

# **City of Morro Bay**

## **Tourism Business Improvement District**

### **Advisory Board**

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#### ***City Mission Statement***

*The City of Morro Bay is dedicated to the preservation and enhancement of the quality of life. The City shall be committed to this purpose and will provide a level of municipal service and safety consistent with and responsive to the needs of the public.*

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#### ***Tourism Business Improvement District Purpose and Authority***

*The Morro Bay Tourism Business Improvement District (MTBID) Advisory Board (“Board”) advises the City Council on the administration and use of the MTBID assessment funds. The Board recommends projects to the City of Morro Bay to promote tourism to directly benefit the City’s lodging industry.*

*The primary purpose of the MTBID is to increase occupancy and room nights across all lodging types (motel, hotels, bed and breakfast) that pay the business improvement assessment (BID) along with transient occupancy tax (TOT) within the City while placing particular emphasis on marketing that positively impacts the lodging.*

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## **NOTICE OF MEETING**

**THURSDAY, JUNE 9, 2016**  
**VETERAN’S MEMORIAL HALL – 9:30 A.M.**  
**209 SURF STREET, MORRO BAY, CA**

- I. ESTABLISH QUORUM AND CALL TO ORDER
- II. PUBLIC COMMENT PERIOD REGARDING ITEMS ON THE AGENDA
- III. WELCOME NEW ADVISORY BOARD MEMBERS, MARGARET JUREN AND PAUL VANBEURDEN
- IV. WELCOME CITY OF MORRO BAY TOURISM MANAGER, JENNIFER LITTLE
- V. AMGEN TOUR OF CALIFORNIA REPORT
- VI. DISCUSSION AND APPROVAL OF TOURISM BUREAU BUDGET REPORT
- VII. DISCUSSION AND APPROVAL OF 2016/17 GRANT PROGRAMS
- VIII. DECLARATION OF FUTURE ITEMS
- IX. ADJOURNMENT

**THIS AGENDA IS SUBJECT TO AMENDMENT UP TO 72 HOURS PRIOR TO THE DATE AND TIME SET FOR THE MEETING. PLEASE REFER TO THE AGENDA POSTED AT CITY HALL FOR ANY REVISIONS, OR CALL CITY HALL AT 772-6568 FOR FURTHER INFORMATION.**

**IN COMPLIANCE WITH THE AMERICANS WITH DISABILITIES ACT, IF YOU NEED SPECIAL ASSISTANCE TO PARTICIPATE IN A CITY MEETING, PLEASE CONTACT THE CITY CLERK'S OFFICE AT LEAST 24 HOURS PRIOR TO THE MEETING TO INSURE THAT REASONABLE ARRANGEMENTS CAN BE MADE TO PROVIDE ACCESSIBILITY TO THE MEETING.**



AGENDA NO: V

MEETING DATE: June 9, 2016

## Staff Report

**TO:** Tourism Business Improvement District Board   **DATE:** June 3, 2016  
**FROM:** Brent Haugen, Morro Bay Tourism Bureau Director  
**SUBJECT:** Amgen Tour of California Report

### **RECOMMENDATION**

Staff is recommending a discussion on the overall impact of the Amgen Tour of California on Morro Bay. They are also making a recommendation that a final staff report be submitted to the Morro Bay City Council.

Lastly, staff is making a recommendation that an Amgen Tour of California Sponsor Handbook be created with input and insight from all County partners who have hosted the event in the past. This handbook will be a great resource to other cities on the hosting expectations and how to better plan for this event.

### **BACKGROUND**

Visit San Luis Obispo County approached the City of Morro Bay on becoming the stage 4 start for the Amgen Tour of California on Wednesday, May 18, 2016. The City of Morro Bay received a \$30,000 financial contribution from Visit San Luis Obispo County for expenses related to hosting the start. The City of Morro Bay approached the Morro Bay Tourism Bureau to help host up to 120 complimentary rooms or a maximum of \$16,000 for Amgen staff. In addition to this financial assistance, the organization also assisted in the marketing and public relations aspects of the event, plus organized and hosted a progressive dinner the night before the race.

In total, the organization paid approximately \$9,800 in room sponsorship, \$7,500 in marketing & public relations (Verdin), \$3,500 for commercial production, plus invested 150 hours (\$3,500) in staff time towards the event (approximate total of \$24,300).

