



**TRANSIENT LODGING TAX AD HOC COMMITTEE AGENDA
JANUARY 3, 2018, 3:30 PM
PUBLIC SAFETY BUILDING 401 E Third Street**

- I. CALL MEETING TO ORDER**
- II. ROLL CALL**
- III. APPROVAL OF DECEMBER 6, 2017 MINUTES**
- IV. MINUTES OF THE MARKETING SUBCOMMITTEE – OCTOBER 16 and NOVEMBER 20, 2017**
- V. MARKETING SUBCOMMITTEE - MARKETING PROPOSAL**
- VII. UPDATE ON SMALL GRANT SOLICITATION (FY 2016-2017)**
- VIII. PRESENTATIONS BY APPLICANTS FOR THE TLT SMALL GRANT PROGRAM**
- IX. TLT MEMBER UPDATES**
- X. NEXT MEETING FEBRUARY 7, 2018**
- XI. ADJOURNMENT**

ACCOMMODATION OF PHYSICAL IMPAIRMENTS: In order to accommodate persons with physical impairments, please notify the Office Assistant II of any special physical or language accommodations you may need as far in advance of the meeting as possible and no later than 48 business hours prior to the meeting. To request these arrangements, please contact the Office Assistant II at (503) 544-7788. For TTY services please dial 711.



TRANSIENT LODGING TAX AD HOC COMMITTEE
December 6, 2017 4:00 pm
Public Safety Building, 401 E Third Street

Chair Dennis Lewis called the meeting to order at 4:00pm

ROLL CALL

Members Present:	Dennis Lewis, Chair	Kyle Lattimer, arrived late
	Rob Felton	Stephen McKinney
	Ashley Lippard	Lori Louis
	Megan Carda	Jessica Bagley
	Loni Parrish	Bob Andrews, Ex Officio
	Joe Hannan, Ex Officio	

Members Absent: Brian Love, Sheila Nichols Sheryl Kelsh (all excused)

Staff Present: Doug Rux, Community Development Director

APPROVAL OF MINUTES:

Approval of the November 1, 2017 Transient Lodging Tax meeting minutes.

<p>MOTION: McKinney/Louis moved to approve the November 1, 2017 meeting minutes. The motion carried 8 Yes/ 0 No).</p>
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FINAL REPORT FOR NEWBERG OLD FASHIONED FESTIVAL

CDD Rux gave updates: Referred to page 10 of the packet for information on the budget. Old Fashioned Festival responded that funds went to advertising not directly to the fireworks. They provided information that people came from more than 50 miles away from Northern California, Southern Oregon, the Southwest, Central Washington and Western Idaho.

Member Louis asked how they found out this information on people that came more than 50 miles away, and CDD Rux replied that they did not provide that information in their report.

UPDATE ON SMALL GRANT AWARDS (FY 2016-2017)

CDD Rux gave brief updates, the Cultural Center is still outstanding for Camellia Festival, and the final report is due May 2018. Another application will probably be submitted for Camellia Festival.

UPDATE ON SMALL GRANT SOLICITATION (FY 2017-2018)

CDD Rux recapped the schedule on the Small Grant program, no applications have been submitted yet. The solicitation closes on Dec 15 at 4:30pm, and goes to Council in March 2018.

REVIEW OF APPLICATIONS FOR THE TLT DESTINATION DEVELOPMENT-MARKETING GRANT PROGRAM

CDD Rux explained scoring sheets, conflict of interest, potential conflict of interest or direct conflict of interest. He explained potential conflict and that direct conflict of interest means family member receives funds or you would personally have financial gain from your recommendation.



Member Felton asked would any of the marketing subcommittee disclosure be affected by large grant.

CDD Rux replied no.

Chair Lewis explained marketing subcommittee discussion.

Member Parish asked what the discussion on marketing is.

Chair Lewis responded they are the same thing.

Member Lippard responded we will come back in January with a proposal.

CDD Rux explained subcommittee disclosure on marketing.

Chair Lewis asked what the charge is for the Committee.

Member Parish asked if the Committee could go through how people scored.

Member Felton noted just because someone voted on something does not mean we should spend money on it.

Newberg Downtown Wineries Association

Member Parish –Indicated she provided scores of 3&4 and that her concern was lasting impact.

Member Carda – Majority of 3 scores, how does marketing plan generate heads in beds? Can we control marketing, lasting impact scored low.

Member Lippard – Marketing, hope the proposal gets heads in beds; wine is a draw, aligned with 4 target audiences.

Member Bagley – For her review the application was her 2nd highest score. Their goal would bring people.

Member Felton – His highest score. Not sure would award, needs to align with market subcommittee activities.

Member Louis – One of her highest scores. Aligns, promotes off season.

Member McKinney – His highest score. If can dove tail with TLT marketing it's a benefit.

Chair Lewis –His 2nd highest score. Would like to see the proposal align with TLT and Chamber Marketing.

Cultural Center Culinary Enrichment Center

Member McKinney- He scored 38, scored high because already there.

Member Louis – Did not score high. Did not see drawing off season tourists, wanted to see more about cooking school.



Member Felton – One of his higher scores. Usage would go up and will draw tourist and generate TLT funds.

Member Bagley – Her highest score. Brings in culinary world and the kitchen is a value. There are aspects that could be eliminated in the proposal.

Member Lippard – Scored high. They do well with weddings. Could bring in conferences.

Member Carda – Large ask, value would be long lasting.

Member Parish – Her score was high, good track record at Chehalem Cultural Center, would fill off season.

Member Louis – Inquired how much business from out of area. What is the level of tourism?

Member Parish – Noted the proposal brings people to wineries for weddings and could bring in tourists.

Member Lippard – A lot of weddings are not locals and noted she and Dennis are on the Chehalem Cultural Center Board.

Member Felton – The proposal draws people from outside the area.

Chair Lewis – The kitchen and bathrooms are essential. No bride's room currently.

Member McKinney – A little biased because of IGAs and making sure the Cultural Center is successful.

Wolves & People Vines to Steins Trail

Member Parish – Noted she really likes the concept, issue is funding private vs public. Private property, what if they sell and deny access? If use public dollars need to ensure public access.

Member Carda – Issue with charging and passport. The proposal had nothing on charging. In presentation said charging would be a cool experience. What does pavilion mean? How many dollars for pavilion vs trail?

Chair Lewis – Charging was a complication. The proposal enhances destination, makers & doers, aligned with target audiences.

Member Parish – Seconded what Chair Lewis stated.

Member Bagley – Her third highest score, unique, concerns if in 1-2 years close.

Member Felton – His dream is a tram up the mountains, high score. Charging is an issue. Beaches and Parks are free.

Member Louis – One of her highest scores. Unique, beer/wine/agriculture. Should award funds. Providing dollars for better tourist experience.

Member McKinney – Scored zero. Other things could be funded first and other things could put heads in beds.

Member Carda – Had similar concerns as Member McKinney.



Member McKinney – Noted private entities can make a profit.

Chair Lewis – Lowest of his scores. It's a one off. Timing and life span of when wineries closed is a concern. Limited hours at Wolves & People. Could they be open more hours? Could look at the concept in the future.

Member Louis – Entities are putting their own investments in projects. She noted Wolves & People are not a one off entity.

Chair Lewis – Noted limited hours of operation Friday/Saturday/Sunday.

Member Lippard – She looks at how they market themselves. Project would give more marketing reach.

Member Louis – They are investing their dollars into the project. Maybe they could be open more hours? Can application be clarified?

CDD Rux – Could ask questions but would have to allow for all applicants to respond to questions.

Member Louis – Could there be stipulations on award?

Member Lippard – Can questions be asked?

Mayor Andrews – Inquired on what is being requested and the amount?

City of Newberg Cultural District Wayfinding

Member Lippard – Not marketing City. Could this proposal get funded some other way?

Member Carda – How does the proposal fit into larger wayfinding program. Not sure brings heads/beds at this time.

Member Parish – Has lasting impact. Does not bring heads/beds.

Chair Lewis – Can't offer more than what's been said. Don't see bringing in revenue.

Member McKinney – Cultural District attracts largest crowds, largest events. Council took action to support funding contingent on TLT funding. Newberg does a terrible job in wayfinding.

Member Louis – Wayfinding is important. Does the project bring people to the area?

Member Felton – One of his lower scores. Does not attract tourist but enhances experience when here.

Member Bagley – Agrees with Members Louis and Felton.

Member Latimer – He agrees with the majority of the Committee. Focus should be on getting people here.



Hoover-Minthorn House Museum Roof/Gutters/Electrical

Member Latimer – The application scored lower, it is a draw for some visitors. Don't see drawing a lot of new people.

Member Bagley – Important facility, concern on matching amount.

Member Felton – He values the facility, number of visitors (1,100) was not huge. Return on Investment should be higher.

Member Louis – Hoped they wanted dollars for marketing. Inquired if this the right funding source for the project?

Member McKinney – Scored high in his review. The facility is singularly unique to Newberg. As a president's home and it needs to be promoted by a marketing director.

Chair Lewis – Valuable asset but not correct use of Transient Lodging Tax dollars.

Member Parish – Transient Lodging Tax dollars should not be for building maintenance.

Member Carda – Not a project she would fund because it's a maintenance project. She would support marketing. The hours of operation are limited for the facility.

Member Lippard – It a preservation project and not a tourism project. Agrees with Member Bagley.

CPRD Darnell Wright Sport Complex Lighting

Member Lippard – Second lowest score for her. Not the correct season, don't have enough lodging to accommodate people using the facility.

Member Latimer – Does not hit the four target audiences well.

Member Bagley – Lowest scored item for her, does not hit on four target audiences and does not promote downtown.

Member Felton – Return on Investment good. Teams play in October and March/April/May. Heads/beds is occurring now.

Member Louis – Thinks the proposal is wonderful project, but need more limited service hotels. Can't sell services if don't have hotel capacity.

Member Felton – If the facility generates demand it brings hotels.

Member McKinney – It ranked #4 on his score sheets. He inquired which entities have the opportunity for success. More people/money/stays. The proposal is one of the likely projects to bring in people.

Chair Lewis – Don't have the infrastructure to deal with more visitors. The proposal is a timing issue.



Member Parish – She struggled with the proposal as it will bring in people. Compared to Special Olympics people don't come downtown. People use on site concession stands.

Member Carda – One of her lower scores. Lasting project, would generate more heads/beds. Will we have other hotels in the future? Maybe funded at lower level. Tournaments run 2-4 days, longer than weddings where they are one night.

Chair Lewis – Asked if the Committee wanted to rank the proposals.

Scoring Review

Member Parish – Her approach was spend and allocate all of the funds but each award would be at a lower amount.

Member McKinney – Suggested awarding at lower amounts.

Member Bagley – Her #1 is the Cultural Center but asked if don't fund would the project delay or stall.

Member Lippard – Noted if the Cultural Center is not fully funded can't do the project.

Member Parish – The Cultural Center has grant application into Travel Oregon for \$250,000.

The Committee discussed funding options and Chair Lewis asked each member to rank their top six proposals. The ranking information was put onto the white board and catalogued and photos taken. Members then verbally recapped their scoring.

The Committee discussed and by consensus agreed 9-0 to remove Hoover-Minthorn Museum and CPRD proposals from further discussion.

The Committee discussed their top three choices and by consensus agreed 8-1 (McKinney) to focus on the Downtown Wineries Association, Cultural Center and Wolves & People applications.

The Committee discussed their top three and a funding amount of \$350,000.

Member Bagley – Suggested leaving \$100,000 to roll over to next year.

Member Felton – If Newberg Downtown Wineries Association should be funded or if the Marketing Subcommittee is doing the same thing.

Member Carda – Agreed with Member Felton.

Member Bagley – Indicated Newberg Downtown Wineries Association will keep doing marketing. Members Parish and Lippard agreed.

Member Carda – Clarified that Wolves & People Phase 1 is \$40,000 (Trail/Signs only).

Member Parish – Suggested reducing the Cultural Center by \$25,000.



Member Lattimer – Noted he has catered at the Cultural Center recently and it was a nightmare. He asked if the public restroom could be delated.

Chair Lewis – Explained restroom issue and its need.

Member Louis – Inquired if Tunes on Tuesdays and some other events are more local for the Cultural Center.

Member Bagley – The Cultural Center opens up other festival opportunities in the community.

Member McKinney – Noted if the ballroom is full you don't have adequate bathrooms.

Member Carda – She noted Tunes on Tuesday has to manage bathrooms for 2,000 attendees.

Member Louis – Of the 2,000 attendees how many are from 50 miles or stayed overnight?

Member Carda – Noted it is about 15%.

Member Parish – Stated if you take \$100,000 out of Cultural Center it is likely the project would not move forward.

Member Carda – Suggested Wolves & People be funded only at \$30,000.

MOTION: McKinney/Carda moved to approve the Cultural Center at \$250,000, Newberg Downtown Wineries Association at \$20,000, and Wolves & People at \$30,000. The motion carried 9 Yes/ 0 No).

NEXT MEETING JANUARY 3, 2018

ADJOURNMENT

Meeting adjourned at 6:30 p.m.

Approved by the Transient Lodging Tax Ad Hoc Committee this 3rd day of January, 2018.

Dennis Lewis,
TLT Ad Hoc Committee Chair

Doug Rux,
Community Development Director

**TRANSIENT LODGING TAX AD HOC COMMITTEE
MARKETING SUBCOMMITTEE
October 16, 2017 8:30 am
Newberg City Hall, Permit Center Conference Room
414 E First Street**

The meeting was called to order by Chair Ashley Lippard at 8:35 a.m.

ROLL CALL:

Members Present:	Ashley Lippard, Chair	Rob Felton, Vice Chair
	Sheila Nicholas	Jessica Bagley
	Sheryl Kelsh	Lori Louis
	Loni Parish	

Members Absent: Kyle Lattimer, Dennis Lewis (excused)

Staff Present: Doug Rux, Community Development Director

Guests: Carr Biggerstaff, Teri Council, Bob Andrews, Joe Hannan

APPROVAL OF MINUTES

Approval of the August 14 and September 18, 2017 Transient Lodging Tax Ad Hoc Marketing Subcommittee meeting minutes.

<p>MOTION: Kelsh/Louis to approve the Transient Lodging Tax Ad Hoc Marketing Subcommittee minutes for August 14 and September 18, 2017. Motion carried (7 Yes/0 No/0 abstain).</p>

**CHEHALEM VALLEY CHAMBER OF COMMERCE PRESENTATION ON TOURISM
MARKETING ACTIVITIES**

Member Kelsh explained the history of the Transient Lodging Tax (TLT) in Newberg and the new State law from 2003 on the split of funds and how funds are to be spent (70% Tourism/30% General Fund). She shared that in 2005 the Chamber had a contract with the City to run the visitor center. In 2006 Yamhill Valley Visitor Association formed as unfunded Destination Marketing Organization. Market Yamhill County.

Member Lippard inquired if there is data on how tourism has grown.

Member Kelsh noted there is data that looks at spending and the information is on the Travel Oregon website. The Chamber has a relationship with Travel Oregon and had developed other relationships. Developed relationships for Destination marketing. She noted the first City Contract was for \$18,000 when the Chamber was located at the Cultural Center. The Chamber then moved to the College Street facility. Negotiated a

percentage on city contract. Opened the Oregon Wine Education Center, more advertising and tourism promotion. At the end of the first contract re-negotiated, it now has a cap and COLA increase. The Chamber does the Visitor Center and Tourism Promotion. Visit McMinnville opened their program two years ago. AVAs have also been marketing.

Member Kelsh handed out information that covers the past three years of marketing expenses.

Member Parrish asked if there have been staff increases.

Member Kelsh noted there has been a .5 FTE increase.

Member Kelsh indicated the lodging tax was increased to 9%. The fiscal year is July 1 to June 30. She reviewed the marketing expenses. \$40,000 – \$45,000 for marketing does not go far. The data documents do not include donations related to tourism. Cited Painted Lady contribution and the Allison donates through reduced rates for rooms which lowers the TLT revenue, like double dipping.

Member Louis noted the Allison's special media rates.

Member Lippard asked if TLT funds could be used to cover the reduced room rates for FAMs.

Member Parrish noted the website design does not have much spent on enhancements.

Member Kelsh indicated a person has been hired to work on the Chamber web and SEO.

Carr Biggerstaff noted that Google 6 takes ten months or so to get traction.

Member Parrish asked how Chamber staff is distributed for activities.

Carr Biggerstaff shared that the Chamber has three functions – Chamber membership activities, Visitor Center and Tourism and Destination Marketing.

Member Parrish inquired on the number of people visiting the Visitor Center and is a physical site necessary.

Carr Biggerstaff noted the Chamber staff is shared in responsibilities. Kelsh is full time, the two other staff members work 4 days week and 3 days week. The Visitor Center is open 7 days a week during season and 5 days a week during off season. At peak have 2.75 FTE working on tourism. At peal have full time FTE working on tourism that is shared amongst staff.

Joe Hannan asked if there is a breakdown on expenses for facility share and staff share.

Member Kelsh noted that information is in the quarterly report information. Chamber gives free time, she is exempt, works weekends and nights.

Member Kelsh shared that transportation and buildable land problems in issues in 2006 and difficult to recruit business. Tourism was growing and the Chamber made a conscious decision to focus on tourism.

Member Louis inquired if Webworks is a monthly fee. Member Kelsh indicated it is a monthly fee and they look a text and key words. People are not searching for Chehalem Valley and working through each web page to update and make changes.

Member Parrish inquired if the \$450 is only for tourism web.

Carr Biggerstaff noted the Chamber has other web domain names.

Member Nicholas asked about the percentage of TLT to Chamber.

CDD Rux noted roughly 10%, \$680,000 to the City General fund and \$139,000 to Chamber, the balance for grants and TLT program.

Member Kelsh shared a handout on media relations. FAM tours increased with the Willamette Valley designation as wine region of the year. She coordinates with Travel Oregon and partners, itineraries change.

Member Louis noted the Allison coordinates on some FAMs tied directly to the Allison.

Member Parrish noted it seemed time would be better spent not coordinating but doing tours for Kelsh.

Member Kelsh noted FAMs need to be personalized, people have dietary restrictions.

Member Parrish inquired how Brews and BBQ works.

Carr Biggerstaff shared that Brews & BBQ is a Chamber event with some regional tourism. Classify 33% of expenses as tourism.

Member Kelsh noted the Chamber is investing more in tourism than the City provides. Last year it was \$18,000.

Carr Biggerstaff provided numbers that 50% is overhead visitor Center, 40% goes to tourism (37%), FAMs have increased to a bi-monthly activity.

Member Parrish asked if there was no Visitor Center how would that effect the Chamber.

Carr Biggerstaff noted that Chamber would still have an office.

Member Kelsh noted people thought social media was the correct approach, but people still want hard copy handouts.

Member Louis noted there is so much information out there, people ask for guidance and where to go. We can help drive where people go to support local businesses.

Vice Chair Felton asked what is the count for visitors to the Visitor Center.

Member Kelsh noted over 10,000 in previous years. Reduction in FY 16/17. She noted only one sign to direct people to the Visitor Center. The Field Guide produces 19,000 copies annually and go through 19,000 a year.

Member Parrish asked if the Chamber was given more dollars to hire someone what would that look like.

Carr Biggerstaff noted the Chambers has \$37,000 and if it has more dollars it could hire someone to do tourism. The question is where does the person live? It could be at the Chamber.

Member Lippard noted the new person may not have the local knowledge.

Carr Biggerstaff noted the person could do more of the background work.

Member Parrish if the City could do an RFP and interview. If the Chamber did not have tourism what would happen?

Carr Biggerstaff noted the Chamber would still have the Visitor Center.

Member Parrish shared that she talked with McMinnville and they do not do grants.

Chair Lippard noted if the City took back the \$37,000 and added \$30,000 you would have \$67,000 to spend on hiring a person.

Carr Biggerstaff noted hours for tourism is taken from Sheryl, Pattie and Karla at the Chamber.

Member Parrish indicated it sounds like the Chamber is looking for more dollars.

Member Nicholas asked what is the Chambers recommendation.

Chair Lippard noted the Marketing Subcommittee is volunteers and reached a point that it needs a body to do tourism marketing.

Carr Biggerstaff indicated that a person could be co-located with the Chamber.

Joe Hannan noted that a marketing plan was the Subcommittee's task.

CDD Rux recapped the four models of independent organization, Chamber, City hire a staff person or City use existing staff. The City Council selected the using existing City staff.

Member Louis noted having someone dedicated to tourism would be huge.

Member Parrish asked the group if a tourism person should be hired.

Chair Lippard indicated over the next two months the Marketing Subcommittee needs to discuss the approach.

Joe Hannan noted the charge is to prepare a market plan.

Member Nicholas noted we need a job description.

Member Parrish asked if Member Kelsh hired someone what would you do.

Member Kelsh indicated she would create a plan, need someone to bridge now and the aspirational Tourism Strategy.

Chair Lippard noted we have future goals, a person would work with Subcommittee.

CDD Rux suggested a proposal to City Council in January, full TLT in December, Subcommittee in November.

Member Parrish asked the Subcommittee to look at the Chamber marketing plan. CDD Rux to resend the marketing plan to Subcommittee members.

Vice Chair Felton asked what is working and what is not. He would like to see the data.

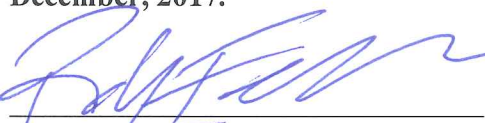
Chair Lippard left at 9:50.

TOURISM MARKETING MATERIAL:

No discussion.

ADJOURNMENT: Vice Chair Felton adjourned the meeting at 9:53 a.m.

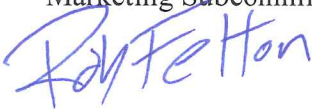
Approved by the Transient Lodging Tax Ad Hoc Committee Marketing Subcommittee this 18th day of December, 2017.



Ashley Lippard
TLT Ad Hoc Committee
Marketing Subcommittee Chair



Doug Rux, Community Development Director





**TRANSIENT LODGING TAX AD HOC COMMITTEE
MARKETING SUBCOMMITTEE
November 20, 2017 8:30 am
Chehalem Valley Chamber of Commerce
2119 Portland Road**

The meeting was called to order by Chair Ashley Lippard at 8:35 a.m.

ROLL CALL:

Members Present:	Ashley Lippard, Chair	Rob Felton, Vice Chair
	Sheila Nicholas	Jessica Bagley
	Sheryl Kelsh	Dennis Lewis

Members Absent: Kyle Lattimer (excused)

Staff Present: Doug Rux, Community Development Director

Guests: None

APPROVAL OF MINUTES

None.

**CONTINUED DISCUSSION ON CHEHELAM VALLEY CHAMBER OF COMMERCE
PRESENTATION ON TOURISM MARKETING ACTIVITIES**

The Subcommittee discussed and outlined three primary topic areas related to marketing activities. The first was the Marketing Subcommittee that it was a cheap option, members were knowledgeable and they had learned a lot over the past 10 months. Second was to hire a consultant with subsets of dollars on the ground and the investment was low. Third was to hire an employee to do marketing and develop a plan. They additionally discussed a marketing outline rather than a marketing plan.

The Subcommittee outlined that there is currently about \$14,000 to do marketing and that the Chehalem Valley Chamber of Commerce (Chamber) through its contract with the City of Newberg has \$37,000 for marketing. There was a general discussion that the cost for a person would be roughly \$60,000 and a need for marketing funds of approximately \$50,000.

Member Kelsh recapped her proposal from October and information in the November meeting packet to hire a person would be in the \$48,000 - \$60,000 range based on recent hires by other organizations. She has a job description drafted, there are people looking for this type of employment opportunity, that the person could be housed at the Chamber, the person could report to the Subcommittee and that day to day reporting would be to the Chamber Executive Director.



Member Lewis discussed the issue of procedure and the budget.

CDD Rux noted that with \$14,000 for marketing, \$37,000 from the Chamber marketing budget that to increase the available funds it would need to come from the grant program.

Chair Lippard inquired to the Subcommittee what do we focus on marketing or grants.

CDD Rux commented that if there is a proposal the Subcommittee would need to develop one and take it to the full TLT Committee in either December of 2017 or January 2018.

Member Lewis inquired if \$55,000 for a salary for a position was adequate.

Chair Lippard noted a total amount of \$137,000 for the Chamber contract. Chamber keep \$100,000 and give back \$37,000 for marketing purposes.

CDD Rux clarified that it is not actually giving back \$37,000. What is being discussed is adding additional funds to the Chamber contract to support a person and marketing activities that in total for the marketing program would be around \$120,000 and would include the existing \$37,000 the Chamber uses for marketing. He also clarified that have of the \$37,000 for this year has been spent.

Chair Lippard shared that \$30,000 for public relations and \$20,000 for web would be part of the approximately \$120,000 program cost.

Member Nicholas inquired if the person only works for Newberg or if they do things for Dundee. The focus should be Newberg and used an example of familiarization (FAM) tours.

Member Felton shared FAM's benefit Newberg if they visit Dundee, people eat in Newberg and stay in Newberg.

Member Bagley inquired if the Subcommittee needs to vote on their proposal.

Chair Lippard suggested that the proposal go to the TLT meeting on December 6, 2017 and if it is not resolved at that meeting it be continued to the January 2018 TLT Committee meeting. In summary the proposal is a total of \$120,000 (\$60,000 for salary, \$60,000 for marketing), use the job description as a template for the position description, and use dollars from the grant program to fill out the overall funding need.

CDD Rux asked who was going to prepare the proposal material to the TLT Committee. It was determined that Chair Lippard, Members Kelsh, Felton and Lewis would meet on November 27, 2017 at City Hall to discuss preparing the proposal and that CDD Rux would update the budget to reflect the Subcommittee's discussion for a marketing program.

TOURISM MARKETING MATERIAL:

No discussion.

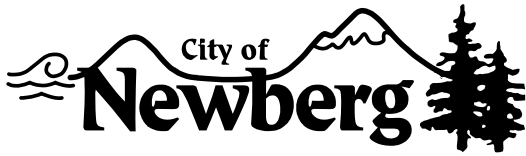
ADJOURNMENT: Vice Chair Felton adjourned the meeting at 9:53 a.m.



Approved by the Transient Lodging Tax Ad Hoc Committee Marketing Subcommittee this 18th day of December, 2017.

Ashley Lippard
TLT Ad Hoc Committee
Marketing Subcommittee Chair

Doug Rux, Community Development Director



Community Development Department

P.O. Box 970 ▪ 414 E First Street ▪ Newberg, Oregon 97132
503-537-1240 ▪ Fax 503-537-1272 ▪ www.newbergoregon.gov

MEMORANDUM

TO: Transient Lodging Tax Ad Hoc Committee

FROM: Doug Rux, Community Development Director

DATE: January 3, 2018

SUBJECT: Marketing Subcommittee Proposal

The TLT Marketing Subcommittee has been discussing a proposal to hire a person to conduct tourism marketing activities. Attached you will find a proposal which includes material from the Chehalem Valley Chamber of Commerce, a Proposed Marketing Strategy, and a Five-Year Budget that reflects the proposal.

Attachments: 1. Chehalem Valley Chamber of Commerce
2. Proposed Marketing Strategy
3. Five-Year Budget

From: Chehalem Valley Chamber of Commerce
To: City of Newberg Transient Lodging (TLT) Tax Ad- Hoc Marketing Subcommittee
Re: Tourism (Destination Marketing Services) for Chehalem Valley

About the Chamber, its Visitor Center, and Tourism

- In 1996, the Chamber of Commerce, at the request of the City, added the Visitor Center. A living kiosk, the Chamber and its staff drop everything when visitors walk through the door to ask advice about events and hospitality, get directions, book hotel rooms, etc. They leave with maps, rack cards and brochures from our many Chehalem Valley businesses. *Over the past 36 months, our metrics show an average of 1,000 people per month use the Visitor Center.*
- The Visitor Center became the “Tourism Center” in 2006. That’s when the Chamber began to deal with regional tourism needs and got involved with destination marketing in addition to staffing the Visitor Center. The Chamber CEO joined Travel Yamhill Valley and was elected to represent Yamhill County on the Board of the Willamette Valley Visitors Association (WVVA). The WVVA Board, in collaboration with Travel Oregon, orchestrates destination marketing for the region between Yamhill County and Eugene Oregon.
- In 2009, the Chamber began to spend the surplus TLT funds, over and above the Visitor Center expenses, on Display Advertising in targeted publications including the Official Travel Oregon visitor guide, Travel Portland Visitor Guide, NW Travel and Life Magazine and more, a visitor website, social media and familiarization tours.
- By 2010, especially with the advent of The Allison, tourism promotion opportunities took on a whole new life. Media requests for information, photography and familiarization tours grew at an exponential rate. Instead of fielding media requests at a rate of 1 or 2 per month the Chamber started receiving 5 or 10 requests per week.
- As TLT dollars grew, the Chamber funds for both the Visitor Center operations and subsequent tourism promotion were capped by the City in July 1, 2015 at \$137K:
 - Per the quarterly reports provide to the City since the last contract renewal in 2015, the Visitor Center’s share of facilities, equipment, insurance, accounting, etc. (i.e. allocated overhead) is approximately \$50K.
 - The cost of staffing for the Visitor Center, allocated across Chamber and including additional staff (i.e. for weekend and seasonal purposes) is approximately \$50K.
 - That leaves approximately \$37K for tourism promotion that the Chamber budgets and spends on destination marketing. Additionally, the Chamber usually contributes additional funds (over and above the \$37).

Moving Forward: Promoting Tourism in Chehalem Valley

- With the percentage increase in TLT dollars, the City found itself with an approximate surplus of \$225K over the \$137K provided by contract to the Chamber. This surplus is estimated to remain around \$225K/year until additional lodging accommodations move into Newberg.

