

REGIONAL TOURISM ORGANIZATION 7

PARTNERSHIP FUNDING PROGRAM

Guidelines For

Fiscal Year 2013/14

(April 1, 2013 to March 31, 2014)

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BACKGROUND

In 2012 the Ministry of Tourism, Culture and Sport (MTCS) announced that effective fiscal year 2013/14 (April 1, 2013 to March 31, 2014), Regional Tourism Organizations (RTOs) are eligible for partnership funding from the province for joint projects they undertake with partner organizations. This funding represents new money, i.e., it is in addition to the base funding received by RTOs.

This funding opportunity requires that RTOs secure matching funds from partner businesses and organizations.

“Partners” are defined as private businesses, destination marketing and management organizations (DMMOs), tourism organizations, municipalities, associations, and interest groups.

The purpose of the program is to support “partnerships,” which are defined as agreements where RTO7 agrees to work with one or more partners on specific initiatives or projects. These initiatives must be within the RTO mandate (e.g., marketing, experience or product development, workforce development, and investment attraction), and reflect priorities consistent with the RTO’s business plan.

MTCS Guidelines and a Q&A document are available on the [Partnership Funding resource page](#).

ABOUT THE PROGRAM

The Regional Tourism Organization 7 Partnership Funding Program is available to eligible partners with an active interest in tourism in BruceGreySimcoe (Ontario Tourism Region 7).

For 2013/14, RTO7’s partnership funding allocation from the Province is \$336,000. RTO7’s objective is to ensure that 100% of available partnership funds are utilized.

In addition to matching funds from eligible partners, RTO7 will invest a portion of its base funding in projects that align with its strategic and business objectives. With RTO7’s additional investment, our goal for 2013/14 is to put \$1 million in total funds at work in joint projects that will build, sustain and grow tourism spending in BruceGreySimcoe.

RTO7 has identified four categories of projects that are eligible for partnership funding in 2013/14:

- I. **Signage:** Implementation of Region 7 Tourism Wayfinding Signage Standards
- II. **Experience Development:** Product development and workforce initiatives
- III. **Promotion:** Marketing and advertising programs
- IV. **Cooperative Advertising:** Co-branded major market campaign(s) leveraged by RTO7

This guide details the general provisions of the program and the objectives and particulars of each program category.

GENERAL GUIDELINES

This guide is effective as of February 2013. For the most current information on the program, including updates to this guide, please refer to the [Partnership Funding resource page](#).

Project Timing

1. Consistent with MTCS requirements, funding is contingent on project initiation and completion during FY 2013. This means that all expenses must be incurred and paid between April 1, 2013 and March 31, 2014.

Eligible Partners

1. Eligible partners are private and non-private tourism operators, destination marketing and management organizations (DMMOs), tourism organizations, municipalities, and associations/interest groups with an active interest in tourism in BruceGreySimcoe.
2. In order to be considered under the program, businesses or organizations must be established and be able to demonstrate the financial capacity and other resources (if applicable) to execute the project in partnership with RTO7.
3. Upon approval of the initiative or project, organizations will be required to execute a project agreement (enter into a formal contract with RTO7) specifying the particulars of the initiative funding and respective roles and responsibilities towards its execution.

Eligible Projects

4. Initiative or project goals and outcomes must be consistent with and demonstrate a clear benefit to building, sustaining and/or growing tourism in BruceGreySimcoe.
5. Applications are encouraged for new initiatives as well as for established initiatives (i.e., projects already in place). If the proposed project is established, organizations must demonstrate:
 - a) That the project meets all general and relevant funding category requirements; and
 - b) How partnership funds will incrementally improve execution and/or outcomes.
6. Each initiative or project must be consistent with the objectives of the relevant program category and the mission / mandate / purpose of the applicant organization(s).
7. Each proposed project application should:
 - a) Demonstrate how the outcomes or outputs of the project will be measured.
 - b) Reference to applicable research. Where applicable, applicants should cite relevant research to support the proposed project. This should include, but is not limited to, RTO7 data available at no cost through the [RTO7 Stakeholder Site](#).

Acknowledgements

8. In the execution of the project, partner organization(s) will be expected to:
- a) Acknowledge the partnership funding support of RTO7 and the Province of Ontario in the communication of the project, and provide for opportunity for RTO7 and/or the Province to participate in public/media announcements related to the project.
 - b) Acknowledge the partnership with RTO7, i.e., including but not limited to ensuring that the BruceGreySimcoe logo and reciprocal links to web sites are incorporated as appropriate.
 - c) Provide reporting to RTO7, the format and particulars of which will be specified in the project agreement, to document the execution and outcomes of the project.