The total number of rooms consumed as a result the event:

- 97 staff sponsored rooms paid by the Morro Bay Tourism Bureau
- 285 rooms were in the initial room block for the event
- 215 were actual rooms used (82 rooms paid by MBTB) - \$13,489 (133 x \$101.42 negotiated rate)
- An additional 83 estimated rooms resulted from the event - \$9,877 (83 x \$119 ADR)

Prepared By:   BH  

Deputy City Manager Review: \_\_\_\_\_

- Total estimated room revenue resulting from the event was \$23,366 [\$13,489 (133 x \$101.42 negotiated rate) + \$9,877 (83 x \$119 ADR)] \*Please note: this does not include the rooms sponsored by MBTB.

The organization also organized the Amgen Taste of the Race Progressive Dinner. This event resulted in 60 paid tickets and 90 complimentary tickets (Amgen staff, giveaways). A total of 74 tickets were used (60 paid) and redeemed at the (4) four participating restaurants including Brickhouse BBQ, Dutchman's Seafood House, Giovanni's Fish Market & Galley and Grandma's Frozen Yogurt & Waffle Shop.

Verdin worked with the Amgen Tour of California and their public relations firm, Canvas Blue to obtain local coverage for Stage 4 of the race in Morro Bay on May 18, 2016. The goal was to increase public awareness prior to the event and to drive attendance to the event in Morro Bay. The efforts resulted in 23 pieces of direct coverage between October 2015 and May 2016.

From January 1, 2016 through the end of the week of the event, the Amgen Tour of California created 2,027 page views on MorroBay.org. 45% were viewing the event listing and an additional 45% were viewing the online spectator guide organized by the Morro Bay Tourism Bureau.

The Morro Bay Chamber of Commerce organized the vendors at Coleman Park. They also conducted a follow-up survey with businesses to see if the event made an impact on their business. The results were that there wasn't a specific impact made resulting from hosting the Amgen Tour of California.

Visit San Luis Obispo County was an essential partner in bringing the event to Morro Bay. With the financial contribution of \$30,000, plus the promotional aspect of their partnership, the organization will be providing a report to the advisory board at the time of the meeting.

### **DISCUSSION**

This is an opportunity for the Morro Bay Tourism Business Improvement District Advisory Board to discuss the overall impact of the Amgen Tour of California and make recommendations for a final staff report to be submitted to the Morro Bay City Council.

### **CONCLUSION**

None

### **ATTACHMENTS**

MBTB Amgen PR Report 2015 - 2016 FINAL

Taste of the Race Tally

AMGEN rooms pick up

# AMGEN PUBLIC RELATIONS REPORT

## MORRO BAY TOURISM BUREAU

*2015- 2016*

### OVERVIEW

Verdin worked with the Amgen Tour of California and their public relations firm, Canvas Blue to obtain local coverage for Stage 4 of the race in Morro Bay on May 18, 2016. The goal was to increase public awareness prior to the event and to drive attendance to the event in Morro Bay. The efforts resulted in 23 pieces of direct coverage between October 2015 and May 2016.

### COVERAGE

#### *SLO Tribune & sanluisobispo.com*

- 10/12/2015 [Morro Bay to host leg of 2016 Tour of California](#)
- 10/22/2015 [Morro Bay leaders thrilled to host first Tour of California](#)
- 1/28/2016 [Morro Bay's Tour of California Leg to Start at the Rock](#)
- 5/16/2016 [Party, road closures set stage for Tour of California leg in Morro Bay](#)
- 5/17/2016 [Start time changed for Morro Bay's Tour of California leg kickoff](#)
- 5/18/2016 [Tour of California Stage 4 start draws thousands to Morro Bay](#)
- 5/18/2016 [Tour of California's Morro Bay stop big for local cyclists](#)

#### *KSBY*

- 1/28/2016 [Central Coast to be featured again in 2016 Amgen Tour of California](#)
- 1/28/2016 [2016 Amgen Tour of California Route Released](#)
- 4/19/2016 [Volunteers needed for Amgen Tour of California stop in Morro Bay](#)
- 5/17/2016 [Morro Bay gearing up for Amgen Tour of California](#)

5/18/2016 [Amgen Tour of California brings hundreds to Morro Bay](#)

### ***KEYT***

5/17/2016 [Morro Bay Prepares for the Amgen Tour](#)

5/18/2016 [Big Turnout for Tour of California Cycling Race in Morro Bay](#)

### ***Pacific Coast Business Times***

10/22/2015 [2016 Tour of California to include Thousand Oaks, Santa Barbara, Morro Bay](#)