- The City retained tourism consultants in 2015, who recommended that the City create an independent Destination Marketing organization at some point in time.
- The result was that the City of Newberg created a TLT Ad-hoc Committee, and its Marketing Subcommittee, to determine how best to use the surplus.
- The TLT Committee (T-C) has been meeting monthly since its inception in December 2016.
- The T-C has created a grant program that may award up to \$200k of funds of the \$225K
- The T-C may make recommendations to Newberg City Council to use fewer funds for the grant program and more funds for destination marketing.
- The Marketing Subcommittee's charter is to direct the use of TLT funds that remain after the funds budgeted the grant program

Issues Currently Under Discussion by the Marketing Committee

- What is the current scope of marketing activities that the Chehalem Valley Chamber of Commerce addresses in their Destination Marketing Plan?
- Should the Ad Hoc committee engage in a potential rebranding of marketing materials, including the Visitor (tourism) website, using Newberg instead of the Chehalem Valley as the stated destination?
- Is there a need for a more expansive Destination Marketing plan that is inclusive of the Chehalem Valley Chambers existing plan, but which also includes additional marketing activities to be funded by the Ad Hoc Committee's marketing funds?
- What is the best way to create a marketing plan that addresses the marketing activities of both the Chehalem Valley Chamber and the Ad Hoc committee?
- The contract with two GFU students by the ad hoc committee to create a video that will market Newberg as a destination. Who is the project audience and how will the video be distributed?
- How can we increase our investment of time and money in Public Relations activities that will result in more familiarization tours and earned media coverage?
- What is the best way to eliminate the Ad Hoc Committee's frustration over the inability to manage tourism marketing projects that are discussed in an efficient and effective manner (recognizing that everyone on the committee is serving as a volunteer.
- Could the Ad Hoc committee be more successful by hiring a Tourism Coordinator that could create an all-encompassing Destination Marketing plan for Newberg?
- How much more could be accomplished if Newberg had a full-time person dedicated to marketing the area?
- Until area TLT dollars increase to an amount that affords Newberg and its surroundings to have a stand-alone Destination Marketing organization, how can we use the funds and resources at our disposal the most efficient way?

Proposed Interim Approach

Newberg can phase into a fully-functional Destination Marketing organization by combining the resources of the Chamber and the TLT Ad Hoc Committee by hiring a Full-time *Tourism Coordinator (Tourism Coordinator)*. This person can office at the Chamber and report to both the TLT Ad Hoc committee and the Chamber CEO. Since facility and overhead costs would be

provided by the Chamber, the expense to the Committee and Chamber would be the salary and benefits of the Tourism Coordinator. A sample Tourism Coordinator job description as provided by the Willamette Valley Visitor's Association below.

- Costs:
 - Based on market data, the estimated salary and benefits for the Tourism Coordinator would be \$60-70K
 - Cost for the hire could be shared by the Committee and the Chamber - approximately \$35K each
- Benefits:
 - The TLT Ad Hoc Marketing Committee, and the broader committee, would have a dedicated resource for developing the Destination Marketing plan, incorporating elements of the Chamber's plan as needed
 - Additionally, this person would be responsible for other deliverables such as:
 - Providing content for the Visitor (tourism) Website, social media, online advertising, and SEO
 - Create the "Naked" map
 - Activities associated with the re-branding, the logo, etc.
 - Public Relations and FAM tours
 - Video and other media content development and placement
- The Tourism Coordinator could hit-the-ground running since s/he could take advantage of the processes, contacts and knowledge that the Chamber has acquired - in particular, the CEO, who has been supporting tourism marketing for the past 12 years
- Chamber staff would provide back-up for the Tourism Coordinator if they are out of the office (i.e. vacation, sick leave, etc.)
- The Tourism Coordinator's salary and benefits would be incorporated into the Chamber payroll process (along with any other legal or personnel-related services)
 - Performance evaluation could be conducted by a small compensation committee consisting of two Ad Hoc Committee members and the Chamber CEO

SAMPLE JOB DESCRIPTION (from the Willamette Valley Visitor's Association)

Position Title: Newberg Tourism Coordinator

Supervisors: CEO, Chehalem Valley Chamber of Commerce & TLT Ad Hoc Committee Representative

Position: Regular Full-Time. May be required to work weekends and holidays

General Statement of Duties:

This position is responsible for identifying industry related tourism markets and related programs. Assist in developing and implementing strategies to increase the awareness of the culture, history, attractions, and special events to enhance the visibility of the City of Newberg, resulting in increased tourism.

Examples of duties and responsibilities:

- Create the annual Destination Marketing Plan
- Plan and implement effective and aggressive tourism promotion programs
- Develop strategies for new markets and Newberg advertising materials
- Implement the Destination Marketing plan in collaboration with Newberg Transient Lodging Tax Ad Hoc Committee
- Facilitate the development of a master brand for Newberg
- Develop and maintain the Newberg Visitors Bureau Website and coordinate a local Calendar of Events
- Manage online advertising campaigns and social media (FB, Instagram, Twitter)
- Manage Familiarization tours with Media and members of the Travel Trade
- Provide monthly and annual reports for Chamber BOD, Newberg Tourism Ad Hoc Committee and Newberg City Council
- Conduct and analyze area tourist surveys
- Develop strong working relationship with key personnel from all lodging, meeting and convention facilities. Maintain a well-informed working knowledge of all hotels attractions and services available in the area
- Coordinate and collaborate with Newberg event and activities organizers to help them promote their events
- Assist in developing and supervise the production of marketing collateral needed to successfully promote tourism
- Write and distribute press releases for approval of supervisor for events and activities and respond in a timely fashion to negative press
- Represent Newberg's interest as appropriate with local, state and federal organizations associated with tourism
- Maintain and oversee the compilation of tourism data and statistical information that may be helpful in designing a marketing strategy
- Attend tourism related workshops, conference and training seminars to keep abreast of new strategies and marketing techniques available to destination marketing organizations volunteer and full-time staff

Education:

- Bachelor degree in Marketing or related field

Minimum Tourism Skills and Experience Required:

- At least three years of recent progressive tourism experience which includes the following skills and abilities:
- Considerable knowledge of the tourism industry including tour operations, meeting/convention planners, and FIT (Free Independent Traveler) markets
- Working knowledge of the principles of volunteer management and strategic planning
- Strong communication and public relations skills coupled with the ability to influence others in a positive manner

- Knowledge of publication layout, design and graphics as well as related editing and writing skills
- Knowledge of Media Relations - public/community/news - accessible and open to all media
- Social media management experience (FB, Instagram, Twitter)
- Ability to establish and maintain strong working relationships with city staff, the public, and business community and to present ideas effectively, verbally and in writing
- Ability to do community outreach; comfortable giving speeches and presentations
- Interested in people; possesses a positive self-image; approachable; a team player; respects people; understand the importance of first impressions

Additional Requirements:

- Possess a valid driver's license
- Knowledge of standard office practices and procedures, office record keeping and recording, and office machines.
- Calculator, typing/word processing, data entry skills for computer, and attention to detail.
- Good vision and hearing.
- Employee is required to be able to lift and/or move up to 45 pounds.
- Be able to obtain an Oregon Liquor Control Commission Service Permit.

Proposed Marketing Strategy: Newberg

Excluding the George Fox audience, the typical tourist in Newberg comes for wine tasting. One of our primary differentiators from our local competition is our proximity to Portland, where most tourists will be beginning their visits. I propose we capitalize upon this advantage.



Brand Promise

The best place to start your Oregon wine country vacation

Tagline – The first destination in Oregon wine country

Brand Attributes

Proximity to Portland – Willamette Valley's closest wine region to Portland

Wine – Growing international reputation for Pinot Noir, dozens of tasting rooms and wineries

Recreation – Hot air balloon adventures, golf, 99W Drive In, Willamette river, ropes course, disc golf, skate park, Evergreen Aviation Museum, Farmers Market, Chehalem Cultural Center, George Fox University festivals/events, Champoeg and Dundee trails,

Friendly – Small town community feel

Historical – Hoover-Minthorn Museum, Champoeg,

Food – JORY, Painted Lady and other acclaimed restaurants

Art – Art Elements, Cultural Center, Allison, George Fox

Marketing Goals

- To increase visitor volume, visitor spending and the economic impact of tourism in Newberg
- Influence the long-term development of Newberg as a destination and its brand
- Increase leisure visitor volume, visitor spending, meeting, tours and group markets to the Newberg area through effective promotion with media and the travel trade
- Promote the importance of business and government investment in tourism

Audiences

- Target Audiences
 - Wine tasting visitors
 - George Fox Audience
- Top geographic markets
 - Portland
 - Seattle
 - San Francisco

Strategies

Newberg has less staff and resources than many of our competition. We need to be strategic in the use of our time and budget. The majority of our marketing effort should be spent where we can reach the largest portion of our target audience...online.

Online Marketing

Website

- Break out site from CVCC subdomain
- Market the attractions of the broader Newberg-Dundee Region
- Heavy on visuals

- Highlight Newberg accommodations and restaurants
- Feature travel itineraries, new travel partners, visitor testimonials, seasonal specials, family reunion planning information, photos, maps and more

Sample: <http://www.visitcalifornia.com/support-wine-country>

SEO

- Target Keywords: Oregon Wine Country, Dundee wine tasting, wine tasting near Portland, Oregon wine tasting, vacations near Portland, vacations in Oregon

Search Engine Marketing (Google, Bing)

- Target keywords that are difficult to rank organically for

Remarketing ads

- Create display ads to remarket to previous visitors to the site

Social Media

- Create separate Facebook and Instagram channels from CVCC (different audiences need different content)
- Highlight positive media coverage
- Share high-quality local content with emphasis upon engagement metrics over special interest
- Instagram

Social Media advertising

- Target Facebook fans of regional wineries
- Target Twitter followers of travel writers

Media Relations

- Could be handled in-house or outsourced to freelancer
- Press trips—Host regional, national and international travel writers and editors on individualized and/or group press trips
- Media leads—Continue to respond to leads, and forward leads to members from Travel Oregon and the Willamette Valley Visitors Association
- Pre-publication editing & fact checking
- Media kit – Develop an electronic media kit that highlights the outstanding tourism assets in Newberg and the surrounding area
- Build a more expansive photo and video library that is available for media requests, ads, and our website.

Fam Tours

Oregon Wine Trail w/ Dundee/Newberg

- Hire wine writer to create Oregon Wine Trail similar in concept to the Romantic Road in Germany. Trail starts in Newberg/Dundee.
- Create Web site
- Promote via media relations, SEO and advertising
- See <https://tualatinvalley.org/forest-grove-wine-trail/>

Downtown banners

- “The first destination in Oregon Wine Country”

Print

- Evaluate current pieces for cost effectiveness
 - Rack piece/brochure
 - Newberg city/Yamhill County map
 - Monthly event brochure
 - Chehalem Valley Field Guide
 - Group travel brochure

Tourism training

- Create class for front-line employees to educate on tourism assets of Newberg and the surrounding community.

Secondary Marketing Projects

Signage

- Seek funding and permission for decorative road signage for 99W (e.g. similar to Lake Oswego or McMinnville’s third street).

Race Tourism

- Support efforts to market running races (e.g. Wine Country Half Marathon)

Newberg Historic Walking Tour

- Create plaques/markers for a Newberg historic walking tour. The Newberg Downtown Coalition already has the bones of a tour created [here](#).

Promotion of Conferences

- Support efforts by Newberg hotels and organizations (Allison, Windrose, A-dec, George Fox) to bring out-of-town groups to town for conferences

Note about George Fox audience

This plan does not address the George Fox audience, which may have more economic impact on the city than the wine tourism audience. The parents of prospective undergraduates often spend the night and eat most meals off campus. When 700 or so of those freshmen chose to enroll at George Fox, they each spend \$5,500+ a year in town on food, rent and other services) and support the university's \$70 million budget - which includes \$45+ million in taxable salaries and benefits. Some - especially the Chinese students - buy cars here. As these students go through 2-6 years of school, they attract even more visitors to Newberg (family weekends, sports and arts events, graduation, etc...) Graduate students probably spend even more in Newberg since they often bring family to live here. If we can think of ways to make that visit experience even more positive, it can pay off for everyone.

BUDGET TLT MARKETING SUBCOMMITTEE PROPOSAL

12/18/17

Revenue	FY 16/17	FY 17/18	FY 17/18 Supplemental Budget	FY 18/19 Projection	FY 19/20 Projection	FY 20/21 Projection	FY 20/21 Projection
Gross Operator Receipts	11,994,410	12,220,625	12,220,625	12,587,244	12,964,861	13,353,807	13,754,421
Beginning Fund Balance	207,113	250,000	343,718	115,214	0	0	0
Tax Revenue -Restricted for Tourism	359,617	365,703	366,399	377,390	388,712	400,373	412,385
Tax Revenue City Services	665,905	679,160	678,465	698,819	719,748	741,377	763,618
Interest Revenue-Restricted for Tourism	897	897	897	897	897	897	
Interest Revenue- City Services	1,667	1,667	1,667	1,667	1,667	1,667	
Estimated Additional Funds							
Total	1,235,199	1,297,427	1,391,146	1,193,987	1,111,024	1,144,314	1,176,003
Expenses							
Transfers out General Fund	665,905	680,132	678,465	698,819	719,748	741,377	763,618
Visitor Center/Destination Marketing Contract	137,548	139,886	139,886				
Visitor Center Contract				105,901	109,078	112,350	115,721
Destination Marketing Contract				120,000	120,000	120,000	120,000
Unallocated Tourism Activity	431,746	477,409	572,795	269,267	162,198	170,587	176,664
Consultant							
Staff - Meetings, Travel, Networking		2,000	2,000	2,000	2,000	2,000	2,000
Tourism Marketing		14,787	109,622	0	0	0	0
Fundraising (Grant Match)		10,000	10,000	10,000	10,000	10,000	10,000
Subtotal		26,787	121,622	12,000	12,000	12,000	12,000
Tourist Related Facilities (Large Grant)	313,774	430,622	431,173	237,267	130,198	138,587	144,664
Small Grant Program (pilot program)	20,000	20,000	20,000	20,000	20,000	20,000	20,000
Total	1,235,199	1,297,427	1,391,146	1,193,987	1,111,024	1,144,314	1,176,003
Ending Balance Restricted for Tourism		0	0	0	0	0	0

* The \$250,000 for the Tourist Related Facilities (Large Grant) originally budgeted will not be expended by June 2016 and becomes the Beginning Fund Balance for FY 17/18

Assumptions

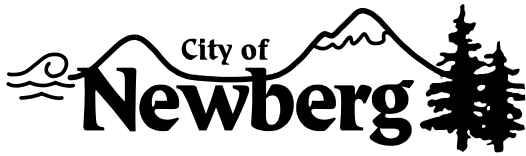
Visitor Center Contract escalator of 1.7% annually (Actually tied to CPI-W)

26.5% of Visitor Center Contract for Marketing Services

73.5% of Visitor Center Contract for Visitor Center Operation

\$120,000 for Marketing Services (\$60,000 salary/\$60,000 implementation of marketing/FAMs/web/public relations)

\$120,000 for Marketing Services drawn from 26.5% of Visitor Center Contract and reduction of funding for Tourist Related Facilities



Community Development Department

P.O. Box 970 ▪ 414 E First Street ▪ Newberg, Oregon 97132
503-537-1240 ▪ Fax 503-537-1272 ▪ www.newbergoregon.gov

MEMORANDUM

TO: Transient Lodging Tax Ad Hoc Committee

FROM: Doug Rux, Community Development Director

DATE: January 3, 2018

SUBJECT: Small Grant Presentations

Five applications for the TLT Small Grant program have been submitted for consideration. The attached information details each application. Presentations will be provided on January 3, 2018. Each presentation will be around 10 minutes followed by a Q & A session with the TLT Ad Hoc Committee. The TLT Ad Hoc Committee will meet again on February 7, 2018 to score and evaluate each application proposal. The Committee will also develop a recommendation to the City Council. The City Council review will occur on March 5, 2017.

Attachments: 1. Hoover-Minthorn House Museum Exhibit & Marketing Plan
2. Anvil Academy Newberg Grand Prix Cycle Kart Rally
3. Anvil Academy Promotion Newberg Grand Prix Rally at Portland Indy Car Event
4. Oregon Truffle Festival Weekend – The Terroir of Truffles
5. Newberg Camellia Festival and Run/Walk

Small Grant Program	Funding Request
Hoover-Minthorn House Museum Exhibit & Marketing Plan	\$ 7,500.00
Newberg Grand Prix Cycle Kart Rally	\$ 10,000.00
Promotion of Newberg Grand Prix Rally at Portland Indy Car Event	\$ 10,000.00
Oregon Truffle Festival Newberg Weekend - The Terroir of Truffles	\$ 9,250.00
Newberg Camellia Festival and Run/Walk	\$ 8,000.00
TOTAL	\$ 44,750.00
Funding Available	\$ 20,000.00
Minimum Funding Request	\$ 1,000.00
Maximum Funding Amount	\$ 10,000.00

**Hoover-Minthorn House Museum Herbert Hoover's
Oregon Boyhood - An Exhibit and Marketing Plan**

Request amount: \$7,500

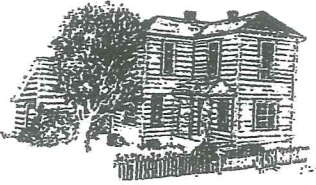
Required Application Materials

YES NO NOTES

1) Completed application Cover Sheet	X		
2) Budget for project/program/event being funded that lists all anticipated income and expenses.	X		Cash and in-kind donations
3) Board or Owner approved financial statement for most recently completed fiscal year of the organization or business responsible for the project/program/event.	X		Fiscal Year 2016 - 2017
4) Letter signed by officers of the Organization's Board of Directors or Business Owners authorizing this application.	X		Signed letter and signed Certification Letter in application but no separate letter
5) Documentation of organization or business existence: Current, valid Oregon Secretary of State Corporation Division registry filing.	X		2017 Annual Report
6) Documentation that no bankruptcy or other financial corruption has occurred within the past five years.	X		Letter stating no bankruptcy
7) Letters of support.	X		3 submitted letters
8) Past grant recipient.	X		Met prior grant progress and final reporting requirements for Small Grant program

Eligibility Requirements**YES NO NOTES**

1) Aligns with Transient Lodging Tax regulations (Tourist, Tourism Promotion, Tourism Promotion Agency, Tourism related facility)	X		Tourists, Tourism promotion
2) Promote or create experiences for: Outdoor recreation visitor, Experiential arts, Wayfinding, Downtown enhancement	X		Experiential Arts, Downtown Enhancement
3) Appeals to designated audiences in the Newberg Strategic Tourism Plan (Wine Country Adventures, Millennial Explores, George Fox Network, and Luxury Wine Travelers)	X		Millennial Explorers, George Fox Network
4) The project will create or enhance an experience for shoulder or off-season visitors	X		High season event
5) Does it align with other tourism activities in the community	X		Festivals, events
6) Builds on existing assets	X		Cultural Center, George Fox University
7) Leverages funding	X		.5:1 and meets the requirement
8) Entities that have a bankruptcy or other financial corruption within the past five years are ineligible		X	None



HOOVER-MINTHORN HOUSE MUSEUM
115 South River Street
P.O. Box 1212
Newberg, OR 97132

December 15, 2017

Doug Rux, Community Development Director
City of Newberg
Newberg City Hall
414 East First Street
Newberg, OR 97132

Re: Transient Lodging Tax Small Grant Program Application

Dear Mr. Rux,

Enclosed is an application from the Hoover-Minthorn House Museum to the Transient Lodging Tax small grant program for creating an exhibit at the Chehalem Cultural Center and related marketing. The application includes the following:

1. Application cover sheet (p. 1)
2. Application (p. 2-3)
3. Project Budget 2017-2018 (p. 4)
4. HMHM Revenue and Expenses 2016-2017 (p. 5-6)
5. HMHM Foundation Stabilization Budget (p. 7)
6. Letter signed by officers of NSCDA-OR authorizing application (p. 8)
7. Current Oregon Secretary of State Corporation Division registry filing (p. 9-11)
8. Letter stating that no bankruptcy or other financial corruption has occurred in the last five years (p. 12)
9. Letter of support from Carissa Smith-Burkett, Chehalem Cultural Center (p. 13)
10. Letter of support from Rachel Thomas, archivist, George Fox University (p. 14)
11. Letter of support from Suzanne Miller, Chehalem Garden Club (p. 15)
12. Project Narrative (p. 16-19)
13. Signature and Certification (p. 20)

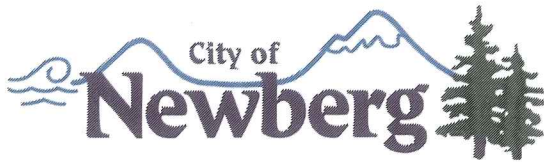
Please let me know if I can provide any additional information. Thank you so much for your consideration.

Very truly yours,

Sarah B. Munro
Director, Hoover-Minthorn House Museum

RECEIVED

DEC 15 2017



RECEIVED

DEC 15 2017

Initial: DJR

City of Newberg 2017 - 2018
Transient Lodging Tax – Small Grant Program Application Cover Page

Project Title: Herbert Hoover's Oregon Boyhood – An Exhibit and Marketing Plan

Applicant Name: The Hoover-Minthorn House Museum, owned and operated by The National Society of The Colonial Dames of America in the State of Oregon

Mailing Address: PO Box 1212 Newberg OR 97132
Street City State Zip

Street Address: 115 South River Street, Newberg, OR 97132

Contact Name: Sarah B. Munro

Phone: 503-806-7286 Email: sarahmunro@comcast.net

Alternate Phone: 503-538-6629 (during hours that Museum is open)

Amount of total Funding Requested: \$7,500.00

Please note: Funds not spent on the approved project must be returned to the City of Newberg by check with the Final Report due 30 days after completion of the project, program or event.

Project, Program or Event Detail:

- A. To apply, attach a completed application to this cover sheet along with any required supporting materials.
- B. Submit an updated Project, Program or Event Detail as your Progress Report.
- C. Within 30 days after project, program or event is complete submit a Final Report. Attach receipts/paid invoices for monies spent and a check to the City of Newberg for any unspent funds.

Any changes to your project must have prior approval to receive funding.

I agree to all terms described on this application and verify that the information provided on this cover sheet is true and accurate.

Print Name: Marjorie Wilson

Signature: Marjorie P. Wilson

Title: President, NSCDA-OR

Date: December 14, 2017

*****FOR OFFICE USE ONLY*****
APPROVED/NOT APPROVED/REVISED (ATTACH DETAILS) _____

Progress Report Received: _____ Final Report received: _____

Funds returned, received on: _____

Classify how funds will be used for your project/program/event: *check all that apply*

New Project

New Program

New Event

Existing Project

Existing Program

Existing Event

Has this project, program or event received these grant funds in the past?

No

If so when and for how much?

Prior year grant award through this program does not guarantee additional funding in subsequent years. All returning projects, programs or events must reapply and are subject to approval. This program has limitations of funding available in the fiscal year in total amount of funds requested. All required reports must be in good standing at the time of application for future funding by a past grant recipient.

Budget Summary (this format must be used):

Project/Program/Event Budget: This budget provides the detail of the project, program or event that the grants funds would be applied to. This should include how the funds from this grant will be spent. Expenses must be explicitly defined. Please include in-kind and cash match.

Fiscal Year: 2018 to 2019

Income Sources	Amount
City of Newberg TLT Small Grant	\$7,500
Yamhill County Cultural Coalition (cash)	\$1,000
NSCDA-OR (cash)	\$4,000
NSCDA-OR (70 hours in-kind @ \$23/hour)	\$1,610
Community Volunteers (10 hours in-kind @ \$23/hour)	\$230
Newberg Historical Society (10 hours in-kind @ \$23/hour)	\$230
Chehalem Cultural Center (10 hours in-kind @ \$23/hour)	\$230
Total Project/Program/Event Income	\$14,800.00

Expenses – Must be explicitly defined.	Amount
Marketing Consultant – free-lance consultant to assist in developing brand identity, presentation materials for schools, tagline evaluation, website and social media interactions.	\$2,500
Printed fliers and programs	\$2,000
Facebook ads for exhibit at Chehalem Cultural Center (\$638/month for 2 months)	\$1,276
Digital images for exhibit (30 @ \$30/each)	\$900
Design and printing of display boards 32"x40" (8.89 sq ft x \$7/ sq ft = \$62.23 x 30)	\$1,869
Mat board for display boards (\$24 x 30)	\$720
Drymounting on mat board (\$85/board x 30)	\$2,550
Reception to open exhibit on June 1 (wine, tea, coffee, cookies and savories; flowers, napkins, cream, sugar)	\$500
Speaker on Herbert Hoover at opening or during exhibit at Chehalem Cultural Center	\$2,450
Total Project/Program/Event Expense	\$14,765.00

**HOOVER-MINTHORN HOUSE MUSEUM
REVENUE-EXPENSES 2016-2017**

12/15/2017

Revenue	Annual
Tour Income (fluctuates)	\$2,775.20
HMHM Endowment Contribution	\$42,000.00
NSCDA-OR Project Fund	\$10,000.00
HMHM Operating Fund Savings transfers	\$10,612.73
Contributions	\$3,100.00
Contributions for re-upholstering chair	\$701.96
Interest	\$21.63
Austin Grant 2015	\$147.00
Northwest History Network Grant	\$187.44
Kinsman Foundation grant for architectural drawings and engineer's report	\$137.50
Donation for Willamette Heritage Center Exhibit	\$570.00
Contribution for display columns	\$50.00
Transient Lodging Tax Small Grant	\$1,400.00
Total Revenue	\$71,703.46
Expenses	
Utilities	
Water/Sewer	\$1,246.85
Electricity-Museum	\$2,957.06
Electricity-Little House	\$1,329.59
Website Maintenance (monthly charge eliminated & Vistaprint dropped)	\$329.00
Frontier Telephone, Internet	\$928.09
General Maintenance	
Landscape (includes contribution to Camellia Festival 2016)	
Garbage	\$210.06
Quadrant Security (\$125 for annual fire alarm inspection)	\$315.00
Exterminator	\$68.00
Roof/gutter repair	\$90.00
Window and Museum Cleaning	\$289.81
Handyman Services	\$946.65
Insurance	\$1,966.47
Business License	\$50.00
Bookkeeper/checking account access*	\$506.00
Personnel	
Intern Program	\$10,257.96
Director	\$36,999.96
Bonus	\$3,000.00

HOOVER-MINTHORN HOUSE MUSEUM
REVENUE-EXPENSES 2016-2017

12/15/2017

	Community Outreach	
	Programs & Events (Camellia Festival, Old Fashioned Days, Hoover Birthday, CBS Sunday Morning; Exhibit at Newberg Library Am. Assoc State & Local History (AASLH workshop)	\$1,925.07
	OR Museum Assoc	\$214.00
		\$120.00
	Marketing	
	OR Travel Experience	\$574.00
	Advertising (Chamber of Commerce, design for sign, brochure)	\$1,180.89
	Printed Material (brochures)	\$462.31
	Miscellaneous	
	Archives (nonacid boxes, files, tissue, light-blocking curtains in collection room)	\$631.54
	General (postage, postal box rental, locking file box)	\$1,022.36
	Stamps and business envelopes	\$27.58
	Curatorial Research and Education (OMA)	\$75.00
	Household Supplies	\$311.78
	Willamette Heritage Center exhibit	\$524.49
	Austin Grant 2015 (webpage re-design & sign)	\$89.00
	Northwest History Network Grant (printing educational brochure)	\$94.08
	Kinsman Foundation grant for architectural drawings and engineer's report	\$500.00
	First Lady Lou Fund (Birthday)	
	Contributions	\$740.00
	Total Expenses	\$69,982.60
Expense of exterior signs in 2017-2018		
Foundation stabilization grants and expenditures shown on separate sheet		

HOOVER-MINTHORN HOUSE MUSEUM
FOUNDATION STABILIZATION

EXPENSES	DESCRIPTION	CASH EXPENSES - ESTIMATED	CASH EXPENSES - ACTUAL	IN-KIND EXPENSES	TOTAL PROJECT EXPENSES
Foundation Stabilization Expenses					
Contracted Services					
Structural Engineer (Peder Golberg)	Drawing of foundation for permit	\$500.00	\$500.00		
Structural Engineer (Peder Golberg)	Drawing of foundation for contractor	\$375.00	\$375.00		
Architect (Rob Dortignacq)	Consultation on foundation stabilization	\$1,450.00	\$2,200.00		
Structural Engineer (Peder Golberg)	Drawing of foundation for permit & delivery		\$381.25		
Architect (Rob Dortignacq)	Drawing for permit		\$950.00		
Contractor (Pacific Crest)		\$65,447.00	\$39,700.00		
SUM=(D23-81000)	Notebook & tabs for project	\$15.37	\$15.37		
Other			\$41.18		
City of Newberg - Planning Department	Permit application for foundation stabilization	\$436.66	\$436.66		
City of Newberg - Planning Department	Permit for foundation stabililzation		\$1,318.23		
Additional Preservation Expenses					
Contracted Services					
Architect (Rob Dortignacq)	Consulting	\$3,000.00	\$3,000.00		
Contractor (Pacific Crest)	Painting	\$20,409.00	\$17,695.00		
Contractor (Pacific Crest)	Construction and installation of panels	\$8,452.00	\$8,452.00		
Chimneys (Pioneer Waterproofing)	Clean, seal, and install copper flashing and caps	\$5,179.00	\$5,179.00		
Roof repair (Fisher Roofing)	Repair leaks in woodshed roof		\$410.00		
Screening crawl space (ProHandyman)	Screen area around kitchen and back porch		\$247.52		
Electrical cleanup (Farnham Electric)	Remove obsolete wiring from attic		\$257.50		
TOTAL ACTUAL EXPENSES		\$67,787.37	\$81,158.71		
:	STATUS - PLANNED, PENDING OR CONFIRMED	REVENUE	ACTUAL REVENUE	IN-KIND REVENUE	TOTAL PROJECT REVENUE
EARNED REVENUE (APPLICANT CONTRIBUTION)					
NSCDA-OR - Foundation Stabilization	Confirmed	\$30,000.00	\$30,000.00		
NSCDA-OR - Expense exceeding \$81,000			\$2,463.71		
SUBTOTAL			\$30,000.00		
CORPORATE SUPPORT (SOURCE)					
SUBTOTAL		\$0.00		0	
INDIVIDUAL/COMMUNITY SUPPORT					
Newberg Rotary	Confirmed	\$10,000.00	\$10,000.00		
City of Newberg ERDFL	Confirmed		\$1,000.00		
SUBTOTAL			\$11,000.00		
GOVERNMENT SUPPORT					
COUNTY					
STATE - Oregon Cultural Trust	Confirmed	\$40,000.00	\$40,000.00		
FEDERAL					
SUBTOTAL			\$40,000.00	0	
TOTAL REVENUE		\$40,000.00	\$81,000.00		
Actual revenue			\$81,000.00		
Actual expenses 12-17			\$81,158.00		
Amount over budget 12-17			\$158.71		
Pacific Crest painting porch in spring 2018			\$2,308.00		
Actual expenses spring 2018			\$83,466.71		



December 12, 2017

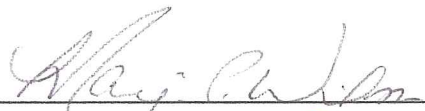
Doug Rux, Community Development Director
City of Newberg
Newberg City Hall
414 East First Street
Newberg, OR 97132

Dear Mr. Rux:

On behalf of The National Society of The Colonial Dames of America in the State of Oregon (NSCDA-OR), the below listed officers of the NSCDA-OR authorize an application to the City of Newberg Transient Lodging Tax Small Grant Program for funding support of an exhibit at the Chehalem Cultural Center in June and July and related marketing efforts.

