



## PARTNER GRANT RULES & APPLICATION – FISCAL YEAR 2021

### *Part of the City of Waterloo Hotel-Motel Tax Grant process*

Experience Waterloo, on behalf of the City of Waterloo, is accepting funding requests from tourism-related, non-profit organizations (as qualified under IRS section 501(c)) or cultural departments.

The organization strives to put Waterloo in the best light at all times, showcasing Waterloo as a great place to live, work, play and visit. Our organizational mission statement is “to enhance and promote the Waterloo experience.” Through a more engaging partnership program, we will be better able to enhance and promote the Waterloo experience, amplifying our collective voices as we strive to make Waterloo a key Iowa destination.

Applications should show how the organization brings visitors to Waterloo throughout the year. Grants awarded are intended to support projects that help draw visitors to Waterloo. Organizations must be able to show results of grant dollars spent (i.e. increased visitation, increased website traffic, etc.) with specific data.

### **PARTNER PROGRAM INTENT**

This program is intended to:

- Recognize that site-based attractions and organizations provide a different level of service to visitors than events. This funding provides a base of support that aids in planning and budgeting.
- Provide regular and reliable support for tourism attractions and organizations to use in marketing outside Black Hawk County.
- Provide financial support for site-based attractions and organizations that:
  - Drive and serve visitors
  - Offer reasons for visitors to extend their stay in Waterloo
  - Have a positive impact on Waterloo

### **PARTNER PROGRAM EXPECTATIONS**

This program expects that Experience Waterloo Partners funded through this program will:

- Assume a leadership and advocacy role in the community to advance tourism in Waterloo and the mission of Experience Waterloo.
- Provide two new blog posts, relevant to the organization’s mission, for use on Experience Waterloo website and other Experience Waterloo affiliated publications.
- Executive Director (or Marketing Director) will participate in 75% of Experience Waterloo partnership meetings, held quarterly starting January 2020.
- Provide support for Experience Waterloo in bidding events, tournaments, conventions, etc.
- Participate in cooperative advertising efforts with Experience Waterloo, where applicable.

## PARTNER PROGRAM ELIGIBILITY

To be eligible for this program, an organization must meet the following criteria:

### ORGANIZATION & STRUCTURE

The organization must:

- Be located in Waterloo, Iowa.
- Be a cultural tourism attraction or organization.
- Be legally organized as an Iowa organization, incorporated under the Iowa Nonprofit Corporation Act, holding a federal 501(c)(3) tax-exempt status OR an arts or cultural department or division of a municipal government that is incorporated in Iowa under the Iowa Nonprofit Corporation Act.
- Have at least one, full-time paid professional employee who is employed year-round, and is responsible for managing the organization.
- Own, operate, rent or lease a facility or office space that has a published street address and has regularly scheduled hours of operation totaling at least five days per week in which to interact with the general public.
- Have facilities, programs or services available to visitors at least 1,040 hours per year.
  - While an organization's major program(s) or service(s) may occur primarily during a specific time of year, other services and programming should occur and benefit visitors throughout the remainder of the year.

### BUDGET & OVERSIGHT

The organization must:

- Be able to match (dollar for dollar) the funding award received in money spent on marketing/event, not in staff salaries or other operational functions.
- Have their financial statements audited or reviewed annually by a third-party CPA, and the most recent year's report will be provided to Experience Waterloo upon request.

### ELIGIBILITY

- The organization must have met all of the above eligibility requirements for a minimum of three years. Until that time, the organization is invited to apply using the Events/Capital Grant Application.
- Should an organization that has been previously funded as an Experience Waterloo Partner not meet eligibility requirements, that organization is invited to apply using the Events/Capital Grant Application until the next funding cycle during which all eligibility requirements are met.