### ***KCBX***

10/22/2015 [Why Morro Bay can be an Amgen host city for the first time](#)

4/18/2016 [Amgen Tour of California looking for Central Coast volunteers during May race](#)

### ***COAST 101.3***

4/19/2016 [Amgen Tour of California searching for volunteers](#)

### ***Lompoc Record***

5/16/2016 Amgen Tour of California Comes Through Central Coast

### ***The Auto Channel***

5/9/2016 [San Luis Obispo County, California To Host Stage 4 of Amgen Tour of California in Morro Bay, May 18, 2016](#)

## *Cycling News*

5/18/2016 [Tour of California: Peter Sagan wins stage 4](#)

## *Ottumwa Courier*

5/18/2016 [Peter Sagan wins seconds stage of Tour of California](#)

## *Press Democrat*

5/19/2016 [Peter Sagan rides to victory in Tour of California stage 4](#)



## Amgen Taste of the Race Tally

Date: Friday, May 20, 2016  
 To: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

#	Amt Per	Activity	Code	Amount
30	\$ 10.00	Online Tickets Sold		300.00
3	\$ -	Comps to MBTB Staff		0.00
2	\$ -	Comps for VSLOC Giveaway		0.00
85	\$ -	Amgen Staff		0.00
30	\$ 10.00	Purchased at Visitor Center		300.00
<b>150</b>	<b>Total</b>		<b>Total</b>	<b>600.00</b>
		<b>RESTAURANT</b>		
73		Brickhouse BBQ		
27		Dutchman's Seafood House		
47		Giovanni's Fish Market		
68		Grandma's Frozen Yogurt & Waffle House		
		<b>DRAWING</b>		
41		Local		
5		Greater California		
8		Out of State		



DISCOVER  
MORRO BAY

MORRO BAY TOURISM BUREAU

## AMGEN Room Pick Up May 17th, 2016

Property Name	Notes	# Rooms on Property	Rooms from Event	Rooms Block by AMGEN	Block Rooms Used	Total Occupancy
<a href="#">456 Embarcadero Inn and Suites</a>	Hotel was sold-out in advance of race day	32	1	0	0	32
<a href="#">Anderson Inn</a>	Very happy about the race and felt a positive impact	8	2	0	0	8
<a href="#">Ascot Suites</a>	Used entire block of rooms	32	2	20	20	27
<a href="#">Bayfront Inn at the Waterfront</a>	4 rooms unused from room block	16	0	16	12	16
<a href="#">Bay View Inn</a>	No rooms from Race, 10 rooms sold	22	0	0	0	10
<a href="#">Beach Bungalow Inn &amp; Suites</a>	1 room from race, Sold out.	12	1	0	0	12
<a href="#">Best Western El Rancho</a>	No rooms from race, 12 rooms sold.	27	0	0	0	12
<a href="#">Best Western Plus San Marcos</a>	3 blocked rooms not used, sold out.	32	0	26	23	32
<a href="#">Best Western Tradewinds</a>	12 rooms from race, sold out.	24	12	0	0	24
<a href="#">Blue Sail Inn</a>	14 rooms from race, sold out.	48	14	0	0	48
<a href="#">Breakers Motel</a>	6 from race, 18 sold.	26	6	0	0	18
<a href="#">Comfort Inn</a>	none from bike race, 29 rooms sold.	32	0	0	0	29
<a href="#">Days Inn</a>	Used all rooms reserved, had people looking for extras.	45	0	45	45	45
<a href="#">Econo Lodge North</a>	3 out of 18 used in room block.	18	0	18	3	18
<a href="#">Estero Inn</a>	3 rooms for race, sold out.	8	3	0	0	8
<a href="#">Fireside Inn</a>	2 rooms from race, 8 sold total.	24	2	0	0	8
<a href="#">Front Street Inn</a>	sold out all from race.	2	1	1	1	2
<a href="#">Grays Inn</a>	1 room from race, sold-out.	3	1	0	0	3
<a href="#">Harbor Front Suites</a>	Waiting to hear back.	3		0	0	
<a href="#">Holland Inn</a>	none from race, 11 sold.	23	0	0	0	11
<a href="#">Inn at Morro Bay</a>	Had media stay with them, 28 rooms from race.	98	28	0	0	
<a href="#">La Roche Suites</a>	Waiting to hear back.	3		0	0	
<a href="#">La Serena Inn</a>	16 no shows, 22 blocked rooms used	38	0	38	22	38
<a href="#">Marina Street Inn</a>	Waiting to hear back.	4		0	0	
<a href="#">Masterpiece Hotel</a>	7 no shows, 19 blocked rooms used	27	0	26	19	26
<a href="#">Morro Crest Inn</a>	16 used for race	17	0	16	16	16
<a href="#">Morro Shores Inn &amp; Suites</a>	29 rooms none from race	30	0	0	0	29
<a href="#">Motel 6</a>	10 extra rooms from race, used all 21 rooms blocked, 58 rooms booked total	70	10	21	21	58
<a href="#">Pacific Cottage Motel</a>	NA	14		0	0	
<a href="#">Pacific Shores Inn</a>	Sold out none from race	22	0	0	0	22
<a href="#">Pleasant Inn Motel</a>	Only used 2 room, 10 were blocked out.	10	0	10	2	10
<a href="#">Rockview Inn &amp; Suites</a>	9 rooms out of 26 blocked used, sold-out.	31	0	26	9	31
<a href="#">Sandpiper Inn</a>	Sold out, no rooms from race.	21	0	0	0	21
<a href="#">Sea Air Inn</a>	7 rooms none from race.	25	0	0	0	7
<a href="#">Sundown Inn</a>	Sold out, no rooms from race.	17	0	0	0	17
<a href="#">Seaside Inn</a>	6 rooms for bike race, 20 rooms sold.	33	6	0	0	20
<a href="#">Coastal Breeze Inn</a>	Used all 22 blocked rooms	22	0	22	22	22