The NSCDA-OR is looking forward to the opportunity to present and promote the story of Herbert Hoover's Oregon Boyhood and to expand marketing efforts to attract tourists to the HMHM and Newberg.

Sincerely,



Marjorie Wilson, President



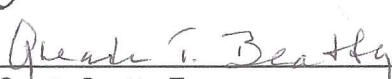
Carolyn McKinney, Vice President



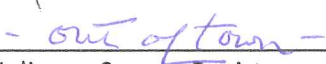
Patty Thompson, Second Vice President and
Corresponding Secretary



Sally LeFeber, Recording Secretary



Greata Beatty, Treasurer



Julianne Spears, Registrar

Business Registry Business Name Search

[New Search](#)

Business Entity Data

12-09-2017
20:54

Registry Nbr	Entity Type	Entity Status	Jurisdiction	Registry Date	Next Renewal Date	Renewal Due?
025883-17	DNP	ACT	OREGON	04-20-1923	04-20-2018	
Entity Name	THE NATIONAL SOCIETY OF THE COLONIAL DAMES OF AMERICA IN THE STATE OF OREGON					
Foreign Name						
Non Profit Type	PUBLIC BENEFIT WITH MEMBERS					

[New Search](#)

Associated Names

Type	PPB PRINCIPAL PLACE OF BUSINESS					
Addr 1	3684 NW 124TH PL					
Addr 2						
CSZ	PORTLAND	OR	97229		Country	UNITED STATES OF AMERICA

Please click [here](#) for general information about registered agents and service of process.

Type	AGT REGISTERED AGENT			Start Date	06-03-2015	Resign Date
Name	GREATA	T	BEATTY			
Addr 1	1132 SW 19TH AVE #603					
Addr 2						
CSZ	PORTLAND	OR	97205		Country	UNITED STATES OF AMERICA

Type	MAL MAILING ADDRESS					
Addr 1	PO BOX 28071					
Addr 2						
CSZ	PORTLAND	OR	97228		Country	UNITED STATES OF AMERICA

Type	PRE PRESIDENT			Resign Date
Name	MARJORIE		WILSON	
Addr 1	3684 NW 124TH PL			
Addr 2				
CSZ	PORTLAND	OR	97229	Country UNITED STATES OF AMERICA

Type	SEC SECRETARY			Resign Date
Name	CAROLYN		MCKINNEY	
Addr 1	0836 SW CURRY ST #900			
Addr 2				
CSZ	PORTLAND	OR	97239	Country UNITED STATES OF AMERICA











New Search

Name History

Business Entity Name	Name Type	Name Status	Start Date	End Date
THE NATIONAL SOCIETY OF THE COLONIAL DAMES OF AMERICA IN THE STATE OF OREGON	EN	CUR	05-02-1977	
THE OREGON SOCIETY OF THE COLONIAL DAMES OF AMERICA	EN	PRE	04-20-1923	05-02-1977

Please read before ordering Copies.New Search

Summary History

Image Available	Action	Transaction Date	Effective Date	Status	Name/Agent Change	Dissolved By
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	09-01-2017		FI		
	AMENDED ANNUAL REPORT	03-31-2017		FI		
	AMENDED ANNUAL REPORT	04-14-2016		FI		
	AMNDMT TO ANNUAL RPT/INFO STATEMENT	06-03-2015		FI	Agent	
	AMENDED ANNUAL REPORT	05-15-2015		FI		
	NOTICE LATE ANNUAL	04-24-2015		SYS		
	AMENDED ANNUAL REPORT	04-11-2014		FI		
	AMENDED ANNUAL REPORT	05-20-2013		FI		
	NOTICE LATE ANNUAL	04-26-2013		SYS		
	AMENDED ANNUAL REPORT	06-15-2012		FI		
	NOTICE LATE ANNUAL	04-27-2012		SYS		
	AMENDED ANNUAL REPORT	04-27-2011		FI	Agent	
	NOTICE LATE ANNUAL	04-22-2011		SYS		
	AMENDED ANNUAL REPORT	05-10-2010		FI		
	NOTICE LATE ANNUAL	04-23-2010		SYS		
	AMENDED ANNUAL REPORT	04-16-2009		FI		
	AMENDED ANNUAL REPORT	04-10-2008		FI	Agent	
	AMENDED ANNUAL REPORT	04-18-2007		FI	Agent	
	ANNUAL REPORT PAYMENT	03-21-2006		SYS		
	ANNUAL REPORT PAYMENT	03-29-2005		SYS		
	REINSTATEMENT	08-04-2004		FI	Agent	

	AMENDED				
	ADMINISTRATIVE DISSOLUTION	06-18-2004		SYS	
	NOTICE LATE ANNUAL	04-23-2004		SYS	
	ANNUAL REPORT PAYMENT	03-21-2003		SYS	
	ANNUAL REPORT PAYMENT	04-12-2002		SYS	
	ANNUAL REPORT PAYMENT	03-16-2001		SYS	
	STRAIGHT RENEWAL	04-13-2000		FI	
	CHANGED RENEWAL	04-28-1999		FI	
	AGENT/AUTH REP CHNG	04-28-1999		FI	
	STRAIGHT RENEWAL	04-16-1999		FI	
	STRAIGHT RENEWAL	03-19-1998		FI	
	CHANGED RENEWAL	03-19-1998		FI	
	STRAIGHT RENEWAL	03-14-1997		FI	
	CHANGED RENEWAL	03-14-1997		FI	
	STRAIGHT RENEWAL	04-15-1996		FI	
	CHANGED RENEWAL	04-15-1996		FI	
	AGENT/AUTH REP CHNG	04-15-1996		FI	
	NB AMENDMENT	01-11-1996		FI	
	STRAIGHT RENEWAL	04-14-1995		FI	
	AMENDED RENEWAL	04-06-1994		FI	
	AMENDED RENEWAL	05-14-1993		FI	
	AGENT/AUTH REP CHNG	05-14-1993		FI	
	AMENDED RENEWAL	04-08-1992		FI	
	AMENDED RENEWAL	04-18-1991		FI	
	AGENT/AUTH REP CHNG	04-18-1991		FI	
	AMENDED RENEWAL	05-02-1990		FI	
	AMENDED RENEWAL	04-19-1989		FI	
	ASSOCIATED NAME CHNG	04-19-1989		FI	
	AMENDED RENEWAL	04-06-1988		FI	
	STRAIGHT RENEWAL	04-03-1987		FI	
	AMENDED RENEWAL	04-11-1986		FI	
	STRAIGHT RENEWAL	03-12-1985		FI	
	ENTITY NAME CHANGE	05-02-1977		FI	

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October 1, 2017

To Whom It May Concern:

This is to verify that The National Society of the Colonial Dames of America in the State of Oregon has had no bankruptcy or other financial corruption within the last five years or during its entire history beginning in 1923.

Sincerely,

A handwritten signature in blue ink that reads "Greata T. Beatty".

Greata T. Beatty
Treasurer



www.chehalemculturalcenter.org
415 E Sheridan St
Newberg, OR 97132
(503) 487-6883

Dear TLT Grant Committee,

I am happy to write this letter to confirm our commitment to partnering with The Hoover-Minthorn House on the Herbert Hoover exhibition that they will be bringing to the Cultural Center in 2018. This project will benefit the community we serve, as well as further the Chehalem Cultural Center's mission to inspire and enrich lives by connecting community and culture.

The Chehalem Cultural Center is a non-profit 501 (c)3 organization housed in a historic building in the cultural district in Newberg OR that began its life in 1935 as Central School—a depression era Works Progress Administration (WPA) project. This historic building now houses the Cultural Center's galleries, arts studio classrooms, meeting space, a black box theater and a grand ballroom for public and private events.

As a project partner, the Chehalem Cultural Center will provide exhibition space for the project. The CCC is excited to have the opportunity to provide this programming to the community through this partnership. This type of programming will help us achieve our goals of exposing the community to history and heritage.

If I can be of any further assistance, please don't hesitate to contact me.

Sincerely,

A handwritten signature in black ink, appearing to read "Carissa Smith-Burkett". The signature is fluid and cursive, with the first name "Carissa" being more prominent than the last name "Smith-Burkett".

Carissa Smith-Burkett, MFA

Arts & Public Programming Coordinator
Chehalem Cultural Center

<http://www.chehalemculturalcenter.org/>



Doug Rux
Community Development Director
City of Newberg
Transient Lodging Tax – Small Grant Program
Newberg City Hall
414 E First Street
Newberg, OR 97132

December 12, 2017

Dear Doug Rux,

The George Fox University Archives offer their support for the Hoover-Minthorn House proposal “Herbert Hoover: Oregon Boyhood.” The planned exhibit at the Chehalem Cultural Center provides an excellent opportunity to increase local awareness of one of our most famous residents. I believe it is a fantastic candidate for the Transient Lodging Tax funds.

The archives are supporting this project with archival resources, research materials and scanned images and documents for display.

Sincerely,

A handwritten signature in cursive script that reads "Rachel Thomas".

Rachel Thomas, George Fox University Archivist.

Dec. 12, 2017

Mr. Doug Rux
Community Development Director,
City of Newberg
Newberg City Hall
414 East First St.
Newberg, OR 97132

Dear Mr. Rux,

On behalf of the members of the Chehalem Garden Club, which has been based in Newberg since 1993, I am writing to express our support for a grant requested by the management of the Hoover-Minthorn House Museum.

Our club maintains the herb garden at the Museum. When our members are out working in the Museum garden, we are often approached by visitors who comment on what a "hidden jewel" the Museum is. The proposed grant will help promote local awareness and tourism by providing an educational exhibit where visitors can learn about Herbert Hoover and his Oregon boyhood home. It is so incredibly special that Newberg is home to the ONLY presidential property in the Pacific Northwest.

We urge you to approve the requested grant. Thank you.

Suzanne Miller
President,
Chehalem Garden Club

Project Narrative:

1. Project description:

The project is to create an exhibit at the Chehalem Cultural Center (CCC) about Herbert Hoover's Oregon Boyhood. The exhibit will be comprised of visual material, text, photographs and illustrations mounted on panels. It may include several short video segments on a television screen. The exhibit opening on June 1 will be celebrated with a reception and a talk by an expert on Hoover.

The second part of the project includes development of a marketing plan to promote the exhibit and advertise tours of the Hoover-Minthorn House Museum (HMHM). Promotions will include printed fliers and brochures, Facebook ads, social media communications, and targeted contacts with schools and retirement communities. Marketing efforts will focus on developing regional contacts. Marketing communications established to promote the exhibit will be continued in the future to help promote the HMHM.

The topic of the exhibit will be the three years that Hoover spent in Newberg and the impact that these years had on his life. Arriving as an 11-year old orphan, Hoover lived with Dr. Henry John Minthorn, attended the Friends Pacific Academy, fished in Oregon streams, and absorbed Quaker values. As an adult, Hoover executed what may be considered the greatest humanitarian projects in the history of mankind. The exhibit will explore possible influences that led to Hoover's extraordinary public service.

2. How will your project, program or event further the Newberg Strategic Tourism Plan goals?

Among Newberg's five Strategic Tourism Plan goals are the following three: (1) recognizing Newberg as a destination of artisan makers and doers, (2) funding and catalyzing downtown development and creating new experiences for target audiences, and (3) engaging and energizing local tourism partners.

Artisan makers and doers already visit the CCC and having the opportunity to see the exhibit at the CCC will enhance their experience. The exhibit will create a new experience for the target audiences of millennials and the George Fox University (GFU) network. The exhibit will be based in part on research by George Fox students. The CCC and GFU are among the target audiences and the exhibit will provide the opportunity to engage and energize these two community partners.

3. How does your project, program or event align with Transient Lodging Tax regulations (Tourist, Tourism Promotion, Tourism Promotion Agency, or Tourism related facility)?

The exhibit aligns with the TLT regulations by promoting the HMHM, a tourist-related facility. The exhibit at the CCC celebrates the HMHM by telling the story of Herbert Hoover's Oregon boyhood. The exhibit will include maps illustrating how Quakers and Herbert Hoover traveled to Newberg in the nineteenth century. Much of Newberg's early history will be told in the exhibit. The exhibit may attract visitors to the HMHM at the east end of town.

4. What is the projected return on investment?

The return on investment weighs the cost of the project against the value of tourist visits. Although it is difficult to quantify the value of the tourist visits, the location of the CCC at the northwest part of town and the HMHM at the southeast corner of downtown Newberg provides an opportunity to welcome tourists as they enter Newberg, either from the east and south or from the west and north.

5. Predicted number of tourists' attracted/overnight guests?

The exhibit will provide an opportunity to attract visitors to the HMHM and increase the number of tourists who are also overnight guests in Newberg.

Fully one-third of the visitors to the HMHM are "tourists" within the definition of tourist in Newberg's Strategic Tourism Plan and come from outside a 50-mile radius of Newberg. Not all visitors stay overnight in Newberg, but many patronize local wineries, coffee shops, and restaurants before leaving town.

The calculation of one-third was drawn by comparing the total number of signed lines (that can include one, two or more visitors) in the visitors' register to the number of lines that were signed by visitors outside a 50-mile radius of Newberg. The HMHM has also hosted several tourist groups that came to Newberg specifically to tour the HMHM; a group from Texas visited recently and another group of traveling antique car collectors visited on Herbert Hoover's birthday. The records of HMHM visitors are not accurate enough to predict the number of tourists who will be overnight guests at local hotels.

6. Will it have lasting impact and/or utility?

The exhibit will be temporary, but its impact should be lasting among visitors. Those visitors may be drawn to visit the HMHM and local businesses in Newberg. In addition, the marketing plan which will be implemented to promote the exhibit will remain in place and should be effective in attracting visitors to the HMHM long after the exhibit has closed.

7. How does your project, program or event leverage funding?

The exhibit at the Chehalem Cultural Center will be visible to all CCC visitors during June and July, reacquainting this audience with Herbert Hoover's childhood in Newberg and promoting understanding of his U.S. presidency and international humanitarianism. Visitors will be reminded that the HMHM stands not only as a memorial to this outstanding citizen but also as the only presidential house in the northwest. The exhibit will leverage funding by aligning the HMHM with the CCC, GFU, and other community partners.

8. What is the ratio at which Transient Lodging Tax funds will be matched?

The entire cost of the project is anticipated to be \$14,765; the amount requested from the TLT is \$7,500. The cost of the project divided into the amount of the request equals 0.5. The amount of the financial and in kind contribution from the NSCDA-OR, the contribution of the Yamhill County Cultural Coalition, and the in kind support of others meets the required .5:1 ratio for the match for non-profits.

9. What is your demonstrated history of attracting tourists?

The HMHM has operated as a museum since 1955 and for many years the museum has maintained the same schedule of being open to the public Wednesday through Sunday from 1 to 4 pm. Many tourists come to the HMHM because it is a presidential site. It is older than almost all commercial venues in Newberg and has a demonstrated history of attracting tourists over time.

The HMHM has great potential to attract more tourists in the future. It is unique as the only presidential house in the northwest. In addition, because it is owned and operated by NSCDA-OR, the HMHM is grouped with "Great American Treasures," the properties of historical significance that 44 Colonial Dames societies are involved with nationally. The national organization of Colonial Dames plans to link all of their historic properties and to promote them together through signage and social media. The HMHM has the potential to attract more tourists to Newberg through this national linkage.

10. Does your project, program or event engage and energize local tourism partner(s)?

The collaboration with the CCC on the exhibit is an opportunity to energize both the CCC and the HMHM. Additional partners on the exhibit include the George Fox network and the Newberg Historical Society. The HMHM has other collaborations with the Newberg Historical Society through the year, including on Old Fashioned Festival events. The HMHM has undertaken several fruitful collaborations including an internship program that depends upon George Fox University. The HMHM is proud of its partnerships with the Chehalem Park and Recreation District as a sponsor for the Camellia Festival and the Chehalem Garden Club that manages the herb bed in the HMHM garden. All of these partnerships seek to encourage visitors and tourists to Newberg.

11. Does your project, program or event enhance Newberg as a destination? If so how?

The project will enhance Newberg as a destination by celebrating Herbert Hoover. This focus should appeal to some tourists who visit Newberg solely because the HMHM is a presidential site. In addition, some tourists will seek out the HMHM as a historic house museum – the HMHM is the only historical museum in Newberg. As one of the oldest houses in Newberg and the oldest in that part of Newberg that was known as the "godly end," the HMHM is a testament to the early Quaker history of Newberg. The HMHM has the potential to enhance any tourist's visit to Newberg by putting the town in historic context.

12. Does your project, program or event enhance Newberg as a location for Makers and Doers? If so how?

The exhibit should be attractive to Makers and Doers by telling the story of arguably the most prominent citizen to come out of the community. Makers and Doers are integral to the Chehalem Cultural Center. The exhibit will catch their attention and hopefully engage their interest in drawing visitors to the HMHM in the long term.

13. Does your project, program or event catalyze downtown development? If so how?

The exhibit at the CCC is within easy walking distance from the HMHM. Walkers will be tempted to stop at the restaurants, bakeries, coffee houses, galleries, shops, food carts, and tasting rooms along the streets between the CCC and the HMHM.

The project should help in catalyzing downtown development because it will celebrate Newberg's past. It will raise awareness of the history of Newberg's south side and the role that the HMHM plays as a symbol of the early Quaker settlement in the southeast end of downtown. It is generally accepted that cultural sectors of towns catalyze economic vitality and the HMHM and its neighborhood are no exception. See: The American Planning Association report, "Economic Vitality: How the arts and culture sector catalyzes economic vitality" (www.planning.org/research/arts/briefingpapers/vitality.htm).

14. Does your project, program or event enhance tourism from October – May or Sunday – Thursday Visitation? Explain how.

The exhibit will be at the Chehalem Cultural Center from May 29 to July 28, 2018. The exhibit will be accessible most hours of everyday – whenever the CCC is open during these two months. The exhibit is intended to attract more visitors to the HMHM which is open during part of the offseason, including October through November (Sundays, Wednesdays and Thursdays), December and February (Sundays), and March through May (Sundays, Wednesdays and Thursdays). ***The HMHM is always opened by special appointment.***

15. Does this project align with at least one of the four target audiences (Wine Country Adventurers, Millennial Explorers, George Fox Network, or Luxury Wine Travelers)?

The exhibit aligns with the target audience of the George Fox Network. Interns from GFU are engaged in research and layout of the exhibit. Herbert Hoover's tie to George Fox – as a student in the first class of the Friends Pacific Academy, the forerunner of GFU, should appeal to the current GFU community.

Millennial Explorers are also a target audience attracted by the exhibit at the CCC. Millennials are already a target audience of the CCC. Millennials will find it easy and interesting to visit the exhibit at the CCC.

16. What is the timeframe for completion of your project, program or event?

The exhibit will be installed by May 28, 2018. A reception and lecture are planned for June 1 which is First Friday in Newberg. One or more walking tours may be scheduled during the months of June and July. The exhibit will be taken down on July 28, just before Old Fashioned Festival.

Signature and Certification Letter:

I hereby certify that all facts, figures and representations made in this application, including all attachments, are true and correct. This application is made with the written approval of my Board of Directors or Owners, which is attached to this application.

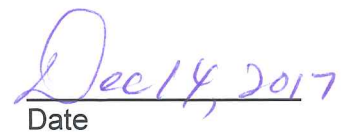
I agree that all publicity, press releases, publications, materials and or media advertising produced as part of this proposed project/program/event will acknowledge the grant program as follows:

"This project/program/event is made possible in part by a grant from Newberg transient lodging taxes and the City of Newberg."

I agree to carry out this project/program/event as outlined within the application. Further, I understand that failure to do so will invalidate this agreement and necessitate the immediate return of all Transient Lodging Tax grant monies to the City of Newberg.



Signature of Authorizing Official



Date

Marjorie Wilson, President, NSCDA-OR

Print Name of Authorizing Official

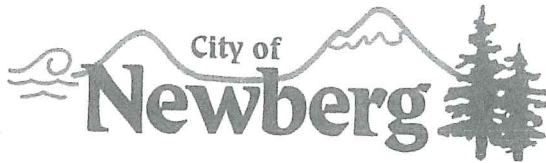
Anvil Academy - Newberg Grand Prix Cycle Kart Rally

Request amount: \$10,000

Required Application Materials	YES	NO	NOTES
1) Completed application Cover Sheet	X		
2) Budget for project/program/event being funded that lists all anticipated income and expenses.	X		Income from souvenir sales and registration, does not list grant funds as revenue
3) Board or Owner approved financial statement for most recently completed fiscal year of the organization or business responsible for the project/program/event.	X		P&L statement calendar year 2016
4) Letter signed by officers of the Organization's Board of Directors or Business Owners authorizing this application.	X		Signed Certification Letter in application but no separate letter
5) Documentation of organization or business existence: Current, valid Oregon Secretary of State Corporation Division registry filing.	X		Amended Annual Report 2017
6) Documentation that no bankruptcy or other financial corruption has occurred within the past five years.	X		Letter stating no bankruptcy
7) Letters of support.	X		None
8) Past grant recipient.		X	

Eligibility Requirements**YES NO NOTES**

1) Aligns with Transient Lodging Tax regulations (Tourist, Tourism Promotion, Tourism Promotion Agency, Tourism related facility)	X		Tourists, Tourism promotion
2) Promote or create experiences for: Outdoor recreation visitor, Experiential arts, Wayfinding, Downtown enhancement	X		Outdoor Recreation, Experiential Arts
3) Appeals to designated audiences in the Newberg Strategic Tourism Plan (Wine Country Adventures, Millennial Explores, George Fox Network, and Luxury Wine Travelers)	X		Millennials
4) The project will create or enhance an experience for shoulder or off-season visitors	X		Event is in July 2018 over two days
5) Does it align with other tourism activities in the community	X		Old Fashioned Festival
6) Builds on existing assets	X		Old Fashioned Festival, hotel nights, local services
7) Leverages funding	X		States 2:1 but budget is unclear on ratio
8) Entities that have a bankruptcy or other financial corruption within the past five years are ineligible		X	None



RECEIVED

DEC 15 2017

Initial: DRR

City of Newberg 2017 - 2018 Transient Lodging Tax – Small Grant Program Application Cover Page

Project Title: Newberg Grand Prix Cycle Kart Rally

Applicant Name: Anvil Academy

Mailing Address: 105 N Main Street, Newberg, OR 97132

Contact Name: Rob Lewis

Phone: 503.679.8788

Email: Rob@AnvilAcademy.net

Alternate Phone: Nancy Lewis – 503.307.4371

Amount of total Funding Requested: \$10,000.00

Please note: Funds not spent on the approved project must be returned to the City of Newberg by check with the Final Report due 30 days after completion of the project, program or event.

Project, Program or Event Detail:

- A. To apply, attach a completed application to this cover sheet along with any required supporting materials.
- B. Submit an updated Project, Program or Event Detail as your Progress Report.
- C. Within 30 days after project, program or event is complete submit a Final Report. Attach receipts/paid invoices for monies spent and a check to the City of Newberg for any unspent funds.

Any changes to your project must have prior approval to receive funding.

I agree to all terms described on this application and verify that the information provided on this cover sheet is true and accurate.

Print Name: ROB LEWIS

Signature: [Signature]

Title: OWNER

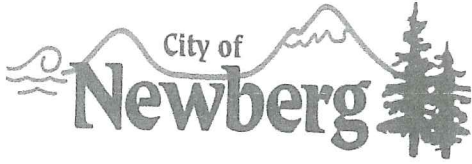
Date: 12-15-17

*****FOR OFFICE USE ONLY*****
APPROVED/NOT APPROVED/REVISED (ATTACH DETAILS) _____

Progress Report Received: _____

Final Report received: _____

Funds returned, received on: _____



City of Newberg 2017 - 2018 Transient Lodging Tax – Small Grant Program Application

THE FOLLOWING ITEMS MUST BE INCLUDED WITH YOUR APPLICATION:

- ❖ Completed application Cover Sheet.
- ❖ Budget for project/program/event being funded that lists all anticipated income and expenses.
- ❖ Board or Owner approved financial statement for most recently completed fiscal year of the organization or business responsible for the project/program/event.
- ❖ Letter signed by officers of the Organization's Board of Directors or Business Owners authorizing this application.
- ❖ Documentation of organization or business existence: Current, valid Oregon Secretary of State Corporation Division registry filing.
- ❖ Documentation that no bankruptcy or other financial corruption has occurred within the past five years.
- ❖ Letters of support.

Project Title: Newberg Grand Prix Cycle Kart Rally

Applicant Name: Anvil Academy

Mailing Address: 105 N Main Street, Newberg OR 97132

Contact Name: Rob Lewis

Phone: 503.679.8788

Email: Rob@AnvilAcademy.net

Alternate Phone: Nancy Lewis – 503.307.4371

Website Address: www.AnvilAcademy.net

Secretary of State Business Registry Number: 115362295

Non Profit _____

Government _____

For-Profit X

Amount of total Funding Requested: \$10,000.00

Please note: Funds not spent on the approved project, program or event must be returned to the City of Newberg by check with the Final Report due 30 days after completion of the project, program or event.

Classify how funds will be used for your project/program/event: *check all that apply*

New Project

New Program

New Event

Existing Project

Existing Program

Existing Event

Has this project, program or event received these grant funds in the past?

No

If so when and for how much?

Prior year grant award through this program does not guarantee additional funding in subsequent years. All returning projects, programs or events must reapply and are subject to approval. This program has limitations of funding available in the fiscal year in total amount of funds requested. All required reports must be in good standing at the time of application for future funding by a past grant recipient.

Budget Summary (this format must be used):

Project/Program/Event Budget: This budget provides the detail of the project, program or event that the grants funds would be applied to. This should include how the funds from this grant will be spent. Expenses must be explicitly defined. Please include in-kind and cash match.

Fiscal Year: Jan 2018 to Dec 2018

Income Sources	Amount
Souvenir Posters 50 @ \$50	\$2500
Kart Entry Fees 40 @ \$200	\$8000
Souvenir Hats 100 @ \$15	\$1500
Souvenir Shirts 100 @ \$25	\$2500
Total Project/Program/Event Income	\$14,500

Expenses – Must be explicitly defined.	Amount
Insurance	\$2000
New Kart Built for event & Rose Parade	\$7500
Promotional Materials/postage	\$4000
New Website	\$1000
Hats/Shirts	\$1250
Event Coordinator	\$2000
Project Management – Anvil	\$3000
Total Project/Program/Event Expense	\$21,750

Organization Budget: This budget shows how this project, program or event fits into your organization. Your project, program or event should be shown as a line in this budget.

Fiscal Year: _____ to _____

Income Sources	Amount
Total Organization Income	

Expenses	
Total Organization Expense	

Project Narrative:

1. Project description:

Newberg Grand Prix Cycle Kart Rally – This rally, that is bringing in open air, Gatsby era Karts from around the Western States, will use the Old Fashioned Festival parade route to run a Cycle Kart event and also hold other events in the Newberg area, July 2018. Anvil Academy students are building a Cycle Kart that will be used to promote the OFF and the Grand Prix in the Portland Rose Festival Parade Mini Float category. There is a rally in Scottsdale, Arizona and one in Tieton, Washington, the only 2 on the west coast, the one in Newberg will be the 3rd rally.

2. How will your project, program or event further the Newberg Strategic Tourism Plan goals?

This event will draw Makers and Millennials from throughout the region wanting to showcase their work, many of whom will be visiting Newberg for the first time. It will be a 2 day event, with the participation in the Parade and then a Rally at another close location, thus encouraging Hotel stays.

3. How does your event align with Transient Lodging Tax regulations (Tourist, Tourism Promotion, Tourism Promotion Agency, or Tourism related facility)?

We are expecting 120 participants, bringing in 40 Karts for the 2 day event, they will be supporting local businesses through purchasing food, lodging and fuel.

4. What is the projected return on investment?

This is a first time event and as such the ROI will be low – it is a precursor to a larger Kart event in 2019 in Newberg, and then a statewide rally in 2022 opening up the old highway in the Columbia River Gorge. Discussion and plans have already begun with ODOT for this event.

5. Predicted number of tourists' attracted/overnight guests?

120, coming from Arizona, California and Washington

6. Will it have lasting impact and/or utility?

We would love for this to be an annual event in Newberg, and for it to get bigger every year. Also, Anvil Academy, which is located in downtown Newberg, would become the "go to" place for new makers to ask questions in future years, this is a new sport and there is not a lot of technical support services for the Cycle Kart industry

7. How does your project, program or event leverage funding?

Our proposed grant funding is requesting monies mostly for promotional activities, promoting it in the Rose Parade and regionally through direct mail, social media and printed materials.

8. What is the ratio at which Transient Lodging Tax funds will be matched? 2:1

9. What is your demonstrated history of attracting tourists?

Anvil Academy sponsors the Pacific Overland Expo Horsedrawn Vehicle and Equipment Auction at the Yamhill County Fairgrounds. This Auction is the only one west of the Mississippi and draws crowds from all over the country, and some internationally. Last year we sold 1800 lots over 2 days in this consignment auction – there were 200+ bidders and total sales was \$158,000 with Anvil's income at \$32,000. April 27 & 28, 2018 will be our third time doing this event.

10. Does your project, program or event engage and energize local tourism partner(s)?

We are promoting the Old Fashioned Festival through partnering with them for the event and promoting them through the Mini-float program in the Rose Parade.

11. Does your project, program or event enhance Newberg as a destination? If so how?

Yes, Anvil Academy becomes the expert for new makers to ask questions in future years, offering classes and workshops to people in the region, this is a new sport and there is not a lot of technical support services for the Cycle Kart industry.

12. Does your project, program or event enhance Newberg as a location for Makers and Doers? If so how?

Yes, see above, question 11

13. Does your project, program or event catalyze downtown development? If so how?

14. Does your project, program or event enhance tourism from October – May or Sunday – Thursday Visitation? Explain how.

Yes, we are bringing in people for classes and workshops during the off season, and they will be spending time in Newberg. Anvil becomes the sanctioning body for the cycle Kart sport in the region, and fosters future visits to downtown Newberg for current owners and future participants.

15. Does this project align with at least one of the four target audiences (Wine Country Adventurers, Millennial Explorers, George Fox Network, or Luxury Wine Travelers)?

This is a true Millennial Explorer and Maker activity – it's an experience to participate in.

16. What is the timeframe for completion of your project, program or event?

The event will be held during the Old Fashioned Festival and will be completed one month later.