### USE OF FUNDS

- Applicants may apply using the Event/Capital Grant Application during the same fiscal year. A Partner organization, if granted Event/Capital grant funds, will be strictly prohibited from applying for Event/Capital grant funds for two years, but will still be eligible to apply for the Partner Program.
- Funding through the Partner Program must be matched, dollar for dollar, by the Partner organization. Those funds must be directly related to marketing.
- Funds may be used solely for marketing projects, or projects that are intended specifically to bring visitors from out-of-county (see fundable items listed below). Any use of grant money for items not listed will result in total funding being reduced by the amount spent on non-fundable items.

- Partner organizations will be funded based on total operating budget. In the event that the specified marketing budget cannot provide a dollar for dollar match, Partner funds will be decreased to reflect partnering organization’s marketing budget.
- Matching funds cannot be in the form of staff salaries or other operational functions.

## FUND USE REPORTING

- In order to be considered for funding through the Experience Waterloo Partner Program, applicants must:
  - Meet with Executive Director of Experience Waterloo prior to submitting application. No applications will be considered without attendance.
  - Give one-year written notice of intention to apply for Partner Grant funds.
- Partners funded through this program will be required to outline specifically how funds will be spent before the beginning of the fiscal year in which funds are awarded.
- Partners will be required to submit a detailed final report, including specific information about marketing projects, results, additional dollars spent, copies of invoices and proof of payment.
- Grant funds are available only after all grant dollars have been spent and final report has been received and reviewed. No grant dollars will be paid in advance. No exceptions will be made.
- Applicants must show out-of-county visitation in a month-by-month format from the organization’s most recently completed fiscal year.
  - Partners will be required to provide specific information about how out-of-county visitation data is collected. Partners may use admission, ticket sales, etc. to track visitation, and will be expected to count/survey visitors at 25% of special events that are not ticketed. The Experience Waterloo Executive Director and Partner representative will determine specifically which events should be counted and the appropriate number of surveys to be completed.
- Applicants will be required to provide actual revenues and expenses from the organization’s most recently completed fiscal year including a breakdown of funds spent specifically for marketing.
- Funding is for projects that occur in the correct fiscal year only.
- Funding must be used for the project designated on the signed contract or funding may be forfeited.
- All project printed materials, signage or advertising must contain the words, “Sponsored, in part by Experience Waterloo, and the City of Waterloo Hotel-Motel Tax Grant” and a logo provided by Experience Waterloo.

## FUNDABLE ITEMS

- Advertising and marketing (Print/Electronic/Billboard)
  - Advertising and marketing should focus on audience(s) outside of Black Hawk County.
- Direct mail campaign expenses, including design, printing and postage.
- Entertainment and honorariums for events.
- Printed materials that promote visits to the event/project prior to the event occurring.
- Travel shows
  - Funding for booth space and registration fees are eligible, but travel is not a fundable expense.
- Marketing and design services by companies or individuals outside the organization.

## FUNDING STRUCTURE

Partner funding for FY20 will be based solely on Annual Operating Budgets. All applicants who've previously enrolled in the Partner Program will be partially evaluated on past performance (see Partner Program Expectations).

Annual Operating Budget	Partner Award
\$1,000,000+	\$23,000
\$750,000 - \$999,999	\$18,000
\$500,000 - \$749,999	\$12,000
\$250,000 - \$499,999	\$8,000
\$100,000 - \$249,999	\$4,000

Partners must submit the electronic version of the application and any additional supporting information. Supporting information must be sent to Tavis Hall at [tavis@experiencewaterloo.com](mailto:tavis@experiencewaterloo.com). Grants will not be accepted until electronic application and supporting information are both received.