Totals: 919 83 285 215 680



AGENDA NO: VII

MEETING DATE: June 9, 2016

## Staff Report

**TO:** Tourism Business Improvement District Board   **DATE:** June 2, 2016

**FROM:** Brent Haugen, Morro Bay Tourism Bureau Director

**SUBJECT:** Discussion and Approval of 2016-17 Grant Programs

### **RECOMMENDATION**

Staff is recommending (3) three different types of applications for the 2016-17 grant program. The first application is generally supporting Morro Bay events through criteria-based event characteristics with funding up to \$5,000; the second is a matching grant process for events for up to \$10,000; and, lastly, a new advertising/promotional matching grant program for up to a \$2,500 match, not exceeding 50% of the total project budget.

### **BACKGROUND**

Over the past few years, the Morro Bay Tourism Bureau has managed and distributed funds through a grant process for events by distributing the full amount without charging any administrative costs. Last fiscal year, the City of Morro Bay contributed \$40,000 out of the General Fund for this program. The Morro Bay Tourism Bureau provided in-kind marketing of events in Morro Bay at an estimated value of \$2,500 per event promoted.

Last fiscal year, an Event Grants Taskforce was created, reviewed the applications and made recommendations for funding. A total of fifteen (15) events were funded over this past fiscal year, plus an additional \$25,000 was allocated to the Harbor Festival (outside of this fund).

This coming fiscal year, the City of Morro Bay has contributed \$60,000 towards the Morro Bay Tourism budget out of the General Fund. It was determined by the advisory board this contribution would be split in between supporting Morro Bay events and through retail promotions in the coming year. Currently in the tentative City's tourism budget, \$65,000 is allocated for event grants and \$20,000 is allocated for retail and business advertising & promotions.

### **DISCUSSION**

Staff is requesting the Morro Bay Tourism Business Improvement District Advisory Board review each application process including criteria, associated dollar amounts and deadlines to be ready for the new fiscal year of July 1, 2016.

Prepared By:   BH  

Deputy City Manager Review: \_\_\_\_\_

**CONCLUSION**

None

**ATTACHMENTS**

2016-17 Event Grant Application Form\_draft

2016-17 Matching Grant Application Form\_draft

2016-17 Retail Matching Grant Application Form\_draft



**2016-17 Event Grant Funding Request  
APPLICATION INFORMATION & CHECKLIST - DRAFT**

Thank you for your interest in this application process. Morro Bay Tourism has budgeted \$65,000 + in-kind marketing contributions for the 2016-16 fiscal year.

Because of the volume of requests we receive each year, the \$65,000 for allocation does not allow for us to fund every request.

**The Process:**

All completed applications must be received on or before the end of the business day (office hours 8am-4:30pm) on **Friday, July 15, 2016** at the Morro Bay Tourism office. You may submit them via email at [grants@morrobay.org](mailto:grants@morrobay.org) or by mail/in person at 695 Harbor Street, Morro Bay, CA 93442.