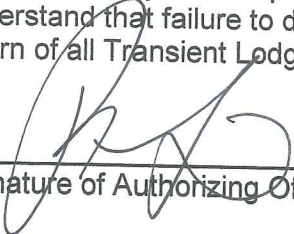
Signature and Certification Letter:

I hereby certify that all facts, figures and representations made in this application, including all attachments, are true and correct. This application is made with the written approval of my Board of Directors or Owners, which is attached to this application.

I agree that all publicity, press releases, publications, materials and or media advertising produced as part of this proposed project/program/event will acknowledge the grant program as follows:

"This project/program/event is made possible in part by a grant from Newberg transient lodging taxes and the City of Newberg."

I agree to carry out this project/program/event as outlined within the application. Further, I understand that failure to do so will invalidate this agreement and necessitate the immediate return of all Transient Lodging Tax grant monies to the City of Newberg.



Signature of Authorizing Official

12-15-17
Date

ROB LEWIS
Print Name of Authorizing Official

Anvil Academy, LLC

PROFIT AND LOSS

January - December 2016

	TOTAL
INCOME	
Sales	21,846.12
Sales of Product Income	31,160.49
Services	300.00
Tuition	2,867.50
Unapplied Cash Payment Income	2,000.00
Total Income	\$58,174.11
GROSS PROFIT	
	\$58,174.11
EXPENSES	
Advertising	4,115.01
Afterschool Program	2,297.73
Bank Charges	75.00
Building Renovation	17,589.37
Commissions & fees	759.95
Equipment purchase	3,412.62
Freight & Delivery	3.00
Fuel	4,802.57
Insurance - Liability	1,575.07
Interest Expense	777.42
Job Materials	41,163.37
Legal & Professional Fees	400.00
Licenses and Fees	257.00
Meals - student/volunteer	36.89
Meals and Entertainment	924.07
Office Expenses	2,855.67
Other General and Admin Expenses	1,426.36
Postage And Delivery	1,709.40
Program Meals and Expenses	4,385.00
Promotional	16,212.42
Purchases	613.95
Rent or Lease	54,388.70
Repair & Maintenance	1,528.56
Shipping and delivery expense	1,484.92
Stationery & Printing	603.20
Subcontractors	7,250.00
Supplies	5,732.02
Taxes & Licenses	206.27
Tools	44,629.49
Travel	5,420.74
Travel Meals	1,564.93
Uncategorized Expense	466.20
Utilities	6,261.91
Window sills	700.00
Total Expenses	\$235,628.81

	TOTAL
NET OPERATING INCOME	\$ -177,454.70
OTHER INCOME	
Grant Funds	31,000.00
Total Other Income	\$31,000.00
NET OTHER INCOME	\$31,000.00
NET INCOME	\$ -146,454.70

AMENDED ANNUAL REPORT



Corporation Division
www.filinginoregon.com

E-FILED
Dec 13, 2017
OREGON SECRETARY OF STATE

REGISTRY NUMBER

115362295

REGISTRATION DATE

10/14/2015

BUSINESS NAME

ANVIL ACADEMY, LLC

BUSINESS ACTIVITY

A PRIVATE CAREER TECHNICAL SCHOOL. TEACHING INDUSTRIAL ARTS SKILLS, SUCH AS WOODWORKING, METAL WORKS AND OTHER MATERIALS.

MAILING ADDRESS

20541 SW DUCKRIDGE PL
SHERWOOD OR 97140 USA

TYPE

DOMESTIC LIMITED LIABILITY COMPANY

PRIMARY PLACE OF BUSINESS

105 N MAIN STREET
NEWBERG OR 97132 USA

JURISDICTION

OREGON

REGISTERED AGENT

NANCY LYNETTE FRIESEN-LEWIS

20541 SW DUCKRIDGE PL
SHERWOOD OR 97140 USA

If the Registered Agent has changed, the new agent has consented to the appointment.

MEMBER

ROBERT E LEWIS

20541 SW DUCKRIDGE PL
SHERWOOD OR 97140 USA

MEMBER

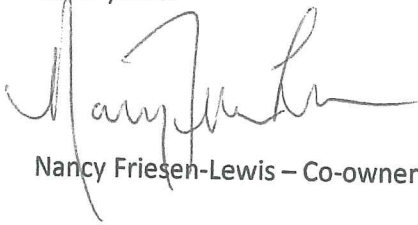
NANCY FRIESEN-LEWIS

20541 SW DUCKRIDGE PL
SHERWOOD OR 97140 USA

December 15, 2017

To whom it may concern:

This is a statement that there has been no financial corruption or bankruptcies by Anvil Academy in the last 5 years.

A handwritten signature in black ink, appearing to read 'Nancy Friesen-Lewis', written in a cursive style.

Nancy Friesen-Lewis – Co-owner Anvil Academy

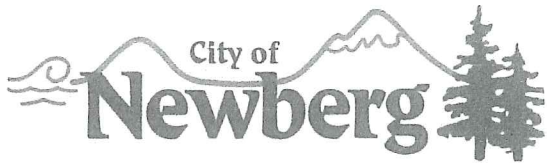
**Anvil Academy - Promotion of 2019 Newberg Grand Prix
at the Portland Indy Car Event**

Request amount: \$10,000

Required Application Materials	YES	NO	NOTES
1) Completed application Cover Sheet	X		
2) Budget for project/program/event being funded that lists all anticipated income and expenses.	X		Income from souvenir sales and registration, does not list grant funds as revenue
3) Board or Owner approved financial statement for most recently completed fiscal year of the organization or business responsible for the project/program/event.	X		P&L statement calendar year 2016
4) Letter signed by officers of the Organization's Board of Directors or Business Owners authorizing this application.		X	Signed Certification Letter in application but no separate letter
5) Documentation of organization or business existence: Current, valid Oregon Secretary of State Corporation Division registry filing.	X		Amended Annual Report 2017
6) Documentation that no bankruptcy or other financial corruption has occurred within the past five years.	X		Letter stating no bankruptcy
7) Letters of support.	X		1 letter
8) Past grant recipient.		X	

Eligibility Requirements**YES NO NOTES**

1) Aligns with Transient Lodging Tax regulations (Tourist, Tourism Promotion, Tourism Promotion Agency, Tourism related facility)	X		Tourism promotion
2) Promote or create experiences for: Outdoor recreation visitor, Experiential arts, Wayfinding, Downtown enhancement	X		Outdoor Recreation, Experiential Arts
3) Appeals to designated audiences in the Newberg Strategic Tourism Plan (Wine Country Adventures, Millennial Explores, George Fox Network, and Luxury Wine Travelers)	X		Millennials
4) The project will create or enhance an experience for shoulder or off-season visitors	X		Indy Car event is in 2018 to promote the 2019 Newberg Grand Prix Cycle Kart Rally
5) Does it align with other tourism activities in the community	X		Old Fashioned Festival
6) Builds on existing assets	X		Old Fashioned Festival, hotel nights, local services
7) Leverages funding	X		States 1:1 but budget is unclear on ratio
8) Entities that have a bankruptcy or other financial corruption within the past five years are ineligible		X	None



RECEIVED

DEC 15 2017

Initial: DLR

City of Newberg 2017 - 2018 Transient Lodging Tax – Small Grant Program Application Cover Page

Project Title: Promotion of 2019 Newberg Grand Prix Rally at the Portland Indy Car Event

Applicant Name: Anvil Academy

Mailing Address: 105 N Main Street, Newberg OR 97132

Contact Name: Rob Lewis

Phone: 503.679.8788

Email: OrencoWagon@gmail.com

Alternate Phone: Nancy Lewis – 503.307.4371

Amount of total Funding Requested: \$10,000.00

Please note: Funds not spent on the approved project must be returned to the City of Newberg by check with the Final Report due 30 days after completion of the project, program or event.

Project, Program or Event Detail:

- A. To apply, attach a completed application to this cover sheet along with any required supporting materials.
- B. Submit an updated Project, Program or Event Detail as your Progress Report.
- C. Within 30 days after project, program or event is complete submit a Final Report. Attach receipts/paid invoices for monies spent and a check to the City of Newberg for any unspent funds.

Any changes to your project must have prior approval to receive funding.

I agree to all terms described on this application and verify that the information provided on this cover sheet is true and accurate.

Print Name: ROB LEWIS

Signature: [Handwritten Signature]

Title: OWNER

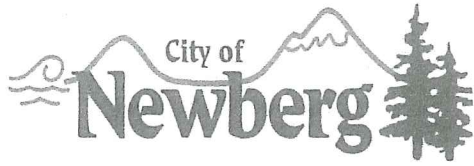
Date: 12-15-17

*****FOR OFFICE USE ONLY*****
APPROVED/NOT APPROVED/REVISED (ATTACH DETAILS) _____

Progress Report Received: _____

Final Report received: _____

Funds returned, received on: _____



**City of Newberg 2017 - 2018
Transient Lodging Tax – Small Grant Program Application**

THE FOLLOWING ITEMS MUST BE INCLUDED WITH YOUR APPLICATION:

- ❖ Completed application Cover Sheet.
- ❖ Budget for project/program/event being funded that lists all anticipated income and expenses.
- ❖ Board or Owner approved financial statement for most recently completed fiscal year of the organization or business responsible for the project/program/event.
- ❖ Letter signed by officers of the Organization's Board of Directors or Business Owners authorizing this application.
- ❖ Documentation of organization or business existence: Current, valid Oregon Secretary of State Corporation Division registry filing.
- ❖ Documentation that no bankruptcy or other financial corruption has occurred within the past five years.
- ❖ Letters of support.

Project Title: Promotion of 2019 Newberg Grand Prix Rally at the Portland Indy Car Race

Applicant Name: Anvil Academy

Mailing Address: 105 N Main Street, Newberg OR 97132

Contact Name: Rob Lewis

Phone: 503.679.8788

Email: Orencowagon@gmail.com

Alternate Phone: Nancy Lewis: 503.307.4371

Website Address: www.AnvilAcademy.net

Secretary of State Business Registry Number: 115362295

Non Profit Government For-Profit X

Amount of total Funding Requested: \$ 10,000.00

Please note: Funds not spent on the approved project, program or event must be returned to the City of Newberg by check with the Final Report due 30 days after completion of the project, program or event.

Classify how funds will be used for your project/program/event: *check all that apply*

New Project New Program New Event
 Existing Project Existing Program Existing Event

Has this project, program or event received these grant funds in the past?

No

If so when and for how much?

Prior year grant award through this program does not guarantee additional funding in subsequent years. All returning projects, programs or events must reapply and are subject to approval. This program has limitations of funding available in the fiscal year in total amount of funds requested. All required reports must be in good standing at the time of application for future funding by a past grant recipient.

Budget Summary (this format must be used):

Project/Program/Event Budget: This budget provides the detail of the project, program or event that the grants funds would be applied to. This should include how the funds from this grant will be spent. Expenses must be explicitly defined. Please include in-kind and cash match.

Fiscal Year: Jan 2018 to Dec 2108

Income Sources	Amount
Souvenir Shirts 300@\$35	\$10,500
Souvenir Hats 300@\$25	\$7,500
Souvenir Posters 50@\$50	\$2,500
Water 500@\$3	\$1,500
In-kind booth – labor only by Anvil Academy	\$15,000
Total Project/Program/Event Income	\$41,500

Expenses – Must be explicitly defined.	Amount
Insurance	\$1,000
Booth/Kiosk built	\$20,000
Print Materials	\$2,000
Shirts 300@10	\$3,000
Hats 300@\$5	\$1,500
Water 600@.16	\$100
Promotional Design work	\$1,000
Total Project/Program/Event Expense	\$28,600

Organization Budget: This budget shows how this project, program or event fits into your organization. Your project, program or event should be shown as a line in this budget.

Fiscal Year: Jan 18 to Dec 18

Income Sources	Amount
Classes	\$20,000
Total Organization Income	

Expenses	
Total Organization Expense	

Project Narrative:

1. Project description:

We are planning on having a promotional booth at the Portland Indy Car Race to promote the 2019 Newberg Grand Prix Cycle Kart Rally. If we receive this grant, it gives us the funds to build a much nicer booth/Kiosk for greater exposure and produce t-shirts and hats that we'll sell to attendees at the event, all is promotion for the Kart Rally held in conjunction with the Old Fashioned Festival.

2. How will your event/program further the Newberg Strategic Tourism Plan goals?

We believe that having a booth to promote the Cycle Kart Rally at the Portland Indy Car Event will create excitement and enthusiasm for the 2019 event. Cycle Karting is a new sport, and one that many Millennials and higher income bracket people are starting to get involved in. We believe that Newberg is the perfect location to bring in this new audience, and this event is the right place to promote it.

3. How does your project, program or event align with Transient Lodging Tax regulations (Tourist, Tourism Promotion, Tourism Promotion Agency, or Tourism related facility)?

If our promotion is effective at the Portland Indy Car Event, we should see growth of at least 50% for the 2019 Newberg Grand Prix Cycle Kart Rally, this is a very conservative projection. This event will bring in tourists from around the U.S. that will be staying in hotels and purchasing food and gifts from Newberg area businesses.

4. What is the projected return on investment?

We project that we will increase the participation by 50% for the 2019 Grand Prix event and with the added sale of shirts and hats at the Portland Indy car event we should see a profit of \$10,000

5. Predicted number of tourists' attracted/overnight guests?

We should see approximately 150 – 200 guests for the 2nd year event. With the promotion at the Portland Indy Car event we expect to attract 60 Karts and many more spectators.

6. Will it have lasting impact and/or utility?

This grant would be spent on promotional materials and a booth – but the lasting impact would be on the increased traffic from getting the word out about the Cycle Kart rally, and the classes and support services that Anvil Academy can offer to new builders of Karts. It will also promote Anvil Academy which offers classes and workshops in Newberg for High Schoolers and the community and weekend workshops that people from around the Northwest attend.

7. How does your project, program or event leverage funding?

The more money spent on promoting the 2019 Cycle Kart event, the greater the attendance and the exposure for Newberg

8. What is the ratio at which Transient Lodging Tax funds will be matched? 1:1

9. What is your demonstrated history of attracting tourists?

Anvil Academy puts on the Pacific Overland Expo Horsedrawn Vehicle and Equipment Auction at the Yamhill County Fairgrounds, it is a fundraiser for the Academy. This Auction is the only one west of the Mississippi and draws crowds from all over the country, and some internationally. Last year we sold 1800 lots over 2 days in this consignment auction – there were 200+ bidders and total sales was \$158,000 with Anvil's income at \$32,000. April 27 & 28, 2018 will be our third time doing this event.

10. Does your project, program or event engage and energize local tourism partner(s)?

We believe that bringing in more people for an event that runs in conjunction with the Old Fashioned Festival energizes the existing event. We have talked with Brian Love, from the Old Fashioned Festival, and he is excited to partner with the event. We are also hoping that once businesses see the increased tourists, they will want to be involved in their own events. They run a Kart Rally in Scottsdale, Arizona every year and it is fun to see the related events that have happened. They even do a Great Gatsby fundraiser for a non-profit.

11. Does your project, program or event enhance Newberg as a destination? If so how?

Having a booth/Kiosk at the Portland Indy Car event gives us the opportunity to promote the Rally, classes at Anvil Academy and the Old Fashioned Festival. All 3 of these bring people into Newberg.

12. Does your project, program or event enhance Newberg as a location for Makers and Doers? If so how?

Absolutely! When people see the Karts we have on display, they will want to build their own and Anvil Academy will be supporting the Cycle Kart sport through offering classes, workshops and general information.

13. Does your project, program or event catalyze downtown development? If so how?

14. Does your project, program or event enhance tourism from October – May or Sunday – Thursday Visitation? Explain how.

Yes – even though the Event is held in July, people are building Karts during the winter and spring, with classes and workshops held during the week-ends and during weekdays.

15. Does this project align with at least one of the four target audiences (Wine Country Adventurers, Millennial Explorers, George Fox Network, or Luxury Wine Travelers)?

The Portland Indy Car event will bring in people from around the world, people with money to spend and who are looking for other fun adventures. We would love to introduce them to Newberg, the Gateway to Wine Country.

16. What is the timeframe for completion of your project, program or event?

The promotional event is Labor Day Weekend and all grant funds would be spent to support that weekend, so it would be completed by the end of September, 2018.


Signature and Certification Letter:

I hereby certify that all facts, figures and representations made in this application, including all attachments, are true and correct. This application is made with the written approval of my Board of Directors or Owners, which is attached to this application.

I agree that all publicity, press releases, publications, materials and or media advertising produced as part of this proposed project/program/event will acknowledge the grant program as follows:

"This project/program/event is made possible in part by a grant from Newberg transient lodging taxes and the City of Newberg."

A agree to carry out this project/program/event as outlined within the application. Further, I understand that failure to do so will invalidate this agreement and necessitate the immediate return of all Transient Lodging Tax grant monies to the City of Newberg.



Signature of Authorizing Official

12-15-17

Date

ROB LEWIS

Print Name of Authorizing Official

Anvil Academy, LLC

PROFIT AND LOSS

January - December 2016

	TOTAL
INCOME	
Sales	21,846.12
Sales of Product Income	31,160.49
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Tuition	2,867.50
Unapplied Cash Payment Income	2,000.00
Total Income	\$58,174.11
GROSS PROFIT	\$58,174.11
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Uncategorized Expense	466.20
Utilities	6,261.91
Window sills	700.00
Total Expenses	\$235,628.81

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NET OPERATING INCOME	\$ -177,454.70
OTHER INCOME	
Grant Funds	31,000.00
Total Other Income	\$31,000.00
NET OTHER INCOME	\$31,000.00
NET INCOME	\$ -146,454.70

AMENDED ANNUAL REPORT



Corporation Division
www.filinginoregon.com

E-FILED
Dec 13, 2017

OREGON SECRETARY OF STATE

REGISTRY NUMBER

115362295

REGISTRATION DATE

10/14/2015

BUSINESS NAME

ANVIL ACADEMY, LLC

BUSINESS ACTIVITY

A PRIVATE CAREER TECHNICAL SCHOOL. TEACHING INDUSTRIAL ARTS SKILLS, SUCH AS WOODWORKING, METAL WORKS AND OTHER MATERIALS.

MAILING ADDRESS

20541 SW DUCKRIDGE PL
SHERWOOD OR 97140 USA

TYPE

DOMESTIC LIMITED LIABILITY COMPANY

PRIMARY PLACE OF BUSINESS

105 N MAIN STREET
NEWBERG OR 97132 USA

JURISDICTION

OREGON

REGISTERED AGENT

NANCY LYNETTE FRIESEN-LEWIS

20541 SW DUCKRIDGE PL
SHERWOOD OR 97140 USA

If the Registered Agent has changed, the new agent has consented to the appointment.

MEMBER

ROBERT E LEWIS

20541 SW DUCKRIDGE PL
SHERWOOD OR 97140 USA

MEMBER

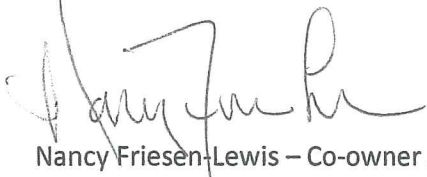
NANCY FRIESEN-LEWIS

20541 SW DUCKRIDGE PL
SHERWOOD OR 97140 USA

December 15, 2017

To whom it may concern:

This is a statement that there has been no financial corruption or bankruptcies by Anvil Academy in the last 5 years.

A handwritten signature in black ink, appearing to read "Nancy Friesen-Lewis". The signature is fluid and cursive, with a large initial "N" and "L".

Nancy Friesen-Lewis – Co-owner Anvil Academy

Anvil Academy

O'Brien, Chris <ChrisOBrien@iheartmedia.com>
To: Rob Lewis <orencowagon@gmail.com>
Cc: Nancy Friesen-Lewis <nancyl.hms@gmail.com>

Wed, Aug 30, 2017 at 10:04 AM

Love the Karts and see the potential fit... Most of all the win, win, win, for all.

From: Rob Lewis [mailto:orencowagon@gmail.com]
Sent: Wednesday, August 30, 2017 7:22 AM
To: O'Brien, Chris
Cc: Nancy Friesen-Lewis
Subject: Re: Anvil Academy

[Quoted text hidden]

CHRIS IS THE DIRECTOR OF
THE PORTLAND INDYCAR TRAC
AND IS VERY SUPPORTIVE

Oregon Truffle Festival Newberg Weekend - The Terroir of Truffles

Request amount: \$9,250

Required Application Materials

YES NO NOTES

Required Application Materials	YES	NO	NOTES
1) Completed application Cover Sheet	X		
2) Budget for project/program/event being funded that lists all anticipated income and expenses.	X		Income identifies TLT Grant but not included in income total as noted in application.
3) Board or Owner approved financial statement for most recently completed fiscal year of the organization or business responsible for the project/program/event.	X		P & L statement July 2016 - June 2017
4) Letter signed by officers of the Organization's Board of Directors or Business Owners authorizing this application.	X		Letter in application packet
5) Documentation of organization or business existence: Current, valid Oregon Secretary of State Corporation Division registry filing.	X		2017 Secretary of State Registry documenta
6) Documentation that no bankruptcy or other financial corruption has occurred within the past five years.	X		Letter stating no bankruptcy
7) Letters of support.	X		7 letters
8) Past grant recipient.		X	

Eligibility Requirements

YES NO NOTES

1) Aligns with Transient Lodging Tax regulations (Tourist, Tourism Promotion, Tourism Promotion Agency, Tourism related facility)	X		Tourists, Tourism promotion, Tourism related facility
2) Promote or create experiences for: Outdoor recreation visitor, Experiential arts, Wayfinding, Downtown enhancement	X		Outdoor recreation visitor, downtown enhancement
3) Appeals to designated audiences in the Newberg Strategic Tourism Plan (Wine Country Adventures, Millennial Explores, George Fox Network, and Luxury Wine Travelers)	X		Wine Country Adventures, Millennial Explores, Luxury Wine Travelers
4) The project will create or enhance an experience for shoulder or off-season visitors	X		Shoulder season - February 2018
5) Does it align with other tourism activities in the community	X		Wine, restaurants
6) Builds on existing assets	X		Cultural Center, local businesses
7) Leverages funding	X		1:1 and meets the requirement
8) Entities that have a bankruptcy or other financial corruption within the past five years are ineligible		X	None



**City of Newberg 2017 - 2018
Transient Lodging Tax – Small Grant Program Application Cover Page**

Project Title: _____ Oregon Truffle Festival Newberg Weekend-The Terroir of Truffles

Applicant Name: ___ Oregon Truffle Festival

Mailing Address: ___ P.O. Box 5275 Eugene, OR 97405
Street City State Zip

Contact Name: Leslie Scott

Phone: 541- 913-3841

Email: leslie@truffletree.com

Alternate Phone: 888-695-6659

Amount of total Funding Requested: \$9,250.00

Please note: Funds not spent on the approved project must be returned to the City of Newberg by check with the Final Report due 30 days after completion of the project, program or event.


Project, Program or Event Detail:

- A. To apply, attach a completed application to this cover sheet along with any required supporting materials.
- B. Submit an updated Project, Program or Event Detail as your Progress Report.
- C. Within 30 days after project, program or event is complete submit a Final Report. Attach receipts/paid invoices for monies spent and a check to the City of Newberg for any unspent funds.

Any changes to your project must have prior approval to receive funding.

I agree to all terms described on this application and verify that the information provided on this cover sheet is true and accurate.

Print Name: Leslie Scott

Signature: 

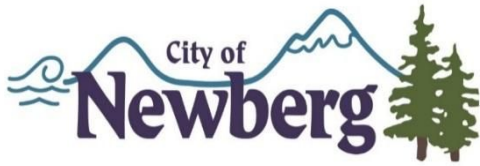
Title: General Manager

Date: 12-15-17

*****FOR OFFICE USE ONLY*****
APPROVED/NOT APPROVED/REVISED (ATTACH DETAILS) _____

Progress Report Received: _____ Final Report received: _____

Funds returned, received on: _____



City of Newberg 2017 - 2018 Transient Lodging Tax – Small Grant Program Application

THE FOLLOWING ITEMS MUST BE INCLUDED WITH YOUR APPLICATION:

- ❖ Completed application Cover Sheet.
- ❖ Budget for project/program/event being funded that lists all anticipated income and expenses.
- ❖ Board or Owner approved financial statement for most recently completed fiscal year of the organization or business responsible for the project/program/event.
- ❖ Letter signed by officers of the Organization's Board of Directors or Business Owners authorizing this application.
- ❖ Documentation of organization or business existence: Current, valid Oregon Secretary of State Corporation Division registry filing.
- ❖ Documentation that no bankruptcy or other financial corruption has occurred within the past five years.
- ❖ Letters of support.

Project Title: Oregon Truffle Festival Destination Marketing-The Terroir of Truffles

Applicant Name: Oregon Truffle Festival

Mailing Address: PO Box 5275 Eugene, OR 97405
Street City State Zip

Contact Name: Leslie Scott

Phone: 541-913-3841 Email: leslie@oregontrufflefestival.org

Alternate Phone: _____

Website Address: www.oregontrufflefestival.org

Secretary of State Business Registry Number: 1348587-94

Non Profit - 501c(3) Government _____ For-Profit _____

Amount of total Funding Requested: \$9,250.00

Please note: Funds not spent on the approved project, program or event must be returned to the City of Newberg by check with the Final Report due 30 days after completion of the project, program or event.

Classify how funds will be used for your project/program/event: *check all that apply*

New Project New Program New Event

Existing Project Existing Program Existing Event

Has this project, program or event received these grant funds in the past?

No

If so when and for how much?

N/A

Prior year grant award through this program does not guarantee additional funding in subsequent years. All returning projects, programs or events must reapply and are subject to approval. This program has limitations of funding available in the fiscal year in total amount of funds requested. All required reports must be in good standing at the time of application for future funding by a past grant recipient.

Budget Summary (this format must be used):

Project/Program/Event Budget: This budget provides the detail of the project, program or event that the grants funds would be applied to. This should include how the funds from this grant will be spent. Expenses must be explicitly defined. Please include in-kind and cash match.

Fiscal Year: _____ 2018 __ to _2018 _____

Income Sources	Amount
Newberg Admissions	\$53,600.00
Newberg Marketplace	\$4,150.00
Reimbursed Expenses	\$1,500.00
Sponsorships	\$1,500.00
Grants-City of Newberg	(\$9250) applied for - not included in event income total
Total Project/Program/Event Income	\$60,750.00

Expenses – Must be explicitly defined.	Amount
Newberg Friday Night Marquee Events - Yamhill Winery Luncheons	\$4,700.00-includes Venue + screening fee*
Saturday Yamhill Marquee Event	\$800.00*
Newberg Fresh Truffle Marketplace	\$6,100.00*
Newberg Transportation	\$5,600.00-includes Venue*
Newberg Lodging	\$3,500.00*
Newberg Travel	\$1,000.00*
Newberg Contract Labor	\$1,000.00
Newberg Equipment	\$1,500.00
Photography	\$1,000.00
Admin Assistant	\$1,500.00
Website	\$1,000.00
Design Services	\$2,500.00
PR/Marketing-Play Nice	\$5,000.00
Insurance	\$11,000.00
Newberg Event Print Ads	\$1,582.00
Truffles	\$5,500.00
Additional Admin Budget	\$5,000.00
	No allocation made for staff salaries or staff travel for Newberg weekend
Total Project/Program/Event Expense	\$58,282.00

Organization Budget: This budget shows how this project, program or event fits into your organization. Your project, program or event should be shown as a line in this budget.

Fiscal Year: 2018 to 2018

Income Sources	Amount
Eugene Weekend Admissions Fees	\$155,250.00
Newberg Weekend Admissions Fees	\$53,600.00
Marketplace(s) Other Income	\$8,300.00
Reimbursed Expenses	\$4,000.00
Sponsorship	\$1,500.00
Donations/Loan	\$21,457.00
Grants	\$5,000.00 estimated from various sources
Newberg TLT Grant	(\$9,250.00) applied for - not included in organizational income budget total
Total Organization Income	\$249,107.00

Expenses	
The Joriad	\$4,000.00
The Eugene Weekend	\$97,950.00
The Newberg Weekend	\$21,700.00*=total of highlighted Expenses
Annual Administrative Budget	\$125,164.00
Total Organization Expense	\$248,814.00

Project Narrative:

1. Project description:

The Oregon Truffle Festival was established in 2006 to help catalyze the nascent Oregon Truffle Industry by elevating the reputation of our native Oregon truffles and establishing Oregon's Willamette Valley as the singular destination in North America for all things truffle. At the time, few people knew that Oregon has a 100 year scientific tradition researching truffles, including several of the world's experts on truffles and truffle cultivation, or that our own James Beard regarded Oregon's native truffles as culinary equals to their famed European cousins.

Over the 12 years of the festival, guests have traveled from all 7 continents and many countries around the world, as well as from most American states, to learn the history, lore and science of the world's most valuable mushroom. Culinarians travel to forage for them in Oregon's forests with truffle dogs, to learn to cook with them, and of course to enjoy them paired with the best of Oregon wines throughout the weekend.

The festival has grown in size and stature every year, quickly becoming a signature seasonal event emblematic of Oregon's bounty, and has garnered many loyal followers who attend annually, significantly benefitting our region financially.

In 2015, OTF expanded the festival into the Yamhill Valley wine country, with its weekend hub located in Newberg. This happened for several critical reasons:

1. Our founding intention for the festival was to establish a world class truffle region, placing Oregon's Willamette Valley on par with the great truffle regions of France and Italy. In 2013 OTF was named "One of the top 5 destinations in the world for truffle lovers" by Fodor's Travel.
2. Also in 2013, the Eugene festival weekend sold out in October three months before the event, leaving hundreds of disappointed travelers with no opportunity to participate.
3. OTF had long wanted to expand into Oregon's premier wine country, and had been encouraged to do so by Travel Oregon, Travel Yamhill Valley, and the Chehalem Valley Chamber of Commerce.

4. The encouragement, support and sponsorship of many of the Yamhill Valley's finest wineries, chefs, and lodging establishments convinced us the expansion was viable.
5. The opportunity to establish a festival hub in Newberg at the Chehalem Cultural Center was an essential component of expansion, and that partnership, along with that with the CVCofC, were the critical factors in our decision to commit to making Newberg the home of an expanded truffle festival and season.

Because of the festival, Oregon is now recognized as the destination for all things truffle in North America, but it is a status that other regions like North Carolina, British Columbia, and most particularly Napa, are aggressively seeking for themselves.

It is the moment in the trajectory of the festival and industry to ensure that Oregon's primacy in the world of truffles in North America is permanently established, and that we have the partners and collaborators necessary to solidify our claim to being the authentic truffle capital of North America.