FUNDING

9. Project funding will be assessed on the merits of each application. The level of approved funding for each project will be determined by RTO7, in consultation with the partner organization(s), and may be for a lesser or greater amount than proposed in the original application.
10. Minimum and maximum partner contribution requirements are provisional guidelines only, designed to ensure that projects benefit from sufficient funding to ensure meaningful outcomes. Notwithstanding these limits all applications are welcome, and RTO7 reserves the right to fund all initiatives or projects that meet program guidelines and requirements.
11. Category II – Experience Development and Category III – Collaborative Promotion projects are eligible for additional RTO7 funding (in addition to partnership funding) to a maximum of (i.e., up to a) \$1 match for each \$1 in partnership funds committed.
 - a) In order to qualify for this additional match, each collaborating partner organization must make a meaningful financial contribution to the initiative or project.
12. In order to secure partnership funds from the MTCS, cash funds to be contributed to the proposed project by the applying organization(s) must be remitted to RTO7 and/or disbursed by the partner(s) according to terms and a budget approved by RTO7. The terms of remittance and/or disbursement will be specified in the project agreement. In all cases RTO7 will be responsible for disbursement of partnership funds.
13. The source of partner funds to be contributed to the proposed project must be identified. Eligible sources of funding include but are not limited to general revenues, funding from municipal or other tertiary governments, or federal funds. Consistent with MTCS requirements:
 - a) Organizations must demonstrate the source of funding to be contributed to the proposed project has not come from other Ontario government ministries, programs or agencies, including programs such as Celebrate Ontario, the Ontario Tourism Marketing Partnership Corporation or other RTOs.
 - b) Only cash contributions can be considered for matching purposes. In-kind contributions cannot be considered / leveraged.

Eligible and Ineligible Expenses

14. Eligible expenses vary depending on the category and nature of the project. Please refer to the relevant project category information for specifics.
15. Partner organization(s) may propose to lead and/or implement projects in collaboration with RTO7 however they may not be compensated for expenses such as:
 - a) Management and staff salaries, wages, benefits, and expenses including travel costs.
 - b) General, administrative and/or overhead costs such as rent, telephone and communication lines/services, computers, utilities, maintenance costs, vehicles, and/or any operational expenses related to an organization's ongoing activities.
16. Other ineligible expenses include but are not limited to:
 - a) Capital costs (other than signage) related to permanent structures (e.g. materials, labour, vehicles, land acquisition, purchase of equipment for project construction, computers, etc.).
 - b) Refundable Harmonized Sales Tax or other refundable expenses (e.g. security deposits, etc.).
 - c) Competition prizes, prize money and appearance fees.
 - d) Advocacy or lobbying directed at the Province of Ontario or its agencies.
 - e) Legal, audit, and interest fees.

APPLICATION PROCESS

Intake and Notifications

17. Initial intake of funding applications will take place effective March 1, 2013. Based on the level of committed funding, a subsequent intake may be offered in order to meet the objective of utilizing 100% of available funds. Please refer to the resource page for information.
18. For initial intake purposes, individual organizations may submit a maximum of three applications for funding, either independently and/or in collaboration with other organizations.
19. In April 2013 RTO7 will announce initial intake projects approved for funding. Successful applicants will be notified directly by RTO7. A list of confirmed successful applicants and projects will be published on the resource page.
20. If a subsequent intake is offered, details including deadlines will be published on the resource page.

How to Apply

21. Application questionnaires are available for download (MS Word format) on the [Partnership Funding resource page](#).
22. Only one application form should be submitted per project or initiative.
 - a) Organizations applying collaboratively must designate a lead organization that will be responsible for the application.
23. Applicants are encouraged to:
 - a) Review these guidelines in full before completing an application for funding.
 - b) Refer to the resource page for details, including deadlines, downloadable application forms, submission processes, FAQs, other important information and program updates.
 - c) Contact RTO7 with any questions and/or for assistance prior to completing an application.

Assessment

24. Each proposed project will be assessed on its own merits and organization(s) are encouraged to ensure that applications are complete and reflect an understanding of guidelines and requirements.
25. RTO7 staff will review and approve all applications. The following scoring system will be utilized:¹

¹ Modified criteria apply to Category IV – Cooperative Advertising.

Assessment Criteria	Score
Objectives: rationale/demonstrated need <ul style="list-style-type: none">Demonstrated or innovation value as supported by available research	/ 30
Project execution/implementation plan <ul style="list-style-type: none">Feasibility, reasonablenessBudget	/ 30
Measurement <ul style="list-style-type: none">Performance/success measures	/ 15
Organizational capacity <ul style="list-style-type: none">Including financial resources	/ 15
Completeness of application <ul style="list-style-type: none">Thoroughness of proposal	/ 10
Total score <ul style="list-style-type: none">All criteria as applicable	/ 100

Inquiries

1. Please refer to the [Partnership Funding resource page](#) for FAQs, and program updates.
2. Inquiries regarding the program and/or applications should be directed to partnerships@rto7.ca.