- All eligible requests will be reviewed by an anonymous volunteer Event Grants Taskforce (these members are not directly associated with any events in Morro Bay)
- The Event Grants Taskforce will make their recommendations to the Morro Bay Tourism Business Improvement District Advisory Board
- The Morro Bay Tourism Business District Advisory Board will review and approve funding requests at their August 2016 meeting
- Each event grants recipient will receive an award letter including the amount awarded, logo requirements, a Post Event Report Form, plus other applicable information before the end of August 2016
- Those events not receiving funding will be notified by mail before the end of August 2016

**Request Form Checklist:**

1. Completed & Signed Event Grants Funding Request Application \_\_\_\_\_
2. Event Budget \_\_\_\_\_
3. Marketing/Action Plan \_\_\_\_\_
4. Any Other Supporting Documentation \_\_\_\_\_



## 2016-17 Event Grants Funding Request Application

### GRANT CRITERIA

- Events must happen between the dates of August 1, 2016-June 30, 2016.
- Your event must be held within the city limits of Morro Bay, California.
- Those applying and who will receive funding from this grant process will not be able to approach the City of Morro Bay, California for additional funding for their event.
- The maximum amount that can be granted for this program is **up to \$5,000**.
- Funds cannot be used for infrastructure, to purchase equipment or to pay for transportation.
- All completed applications must be received on or before the end of the business day (office hours 8am-4:30pm) on **Friday, July 15, 2016** at the Morro Bay Tourism office. You may submit them via email at [grants@morrobay.org](mailto:grants@morrobay.org) or by mail/in person at 695 Harbor Street, Morro Bay, CA 93442. \*Funding requests received after 4:30pm on July 15, 2016 or incomplete applications will not be considered.
- Events and competitions are not allowed to apply with multiple applications to Morro Bay Tourism for the same grant dollars.

### ORGANIZATIONAL INFORMATION

Fed Tax ID | SS# \_\_\_\_\_

Organization Name: \_\_\_\_\_

Board Chair: \_\_\_\_\_ Phone: \_\_\_\_\_

Main Contact: \_\_\_\_\_ Role: \_\_\_\_\_

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

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

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

Website: \_\_\_\_\_

### EVENT DETAILS

Event Name \_\_\_\_\_ Years in existence? \_\_\_\_\_

Description \_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date(s) \_\_\_\_\_ to \_\_\_\_\_

Location(s) \_\_\_\_\_

Website \_\_\_\_\_

*\*This grant funding has been made possible by the Morro Bay Tourism Business Improvement District and the City of Morro Bay, California. A total of \$65,000 is available to fund multiple events.*



**EVENT HISTORY & FUTURE PROJECTIONS**

Please fill in any and all applicable information below. If not applicable, fill in "N/A".

	2013	2014	2015	2016
Total Revenue	_____	_____	_____	_____
Total Expenditures	_____	_____	_____	_____
# Attendees	_____	_____	_____	_____
# Vendors (if applicable)	_____	_____	_____	_____
# Room Nights	_____	_____	_____	_____

*\*Please note that the number of room nights can include hotels, motels, vacation rentals, RV parks & campgrounds*

**EVENT BUDGET**

Please provide or attach up to a (1) one page outline of your event budget (please include any paid staff).

Revenue	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
<b>OTHER FUNDING</b>	_____	\$ _____
	We will receive other sponsorship dollars	\$ _____
	We will receive matching funds	\$ _____
	We will receive in-kind donations	\$ _____
	<b>Total Revenue</b>	\$ _____
Expenses	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
	<b>Total Expenses</b>	\$ _____

*\*This grant funding has been made possible by the Morro Bay Tourism Business Improvement District and the City of Morro Bay, California. A total of \$65,000 is available to fund multiple events.*



**GRANT FUNDING REQUEST**

Granted amounts are subject to the selections below. Please check the following that apply to your event and add up the sum to total the grant amount requested. The total amount cannot exceed \$5,000.