Destination marketing is the key to success of the Newberg weekend. Grant funding support will allow OTF to extend its already vigorous marketing plan into new sectors through film, podcasts, Instagram and other social platforms, as well as highlight particular events in Newberg on Friday evening and the Sunday marketplace during both the weekend and throughout the truffle season. Eugene was understood as the festival destination for 9 years before expanding into Yamhill Valley, so a large percentage of our marketing dollars are necessarily being spent highlighting Newberg area amenities, including local lodging options, our hub at the Chehalem Cultural Center, and Newberg's identity as the gateway to Oregon wine and now truffle country.

Approximately 100 OTF visitors spend 2-3 nights in the area, many at properties in Newberg such as the Allison, Le Puy and others, and this year we expect guests to lodge at the new Holiday Inn Express as well. They shop at local retailers and eat at local restaurants and of course, taste a lot of wine. **Please see our 2016 & 2017 Festival Recap surveys attached.** While the numbers here are impressive, OTF is certain we can increase them significantly through expanded destination marketing partnerships and collaborations.

In 2018, OTF is working on product development with 2 local businesses to help focus attention on Newberg as the home of artisan makers and doers. We began this process in 2017 with Wolves & People Farmhouse Brewery to create a new, seasonal Oregon Truffle Beer, *La Truffe*, which was received with incredible success. We are again working with W&P to ramp up production of *La Truffe*, and it will be served at our Friday and Sunday events in Newberg at the CCC. We have also begun a collaboration with Honest Chocolates for a new event (and product) in 2018 called *Pinot + Chocolate: A Love Story*, featuring truffled chocolates produced especially for this event and the Sunday Marketplace. Part of the requested grant funding will help us promote these 2 businesses and their products at the festival and throughout the truffle season..

In 2008 OTF received a USDA-funded grant to produce a feasibility study on the efficacy of an Oregon Truffle industry. The independent economic analysis done as part of that study projects that the value of Oregon's truffle industry will eventually match that of Oregon's wine industry. Establishing Newberg and the Chehalem Valley as not only the gateway to Oregon's wine country, but also the seasonal destination for truffle lovers is our goal, but achieving it relies on the support of our tourism partners. A free download of the feasibility study is available at oregontruffles.org

Industry sustainability depends on a consistent, high quality supply of truffles, and one key to that supply is the use of trained truffle dogs, which OTF has pioneered in North America. Taking our guests on a truffle hunt with truffle dogs is a completely unique experience outside of Europe, and is one of the most popular elements offered as part of OTF weekend experiences. OTF does truffle dog demonstrations at our Marketplace events in Newberg, helping to educate participants on the role and value of using dogs to harvest truffles, as well as providing an incredible outdoor experience essential to industry sustainability. We expect to develop and promote this highly sought after tourism experience throughout the truffle season once OTF is firmly established in the area.

3. How does your project, program or event align with Transient Lodging Tax regulations (Tourist, Tourism Promotion, Tourism Promotion Agency, or Tourism related facility)?

Truffle lovers have to go where the truffles are, when they are in season, and this is to small communities in the Willamette Valley during the shoulder season months of January-March. Our weekend in Yamhill Valley is called *The Terroir of Truffles* for very specific reasons; to establish a unique sense of place as part of the experience, to take guests on truffle hunts in the woods with trained truffle dogs, and then to winery luncheons and dinners to meet winemakers and learn about the pairing of wine and truffles. There is no other comparable forest to table tourism experience in North America.

Our preferred partners are rural communities with strong marketing plans focused on culinary tourism, specialty foods and agricultural crops, seasonal celebrations of local food and wine, and authentic representation of Oregon's beauty and bounty. As an organization committed to sustainability, we hope for partnerships with communities and venues who share those values.

OTF has formed strong partnerships with the Chehalem Valley Chamber of Commerce, the Chehalem Cultural Center, the Willamette Valley Winery Association and Travel Oregon, all focused on the promotion of exactly the demographic the City of Newberg seeks to attract. In addition, we have partnered with a number of local wineries, restaurants, chefs and lodging partners to offer tourists an unforgettable and completely unique guest experience.

A Travel Yamhill Valley Tourism study from 2011 concluded the most promising forms of tourism are "food and wine related group tours, culinary tourism and fine dining." This is an

exact match with the reasons people come to the truffle festival, with the added attractions of participatory experiences like truffle hunting with trained truffle dogs, truffle cooking classes and demonstrations, and cultural and educational experiences to feed hungry minds.

The Chehalem Cultural Center is a near perfect tourism destination facility for OTF. It is a beautiful space with a unique story and history, and offers guests a glimpse of place based art and culture in a beautiful setting with plenty of parking close to a major thoroughfare so it promotes ease of travel for out of town guests. It has a variety of spaces for different sized events, with the Grand Ballroom being particularly significant for OTF. We have used it for receptions, lectures, walk around dining events, and as our festival registration and transportation hub, and perhaps most importantly, our fresh truffle marketplace.

OTF has created the only fresh truffle marketplaces we know of for sales of both native Oregon truffles as well as cultivated European truffles, and the CCC is the site of one of these 2 seasonal marketplace events, making it a completely unique destination and an extremely valuable tourism destination facility. OTF hopes to grow our harvesting capacity in the area in order to support late winter and early spring marketplace events at the CCC throughout the truffle season.

4. What is the projected return on investment?

What we know from past experience everywhere in the world that truffles are found is that the real value in owning the truffle brand for Oregon, and for the communities that host the Oregon Truffle Festival, is in their capacity to add value by association to all other agricultural products and experiences our region has to offer. The mystique associated with truffles, particularly around the use of dogs to find them hidden underground, and their status among the ultimate culinary delicacies in the world, is compelling not only to culinary tourists, but also to media of all kinds. Every dollar invested in marketing truffles, the places they are found, and the celebration of them during the festival season, has exponential value for the communities and businesses they are part of.

The funds from the grant that we will utilize for destination Marketing & PR (\$7,500) we hope will be the difference between having $\frac{2}{3}$ of our potential guest capacity full and selling out that additional $\frac{1}{3}$. If projected out that would roughly mean as many as an additional 350 unique guests coming to Newberg, many of whom would be staying for the weekend utilizing local lodging and other services. Marketing and pr funding will also support a film company we are partnered with that will provide video to be used throughout the year, and that will be accessible to the Chamber and other partners to promote the area as both the Gateway to wine country, and the north valley home of Oregon truffles.

The funds from the grant that we will utilize for Event/Location Photography (\$750) will result in an opportunity to capture high quality imagery of our events in the Newberg area. This collateral will be used throughout our future marketing efforts and will complement any earned

media/reporting on our events in Newberg venues. Access to film and photography provided by OTF will reinforce the image of Newberg as a destination for culinary tourists not only during the festival, but year round.

The funds from the grant that we will utilize for Venue costs (\$1,000) will allow us to cover some of the costs, both direct and indirect, that we are now incurring to continue using the Chehalem Cultural Center as our Newberg weekend hub. We are considered one of the CCC's annual events celebrating local art and culture, each taking place in a different season. Hosting OTF drives an audience of new and unique visitors to this amazing space during the quieter months of the shoulder season in Oregon wine country. It also helps underwrite and offset the overhead costs for staffing and operating the Cultural Center during the event.

While no grant funding is being requested specifically for product development with Wolves & People truffle beer and Honest Chocolates, OTF continues its commitment to invest in co-branded Oregon truffle products in concert with local artisan food and beverage makers. While the festival itself does not receive revenue from these projects, this co-branding allows us to try new things with local companies who do see direct return on investment as well as the unique media exposure that comes with releasing and marketing a new truffle based product.

In addition to culinary tourism during truffle season, the real value of owning the truffle brand for Oregon, and for the communities that host the Oregon Truffle Festival, is in its capacity to add value through association to all of the other agricultural products and experiences that our region has to offer. The mystique associated with truffles, particularly around the use of dogs to find them hidden underground, and their status among the ultimate culinary delicacies is compelling not only to culinary tourists, but also to media of all kinds, and a growing number of artisan foods and other truffle industry entrepreneurs.

5. Predicted number of tourists' attracted/overnight guests?

The OTF will bring approximately 1,000 unique visitors to Newberg, some for a day but many overnight and for the entire 3 day weekend. We believe Newberg has the capacity to host twice this number of people, and that partner marketing and pr efforts are the path to that increase. **Please see our 2016 and 2017 Recap documents attached.**

6. Will it have lasting impact and/or utility?

OTF has good reason to believe we could be the equivalent of a shoulder season IPNC, an event built around this rare and valuable ingredient native to Oregon as its centerpiece, and paired with Oregon's best wines in what has already been recognized as one of the world's top wine regions. Never a fad, entire seasonal cultures are built around truffles wherever they are found, particularly when found in the world's great wine regions like Alba, Tuscany and Provence, and now Oregon's Willamette Valley.

Additionally, since OTF began in 2006, a number of entrepreneurial start ups like truffle dog trainers, truffle hunters and foray leaders, and artisan food and beverage producers have proven this is a viable seasonal business that can have lasting economic impact in smaller communities in wine and truffle country.

The Oregon Culinary Truffles Feasibility Study cites a figure of \$1.5 Billion as the projected value of the truffle industry in Oregon within the next two decades, including direct sales of truffles, as well as economic benefits from tourism, value-added products, and ancillary businesses like truffle dog training and orchard management services. (See <https://oregontruffles.org>)

The Oregon Truffle Festival was largely inspired by the goal of laying the groundwork for this industry. One of OTF's principal goals from its inception was to drive the prices for native Oregon truffles up by introducing the use of trained truffle dogs to our industry. After 12 years and the training of many hundreds of truffle dogs in the PNW, prices for dog-harvested Oregon truffles exceed prices of 'conventionally harvested' raked truffles by a factor of ten. Oregon also now has this country's most productive orchards of the famed French black Perigord truffles.

In North America, Oregon now has the only economically viable, established truffle industry, and Oregon's Willamette Valley has already been identified as one of the world's top 5 destinations for truffles as mentioned in our project narrative, but maintaining this status will require continuing effort and investment to avoid being overtaken by competitors in the Napa/Sonoma, Asheville North Carolina, and more recently in the Seattle and Vancouver BC areas, all of whom recognize the value of vying for the title of North American truffle capital.

7. How does your project, program or event leverage funding?

As stated previously, the Marketing & PR funding will help bolster and amplify our existing media and social media reach and capitalize on all of the graphics and imagery collateral we have already invested in, this year with the added value of video collateral for year round marketing, and the promoting the availability of seasonal products beyond the weekend of the festival. Marketing that helps us capture our full guest capacity projected out would roughly mean as many as an additional 350 unique guests coming to Newberg, many of whom would be staying for the weekend utilizing local lodging and other services, as well as putting this highly desirable demographic in direct contact with all our winery, lodging, restaurant, business, venue and media partners for future pr opportunities and marketing outreach.

The Event/Location Film and Photography funded collateral will be used throughout future marketing platforms and will complement any earned media/reporting on our events in Newberg venues. This will continue to reinforce the image of Newberg as a destination for high end wine

and culinary tourists. These images will also be used in our annual event recap that goes out to all sponsors and partners reiterating Newberg as a destination for these sought after travelers..

The Venue costs grant support will leverage funding in that it helps underwrite and offset the overhead costs for staffing and operating the Chehalem Cultural Center and makes OTF a strong partner, as has been the case for the past 3 years. It also helps support the in kind donation we get through our partnership with the CCC. Additionally, it exposes a new and unique group of visitors, who might not otherwise visit the CCC to its facilities, programming and exhibits, resulting in additional rentals, memberships and art sales for this incredible community asset.

8. What is the ratio at which Transient Lodging Tax funds will be matched?

Destination marketing/advertising funds 1:1 \$7500 matched by a combination of a marketing and advertising sponsorship from Willamette Valley Vineyards, an in-kind contribution for filming from Cineastas, LLC, with the balance matched by OTF.

Photography: 1:1 \$750 for Friday night events and to fund new Marketplace photography will be matched by OTF. Photography is a critical part of destination advertising and marketing, and OTF is proud to be working with 2 extremely talented photographers again in 2018, John Valls and Kathryn Elsesser.

Venue rental: 1:1 \$1,000 for venue rental at the CCC. Matched in-kind by \$1,000 rental cost waived by the CCC

***Please see attached summary of funds expended to date from Play Nice PR & Marketing**

9. What is your demonstrated history of attracting tourists?

Please see attached OTF event marketing recaps for event years 2016 & 2017.

10. Does your project, program or event engage and energize local tourism partner(s)?

We have worked with and will continue to work closely with the Chehalem Valley Chamber of Commerce and the Chehalem Cultural Center. Additionally, OTF works with many other local wineries, lodging, dining/restaurant, artisanal food and beverage makers, and transportation providers such as Black Tie Tours to engage and energize local tourism partners. This year we are partnering with the Willamette Valley Winery Association to promote the event, and bringing in national media to cover the events in Newberg, including Kathleen Squires, the Co-producer of the James Beard film *America's First Foodie* being shown on Friday night at the CCC. Ms. Squires is a culinary writer who publishes regularly in Food and Wine, Saveur, and Bon Appetit, among others. We are partnering with WVWA to support the participation of a writer from Wine

Enthusiast to attend the festival, and who will be staying in the area for 2 additional days to experience more of Oregon wine country.

11. Does your project, program or event enhance Newberg as a destination? If so how?

Already branded as the “gateway to Oregon Wine Country” Newberg is within immediate proximity to Oregon’s truffle and wine country, and is the community that can claim the festival as its own for partnering in a long term community and economic development project to brand Newberg Oregon as the ‘truffle capital’ of North America. With the festival hub already established in Newberg, out of market/state visitors - including media - often have their first experience of Oregon in Newberg during the festival weekend. Because of establishing Newberg as the Gateway to BOTH wine and truffle country, there are dozens of ways OTF and the City can build on attracting our growing and highly desirable audiences - from well heeled world travelers to millennials looking for unique, participatory adventures with great food and beverages - throughout the truffle season January-March and beyond.

12. Does your project, program or event enhance Newberg as a location for Makers and Doers? If so how?

In 2018, OTF is working on product development with 2 local businesses to help focus attention on Newberg as the home of artisan makers and doers. We began this process in 2017 with Wolves & People Farmhouse Brewery to create a new, seasonal Oregon Truffle Beer, *La Truffe*, which was received with incredible success. We are again working with W&P to ramp up production of the beer, and it will be served at our Friday and Sunday events in Newberg at the CCC. We also began a collaboration with Honest Chocolates for 2018 on a new event (and product) called Pinot + Chocolate: A Love Story, featuring truffled chocolates produced especially for the Sunday Marketplace created by Honest Chocolates. The festival has also put us in touch with other local innovators and businesses like Interrobang and Chapters books, local restaurants and their chefs like The Jory, Painted Lady, Recipe, and Ruddick/Wood, all of whom have participated in various ways with OTF and are interested in continuing to do so.

13. Does your project, program or event catalyze downtown development? If so how?

Our festival hub at the Chehalem Cultural Center is an essential component of our success. Many of our weekend guests, as well as many hundreds of our Marketplace attendees, are visiting the CCC and downtown Newberg for the first time. We encourage visitors to experience Newberg and the surrounding wine country through promotion of our lodging partners, downtown businesses and local wineries through our destination marketing program as well as with carefully selected promotional materials in our goodie bags handed out to all weekenders. In 2017, we coordinated OTF cooking demonstrations with the CCC program honoring the culture and heritage of the Grande Ronde. This year’s new Pinot + Chocolate event will feature a local business Honest Chocolates, developing a new seasonal product that we expect to continue for years to come.

OTF would like to hold more culinary events at the CCC, but we are constrained to a great degree by the lack of any kitchen facilities there, and have to rent even the most rudimentary tools and equipment to pull off our Friday evening events and our Sunday Marketplace cooking demonstrations there. We believe that City of Newberg support to both OTF and the CCC to help procure more permanent equipment and facilities would ensure OTF's home remains in Newberg, and would firmly establish Newberg as a destination for high end culinary and wine events.

14. Does your project, program or event enhance tourism from October – May or Sunday – Thursday Visitation? Explain how.

OTF brings a weekend of cultural and culinary programming and events to our Newberg hub in the shoulder season of February, at the height of truffle season. Our events span a long weekend and we have events as part of our programming on Friday, Saturday and Sunday. This year we moved our Newberg weekend on the calendar to take place over the President's Day holiday weekend with the specific intention of encouraging visitors to extend their stay in the area at least an extra day.

15. Does this project align with at least one of the four target audiences (Wine Country Adventurers, Millennial Explorers, George Fox Network, or Luxury Wine Travelers)?

Wine Country Adventurers and Luxury Wine Travelers comprise most of our weekend guests. We are endeavoring to grow our market share of Millennial Explorers in greater numbers each year with addition of outdoor recreation like truffle hunting with truffle dogs, cultural programming like the "Truffles Deconstructed" panel discussion in 2017, and the film showing "America's First Foodie" in 2018, both marquee events held at the Chehalem Cultural Center. We hope to add more cooking classes, and food and wine pairing sensorial analyses as we did in Newberg in 2017, as well as educational events and seminars in the future that could be in partnership with the George Fox network. Many of our guests travel to Oregon for the first time, and for the explicit purpose of attending the Oregon Truffle Festival.

Please see the attached 2018 and 2017 Festival Recaps.

16. What is the timeframe for completion of your project, program or event?

The Newberg weekend concludes Monday February 19th, 2018. Our 2018 Recap is completed by the end of March and is distributed to all our Sponsors and Partners including media like 1859 and Oregon Wine Press. OTF will disseminate media from the festival weekend through all channels throughout the early spring months of March and April until we begin to send out teasers for the 2019 events, likely in June.

Signature and Certification Letter:

I hereby certify that all facts, figures and representations made in this application, including all attachments, are true and correct. This application is made with the written approval of my Board of Directors or Owners, which is attached to this application.

I agree that all publicity, press releases, publications, materials and or media advertising produced as part of this proposed project/program/event will acknowledge the grant program as follows:

"This project/program/event is made possible in part by a grant from Newberg transient lodging taxes and the City of Newberg."

A agree to carry out this project/program/event as outlined within the application. Further, I understand that failure to do so will invalidate this agreement and necessitate the immediate return of all Transient Lodging Tax grant monies to the City of Newberg.

Signature of Authorizing Official

Date

Print Name of Authorizing Official

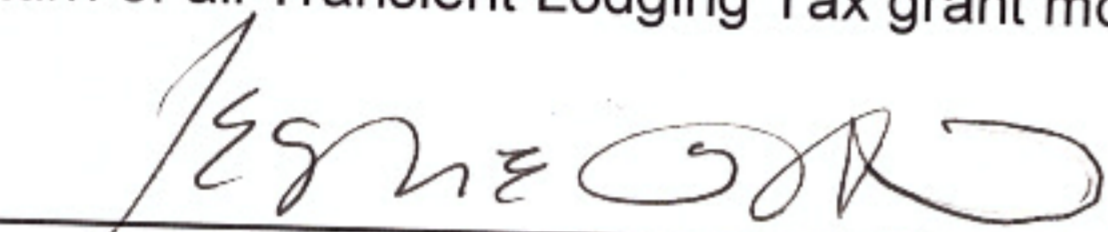
Signature and Certification Letter:

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 12-13-17
Signature of Authorizing Official Date

LESLIE SCOTT
Print Name of Authorizing Official

Oregon Truffle Festival
Profit & Loss
 July 2016 through June 2017

	<u>Jul '16 - Jun 17</u>
Ordinary Income/Expense	
Income	
uncategorized Income	0.00
Admissions Fees Income	235,848.30
Marketplace Truffle Sales	3,335.00
MarketPlace Vendor Fee	3,160.00
Merchandise	951.35
Newberg-McMinnville Weekend	1,950.97
Reimbursed Expenses	1,180.00
Sponsorship	7,250.00
Total Income	<u>253,675.62</u>
Expense	
Urban Forager	795.84
MacDown	2,347.99
Guaranteed Payments-Charles Ruf	9,000.00
gas	328.22
Bank Service Charges	165.10
Contract Labor	1,824.00
Contracted Services	22,567.50
Contribution	250.00
Customer Refund	1,341.00
Dog Training Seminar	1,327.13
Dues and Subscriptions	714.11
Equipment Purchase	652.94
Expense reimbursement	380.49
Friday Event	7,513.58
Gift Items	132.97
Grand Dinner	16,330.09
Growers Forum	1,874.14
Guaranteed Payments to L Scott	18,000.00
Hiltin-Host Venue	56,759.40
Insurance	3,082.00
Licenses and Permits	688.00
Marketing	25,553.36
Eugene Marketplace	140.00
Miscellaneous	110.00
Office Supplies	680.86
Partner mtg.(meals) exp.	183.57
Newberg-McMinnville	30,307.31
Postage and Delivery	875.66
Printing and Reproduction	3,815.77
Professional Fees	941.25
Sponsorship Expenses	557.50
start cash	0.00
Storage	898.00
Supplies	176.49

10:04 PM

12/13/17

Accrual Basis

Oregon Truffle Festival
Profit & Loss
July 2016 through June 2017

	<u>Jul '16 - Jun 17</u>
Tax deductible Contributions	250.00
Taxes	165.00
Telephone	934.07
Transportation	6,548.05
Travel & Ent	1,596.50
Joriad	3,914.69
Truffles	12,570.15
Villa Evenings Dinner	3,100.00
VOID	0.00
Volunteer Expense	404.08
Winery Luncheons	1,832.01
Total Expense	<u>241,628.82</u>
Net Ordinary Income	12,046.80
Other Income/Expense	
Other Expense	
Expense reimbursement #0911	0.00
Total Other Expense	<u>0.00</u>
Net Other Income	<u>0.00</u>
Net Income	<u><u>12,046.80</u></u>



December 13, 2017

BOARD OF DIRECTORS

Maxine Borcharding

Cheryl Crumbley

Darrel Kau

Charles Lefevre, Ph.D.

Mike Thelin

To whom it may concern:

We, the officers who represent the Board of Directors of the Oregon Truffle Festival (OTF), wholeheartedly support and approve of this application for funding. We certify that no bankruptcy or financial impropriety has occurred within this well-managed and mission-driven organization.

We believe that OTF provides a vital and wholly unique diversification to Oregon's nationally-recognized wine and culinary scene while providing increasingly significant economic opportunities in agriculture and tourism.

Thank you for your consideration,

A handwritten signature in blue ink, appearing to read "Charles Lefevre".

Charles Lefevre, President

A handwritten signature in blue ink, appearing to read "Cheryl Crumbley".

Cheryl Crumbley, Secretary/Treasurer



Oregon Truffle Festival

P.O. Box 5275 • Eugene, OR 97405 • oregontrufflefestival.org • VM 1.888.695.6659



Secretary of State
Corporation Division
255 Capitol Street NE, Suite 151
Salem, OR 97310-1327
Phone: (503)986-2200
www.filinginoregon.com

Registry Number: 1348587-94
Type: DOMESTIC NONPROFIT CORPORATION

Next Renewal Date: 08/03/2018

OREGON TRUFFLE FESTIVAL
3977 DILLARD ROAD
EUGENE OR 97405

Acknowledgment Letter

The document you submitted was recorded as shown below. Please review and verify the information listed for accuracy.

Document

ARTICLES OF INCORPORATION

Filed On
08/03/2017

Jurisdiction
OREGON

Nonprofit Type
PUBLIC BENEFIT

Name
OREGON TRUFFLE FESTIVAL

Registered Agent
LESLIE SCOTT
3977 DILLARD ROAD
EUGENE OR 97405

Mailing Address
3977 DILLARD ROAD
EUGENE OR 97405

DELHAT
ACK
08/03/2017

Total number of hours dedicated to the 2018 Yamhill Weekend to date (August 2017 - November 2017): 102 hours

Total cost (hours x hourly rate): \$7,390

Publications that have written about the Yamhill Valley in 2017 thanks to the Oregon Truffle Festival:

- Oregon Wine Press
- Liverpool Confidential
- U.S. News & World Report
- 1859 Magazine
- The Local Dish
- Newberg Graphic
- McMinnville News Register
- 1859 Magazine
- The Register-Guard
- OregonLive.com
- Oregonian
- NPR's The Salt
- NPR's The Four Top Podcast
- The Oregonian
- Everyday Cooking with Kristie Greenwood on KUIK.com
- Seattle Dining
- Travel Oregon
- Northwest Travel Dispatch, Winter 2016 | Northwest Travel | Seattle Met
- Portland Monthly
- Thrillist
- The Register-Guard
- Travel Yamhill Valley
- 1859 Magazine
- Departures
- Portland Food Events
- Events 12
- KUIK AM
- Robb Report
- PDX Food Press
- OPB - Oregon Field Guide
- The Register-Guard
- Oregon Field Guide
- Sip Northwest
- Wine Enthusiast

Total monthly impressions: 128,711,308

Confirmed coverage highlighting the Yamhill Valley weekend by EOY:

- Seattle Met Magazine (print)
- Alaska Airlines Magazine (print)
- Eater Portland (online)
- Robb Report (print)
- Condé Nast Traveler (online)

Other opportunities featuring the Yamhill Valley weekend:

- OPB Pledge Drive
- James Beard Foundation Auction
- Advertising in:
 - Horizon Travel & Lifestyle/Wall Street Journal
 - ABC (Good Morning America) Screen in Times Square
 - 1859 Oregon's Magazine (Print)
 - 1859 Oregon's Magazine (Online)
 - 1899 Washington's Magazine (Print)
 - 1889 Washington's Magazine (Online)
 - Oregon Wine Press

Total advertising impressions to date for 2018 Yamhill Valley: 11,041,000

For the 2018 Festival, PR has reached out to the following writers and publications for coverage:

- Wine Enthusiast
- Yamhill Valley New Register
- The Newberg Graphic
- Corinne Whiting, freelancer
- Bill Kearney, American Way
- Kristie Greenwood, Everyday Cooking with Kristie Greenwood (radio)
- Jen Stevenson, freelancer
- Geoff Nudelman, freelancer
- Chris Angelus, Portland Food Adventures
- Missy Maki, Simple Kitchen with Missy Maki (radio)
- Alexandra Cheney, international freelance travel and culture writer
- Stacy Adimando, Saveur
- Margo True, Sunset
- Jessica Colley Clarke, freelancer
- Max Bonem, freelancer
- Charu Suri, contributor to NYT, Afar, Vogue
- Chadner Navarro, CN Traveler
- Amiee Beazley, freelancer
- Chaney Kwak, freelancer
- Larry Olmsted, freelancer
- The Clever Root
- Food52

- Saveur
- Extra Crispy
- Bloomberg Pursuits
- Bustle
- Statehood Media
- Travel Oregon
- Portland Monthly
- Seattle Met
- Afar
- Air BnB Mag
- Bon Appetit
- Delta Sky Mag
- Jenny Adams, freelancer
- Martha Stewart Living
- Outside Mag
- USA Today
- Bloomberg
- New York Times
- Alaska Airlines
- Horizon Edition
- Moneyish
- OPB
- Robb Report
- Esquire

Newberg-specific publications pitched:

- Yamhill Valley News Register
- The Newberg Graphic
- Woodburn Independent

Social Posts August - Present:

- [December 12](#) - Facebook
- [December 12](#) - Twitter
- [December 12](#) - Instagram
- [December 11](#) - Facebook
- [December 11](#) - Twitter
- [December 11](#) - Instagram
- [December 8](#) - Facebook
- [December 8](#) - Twitter
- [December 8](#) - Instagram
- [November 30](#) - Facebook
- [November 30](#) - Twitter
- [November 30](#) - Instagram

- [November 30](#) - Twitter
- [November 29](#) - Twitter
- [October 24](#) - Facebook
- [October 24](#) - Instagram
- [October 19](#) - Facebook
- [October 19](#) - Instagram
- [October 17](#) - Twitter
- [October 17](#) - Instagram
- [October 5](#) - Facebook
- [October 5](#) - Twitter
- [October 5](#) - Instagram
- [October 2](#) - Facebook
- [October 2](#) - Twitter
- [October 2](#) - Instagram
- [September 28](#) - Facebook
- [September 28](#) - Twitter
- [September 28](#) - Instagram
- [September 22](#) - Facebook
- [September 22](#) - Twitter
- [September 22](#) - Instagram
- [September 6](#) - Facebook
- [August 23](#) - Facebook
- [August 23](#) - Twitter
- [August 21](#) - Instagram

Total Reach: 15,963

Facebook Events

- [Oregon Truffle Festival Weekend 2: Yamhill Valley](#)
- [“America’s First Foodie” The Legacy of James Beard Told in Film](#)
- [A Rustic Truffle Dinner at Ruddick/Wood](#)
- [Forest to Table: The Ultimate Truffle and Mushroom Dinner](#)
- [Forage and Feast in the Yamhill Valley](#)
- [The 2018 Oregon Truffle Festival: James Beard Writ Large](#)
- [Bliss Food: A Dinner With James Beard Honored Chefs](#)
- [Newberg Fresh Truffle Marketplace](#)

Total Reach: 13,611



RECAP

oregontrufflefestival.com

JANUARY 20-22 Newberg to McMinnville

JANUARY 26 The Joriad™

JANUARY 26-29 Eugene and Surrounds



2017 Oregon Truffle Festival



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Cover Photos:
Top row by Katherine Elsesser
2nd row - 1 & 3 Katherine Elsesser, 2, 4 & 5 David Barajas
3rd row - 1 Katherine Elsesser, 2 David Barajas
4th row - 1 Katherine Elsesser, 2 John Valls

*Data from post festival survey



Gregor Halenda



FESTIVAL STATISTICS

29 CULINARY EVENTS

42 CHEFS

26 CULINARY STUDENTS

23 SPEAKERS & TRAINERS

79 MARKETPLACE ARTISANS

33 WINERIES, BREWERS
& DISTILLERS

45 TRUFFLE DOGS

68 LBS OF BLACK TRUFFLES

66 LBS OF WHITE TRUFFLES

2,348

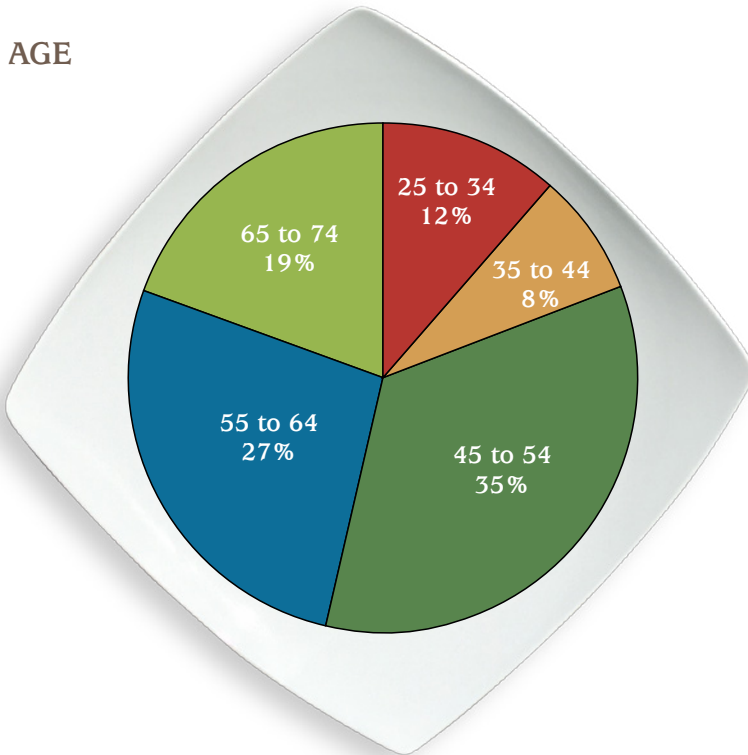
TICKETS SOLD
+ 293 MEDIA,
SPONSORS AND
SPECIAL GUESTS

DEMOGRAPHICS – NEWBERG TO McMINNVILLE



Katherine Elseser

AGE

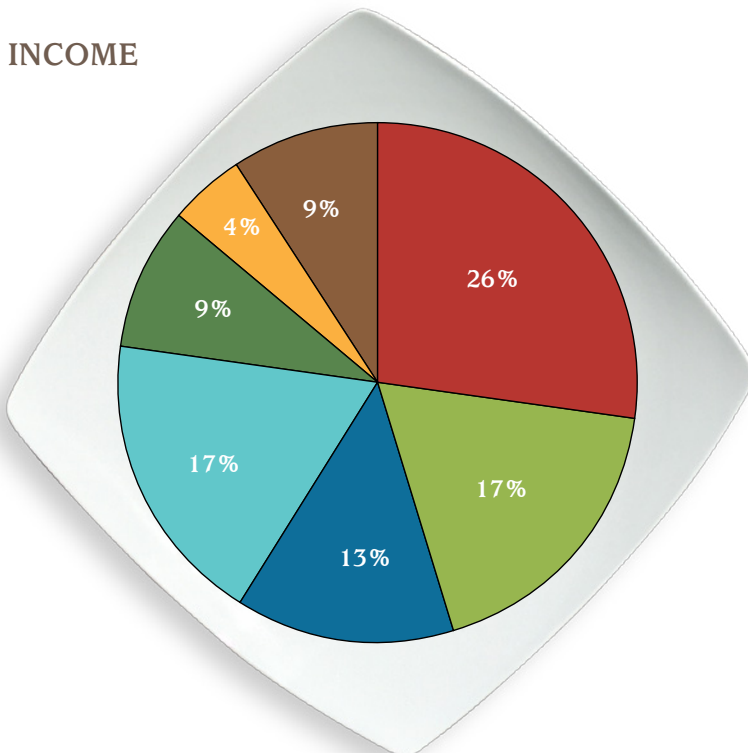


OTF attendees seek out adventuresome travel and elegant food and drink experiences that feed body, mind and spirit.

