.

One year after completion of project, the recipient must submit a letter of completion and goals reached. This letter should include:

1. Summary of Project
2. A list of goals for the project detailing which goals were met and how those goals were reached.
3. List of new events held or to be held due to capital improvements.
4. Attendance numbers versus previous attendance numbers.
5. Event attendance/participant numbers as well as number staying overnight in hotels.





**CAPITAL IMPROVEMENT PROJECT GRANT APPLICATION  
FORM A**

**Organization Information**

**Name of Organization:** \_\_\_\_\_

**Name of Project:** \_\_\_\_\_

**Main Contact:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City, State, Zip:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **E-mail:** \_\_\_\_\_

**President/CEO:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City, State, Zip:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **E-mail:** \_\_\_\_\_

**\*Attach a List of the Current Board of Directors\***

**Project information**

**Name of Capital Improvement Project:** \_\_\_\_\_

**Date for beginning of Capital Improvement Project:** \_\_\_\_\_

**Date for completion of project:** \_\_\_\_\_

**Use of Funds (choose at least one):**

\_\_\_ Capital improvements of new or existing tourist oriented attractions.

\_\_\_ Survey and planning expenditures for developing and revitalizing an existing tourist oriented attraction.

\_\_\_ Special project deemed to be of a community-wide tourism interest.

For CVB Use Only:

Amount requested: \$ \_\_\_\_\_

Amount Granted: \$ \_\_\_\_\_

\_\_\_ Award letter mailed – Date: \_\_\_\_\_

\_\_\_ Signed letter received – Date: \_\_\_\_\_

\_\_\_ Project to begin: \_\_\_\_\_

\_\_\_ Project to be completed: \_\_\_\_\_

\_\_\_ Reminder sent \_\_\_\_\_

**CAPITAL IMPROVEMENTS GRANT APPLICATION  
FORM B**

**GENERAL BUDGET INFORMATION:**

Budget Information (This is a sample format. You can include additional line items appropriate for your event, festival, or marketing campaign)

Requesting from CVB \$ \_\_\_\_\_

Revenue:

Sponsorships \$ \_\_\_\_\_

In-Kind Donations \$ \_\_\_\_\_

Other Income *Designated to project* \$ \_\_\_\_\_

**Total Income:** \$ \_\_\_\_\_

Expenses:

Construction Costs \$ \_\_\_\_\_

Marketing/Promotion \$ \_\_\_\_\_

Administrative \$ \_\_\_\_\_

Other Expenses \$ \_\_\_\_\_

**Total Expenses:** \$ \_\_\_\_\_

*\*\*Attach a detailed construction cost budget to this application.*

**CAPITAL IMPROVEMENTS GRANT APPLICATION  
FORM C**

**Current Attendance/Participant Numbers for the last 3 years:**

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

\*For sporting events, list each event and the number of participants. For attractions, list yearly attendance.

**If this is a new facility, list the expected number of attendance or participants:**

\_\_\_\_\_

**How did you get the attendance/participant numbers:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Discuss new events and increased attendance expected with Capital Improvements:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Number of hotel rooms utilized due to facility currently:** \_\_\_\_\_

**Estimated number of hotel rooms to be used due to capital improvement:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Signature of person filling out application:** \_\_\_\_\_

**Printed Name & Title:** \_\_\_\_\_

**Contact Number:** \_\_\_\_\_ **Contact Email:** \_\_\_\_\_

**Date:** \_\_\_\_\_