*\*To qualify for funding, your event or competition must consume 10 or more hotel/motel rooms in Morro Bay. The selections below must only pertain to your main event and no other existing events.*

# Days (please select only one)

- \$500, One day event
- \$750, Two day event
- \$1,000, 3+ days (must be a main event and not incorporate other existing events)

# Attendees (please select only one)

- \$500, 1,000 or less attendees or spectators
- \$750, 1,001-2,500 attendees or spectators
- \$1,000, 2,501-5,000 attendees or spectators
- \$1,500, 5,001+ attendees or spectators

# Morro Bay Hotel/Motel Rooms (please select only one)

- \$500, 10-49 hotel/motel rooms
- \$750, 50-99 hotel/motel rooms
- \$1,000, 100+ hotel/motel rooms

Groups (select only one)

- \$500, if your event attracts (2) two or more buses to your event
- \$500, if it is a tournament or competition, attracting (6) six or more teams

Reservation Widget

- \$500, inclusion of the Morro Bay Tourism hotel/motel reservation widget on your event or competition site

Tickets/Fees (select only one)

- \$500, if there is no admission or gate fee being charged
- \$500, if your event has a consignment ticket program for Morro Bay hotels/motels to package and sell to their guests

Outreach

- \$500, if 25% or more of your marketing outreach is outside of San Luis Obispo County

Total up the selections above and fill in the total below.

\$\_\_\_\_\_ Total from the selections above. Total amount cannot exceed \$5,000.



**MARKETING/ACTION PLAN**

Please provide or attach up to a (1) one page outline of your marketing and/or action.

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***This is how my event will positively impact the following entities:***

Morro Bay Lodging Community (hotels, motels, campgrounds, vacation rentals) \_\_\_\_\_

Sales Tax Businesses (restaurants, retail, etc) \_\_\_\_\_

City of Morro Bay \_\_\_\_\_

**VERIFICATION OF INFORMATION**

Please explain how your organization will collect and verify the enclosed information (surveys, registrations, hotel rooms, etc.)

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\_\_\_\_ (please initial) *YES, I understand if the event listed in this document receives funding through this grant process, I and the rest of the event committee will not be able to approach the City of Morro Bay, California for any additional funding for this event. This is due to the fact that Morro Bay Tourism is a division under the City of Morro Bay.*

\_\_\_\_ (please initial) *YES, I attest that the information provided in the Event Grants Funding Request Application is true, complete and accurate. I further agree that if my application is approved by the Morro Bay Tourism (TBID) Advisory Board that I will provide the "Post Event Report" to TBID in compliance with the application reporting requirements within 45 days after the event. Should I furnish any false information in this application, I hereby agree that such act shall constitute denial, suspension or revocation of my application.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*This area is for the Event Grants Taskforce*

Date Approved/Denied: \_\_\_\_\_ VOTE: Yes: \_\_\_\_\_ No: \_\_\_\_\_

\*This grant funding has been made possible by the Morro Bay Tourism Business Improvement District and the City of Morro Bay, California. A total of \$65,000 is available to fund multiple events. ---DRAFT---



**2016-17 Event Matching Grant Funds Request  
APPLICATION INFORMATION & CHECKLIST - DRAFT**

Thank you for your interest in this application process. Morro Bay Tourism has budgeted \$65,000 + in-kind marketing contributions for the 2016-16 fiscal year.

Because of the volume of requests we receive each year, the \$65,000 for allocation does not allow for us to fund every request.

**The Process:**

All completed applications must be received on or before the end of the business day (office hours 8am-4:30pm) on **Friday, July 15, 2016** at the Morro Bay Tourism office. You may submit them via email at [grants@morrobay.org](mailto:grants@morrobay.org) or by mail/in person at 695 Harbor Street, Morro Bay, CA 93442.

- All eligible requests will be reviewed by an anonymous volunteer Event Grants Taskforce (these members are not directly associated with any events in Morro Bay)
- The Event Grants Taskforce will make their recommendations to the Morro Bay Tourism Business Improvement District Advisory Board
- The Morro Bay Tourism Business District Advisory Board will review and approve funding requests at their August 2016 meeting
- Each event grants recipient will receive an award letter including the amount awarded, logo requirements, a Post Event Report Form, plus other applicable information before the end of August 2016
- Those events not receiving funding will be notified by mail before the end of August 2015

**Request Form Checklist:**

1. Completed & Signed Event Grants Funding Request Application \_\_\_\_\_
2. Event Budget \_\_\_\_\_
3. Marketing/Action Plan \_\_\_\_\_
- 4.** Any Other Supporting Documentation \_\_\_\_\_

*\*This grant funding has been made possible by the Morro Bay Tourism Business Improvement District and the City of Morro Bay, California. A total of \$65,000 is available to fund multiple events.*