“I love OTF, it’s like a reunion of sorts for me each year and it was my intro to the world of truffles. I am so happy to introduce the festival to friends every year!”

Sunny D., WA

INCOME

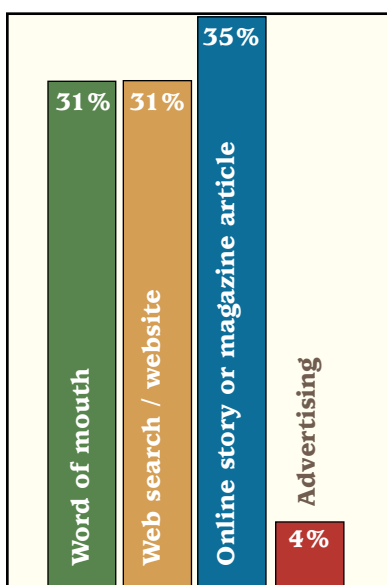




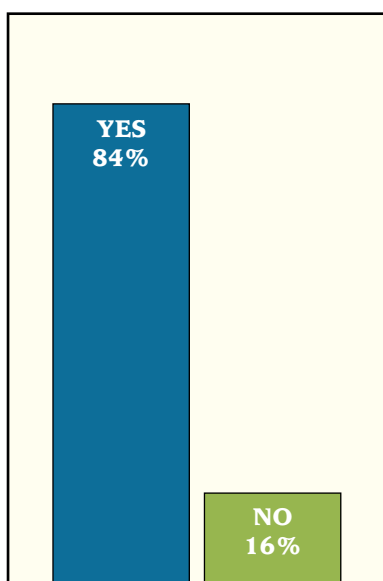
DEMOGRAPHICS – NEWBERG TO McMINNVILLE

The Festival attracts new travelers to Oregon year after year. Many stay and enjoy our state before and after the festival, infusing the economy with tourist dollars.

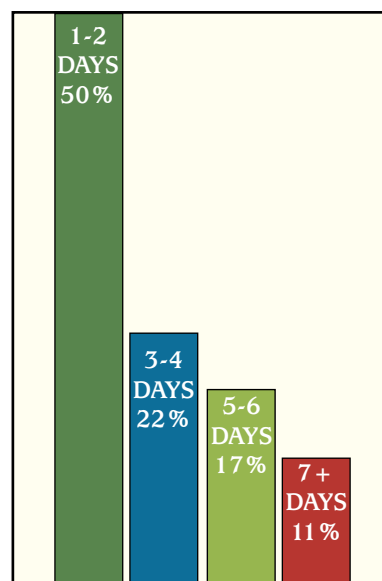
HOW DID YOU HEAR ABOUT THE OTF?



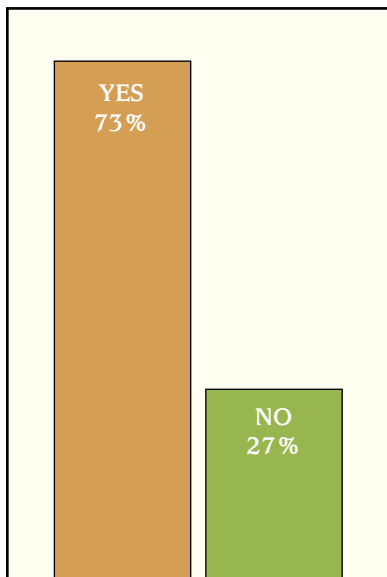
CULINARY TRAVELER



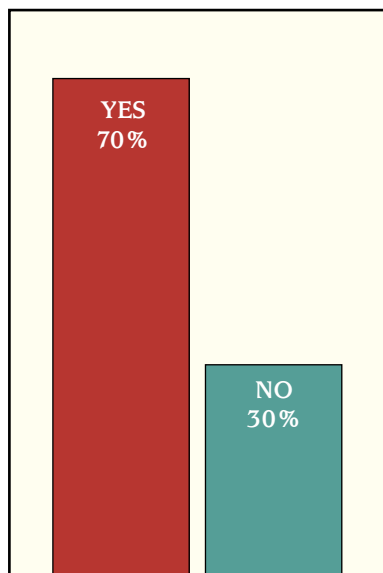
DAYS IN OREGON



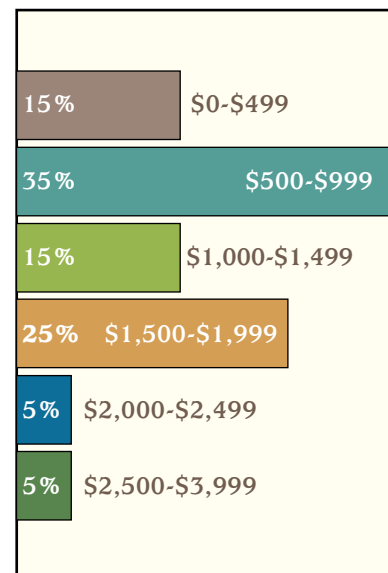
FESTIVAL INSPIRED TRIP



EXPERIENCED OREGON BEYOND FESTIVAL



\$ SPENT BESIDES FESTIVAL TICKETS

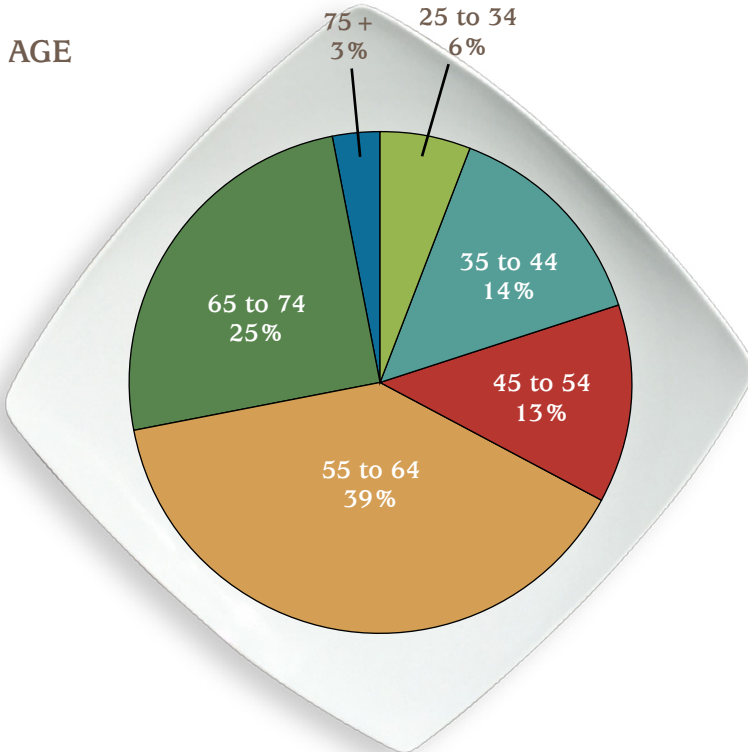


DEMOGRAPHICS – EUGENE & SURROUNDS



David Barajas

AGE

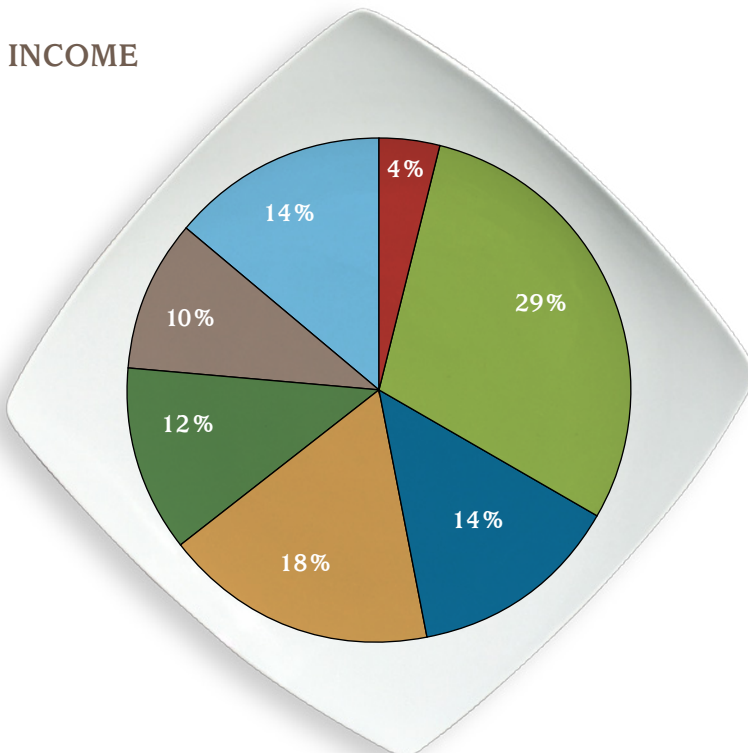


The Oregon Truffle Festival attracts a diversity of ages to indulge in this international culinary event.

“My first time to the OTF..omg it was amazing! The Oregon truffles, the exquisite dishes and the wine pairings with the meals were over the top! Definitely will attend again.”

Melanie P., San Mateo, CA

INCOME

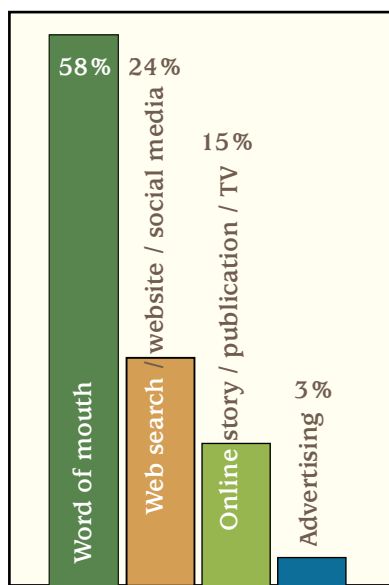




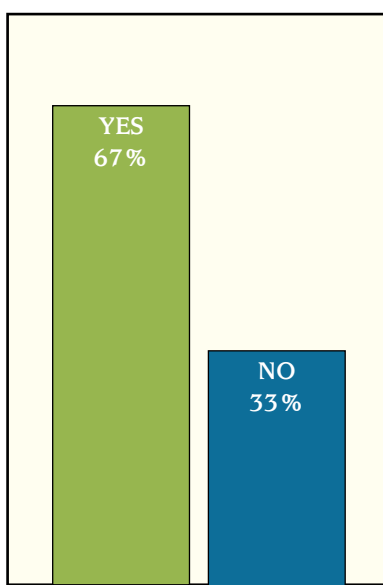
DEMOGRAPHICS – EUGENE & SURROUNDS

Almost all of our attendees come from more than 200 miles away and stay for awhile, enjoying more of what Oregon has to offer.

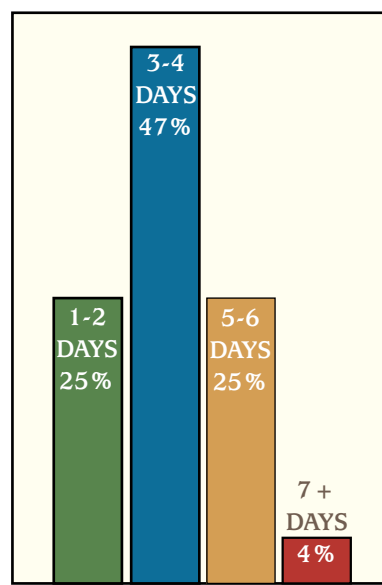
HOW DID YOU HEAR ABOUT THE OTF?



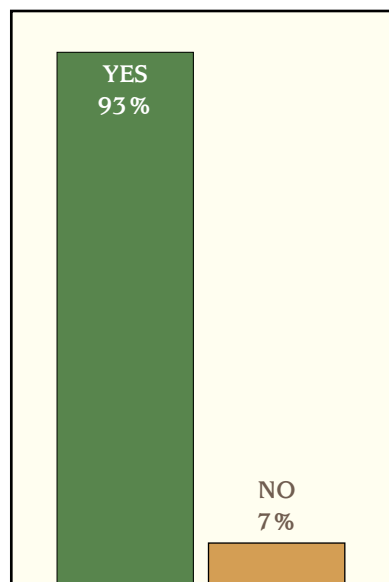
CULINARY TRAVELER



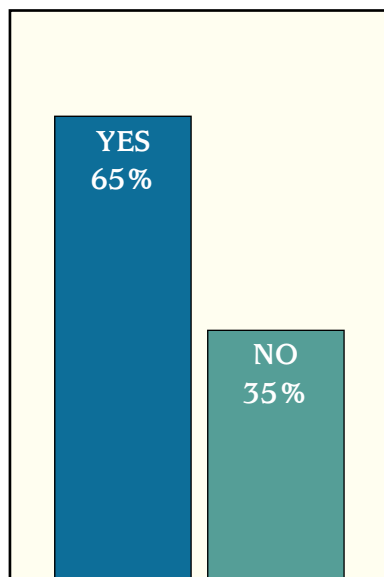
DAYS IN OREGON



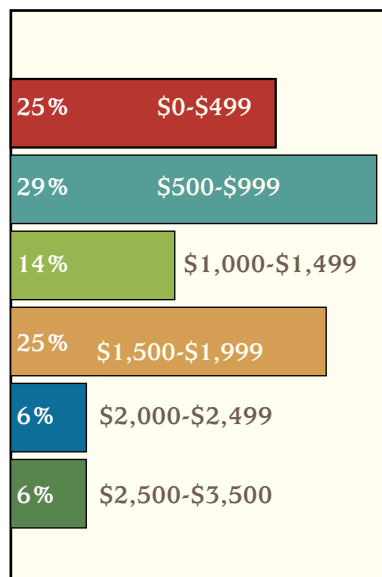
FESTIVAL INSPIRED TRIP



EXPERIENCED OREGON BEYOND FESTIVAL



\$ SPENT BESIDES FESTIVAL TICKETS



MEDIA COVERAGE

PRINT, ONLINE, SOCIAL MEDIA

48

PIECES OF COVERAGE

(And more to come!)

131M

ONLINE READERSHIP

343K

ONLINE IMPRESSIONS

(Not including media shares)

752K

PRINT CIRCULATION

6.71K

SOCIAL SHARES

35

LINKS FROM COVERAGE



Katherine Elseser



[View a graphic report of all clips and links here.](#)



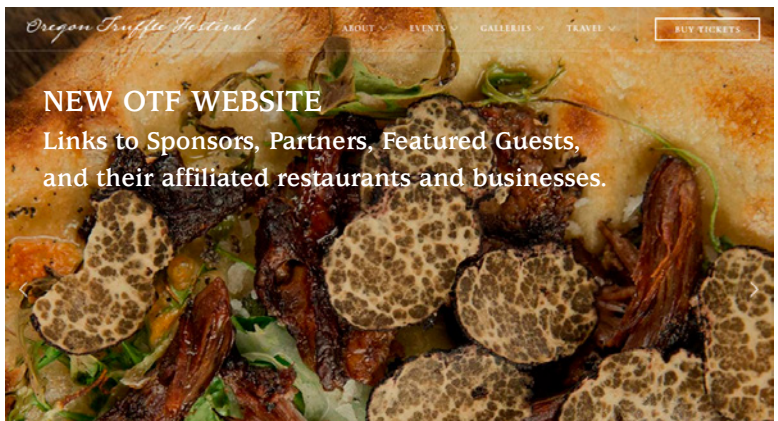
Gregor Halenda

ADVERTISING & SOCIAL MEDIA

As media evolves, so too does the expanse of folks that know about the Oregon Truffle Festival! In 2017, OTF's Instagram following and engagement grew by more than 200%, and @oregontrufflefestival posts often were shared by media and travel partners.

PRINT ADS

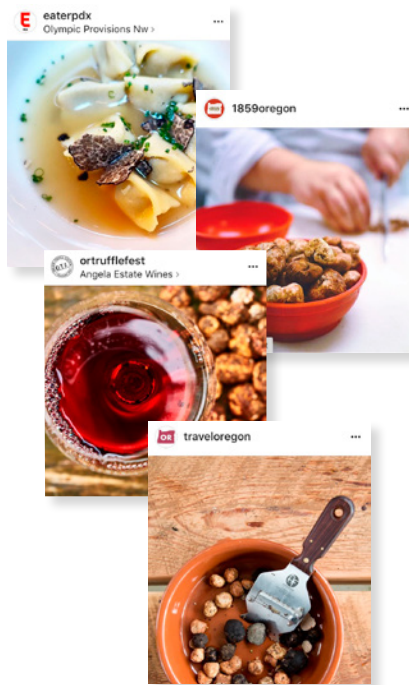
OTF purchases a wide range of print and online advertising including magazines, newspapers, and their respective websites, concert programs, online publications, blogs, and more.



SOCIAL MEDIA



www.facebook.com/oregontrufflefestival
[#oregontrufflefestival #oregontruffles](https://www.instagram.com/ortrufflefest)
www.instagram.com/ortrufflefest
<https://twitter.com/ortrufflefest>



EMAIL ADS

9 email Blasts
 28,371 Total Sends



MARQUEE EVENTS – NEWBERG TO McMINNVILLE

Friday, January 22

“Truffles Deconstructed, or Everything You Always Wanted to Know about Truffles but Didn’t Know Who to Ask”

with Harold McGee and Dave Arnold

Discover the mysteries of truffles with two of the food world’s leading thought leaders. Learn why truffles are dubbed “bliss food” when fully experienced. Featuring a panel discussion moderated by Peter Meehan from Lucky Peach focused on the Oregon winter white and black truffles. Includes wine and truffle pairings from Winderlea and Chef Matthew Lightner.

Bliss Food: A Sensual, Rustic Dinner hosted by Harold McGee and Dave Arnold

Weekend guests will be shuttled to the gorgeous new event center at Youngberg Hill for a multi-course dinner featuring Chef Christopher Czarnecki of the famed Joel Palmer House in Dayton, and accompanied by fine wines from four outstanding Dundee Hills wineries. We’re certain you’ll know after this evening, if you don’t already, why the name bliss food is so well deserved!

Saturday, January 21

Forage & Feast in Yamhill County: Truffle Hunt and Winery Luncheons

Weekend package holders will experience a real truffle hunt lead by a trained dog followed by an unforgettable winery luncheon featuring top culinary talent and foraged Oregon truffles. Held at unique Oregon winery venues, this is wine country immersion and winter truffle excursion at its most authentic. Enjoy the best of the Old World right here in North America.



Saturday, January 21

The Sensory Life of Truffles with Mark Bitterman

Join James Beard Award winning author and owner of the renowned Meadow stores in Portland and New York City Mark Bitterman, as he leads a sensory tour through the flavor notes of Oregon winter black and white truffles. This experience is designed to further enhance your understanding and awareness of one of the world’s great ingredient treasures featuring one of the country’s most respected flavor experts.

Sunday, January 22

Fresh Truffle Marketplace at the Chehalem Cultural Center

The Oregon Truffle Festival’s most popular culinary day-long experience concludes the weekend in grand style for a day of truffle cooking demonstrations with take-home recipes, wine, beer and spirits tasting, artisan foods samples, fresh Oregon truffles for sale and a truffle dog demonstration.

“I love that you provide an incredible, different experience year after year. I enjoyed meeting Harold McGee, Dave Arnold and Peter Meehan--what an honor!!”

Sunny D., Issaquah, WA



David Barajas



David Barajas



David Barajas



David Barajas

FOR THE DOGS

The JORIAD™

3rd Annual North American Truffle Dog Championship

Thursday, January 26, Eugene

Round 1 Competition: Lane County Fairgrounds Livestock Arena, Eugene. Some of the world's most talented truffle dogs compete in the 3rd annual Joriad™ Truffle Dog Championship. The Joriad™ begins in the morning with a series of qualifying events where spectators can cheer-on the teams as they race to search for hidden truffle-scented targets. Finalists are announced at the end of the morning's qualifying events.

Championship Finals: Into the Woods

The morning's finalists will advance to the Joriad™ Field Trial the afternoon for an authentic head-to-head and nose-to-ground action in the wild where nature alone determines location, variety, and quantity of rare Oregon truffles. Because truffle hunting in the field does not lend itself to spectator participation, this event is not open to the public, but everyone ticketed from the morning round is invited to attend the Gala Awards Ceremony in the early evening at the Hilton Eugene.

“The Joriad exceeded our expectations! We enjoyed the entire experience from start to finish. This was our first time seeing a truffle hunt and to say we learned a lot is an understatement. The organizers of this event put a great deal of care to ensure the competitors AND their dogs enjoyed the day. We are grateful for this wonderful experience.”

Dan and Karen S., Portland, OR

MARQUEE EVENTS – EUGENE AREA

Thursday, January 26

Oregon Truffle MacDown

Multiple chefs elevate comfort and pub food to new heights with the abundant inclusion of Oregon's black and white winter truffles. Experience firsthand why truffles are not solely the province of fine dining or Michelin stars. This gives a wonderful new "high comfort" twist to the gastropub experience. Come MacDown on Oregon truffles in an event that no one will walk away from hungry!

Saturday, January 28

The Urban Forager Tour

You asked for it, we listened! Explore one of Eugene's oldest neighborhoods that has become a hub for great food, craft beer and urban wine tasting. Enjoy lunch at Party Downtown, a standout in Eugene's local food scene. End your tour at one of Eugene's iconic landmarks, the 5th Street Public Market and its new Provisions Market Hall. Each stop on your tour will include truffle bites accompanied by beverage tasting.

Truffle Foray & Winery Luncheon

Weekend guests experience a real truffle hunt lead by a trained dog followed by winery luncheons featuring top culinary talent and foraged Oregon truffles. Held at Silvan Ridge and Pfeiffer Winery, this is wine country immersion and winter truffle excursion at its most authentic.

Grand Truffle Dinner, Hilton Eugene

Some 300 guests enjoy an evening of conviviality around the table, as we present our 12th Grand Truffle Dinner featuring Oregon's native winter white and black truffles in a six-course feast designed and brilliantly executed by award winning chefs known for their love of fresh, seasonal ingredients, and their skill and creativity with Oregon truffles.



Oregon Truffle Marketplace

Sunday, January 31

Eugene

Winding up 10 days of OTF activity, the Eugene fresh truffle Marketplace buzzes with energy and excitement, as 40+ artisan food vendors, authors, fresh Oregon and European truffle sales, and 12 craft distillers, brewers and wineries offered their wares for tasting and sales. Accompanied by 2 cooking demonstrations, a lecture series, and a truffle dog demonstration, the day is the perfect conclusion to OTF's 12th anniversary year.

"I can't tell you how much I enjoyed the Festival. It was my first time and definitely exceeded my already high expectations for it."

Mike N., Los Angeles



EDUCATIONAL EVENTS

January 27 & 28 Truffle Growers' Forum

The 2 day TGF is an annual gathering and focal point for the international truffle industry, and as always features a range of speakers with expertise in the science of truffle cultivation, the practicalities of truffle farming, and the realities of marketing truffles. It is an opportunity unique in North America to engage with experts from around the world and make essential contacts within the industry. Day 1 is a series of lectures and conversations, while Day 2 takes participants to a newly planted orchard, a producing truffle orchard, and a winemaker's luncheon at the famed Sybaris Restaurant with Chef Matt Bennett.

"The truffiere tour was invaluable, not only on seeing first-hand orchards but mostly for the opportunities it gave us to meet and talk with other participants and speakers.

Fabrice C., San Alameda, CA



January 27 & 28 Truffle Dog Training

Launched at the festival in 2008, this one of a kind experience sells out quickly every year with space for only 18 dogs. Led by nationally recognized trainers from Oregon and Tennessee, Day 1 is spent in the classroom and nearby parks with dogs of all kinds learning to recognize the scents of both Oregon and Perigord truffles. Day 2 takes the group out to an Oregon truffle patch where dogs are challenged to begin seeking out truffles in their native habitat. A number of TDT grads have gone on to participate in the Joriad truffle dog championship.

"Absolutely loved hunting the truffles with dogs: just a great experience. The luncheon chef was phenomenal. Everyone was friendly and informative. Great experience."

Tom C., Tampa, FL



SPONSORS & PARTNERS

PRESENTING MEDIA SPONSOR



NEWBERG/MCMINNVILLE HOST SPONSORS



EUGENE HOST SPONSOR



PRESENTING WINERY SPONSORS



WINERY LUNCHEON SPONSORS



SPONSORS & PARTNERS



Thank You!

*We could not have done it
without you.*



Oregon Truffle Festival 2018

*Announcing
soon!*

Newberg to McMinnville
wine and truffle country

*January
25*

The Joriad™ North American
Truffle Dog Championship

*January
25-28*

Eugene and the
surrounding countryside

Mark your calendars! And, check oregontrufflefestival.com for updates. Tickets on sale September 1.



2016 RECAP

JANUARY 16-17 THE JORIAD™

JANUARY 22-24 NEWBERG / YAMHILL

JANUARY 27-29 EUGENE AREA

www.oregontrufflefestival.com



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THE JORIAD™ 11

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2017 FESTIVAL DATES..... 15

**Data from post festival survey*





2,252

TICKETS SOLD
+ 277 MEDIA,
SPONSORS AND
SPECIAL GUESTS

FESTIVAL STATISTICS

23 CULINARY EVENTS

38 CHEFS

26 CULINARY STUDENTS

18 SPEAKERS & TRAINERS

75 MARKETPLACE ARTISANS

24 WINERIES, BREWERS
& DISTILLERS

32 TRUFFLE DOGS

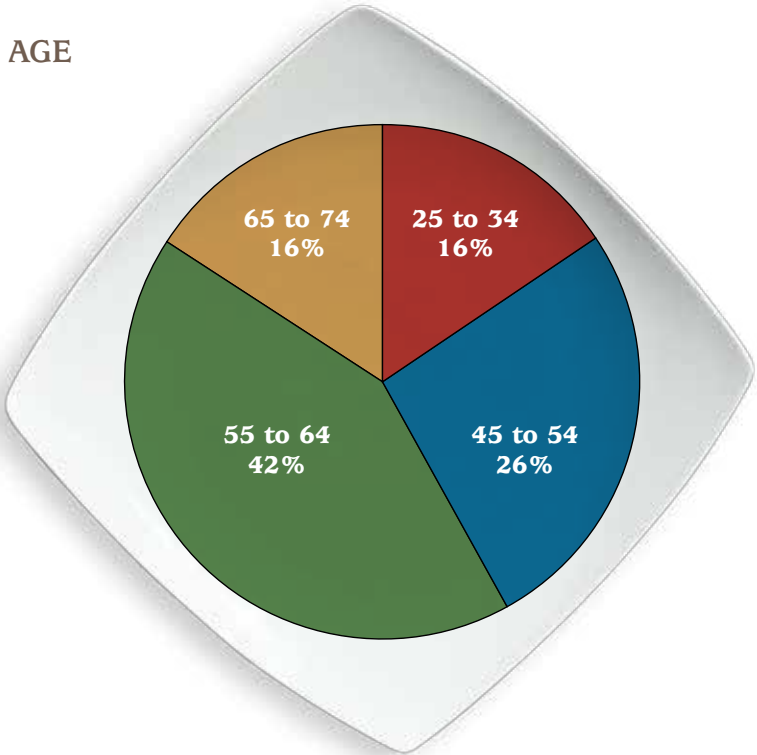
41 LBS OF BLACK TRUFFLES

93 LBS OF WHITE TRUFFLES



DEMOGRAPHICS – PORTLAND & YAMHILL

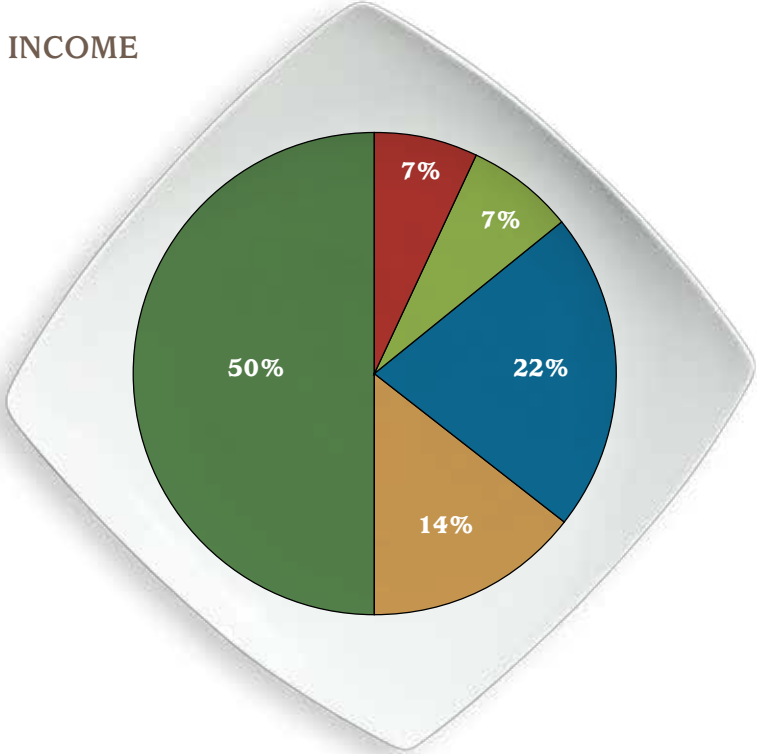
AGE



Our attendees are at a place in their lives where they have the time and resources to spend on adventuresome travel and elegant food and drink experiences.