## TIMELINE

February 7, 2020	Applications available on <a href="http://experiencewaterloo.com">experiencewaterloo.com</a>
March 11, 2020	Applications due to Experience Waterloo
March 2020	Board meets and makes recommendations to City Council
March 2020	Partners notified of funding results
July 1, 2020	Funds available after completion of project
30 Days Post Project	One hard copy <b>AND</b> one electronic copy of evaluation form/final report due to Experience Waterloo

*Note: Awarded grant money will be distributed in full from the City of Waterloo approximately one month following the recipient's submission of two copies of the completed project evaluation form for the funded project. Evaluations are to be returned within 30 days of the completion of the event or project. Failure to provide this final report will result in the delay or loss of grant funds. Failure to utilize grant funds for the use(s) provided in this grant application may result in funding being disallowed, reduced or delayed. Use of approved funds for non-fundable items may result in funding being disallowed or reduced.*

**PARTNER GRANT APPLICATION – FISCAL YEAR 2021**

*Entire form must be typed*

**CONTACT INFORMATION**

Name of organization: \_\_\_\_\_

FEIN: \_\_\_\_\_

Check payable to (if different than above): \_\_\_\_\_

Contact person: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone number: \_\_\_\_\_ Email: \_\_\_\_\_

Organization web address: \_\_\_\_\_

Does your organization meet all of the eligibility requirements listed below?

- The organization must be legally organized as:
  - An Iowa organization, incorporated under the Iowa Nonprofit Corporation Act, holding a federal 501(c)(3) tax-exempt status OR an arts or cultural department or division of a municipal government that is incorporated in Iowa under the Iowa Nonprofit Corporation Act.
- The organization must be a cultural tourism attraction or organization.
- The organization must be located in Waterloo, Iowa.
- The organization must own, operate, rent or lease a facility or office space that has a published street address and has regularly schedule hours of operation in which to interact with the general public.
- The organization must have their financial statements audited or reviewed annually by a third-party CPA, and the most recent year’s report will be provided to Experience Waterloo upon request.
- The organization’s facilities, programs or services must be available to visitors at least 1,040 hours per year. While an organization’s major program(s) or service(s) may occur primarily during a specific time of year, other services and programming should occur and benefit visitors throughout the remainder of the year.
- The organization must have at least one, full-time paid professional employee who is employed year-round and is responsible for managing the organization.
- The organization must meet all of the above eligibility requirements for three consecutive years.

If YES, please continue. If NO, we invite you to pursue funding through the Event or Capital Grant Application.

**Please answer the following questions/provide the following information:**  
*(continued on next page)*

1. Please provide information showing out-of-county visitors to your attraction month-by-month from the most recently completed fiscal year. Please outline specifically your measurement tool for tracking attendance.  
[limit of 1,000 characters]

2. Please provide information about any special events, especially those that are non-ticketed events, and describe how visitors were counted/surveyed.  
[limit of 500 characters]

3. How does your organization currently market to those outside of Black Hawk County?  
[limit of 500 characters]

4. Please provide a brief explanation of how you would use funds received through the Experience Waterloo Partner Funding Program. Funded Partners will be required to provide a specific plan for use of granted funds prior to the beginning of the fiscal year. This explanation may be more general and helps the Experience Waterloo Board and City Council get an idea of some of the ideas that may be implemented.

- a. Please share what ideas might be new or innovative, different than what the organization has done previously.  
[limit of 250 characters]

- b. What is the mechanism for measuring success of the project(s)?  
[limit of 250 characters]

5. Please provide a detailed financial picture of your most recently completed fiscal year, including all actual revenue and expenditures.
  - a. Please outline how funds received through this program would affect the organization's annual budget, understanding that these funds are to be used solely for marketing and cannot be matched with staff dollars.  
[limit of 250 characters]

**Acknowledgment and Signature**

I have reviewed this application from the City of Waterloo and Experience Waterloo. To the best of my knowledge, the information contained in this application and its attachments is accurate and complete. The Hotel-Motel Tax Grant funds are **reimbursement** funds for project funding already spent, and are to be used for the express purpose as stated in this application. I, the undersigned, know full and well that if this program/project does not transpire, recommendation by the Experience Waterloo Board of Directors for funding will be withdrawn. My organization will be responsible for refunding any portion of grant funds already received or for covering the costs for portions of the project that are non-fundable or not stated herein.

\_\_\_\_\_  
Signature of Applicant (*please initial*)

\_\_\_\_\_  
Date