## 2016-17 Event Matching Grants Funds Request Application

### GRANT CRITERIA

- Events must happen between the dates of August 1, 2016-June 30, 2016.
- Your event must be held within the city limits of Morro Bay, California.
- Those applying and who will receive matching funds from this grant process will not be able to approach the City of Morro Bay, California for additional funding for their event.
- The maximum amount that can be matched in this program is **up to \$10,000**.
- Proof of funds will need to be presented before pay out transpires.
- Funds cannot be used for infrastructure, to purchase equipment or to pay for transportation.
- All completed applications must be received on or before the end of the business day (office hours 8am-4:30pm) on **Friday, July 15, 2016** at the Morro Bay Tourism office. You may submit them via email at [grants@morrobay.org](mailto:grants@morrobay.org) or by mail/in person at 695 Harbor Street, Morro Bay, CA 93442. \*Funding requests received after 4:30pm on July 15, 2016 or incomplete applications will not be considered.
- Events and competitions are not allowed to apply with multiple applications for the same grant dollars.

### ORGANIZATIONAL INFORMATION

Fed Tax ID | SS# \_\_\_\_\_

Organization Name: \_\_\_\_\_

Board Chair: \_\_\_\_\_ Phone: \_\_\_\_\_

Main Contact: \_\_\_\_\_ Role: \_\_\_\_\_

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

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

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

Website: \_\_\_\_\_

### EVENT DETAILS

Event Name \_\_\_\_\_ Years in existence? \_\_\_\_\_

Description \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date(s) \_\_\_\_\_ to \_\_\_\_\_

Location(s) \_\_\_\_\_

Website \_\_\_\_\_

*\*This grant funding has been made possible by the Morro Bay Tourism Business Improvement District and the City of Morro Bay, California. A total of \$65,000 is available to fund multiple events.*

----DRAFT----



**AMOUNT OF MATCHING FUNDS REQUESTED**

All matching funds must be in actual US dollars. Sorry, no in-kind donation values will be considered.

I am applying for \$ \_\_\_\_\_ in matching funds (cannot exceed \$10,000)

**EVENT HISTORY & FUTURE PROJECTIONS**

Please fill in any and all applicable information below. If not applicable, fill in "N/A".

	2013	2014	2015	2016
Total Revenue	_____	_____	_____	_____
Total Expenditures	_____	_____	_____	_____
# Attendees	_____	_____	_____	_____
# Vendors (if applicable)	_____	_____	_____	_____
# Room Nights	_____	_____	_____	_____

*\*Please note that the number of room nights can include hotels, motels, vacation rentals, RV parks & campgrounds*

**EVENT BUDGET**

Please provide or attach up to a (1) one page outline of your event budget (please include any paid staff).

Revenue

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

**OTHER FUNDING**

\_\_\_\_\_ We will receive other sponsorship dollars \$ \_\_\_\_\_

\_\_\_\_\_ We will receive matching funds \$ \_\_\_\_\_

\_\_\_\_\_ We will receive in-kind donations \$ \_\_\_\_\_

**Total Revenue** \$ \_\_\_\_\_

Expenses

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

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

*\*This grant funding has been made possible by the Morro Bay Tourism Business Improvement District and the City of Morro Bay, California. A total of \$65,000 is available to fund multiple events.*





**MARKETING/ACTION PLAN**

Please provide or attach up to a (1) one page outline of your marketing and/or action.

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***This is how my event will positively impact the following entities:***

Morro Bay Lodging Community (hotels, motels, campgrounds, vacation rentals) \_\_\_\_\_

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Sales Tax Businesses (restaurants, retail, etc) \_\_\_\_\_

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City of Morro Bay \_\_\_\_\_

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**PROOF & PROCESSING OF FUNDS**

In order to process the pay out of funds, you must provide proof of support through the following means (sorry, no in-kind donation values will be considered):

- Provide an award letter from a sponsor or sponsors on their official letterhead. It must include the dollar amount awarded to your event or competition (must be in US funds. No in-kind donation values will be considered)
- And/or a copy of the check or checks payable to your event/competition (or fiscal agent) awarded to your event or competition (must be in US funds)
- Grant funds cannot be processed and dispersed if proof of US funds is provided after the event or competition is complete
- Your event or competition must process an invoice to Morro Bay Tourism within the current fiscal year, allowing at least 15 business days to process the payment

**VERIFICATION OF INFORMATION**

Please explain how your organization will collect and verify the enclosed information (surveys, registrations, hotel rooms, etc.)