“The Oregon Truffle Festival is a must for anyone who loves great food, wine, and people all in the context of world class truffles. The experience is one we’ll remember for a lifetime. The festival founders add a local flair and personal touch to an event that is so fun we didn’t want it to end! See ya next year!”

INCOME

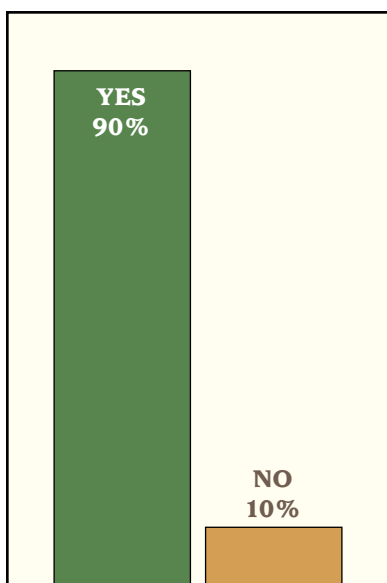




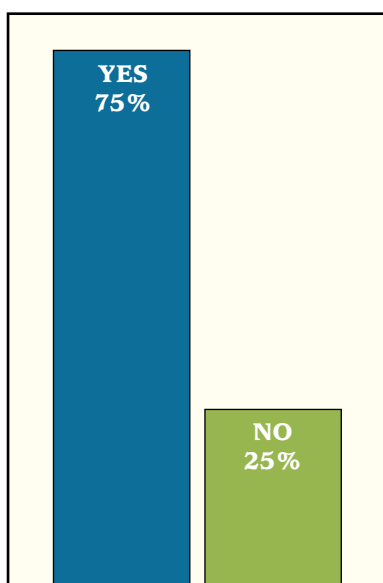
DEMOGRAPHICS – PORTLAND & YAMHILL

The Festival attracts new travelers to Oregon year after year. Many stay and enjoy our state before and after the festival, infusing the economy with tourist dollars.

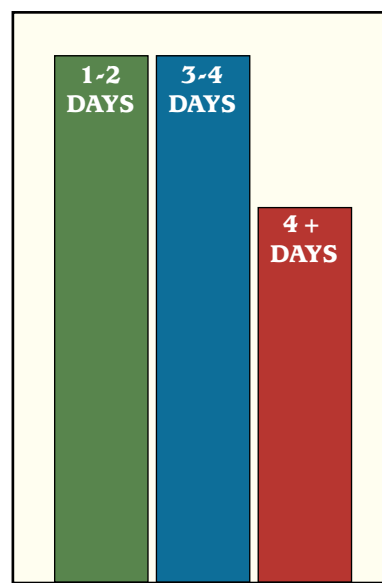
**FESTIVAL
INSPIRED TRIP**



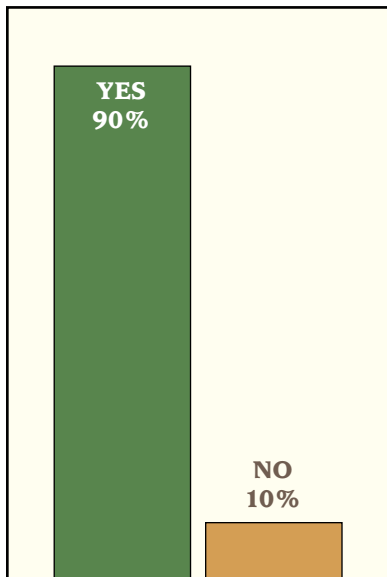
CULINARY TRAVELER



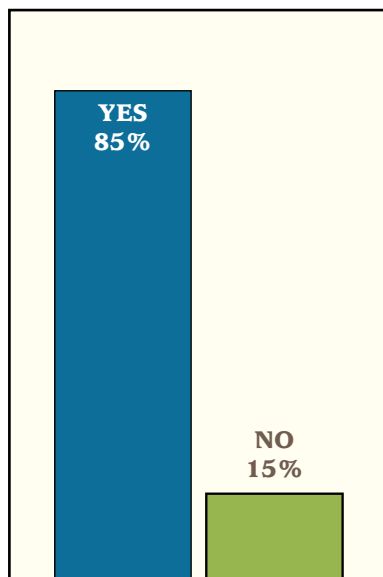
DAYS IN OREGON



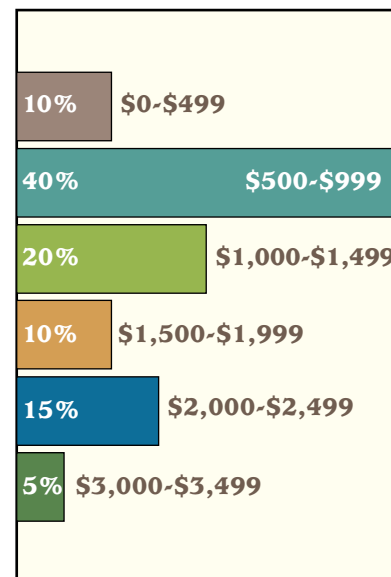
**TRAVELED MORE
THAN 200 MILES**



**EXPERIENCED OREGON
BEYOND FESTIVAL**



**\$ SPENT BESIDES
FESTIVAL TICKETS**





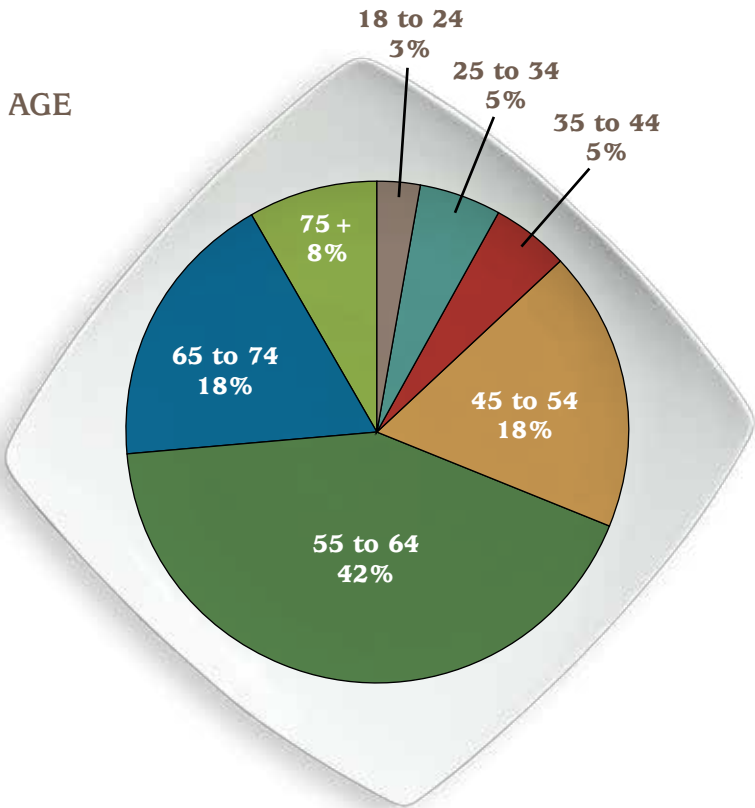
The Oregon Truffle Festival attracts a diversity of ages to indulge in this international culinary event.

“The Oregon Truffle Festival has become a truly glorious annual pilgrimage for me... where else could a chef/ forager be able to connect with so many of the best culinary professionals and the finest truffles in North America.”

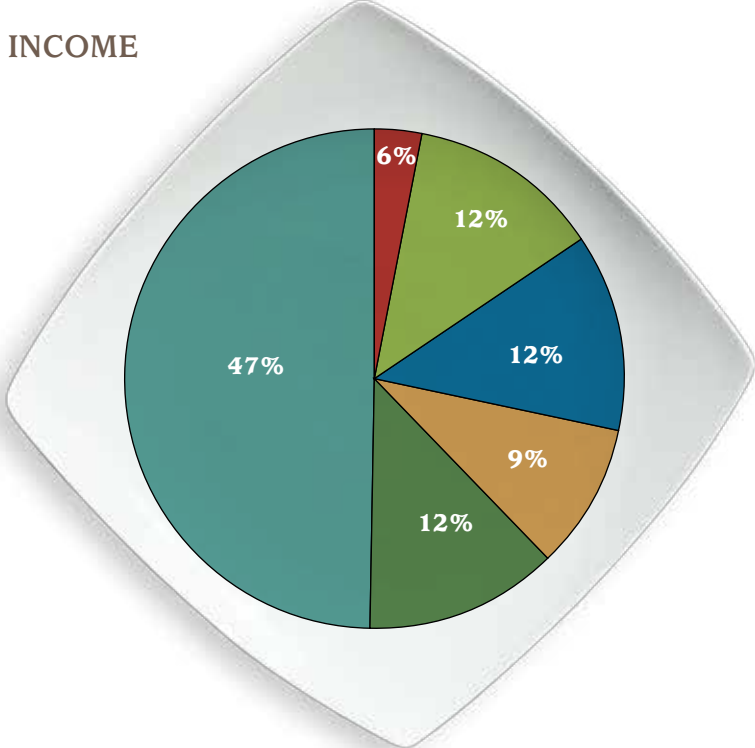
Chef Robin Jackson, Knight Inlet Lodge, Knight Inlet, B.C.

DEMOGRAPHICS – EUGENE & SURROUNDS

AGE



INCOME

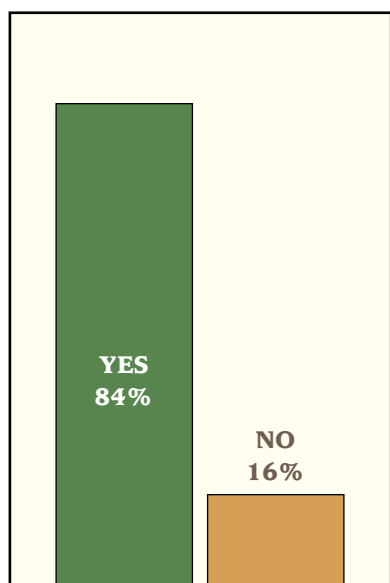




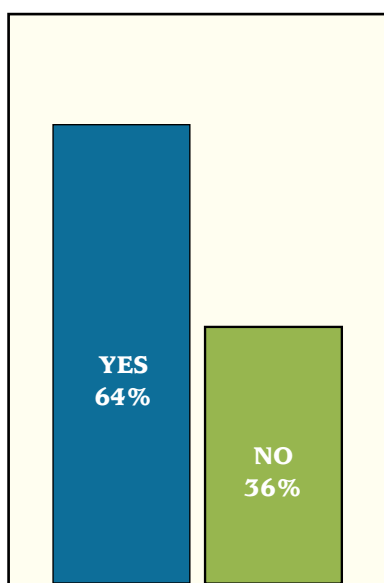
DEMOGRAPHICS – EUGENE & SURROUNDS

Almost all of our attendees come from more than 200 miles away and stay for awhile, enjoying more of what Oregon has to offer.

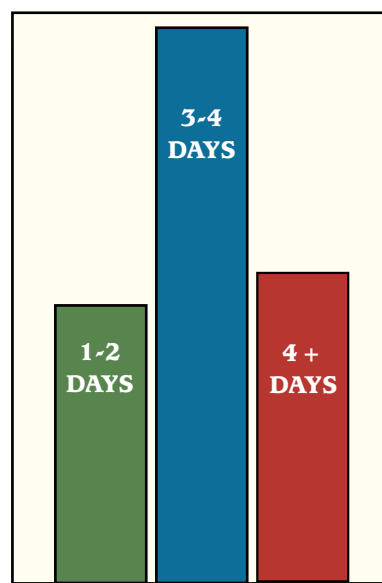
FESTIVAL INSPIRED TRIP



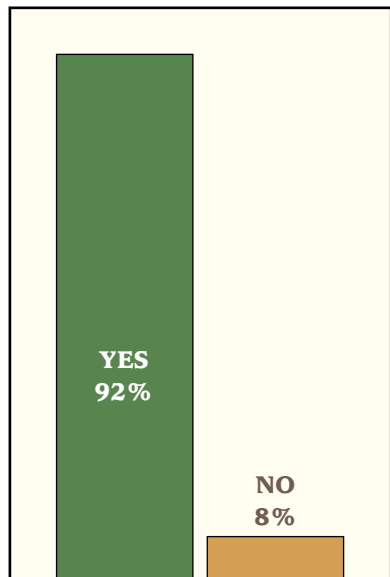
CULINARY TRAVELER



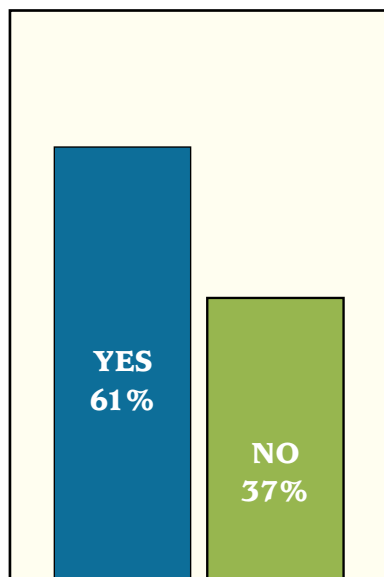
DAYS IN OREGON



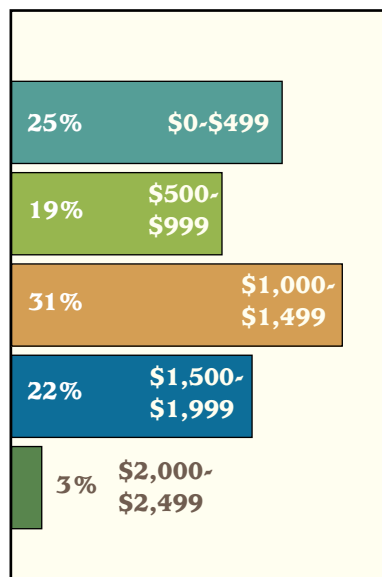
TRAVELED MORE THAN 200 MILES



EXPERIENCED OREGON BEYOND FESTIVAL



\$ SPENT BESIDES FESTIVAL TICKETS



The Oregon Truffle Festival continues to generate high-quality media coverage from top-tier publications and outlets. Here are just a few examples:



Click logo to view media.

THE
PRESS
DEMOCRAT

PORTLAND WINE EXAMINER

Capital Press

1859
Oregon's Magazine

OREGON
ESTD. 1984
WINE PRESS

The Register-Guard

By the second course, even if you've never had the experience of eating truffles, you learn the first abiding rule of truffle consumption: You want more.

[Oregon Wine Press, March 2016](#)

MONTHLY
Portland

BuzzFeed Life

CONDÉ NAST
Traveler

EUGENE
Weekly

WEBSITE Linked to Sponsors,
Partners, Featured Guests
www.oregontrufflefestival.com

EMAIL ADS

6 email Blasts
22,668 Total Sends



SOCIAL MEDIA

Year-round promotion and engagement on social media:
www.facebook.com/oregontrufflefestival
[#oregontrufflefestival](https://twitter.com/oregontruffles) [#oregontruffles](https://twitter.com/oregontruffles)
www.instagram.com/ortrufflefest



ADVERTISING
& SOCIAL MEDIA

PRINT ADS

OTF purchases a wide range of print and online advertising including magazines, newspapers, and their respective websites, concert programs, online publications, blogs, and more.



MARQUEE EVENTS – NEWBERG & YAMHILL

Friday, January 22

Shaved & Infused

Chehalem Cultural Center, Newberg

This popular walk-around dining gala was a decadent, sensory immersion in Oregon truffles! A night of unforgettable dishes prepared by a who's who of regional chefs, each showcased two dishes that put beautiful Oregon black and white truffles front and center.

Saturday, January 23

**Authentic Truffle Hunt, Winery Luncheon
Yamhill County**

The *Terroir of Truffles* weekend package holders experienced an authentic truffle hunt lead by professional truffle hunters with their dogs, followed by an unforgettable winery luncheon featuring top culinary talent and foraged Oregon truffles. Held at unique Oregon winery venues, this was wine country immersion and winter truffle excursion at its most authentic. Festival goers enjoyed the best of the Old World right here in North America.

Saturday, January 23

Black & White Dinner Series

Various Locations, Yamhill County

Five of Yamhill Valley's most highly regarded restaurants brought their truffled best to this sold out dinner series: *The Barlow Room, The Dundee Bistro, The Joel Palmer House, JORY at The Allison Inn & Spa, and The Painted Lady*. Each chef presented three to five course prix fixe menus plus appetizers featuring Oregon black and white truffles.



*Oregon
Truffle
Marketplace*

Sunday, January 24

Newberg

Held in the Grand Ballroom of the Chehalem Cultural Center, the fresh truffle Marketplace featured artisan vendors from Oregon, with a focus on those from the Yamhill Valley, and wineries, brewers and distillers who had participated in OTF culinary events throughout the weekend. More than 600 people tasted dozens of savory and sweet delights, wines, beers and spirits from their makers, and enjoyed cooking and truffle dog demonstrations throughout the day. A Marketplace highlight was fresh truffle sales, and the line at the OTF table did not let up until virtually every truffle was sold.

*“It was very nice to have winemakers
Ken Wright and Tony Soter at the dinner with us!
I really enjoyed their presentations
and their wine pairings.”*



FOR THE DOGS

The **JORIAD**[™] Eugene, January 16 & 17 North American Truffle Dog Championship

This 2 day event began with a series of qualifying events at the Lane County Fairgrounds Horse Pavilion. Dogs of all breeds vied for the chance to advance to the field trials on Day 2, an authentic head to head and nose to ground competition in the Oregon woods, with a \$500 cash prize to the winner. All 5 finalists performed well, and were well celebrated with magnificent food and wine during an awards ceremony at Willamette Valley Vineyards.

It is an extraordinary fact that truffles, the most celebrated and expensive delicacies on the planet, originate hidden within the Earth. Hunting them requires knowledge of secret locales and trained truffle hunting dogs. It is an exclusive profession and a source of enduring mystique. For those who know where to look, it can be spectacularly rewarding, but success ultimately depends on the skill and talent of both the harvester and the dog. It is an intensely competitive, high-stakes pursuit that unfolds out of sight in the forest where triumph is seldom witnessed.

The Oregon Truffle Festival now brings this ongoing competition into the light with The Joriad[™] North American Truffle Dog Championship, a first of its kind sporting event celebrating the emerging culture of truffle hunting on this continent.

Condè Nast Traveler noted OTF in this piece last fall.

[5 Droolworthy Getaways for Dog Lovers](#)

MARQUEE EVENTS – EUGENE AREA

Friday, January 29

To Market, To Market at Provisions Market Hall

Eugene Chef Stephanie Pearl Kimmel and her team brought the region's best locally sourced seasonal ingredients to this Friday evening event. OTF guests had the opportunity to experience Oregon's bounty first hand at Kimmel's brand new Provisions Market Hall. There were multiple truffle delights, local seafood, and specialty meats, all paired with Oregon wines and craft brews.

Friday, January 29

A Villa Evening at Pfeiffer Vineyards

The Pfeiffer's welcomed festival participants into their gorgeous Tuscan inspired Villa for an elegant and intimate evening. Guests enjoyed a four-course truffle dinner prepared by guest chefs in their classic kitchen adjoining the dining area. Guests dined by candle and firelight at one long bountiful table. Wines selected from the Pfeiffer cellar were beautifully paired with each course.

Saturday, January 30

Truffle Foray & Winery Luncheon

All weekend guests and 2 day TGF participants spent a gorgeous Saturday in Oregon wine country surrounding Eugene, where they hunted truffles with trained dogs and enjoyed scrumptious multi-course winery luncheons with guest chefs. As with our Newberg day, Forage & Feast guests pronounced their experience "exceptional".

Saturday, January 30

Grand Truffle Dinner, Hilton Eugene

The Grand Truffle Dinner celebrated Oregon truffles in an unmatched 6 course dinner designed and brilliantly executed by award winning chefs from Toronto, British Columbia, Seattle and Portland. Guests were greeted with a specially designed craft cocktail paired with the first course, followed by five more delicious dishes paired with magnificent Oregon wines.



Oregon Truffle Marketplace

Sunday, January 31

Eugene

Winding up 3 weekends of OTF activity, the Eugene fresh truffle Marketplace buzzed with energy and excitement, as 40 artisan food vendors, several artists and authors, fresh Oregon and European truffle sales, and 12 craft distillers, brewers and wineries offered their wares for tasting and sales. Accompanied by 2 cooking demonstrations, a lecture series, and a truffle dog demonstration, the day was the perfect conclusion to OTF's 11th anniversary year.

*"I met so many passionate people,
learned about the truffle dogs,
and got to try the many ways
truffles can be enjoyed.
We will be back."*



EDUCATIONAL EVENTS

January 29 & 30

Truffle Growers' Forum

The 2 day TGF is an annual gathering and focal point for the international truffle industry, and as always featured a range of speakers with expertise in the science of truffle cultivation, the practicalities of truffle farming, and the realities of marketing truffles. It is an opportunity unique in North America to engage with experts from around the world and make essential contacts within the industry. Day 1 is a series of lectures and conversations, while Day 2 takes participants to a producing truffle orchard, a truffle hunt with truffle dog, and a winery luncheon with guest chef.



January 29 & 30

Truffle Dog Training

Launched at the festival in 2008, this one of a kind experience sells out quickly every year with space for only 24 dogs. Led by nationally recognized trainers from Oregon and Tennessee, Day 1 is spent in the classroom and nearby parks with dogs of all kinds learning to recognize the scents of both Oregon and Perigord truffles. Day 2 takes the group out to an Oregon truffle patch where dogs are challenged to begin seeking out truffles in their native habitat. A number of TDT grads have gone on to participate in the Joriad truffle dog championship.



“My comment is this was one of the best organized conferences I have been to. Comfortable, smart, and delicious.”

SPONSORS & PARTNERS

PRESENTING MEDIA SPONSOR

EUGENE HOST SPONSOR



NEWBERG/YAMHILL HOST SPONSOR



PRESENTING WINERY SPONSORS



TRUFFLE GROWERS FORUM SPONSOR

WINERY LUNCHEON SPONSORS



SPONSORS & PARTNERS



Thank You!

We could not have done it
without you.



Oregon Truffle Festival 2017

January
20-22

Newberg and Yamhill Valley
wine and truffle country

January
26

The Joriad™ North American
Truffle Dog Championship

January
27-29

Eugene and the
surrounding countryside

Mark your calendars! And, check oregontrufflefestival.com for updates. Tickets on sale September 1.



December 13, 2017

To Whom It May Concern:

Argyle Winery is in support of the Oregon Truffle Festival's continuing presence in our area. The objectives of the Festival are well aligned with our marketing objectives. The Festival brings a high end, luxury, culinary-centric audience to the area (including media) at a time of year when visitation is down. We have participated in the Festival for several years, and always enjoy welcoming new guests to the area.

In 2017, Argyle helped organize the Dundee Hills AVA sponsorship of the OTF Friday night events "Truffles Deconstructed" and the Bliss Food dinner following, and then participated in the Sunday Marketplace. We felt it was great marketing exposure for the participating wineries and the Dundee Hills AVA generally.

Sincerely,
Cathy Martin
Marketing Coordinator
Argyle Winery



December 8, 2017

To Whom It May Concern:

I am pleased to provide this letter of support for the Oregon Truffle Festival. In my capacity as Chair of the Chehalem Valley Chamber of Commerce, I had the privilege of opening the festival in Newberg at the Cultural Center in 2016. With approximately 75 participants in the room, I asked how many were from out of state and almost 100% of them raised their hands. And when I asked how many were from out of the country, approximately 6-8 raised their hands.

The Truffle Festival brings in a significant number of out of town visitors for a multi-day event in our city, visiting our local restaurants, shops and wineries and staying in lodging ranging from The Allison Inn and Spa to our local bed and breakfast facilities. And the Sunday Market brings in hundreds of visitors from the region to shop for all things "truffles." In addition, events like the 2017 Friday evening seminar bring in journalists from major periodicals. In short, this unique event continues to grow and bring the type of destination tourism that we need to cultivate.

As I understand it, the Truffle Festive is seeking a Newberg TLT Small Grant to help their destination marketing activities, including PR through all channels, paid advertising, photography, venue promotion and costs, and business development with a focus on Newberg as the "hub" of the Yamhill County half of the festival with opening and closing marquee events at the Chehalem Cultural Center. Not only is this important for continuing to grow the Truffle Festival, which is needed as a keystone winter destination event, promotions like this help attract attention to our other destination marketing events like the Camelia Festival.

The Chamber of Commerce, Chehalem Cultural Center, and other local organizations have worked hard to recruit and keep the Truffle Festival in Newberg. Please provide them with a grant so that we can continue this one-of-a-kind event – the type of event that helps put Newberg on the map.

Sincerely,

Carr Biggerstaff

Cc: Leslie Scott, Oregon Truffle Festival



www.chehalemculturalcenter.org
415 E Sheridan St
Newberg, OR 97132
(503) 487-6883

To whom it concerns,

The Chehalem Cultural Center (CCC) is proud to partner with the Oregon Truffle Festival (OTF). We are honored to host the Newberg leg of their festivities and whole heartedly support their grant request. Though the Truffle Festival is not an event we produce in-house, we enjoy a unique partnership with the festival and have come to think of it as one of our own. The festival comes during a quieter time in our year and provides a valuable boost to our own programming activities.

The OTF makes creative use of our venue and hosts a number of events at the CCC of unparalleled quality. Aside from serving as a home base and hub of activities for the festival the CCC hosts walk around dining events, films, lectures, cooking demonstrations and other educational and cultural activities that showcase our capability. By introducing their audience to us and all we have to offer, the festival helps promote the CCC as a tourist destination and raises our profile throughout Yamhill County and beyond. The OTF fresh truffle marketplace held in our Grand Ballroom on Sunday is one of only two events of its kind on the entire west coast and brings several hundred first time visitors to Newberg and the CCC whom might otherwise never hear of us.

Our partnership with the OTF is one we hope to preserve and strengthen for many years to come. By using the CCC as the center of festival activities in Yamhill tourists are more inclined to choose lodging in Newberg and are more likely to visit many of the shops, restaurants, wineries, and other businesses nearby. Not only is this a boon for local business but it helps re-enforce the role the Center can play in driving tourism and commerce. The Chehalem Cultural Center is proud to host the Oregon Truffle Festival each year and we urge you to offer your support to this world class event.

With regards,

A handwritten signature in black ink, appearing to read "S. Andries", written over a horizontal line.

Sean Andries
Executive Director
Chehalem Cultural Center



DOMAINE SERENE

12/11/17

To Whom it may Concern:

I am writing this letter in support of the Oregon Truffle Festival Grant Request.

As a partner and an event host in the 2018 Oregon Truffle Festival we are very supportive of the efforts of the Oregon Truffle Festival. We feel that it is a premier organization that is showcasing yet another high-quality item available in this bountiful part of the United States.

This is a great way to expose high income, food-focused travelers to the Willamette Valley in the shoulder season. For this, we fully embrace their efforts. The presence of such an exciting and unique festival helps raise all tides in the Willamette Valley through a focus on quality. Through their efforts to attract top travelers to the area in the leaner winter months, they are raising awareness about the area and are reinforcing what we are *all* trying to convey with Brand Oregon.

This will be our first year as an event host and as a participating vendor. We are excited to partner with the organization and are excited by the passion on the part of the board members with their mission.

Thank you for considering this grant request. I believe that the funding will help to grow this festival this year and beyond.

Sincerely,

Matthew Thompson
Director of Marketing, Club Strategy, & Branding

Domaine Serene

6555 NE Hilltop Ln

Dayton, Oregon 97114

503.864.4600

matthew@domaineserene.com

----- Forwarded Message -----

Subject:letter of support

Date:Tue, 12 Dec 2017 12:25:19 -0800

From:Christian DeBenedetti <christian@wolvesandpeople.com>

To:Charles Ruff <ruff@truffletree.com>

December 12, 2018

To the Committee,

Wolves & People writes in support of the Oregon Truffle Festival's bid for Newberg tourism small grant support. Since its founding the OTF has grown to be a world-class event drawing tourists and A-list food and travel media to the area. We have been collaborating with the festival for several years and admire their passion and dedication to putting a great tourism-related event together each year. It's crystal clear that the OTF is a unique wine country attraction drawing discerning tourists who stay in the area overnight in the off-season, patronizing local restaurants and businesses, and helping spread the growing reputation of Newberg as a travel destination. They are doing strong work and deserve a lift in the form of grant support.

Best Regards,

Christian DeBenedetti, Founder & Head Brewer

Wolves & People Farmhouse Brewery

30203 NE Benjamin Rd. Newberg OR 97132

o: 503-487-6873

c: 917-586-2357

www.wolvesandpeople.com



DECEMBER 14, 2017

To Whom it May Concern:

This letter is in support of the Oregon Truffle Festival Grant Request. We believe the Oregon Truffle Festival brings positive awareness to the Willamette Valley and generates additional high-value culinary and wine tourism to the region during the off-season.