CATEGORY I: SIGNAGE

Purpose

To support adoption and implementation of Region 7 Tourism Wayfinding Signage Standards

Objectives

- Enhance tourism experience through improved wayfinding
- Support tourism destinations and operators through improved signage

Eligible Projects

- Applicant organizations must adhere to Region 7 Tourism Wayfinding Signage Standards & Specifications Manual. This document is available for download through the [RTO7 Stakeholder Site](#)
- Must be designed to implement, fabricate and/or install/erect tourism-focused signage for vehicular and/or pedestrian applications based on RTO7 specifications
- Implementation includes the conduct of feasibility or need assessment studies
- Projects to erect signage to assist wayfinding to destinations, attractions as well as trails or routes (including recreational trails, e.g., hiking, etc.)
- Note that eligibility is not extended to other signage programs (e.g. TODS)

Expectations

- As detailed in the application questionnaire, applicants must clearly articulate:
 - The scope of the project including rationale (need) as supported by available research
 - A well-defined execution plan and budget
 - Expected outcomes, and how success will be measured

Category I – Funding Formula

- Approved projects are eligible for funding from the RTO7 partnership funding pool on the basis of \$0.50 match for each \$1 in partner organization(s) funding committed

Funding ratio (partner dollars to partnership funding): \$2 : \$1			
Example funding	Partner funding	Partnership funding	Total funding
Minimum partner(s) funding (recommended)	\$10,000	\$5,000	\$15,000
Maximum partner(s) funding (recommended)	\$50,000	\$25,000	\$75,000

CATEGORY II: EXPERIENCE DEVELOPMENT

Purpose

To support and enhance development of tourism experiences (tourism product) and workforce development

Objectives

- Experience development: increase visitation, visitor spending from key (existing and/or emerging) BruceGreySimcoe target markets
 - Support enhancement of existing experiences with demonstrated appeal
 - Support innovation through development of new experiences with demonstrable market appeal
- Workforce development: enhance visitor satisfaction through improvements in delivery of tourism services and practices

Eligible Projects

- Identified BruceGreySimcoe experience/product demand generators, i.e.:
 - Outdoor recreation (winter sports, golf, etc.)
 - Waterways, beaches and trails
 - Festivals and events
- Emerging experiences with demonstrated tourism appeal or potential including but not limited to:
 - Agri-culinary
 - Green/sustainable tourism
 - Arts and culture
- Workforce initiatives including but not limited to:
 - Training (customer, visitor service)
 - Employment preparation
 - Career enhancement and employee engagement

Expectations

- As detailed in the application questionnaire, applicants must clearly articulate:
 - The scope of the project including rationale (need) as supported by available research
 - A well-defined execution plan and budget
 - Expected outcomes, and how success will be measured

Category II – Funding Formula

- Approved projects are eligible for funding from the RTO7 partnership funding pool on the basis of \$1 match for each \$1 in partner organization(s) funding committed. In addition, RTO7 will contribute a maximum of \$1 for each \$1 in partner funding committed

Funding ratio (partner dollars to partnership funding to RTO7 funds): \$1 : \$1 : \$1				
Example funding	Partner funding	Partnership funding	RTO7 funds	Total funding
Minimum partner(s) funding (recommended)	\$5,000	\$5,000	\$5,000	\$15,000
Maximum partner(s) funding (recommended)	\$25,000	\$25,000	\$25,000	\$75,000

CATEGORY III: PROMOTION

Purpose

To support operator and organizational marketing and advertising initiatives in order to increase consumer awareness, visitation and tourism spending

Objectives

- Support targeted promotional, marketing and advertising campaigns and tactics designed to generate consumer awareness, interest and increased visitation and spending
- Support innovative campaigns and tactics designed to increase visitation and visitor spending from key (existing and/or emerging) BruceGreySimcoe target markets
- Increase market reach and/or impact of existing campaigns and tactics
- Encourage collaborative initiatives

Eligible Projects and Expenses

- Examples of eligible projects include but are not limited to:
 - Destination marketing initiatives
 - Promotion of attractions
 - Promotion of private tourism businesses
 - Promotion of festivals/events
 - Promotion of experiences/activities
- Examples of eligible expenses include but are not limited to:
 - Development, research, creative
 - Production, fulfillment
 - Online, offline media buys
 - Online (web sites) and offline (print) collateral

Expectations

- As detailed in the application questionnaire, applicants must clearly articulate:
 - The scope of the project including rationale (need) as supported by available research
 - A well-defined execution plan and budget
 - Expected outcomes, and how impacts and success will be measured