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*\*This grant funding has been made possible by the Morro Bay Tourism Business Improvement District and the City of Morro Bay, California. A total of \$65,000 is available to fund multiple events.*



\_\_\_\_ (please initial) *YES, I understand if the event listed in this document receives funding through this grant process, I and the rest of the event committee will not be able to approach the City of Morro Bay, California for any additional funding for this event. This is due to the fact that Morro Bay Tourism is a division under the City of Morro Bay.*

\_\_\_\_ (please initial) *YES, I attest that the information provided in the Event Grants Funding Request Application is true, complete and accurate. I further agree that if my application is approved by the Morro Bay Tourism (TBID) Advisory Board that I will provide the "Post Event Report" to TBID in compliance with the application reporting requirements within 45 days after the event. Should I furnish any false information in this application, I hereby agree that such act shall constitute denial, suspension or revocation of my application.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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*This area is for the Event Grants Taskforce*

Date Approved/Denied: \_\_\_\_\_ VOTE: Yes: \_\_\_\_\_ No: \_\_\_\_\_



**2016-17 Advertising/Promotion  
Matching Grant Funding Request Application - DRAFT**

**GRANT CRITERIA**

- Advertising/promotions must happen between the dates of August 1, 2016-June 30, 2016.
- Only Morro Bay, California businesses are eligible to apply. \*Collaborative efforts are encouraged to include multiple Morro Bay businesses.
- Must include the Morro Bay Tourism logo and/or name of division under the City of Morro Bay.
- The maximum amount that can be granted for an individual advertising or promotional program is up to **\$2,500** and the matched amount awarded cannot exceed 50% of the total project cost.
- Funds are based on availability and cannot be used for events, posters or general collateral.
- All completed applications must be received on or before the **last business day of the month** (office hours 8am-4:30pm) at the Morro Bay Tourism office. You may submit them via email at [info@morrobay.org](mailto:info@morrobay.org) or by mail/in person at 695 Harbor Street, Morro Bay, CA 93442. \*Funding requests received after 4:30pm on the last business day of the month or incomplete applications will not be considered.
- Applications received after the beginning of the advertisement or promotion will not be considered for grant funding.

**BUSINESS & ORGANIZATIONAL INFORMATION**

Business License # \_\_\_\_\_

Company or Organization Name: \_\_\_\_\_

Main Contact: \_\_\_\_\_ Role: \_\_\_\_\_

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

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

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

Website: \_\_\_\_\_

**ADVERTISING/PROMOTIONAL DETAILS**

Date(s) of Advertisement/Promotion: Start Date: \_\_\_ / \_\_\_ / \_\_\_ End Date: \_\_\_ / \_\_\_ / \_\_\_

Brief Description of the Advertisement/Promotion

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*\*This grant funding has been made possible by the Morro Bay Tourism Business Improvement District and the City of Morro Bay, California. A total of \$20,000 is available to fund multiple events. - DRAFT -*



Vendor Information (if applicable):

Company: \_\_\_\_\_ Contact: \_\_\_\_\_

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

Type (check all that apply)

- Broadcast
- Consumer Show
- Digital (online, email, etc)
- Print
- Social Media
- Other \_\_\_\_\_

Geographic Target(s) (check all that apply)

- San Luis Obispo County  
Please specify what cities \_\_\_\_\_
- Regional (within a 3 hour drive)  
Please specify what cities \_\_\_\_\_
- Greater California (outside of a 3 hour drive)  
Please specify what cities \_\_\_\_\_

Top Goals of the Advertisement or Promotion

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What Morro Bay businesses or organizations are contributing to this advertisement or promotion and at what rate?

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
<b>Total Contributions</b>	\$ _____

Total Projected Cost: \$ \_\_\_\_\_ (please provide proof with application)

Amount Requesting: \$ \_\_\_\_\_ (match cannot exceed 50% of total project cost)



What type of benefits will you provide to Morro Bay Tourism in exchange for the funds (logo inclusion, ad space, tourism mention, website inclusion, etc)?

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**VERIFICATION OF INFORMATION**

\_\_\_\_ (please initial) *YES, I attest that the information provided in the Grants Funding Request Application is true, complete and accurate. I further agree that if my application is approved by the Morro Bay Tourism (TBID) Staff that I will provide the "Post Advertising/Promotion Report" to TBID in compliance with the application reporting requirements within 30 days after the advertisement/promotion. Should I furnish any false information in this application, I hereby agree that such act shall constitute denial, suspension or revocation of my application.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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*This area is for City of Morro Bay Tourism Manager*

Date Approved/Denied: \_\_\_\_\_ VOTE: Yes: \_\_\_\_\_ No: \_\_\_\_\_