Category III – Funding Formula

Two funding streams are available:

- Approved projects from **single organizations** are eligible for funding from the RTO7 partnership funding pool on the basis of \$1 match for each \$1 in partner organization(s) funding committed

Funding ratio (partner dollars to partnership funding): \$1 : \$1			
Example funding	Partner funding	Partnership funding	Total funding
Minimum partner funding (recommended)	\$5,000	\$5,000	\$10,000
Maximum partner funding (recommended)	\$25,000	\$25,000	\$50,000

- Approved **collaborative projects from two or more organizations** are eligible for funding from the RTO7 partnership funding pool on the basis of \$1 match for each \$1 in partner organization(s) funding committed. In addition, RTO7 will contribute a maximum of \$1 for each \$1 in partner funding committed

Funding ratio (partner dollars to partnership funding to RTO7 funds): \$1 : \$1 : \$1				
Example funding	Partner funding	Partnership funding	RTO7 funds	Total funding
Minimum 2+ partners funding (recommended)	\$5,000	\$5,000	\$5,000	\$15,000
Maximum 2+ partners funding (recommended)	\$25,000	\$25,000	\$25,000	\$75,000

CATEGORY IV: COOPERATIVE ADVERTISING

Purpose

To develop a cooperative advertising campaign featuring key demand generators

Objectives

- Increase visitation, visitor spending from key (existing and/or emerging) BruceGreySimcoe target markets through promotion of key/iconic demand generators, i.e., destinations, attractions, operators and experiences
- Promote region through awareness building of BruceGreySimcoe brand
- Promote partner brands, experiences and offerings

Concept

- TV campaign (preferred): donuted commercials; or
- Multimedia campaign consisting of some combination of online, offline, radio
- Both options will be supported by social media

Expectations

- Working with a steering committee of participating partners, RTO7 will manage all aspects of the campaign (including planning, execution, and measurement) as an integral component of its marketing program

Category IV – Participation and Funding Formula

- Subscription based, minimum \$10,000
- Each subscribing partner will receive a pro-rata share of ad buys/placements
- Partner contributions will be leveraged from the RTO7 partnership funding pool on the basis of \$1 match for each \$1 in partner organizations funding committed
- In addition, RTO7 will contribute one-third of campaign costs. Example:

Funding ratio (partner dollars to partnership funding to RTO7 funds): \$1 : \$1 : \$1			
Example funding	Partner funding	Partnership funding	RTO7 funds
10 partners subscribing @ \$10,000 each	\$100,000	\$100,000	\$100,000
Total campaign budget	\$300,000		

Category IV – Expressions of Interest

Organizations interested in this cooperative advertising opportunity should contact:

Bill Sullivan
RTO7 Director of Marketing
(705) 715-6544
bsullivan@rto7.ca

APPENDIX: PROGRAM AT-A-GLANCE

**RTO7 Partnership Funding 2013/14
Program At-a-Glance***



Category	I Signage	II Experience Development	III Promotion	IV Cooperative Advertising
Eligible partners	— Private and non-private tourism operators, destination marketing and management organizations (DMMOs), tourism organizations, municipalities, and associations/interest groups with an active interest in tourism in BruceGreySimcoe —			
Objective	Implementation of signage & wayfinding specifications	Enhance development of tourism experiences (products, training)	Marketing / advertising / promotional ventures	Co-branded campaigns leveraged by RTO7
Additional RTO7 funding?	No	Yes	(1) No (stand alone) (2) Yes (collaborative)	Yes
Participation	\$2 : \$1	\$1 : \$1 : \$1	(1) \$1 : \$1 (stand alone) (2) \$1 : \$1 : \$1 (collaborative)	\$1 : \$1 : \$1
Project funding**				
Minimum	\$10,000	\$5,000	\$5,000	\$10,000
Maximum	\$50,000	\$25,000	\$25,000	N/A
Example funding	\$10,000 leverages to \$15,000	\$10,000 leverages to \$30,000	(1) \$10,000 leverages to \$20,000 (2) \$10,000 leverages to \$30,000	\$10,000 leverages to \$30,000
Example initiatives or projects	Local trail group partners to implement wayfinding signage along trail network Municipality implements signage across its boundaries	Waterways stakeholders partner to develop coastal paddling experience Culinary sector groups collaborate on joint experience development initiative	Operator(s) partner with RTO7 on co-branded radio campaign in target market 2+ sector groups collaborate to produce consolidated collateral (e.g., guide or map)	10 stakeholders partner with RTO7 in co-branded TV campaign comprised of donut commercials (feature each partner in rotation)

* E&OE. Refer to Guidelines for complete information

** Recommended minimum and maximum contribution levels