Sincerely,

A handwritten signature in black ink, appearing to read "Morgen McLaughlin".

*Morgen McLaughlin
Executive Director, Willamette Valley Wineries Association*



WILLAMETTE
VALLEY WINE

PO Box 25162
Portland, OR 97298

503.297.2962
willamettewines.com

@wwines



YOUNGBERG HILL

To Whom it may concern,

Oregon Truffle Festival (OTF) is a key component driving traffic and tourism to Willamette Valley wine country during the “off season” 1st quarter of the year. Over the years, it has proven to help provide activities to the valley and because it is a multi-weekend event, it keeps people in the valley for an extended period of time during our slow season.

It has proven that the food component is very complimentary to wine, drawing similar clientele. It is also imperative that these activities also have wine as an integral part of all the dining activities. We have benefited from OTF in terms of tasting room traffic, overnight stays, dinner and luncheon events, and building awareness of our wine country.

I agree that OTF definitely supports our efforts to increase wine country tourism during the 1st quarter of the year.

Sincerely,

Wayne Bailey

Youngberg Hill

**Chehalem Cultural Center - The Newberg Camellia
Festival Run/Walk**

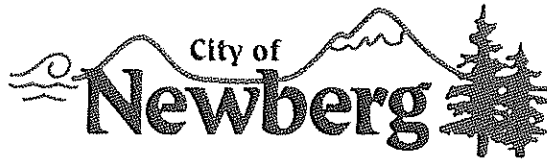
Request amount: \$8,000

Required Application Materials	YES	NO	NOTES
1) Completed application Cover Sheet	X		
2) Budget for project/program/event being funded that lists all anticipated income and expenses.	X		Budget form completed
3) Board or Owner approved financial statement for most recently completed fiscal year of the organization or business responsible for the project/program/event.	X		Balance sheet for year ending December 2016
4) Letter signed by officers of the Organization's Board of Directors or Business Owners authorizing this application.	X		Letter in application packet
5) Documentation of organization or business existence: Current, valid Oregon Secretary of State Corporation Division registry filing.	X		Registration number provided.
6) Documentation that no bankruptcy or other financial corruption has occurred within the past five years.	X		Letter in application packet
7) Letters of support.	X		2 letters
8) Past grant recipient.	X		2016/2017 Grant cycle

Eligibility Requirements

YES NO NOTES

1) Aligns with Transient Lodging Tax regulations (Tourist, Tourism Promotion, Tourism Promotion Agency, Tourism related facility)	X		Tourists, Tourism Promotion, Tourism related facility
2) Promote or create experiences for: Outdoor recreation visitor, Experiential arts, Wayfinding, Downtown enhancement	X		Outdoor recreation visitor, Downtown enhancement
3) Appeals to designated audiences in the Newberg Strategic Tourism Plan (Wine Country Adventurers, Millennial Explores, George Fox Network, and Luxury Wine Travelers)	X		Wine Country Adventurers, Millennials, George Fox Network, Luxury Wine Travelers
4) The project will create or enhance an experience for shoulder or off-season visitors	X		Shoulder season - April
5) Does it align with other tourism activities in the community	X		Events, restaurants, lodging and tourist
6) Builds on existing assets	X		Downtown Merchant Committee, First Friday, Cultural Center, local businesses, tourist attractions
7) Leverages funding	X		.5:1 and meets the requirement
8) Entities that have a bankruptcy or other financial corruption within the past five years are ineligible		X	None



**City of Newberg 2017 - 2018
Transient Lodging Tax – Small Grant Program Application Cover Page**

Project Title: The Newberg Camellia Festival and Run/Walk

Applicant Name: The Chehalem Cultural Center

Mailing Address: 415 E. Sheridan Street Newberg City OR State 97132 Zip

Contact Name: Carissa Smith-Burkett

Phone: 503-487-6883 Email: Carissa@chehalemculturalcenter.org

Alternate Phone: 260-224-3354

Amount of total Funding Requested: \$8,000

Please note: Funds not spent on the approved project must be returned to the City of Newberg by check with the Final Report due 30 days after completion of the project, program or event.

Project, Program or Event Detail:

- A. To apply, attach a completed application to this cover sheet along with any required supporting materials.
- B. Submit an updated Project, Program or Event Detail as your Progress Report.
- C. Within 30 days after project, program or event is complete submit a Final Report. Attach receipts/paid invoices for monies spent and a check to the City of Newberg for any unspent funds.

Any changes to your project must have prior approval to receive funding.

I agree to all terms described on this application and verify that the information provided on this cover sheet is true and accurate.

Print Name: Carissa Smith-Burkett

Signature: 

Title: Arts and Public Programming Coordinator

Date: 12/12/17

*****FOR OFFICE USE ONLY*****
APPROVED/NOT APPROVED/REVISED (ATTACH DETAILS) _____

Progress Report Received: _____ Final Report received: _____

Funds returned, received on: _____

City of Newberg 2017 - 2018
Transient Lodging Tax – Small Grant Program Application

THE FOLLOWING ITEMS MUST BE INCLUDED WITH YOUR APPLICATION:

- v Completed application Cover Sheet.
- v Budget for project/program/event being funded that lists all anticipated income and expenses.
- v Board or Owner approved financial statement for most recently completed fiscal year of the organization or business responsible for the project/program/event.
- v Letter signed by officers of the Organization’s Board of Directors or Business Owners authorizing this application.
- v Documentation of organization or business existence: Current, valid Oregon Secretary of State Corporation Division registry filing.
- v Documentation that no bankruptcy or other financial corruption has occurred within the past five years.
- v Letters of support.

Project Title: Newberg Camellia Festival & Run/Walk

Applicant Name: Chehalem Cultural Center

Mailing Address: 415 E Sheridan St	Newberg	OR	97132
Street	City	State	Zip

Contact Name: Carissa Burkett and Bryan Stewart

Phone: 503-487-6883 Ext #104 **Email:** Carissa@chehalemculturalcenter.org

Alternate Phone: 260-224-3354

Website Address: www.newbergcamelliafestival.com & www.chehalemculturalcenter.org

Secretary of State Business Registry Number: 313206-90

Non Profit Government _____ For-Profit _____

Amount of total Funding Requested: \$8,000

Please note: Funds not spent on the approved project, program or event must be returned to the City of Newberg by check with the Final Report due 30 days after completion of the project, program or event.

Classify how funds will be used for your project/program/event: check all that apply

New Project New Program New Event

Existing Project Existing Program Existing Event

Has this project, program or event received these grant funds in the past?

Yes

If so when and for how much?

The Newberg Camellia Festival and Run/Walk received \$6,000 during the 2016-2017 grant cycle.

Prior year grant award through this program does not guarantee additional funding in subsequent years. All returning projects, programs or events must reapply and are subject to approval. This program has limitations of funding available in the fiscal year in total amount of funds requested. All required reports must be in good standing at the time of application for future funding by a past grant recipient.

Budget Summary (this format must be used):

Project/Program/Event Budget: This budget provides the detail of the project, program or event that the grants funds would be applied to. This should include how the funds from this grant will be spent. Expenses must be explicitly defined. Please include in-kind and cash match.

Fiscal Year: Projected budget for January 2018 to December 2018

Income Sources	Amount
Item Sales	\$6,000
Sponsorship	\$15,000
TLT Grant Funds from 2017	\$3,000
TLT Grant Funds requested for 2018	\$8,000
Event Income	\$500
Total Project/Program/Event Income	\$32,500

Expenses – Must be explicitly defined.	Amount
Personnel Expenses	\$22,455
Contract Labor Expenses	\$9,370
Program Supplies	\$855
Sales Expenses	\$4,500.00
Volunteer Support	\$1,200.00
Equipment Rentals	\$7,000
Other Operating Expenses	\$700
Liability Insurance	\$800.00
License and Permits	\$50.00
Merchant Account Fees	\$500.00
Marketing Costs	
Printed Collateral	\$4,088 (20,000 programs \$3,488.00+10,000 Rack cards \$600)
Signage	\$550
Other Advertising	\$2,550 (billboard \$750+Facebook ads \$300+print adds \$1,500)
Email Marketing fees	\$200.00
Website fees	\$500.00

Total Marketing Expenses	\$7,888
Total Event Expenses	\$55,318
Expenses minus personnel	\$32,863

Organization Budget: This budget shows how this project, program or event fits into your organization. Your project, program or event should be shown as a line in this budget.

Fiscal Year: January 2018 to December 2018

Income Sources	Amount
Education Income	\$54,000
Rental Income	\$185,210
Event Income (Camellia)	\$7,350 (\$500)
Sales Income (Camellia)	\$41,060 (\$6,000)
Contributions (Camellia)	\$370,300 (\$26,000)
Total Organization Income	\$657,920 (\$32,500)

Expenses	
Personnel Expenses (Camellia)	\$487,806 (\$22,455)
Contract Labor Expenses (Camellia)	\$93,070 (\$9,370)

Program Supplies (Camellia)	\$32,370 (\$855)
Sales Expenses (Camellia)	\$22,400 (\$4,500)
Volunteer Support (Camellia)	\$2,300 (\$1,200.00)
Operating Expenses (Camellia)	\$55,715 (\$9,050)
Marketing Expenses (Camellia)	\$17,675 (\$7,888)
Total Organization Expense	\$ 711,336 (\$55,318)

Project Narrative:

1. Project description:

The Newberg Camellia Festival and Run/Walk is an annual community event that offers exploration of Asian and Pacific Rim culture through art, food, performances, fitness, and horticulture. It begins with a 5K and 10K run/walk coordinated in collaboration with Chehalis Parks & Recreation, then continues into a full day festival featuring performances on 3 stages, a variety of local and Portland-Metro vendors, art activities, and an Oregon Camellia Society bloom show. Performers are invited to participate each year to offer experiences honoring the heritage and history of Pacific Rim and Asian cultures. The festival features groups like the Minidoka Swing Band, formed in tribute to and made up of Japanese Americans interned during World War II, and The Lee's Lion & Dragon Dancers who are trained in this ancient art form.

Vendors from around the region sell food, art, and jewelry connected to these cultures. The festival is also known for hosting the annual Oregon Camellia Society Bloom Show, a competitive adjudicated show of the over 100 different types of Camellia flowers. The 2018 Camellia Festival is especially unique as it will be celebrating its tenth annual year! Attendance for the festival has grown exponentially and has averaged between 3,500 and 4,000 visitors each year, and thanks to local sponsors is a free community event for all ages.

The Camellia Festival and Run/Walk is an experience free and accessible for all ages, centered around celebrating community, art, culture, and Newberg's city flower, the Camellia.

2. How will your project, program or event further the Newberg Strategic Tourism Plan goals?

The Camellia Festival occurs in early April, which has been determined as a slower tourism time for the city. As stated before, the festival brings 3,500–4,000 people to downtown Newberg through the specific placement of the event at Chehalem Cultural Center. As Newberg is indeed a destination of artisan makers and doers, we aim to not only feature local artist and makers at our festival with vendors like Purple Cow Vineyards, Chehalem Brewing Co., and Cream Northwest, but also by encouraging attendees to visit our various downtown spaces to experience this important aspect of Newberg themselves. Our Downtown Newberg Camellia Passport (which will be detailed in the answer to question 10) will help to nourish and grow this events relationship with, and benefit to small business.

The Run/Walk grew from 200 to over 650 participants over the past three years with runners traveling to participate from all over Oregon, California, Washington, Idaho, Colorado, Utah, New York, Texas, and Minnesota. The festival has become such a draw that the National American Convention for Camellias brought their convention to the Chehalem Cultural Center in collaboration with the festival in 2017, which drew visitors from California, Georgia, Louisiana, Florida, Mississippi, Virginia, South Carolina, North Carolina, Alabama, Maryland, Arizona, and Oregon. A majority of these out of state visitors stay in local hotels, eat at local restaurants, and engage in other tourist activities while in town for the run and bloom show. With access to more funding and marketing opportunities, we could capitalize on this average growth and aim for over 6,000 participants in 2020.

3. How does your project, program or event align with Transient Lodging Tax regulations (Tourist, Tourism Promotion, Tourism Promotion Agency, or Tourism related facility)?

Tourist: With the addition of the National American Camellia Society Convention at the Cultural Center (drawn specifically by the Camellia Festival), the festival will be bringing at least 50 people from around the country who will be staying in Newberg accommodations for at least 1 week around the event and we have numerous registered runners outside of a 50-mile radius of Newberg.

Tourism Promotion: The Camellia Festival prints 10,000 rack cards which are distributed to local businesses, 5 different Burgervilles around the Portland Metro area, to major sponsors (Chehalem Parks & Recreation, Chehalem Valley Chamber of Commerce, The Allison Inn & Spa, A-Dec, Hoover Minthorn House Museum, City of Newberg Offices, Friendsview Retirement Community, Grocery Outlet, Providence Medical Center, and Les Schwab), collaborative partners, performers, vendors, and health and fitness venues around the Portland Metro area. We distribute electronic fliers to the National American Camellia Convention, Chehalem Cultural Center members, the Chehalem Parks and Recreation community, sports teams, high school clubs, and we make and distribute 1,000 bookmarks to local libraries. In celebrating it's tenth year, the Festival will be advertising on a billboard and will also be designing a program to feature sponsors and all of the festivities, as well as celebrating past years through photo

documentation. We also utilize twitter, facebook, and instagram free advertising. While we access communities outside of Newberg through these avenues, there are still many ways to expand in accessing communities further away as displayed above.

Tourism Facility: The Camellia Festival is housed in the Chehalem Cultural Center, which is a tourism destination and attracts tourists throughout the year with hosting both local and nationally recognized arts exhibitions, coordinating a variety of programming, and hosting a wide range of organizations through our rental spaces. The CCC space is used for conventions, weddings, and fundraisers, which have included but are not limited to: Travel Oregon, The Oregon Humanities, The Oregon Symphony, The Willamette Valley Wineries Association. With each organization or community member that accesses the CCC space, we get the opportunity to promote our events and establish lasting relationships. We are known for cultural and arts celebrations such as the Camellia Festival, Lavender Festival, and Dia de los Muertos celebration. The CCC space is a tourist draw through free arts exhibitions, annual festivals, educational workshops, and a community resource focused facility.

4. What is the projected return on investment?

The Camellia Festival and Run/Walk brings a return on investment with each smiling face, laughing child and newly developed art and culture lover that walks away from the festival. With 4,000 people attending this vibrant festival each year, the festival's impact is significant. People attending from all over the nation have an incredible opportunity to experience Newberg through this festival, which is a remarkable return. Since this festival is a free event for the public, there is no direct financial return on investment to the Chehalem Cultural Center, but the opportunity to bring in so many out of town visitors and tourists to the town provides great return to the local businesses as the festival allows for exposure to all that this community has to offer. A recent economic study done by Americans for the Arts revealed that a person that attends a cultural event spends an average of \$45 a day. With over 4,000 people attending this FREE event, that average of \$45 will be spent in Newberg, bring direct financial return to our city.

5. Predicted number of tourists' attracted/overnight guests?

Our data shows that approximately 9% of the visitors will be coming from out of state. With runners traveling from all over Oregon, California, Washington, Idaho, Colorado, Utah, New York, Texas and Minnesota to participate in the Run/Walk and the National American Convention for Camellias bringing visitors from California, Georgia, Louisiana, Florida, Mississippi, Virginia, South Carolina, North Carolina, Alabama, Maryland, Arizona and Oregon there is an anticipated 360 visitors that will stay as overnight guests, traveling to Newberg for the Camellia Festival and Run/Walk.

For the past five years the Camellia festival has stayed at the 3,500-4,000 attendee range and it is the hope that with a much stronger marketing campaign, accomplished with additional TLT grant funds, we will be able to push this number to 5,000 for the 10th annual festival. The next stage of growth for this festival is to expand to a multi-day festival. By pushing our numbers up to 5,000 we hope to max out our capacity in 2018 and maintain that new capacity in 2019, then begin to plan for growth to a two-day event by 2020.

6. Will it have lasting impact and/or utility?

The lasting impact of this festival and run/walk is that it gives people of all demographics exposure to a variety of art forms and cultures. With a history of evolving through partnerships and creative ideas, the potential is boundless, non-limiting and has the ability to grow with the community it serves. The positive experience attendees have during the festival will contribute to an emerging marketing cycle, and to growing tourism in Newberg. The festival and run/walk bring new people to town each year, they experience downtown Newberg and its phenomenal artisans and small businesses, grow to love this place, spread the word, and the tourism continues to grow.

7. How does your project, program or event leverage funding?

The festival and run/walk is entirely funded through asking for sponsorships from Chehalem Parks & Recreation, the Chehalem Valley Chamber of Commerce, Austin Industries, the Hoover-Minthorn House and Museum, Friendsview Retirement Community, Burgerville, Providence Newberg Medical Center, Grocery Outlet, and Les Schwab. The Chehalem Cultural Center works these sponsorships into each fiscal year budget.

8. What is the ratio at which Transient Lodging Tax funds will be matched?

Based on activities not eligible for funding, and the regulations outlined in the grant application, the ratio of Transient Lodging Tax funds will be based off the budget we have for performances as they serve as self-targeted marketing for attendees to the festival, as well as the funds currently budgeted for general marketing purposes.

With the combination of the festival and run/walk, we have currently budgeted \$4,500 for performances and \$7,888 for marketing to make a total of \$12,388.

As we are asking for \$8,000 total the Transient Lodging Tax funds would be matched by at least half if not more through community sponsorships.

9. What is your demonstrated history of attracting tourists?

The Newberg Camellia festival will be celebrating its 10th annual year in 2018. The festival has grown exponentially over its ten-years, bringing in increasing numbers of visitors and participants in greater numbers and from greater distances each year. In 2017, 4,000 people attended the festival, becoming one of the most attended festivals in Newberg. This festival has the unique ability to attract tourists from a variety of interest points, providing opportunities for fitness enthusiasts, flower lovers, as well as those with interest in Pacific Rim culture.

10. Does your project, program or event engage and energize local tourism partner(s)?

The Camellia festival partners with a wide variety of local tourism partners in putting on the festival, bringing in local beer and wine pourers, food vendors, fitness vendors, providing an opportunity for these partners to promote their products. The incredible Sponsors for the festival are also promoted throughout the event through announcements and displays, encouraging visitors to visit these local organizations and businesses.

In addition to this, the Camellia festival has created an incentive program to encourage festival goers to visit other local tourism partners. By providing a passport book, The Downtown Newberg Passport encourages participants to go around to various local merchants to collect signatures. Once a passport is completed, the winner receives a Camellia bloom as well as having the opportunity to visit a variety of the local businesses.

11. Does your project, program or event enhance Newberg as a destination? If so how?

Outdoor Recreation Visitor: The 5k and 10k walk/run draws outdoor recreation visitors to the Newberg community. Not only is it affordable, but it's unique from other runs/walks through the prizes offered, gaining access to a Jamboree of resources, receiving a free Camellia plant, and getting to participate in the festival after the run.

Experiential Arts: The festival features a wide range of the arts highlighting the significance of heritage and culture, with performances like the tea ceremonies by the Issouan Tea School, Ikebana and Bonsai care demonstrations, Taiko drumming performances, traditional Hula dance, the Lion & Dragon Dancers, and the Minidoka Swing Band. The Minidoka Swing Band for example was formed as a tribute to Japanese Americans interned during World War II and to highlight the popular music in the Internment Camps. This band is made up of several band members who were actually interned during WWII and several other members whose parents and grandparents were interned. The Lee's Lion & Dragon Dancers group was formed by Terry Lee who was formally trained in this ancient art form, but who teaches it to at-risk youth, which exposes these youths to culture and responsibility.

The festival and run/walk naturally appeals to a variety of audiences (horticulture enthusiasts, lovers of the performing arts, musicians, foodies, fitness junkies, etc.). The challenge is

accessing those communities through target marketing in highly viewed avenues. Our current promotion is listed in question 3, but ways in which to expand that promotion with more funds include: producing a billboard advertisement, getting ads in Sunset Magazine, the Oregonian, the Asian Reporter, Travel Oregon, and Oregon Healthy Living. To target reaching Millennials specifically, we would focus on getting featured on Podcasts and OPB, collaborating with other related but different festivals in Portland such as the Lunar New Year Celebration, getting TV ad time or news coverage, and purchasing numerous facebook post boosts.

12. Does your project, program or event enhance Newberg as a location for Makers and Doers? If so how?

The Chehalem Cultural Center is a well-established hub for makers and doers in Yamhill county. The festival hosts exquisite performers, artists and makers, offering a wide array of high-quality artistry, which attracts visitors who value the arts and culture. As the largest public event that the cultural center puts on in the year, it draws in a huge crowd, bringing exposure to Newberg as a location for Makers and Doers. By entering the grounds and walking through the doors, guests are able to use the festival as an entry point to engaging further with the arts in Newberg.

13. Does your project, program or event catalyze downtown development? If so how?

Downtown Enhancement: In collaboration with the Downtown Merchant Committee the festival plans to further this initiative by creating Downtown Newberg Camellia Passports. These passports, distributed on the First Friday before the festival and at the festival, will contain maps of downtown Newberg with the business locations outlined. Passport participants must visit 6 downtown businesses and receive stamps on their passports to win a prize. The festival also hopes to sponsor Camellia themed sidewalk stickers to have a visual wayfinding pathway leading to downtown.

14. Does your project, program or event enhance tourism from October – May or Sunday – Thursday Visitation? Explain how.

The Camellia Festival & Run/Walk is planned in the beginning of April, which has been established as a slow season for tourism. It has consistently drawn between 3,500 and 4,000 people each year in the last 3 years.

15. Does this project align with at least one of the four target audiences (Wine Country Adventurers, Millennial Explorers, George Fox Network, or Luxury Wine Travelers)?

Wine Country Adventurers and Luxury Travelers: While the festival and run/walk do not yet align significantly with wine country, there is definite potential to collaborating in ways that would access that tourist group.

Millennial Explorers: The festival and run/walk aligns with millennial explorers by motivating their fitness priorities and creating connections to further those priorities. It also makes green living a priority and provides a variety of plants at wholesale price. The festival nourishes a space for arts and culture seekers.

George Fox Network: 3.1% of the George Fox network undergrad population are international students with 90% of that population being from China. The Camellia festival celebrates Chinese culture, which gives these students a place to either share their own cultural knowledge and experiences, or have a day to interact with their culture while away in the states. The festival also provides a free family friendly and educational event for this whole George Fox community. The run/walk aligns with the George Fox athletics department and their commitment to service in their community by giving their athletes an opportunity to serve at the run/walk.

16. What is the timeframe for completion of your project, program or event?

The Tenth Annual Camellia Festival and Run/Walk will be on Saturday April 7th , 2018.

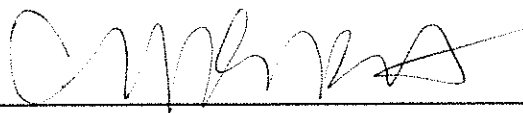
Signature and Certification Letter:

I hereby certify that all facts, figures and representations made in this application, including all attachments, are true and correct. This application is made with the written approval of my Board of Directors or Owners, which is attached to this application.

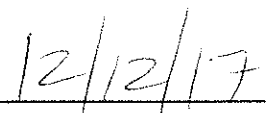
I agree that all publicity, press releases, publications, materials and or media advertising produced as part of this proposed project/program/event will acknowledge the grant program as follows:

"This project/program/event is made possible in part by a grant from Newberg transient lodging taxes and the City of Newberg."

A agree to carry out this project/program/event as outlined within the application. Further, I understand that failure to do so will invalidate this agreement and necessitate the immediate return of all Transient Lodging Tax grant monies to the City of Newberg.



Signature of Authorizing Official



Date

Print Name of Authorizing Official
Carissa Smith-Burkett

10/2/2017

To Whom it may Concern:

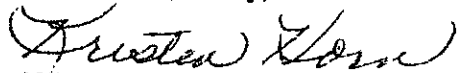
I am writing this letter in support of the Cultural Center's Grant request for funds to help with Camellia Festival.

I have been a long time business owner in Newberg. I was active in the Chamber of Commerce and in Downtown Revitalization always with an eye for bringing people into our local businesses and also attracting quality family, friendly festivals to our area. Camellia Festival is just such a festival. I have watch it grow from the rather quiet beginnings to the robust multicultural event that we are experiencing now. It just gets better every year, bringing more and more folks to our community. The quality of entertainment is top notch as are the other aspects of the festival

The last two years I have experienced the festival as a vender and the level of organization and the committee's obvious passion for this festival shines through. It is a pleasure participating in this event. The Cultural Center continues to provide an exceptional venue for exceptional events.

Thank you for considering this grant request. I believe that it will allow this wonderful, cultural event to grow and flourish in Newberg.

Yours Very Truly,



Kristen Horn
610 E. Sheridan Street
Newberg, OR 97132

503-537-7190



HOOVER-MINTHORN HOUSE

115 South River Street
Newberg, Oregon 97132
(503) 538-6629

October 2, 2017

Doug Rux, Community Development Director
City of Newberg
Newberg City Hall
414 East First Street
Newberg, OR 97132

Dear Mr. Rux,

The Hoover-Minthorn House Museum supports the Chehalem Cultural Center's application to the Transient Lodging Tax small grant program for expanding marketing of the Newberg Camellia Festival. The Camellia Festival is an outstanding event that features Newberg's horticultural heritage and celebrates ethnic diversity. Additionally, it draws many visitors to Newberg during the tourist off-season.

The Hoover-Minthorn House Museum has been a sponsor of the Camellia Festival for several years and is pleased to provide this letter of support for Chehalem Cultural Center's application for Transient Lodging Tax funds.

Very truly yours,

Sarah B. Munro
Director, Hoover-Minthorn House Museum

Boyhood Home of Herbert Hoover
Owned and Operated by The National Society of Colonial Dames Oregon



www.chehalemculturalcenter.org
415 E Sheridan St
Newberg, OR 97132
(503) 487-6883

October 3, 2017

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Mike Ragsdale
Deborah Stevenson

Transient Lodging Tax Board Members,

On behalf of the officers who represent the Board of Directors of the Chehalem Cultural Center, I approve this application. I certify that all facts, figures and representations made in this application, including all attachments, are true and correct.

Thank you,

	MARK TERRY	10/2/2017
_____ Signature	_____ Print	_____ Date

Mark Terry, Board President

CHEHALEM CULTURAL CENTER
Balance Sheet Prev Year Comparison
 As of December 31, 2016

	<u>Dec 31, 16</u>	<u>Dec 31, 15</u>	<u>\$ Change</u>
ASSETS			
Current Assets			
Checking/Savings			
1000 · Columbia Bank New Checking	53,128.62	0.00	53,128.62
1010 · Bank of America-Operations	51,339.57	257,976.23	-206,636.66
1015 · Bank of America-Building	310,326.26	219.26	310,107.00
1025 · Petty Cash	100.00	100.00	0.00
1050 · Edward Jones	28,708.70	14,742.57	13,966.13
Total Checking/Savings	<u>443,603.15</u>	<u>273,038.06</u>	<u>170,565.09</u>
Accounts Receivable			
1100 · Accounts Receivable	11,635.10	2,589.50	9,045.60
Total Accounts Receivable	<u>11,635.10</u>	<u>2,589.50</u>	<u>9,045.60</u>
Other Current Assets			
1499 · Undeposited Funds	0.00	80.00	-80.00
Total Other Current Assets	<u>0.00</u>	<u>80.00</u>	<u>-80.00</u>
Total Current Assets	<u>455,238.25</u>	<u>275,707.56</u>	<u>179,530.69</u>
Fixed Assets			
1601 · Building Improvements	4,115,863.36	4,115,863.36	0.00
1650 · Equipment	20,282.99	15,282.99	5,000.00
1655 · Furniture	33,293.62	33,293.62	0.00
1660 · Glass & Studio Equipment	45,519.35	45,519.35	0.00
1670 · Accumulated Depreciation	-541,737.47	-427,134.47	-114,603.00
Total Fixed Assets	<u>3,673,221.85</u>	<u>3,782,824.85</u>	<u>-109,603.00</u>
Other Assets			
1300 · Suspense Account	73.33	0.00	73.33
Total Other Assets	<u>73.33</u>	<u>0.00</u>	<u>73.33</u>
TOTAL ASSETS	<u><u>4,128,533.43</u></u>	<u><u>4,058,532.41</u></u>	<u><u>70,001.02</u></u>
LIABILITIES & EQUITY			
Liabilities			
Current Liabilities			
Accounts Payable			
2110 · Accounts Payable	7,111.35	862.22	6,249.13
Total Accounts Payable	<u>7,111.35</u>	<u>862.22</u>	<u>6,249.13</u>
Other Current Liabilities			
2200 · Deferred Income	35,000.00	2,750.00	32,250.00
2340 · Scholarship Fund Rivermark CCU	0.00	355.20	-355.20

CHEHALEM CULTURAL CENTER
Balance Sheet Prev Year Comparison
 As of December 31, 2016

	<u>Dec 31, 16</u>	<u>Dec 31, 15</u>	<u>\$ Change</u>
Total Other Current Liabilities	35,000.00	3,105.20	31,894.80
Total Current Liabilities	<u>42,111.35</u>	<u>3,967.42</u>	<u>38,143.93</u>
Total Liabilities	42,111.35	3,967.42	38,143.93
Equity			
3200 · Net Assets	3,817,953.87	0.00	3,817,953.87
3100 · Unrestricted Assets	146,611.12	3,627,865.70	-3,481,254.58
3140 · Temporarily Restricted Assets	90,000.00	0.00	90,000.00
Net Income	<u>31,857.09</u>	<u>426,699.29</u>	<u>-394,842.20</u>
Total Equity	<u>4,086,422.08</u>	<u>4,054,564.99</u>	<u>31,857.09</u>
TOTAL LIABILITIES & EQUITY	<u><u>4,128,533.43</u></u>	<u><u>4,058,532.41</u></u>	<u><u>70,001.02</u></u>

CHEHALEM CULTURAL CENTER
Balance Sheet Prev Year Comparison
As of December 31, 2016

	% Change
ASSETS	
Current Assets	
Checking/Savings	
1000 · Columbia Bank New Checking	100.0%
1010 · Bank of America-Operations	-80.1%
1015 · Bank of America-Building	141,433.46%
1025 · Petty Cash	0.0%
1050 · Edward Jones	94.73%
Total Checking/Savings	62.47%
Accounts Receivable	
1100 · Accounts Receivable	349.32%
Total Accounts Receivable	349.32%
Other Current Assets	
1499 · Undeposited Funds	-100.0%
Total Other Current Assets	-100.0%
Total Current Assets	65.12%
Fixed Assets	
1601 · Building Improvements	0.0%
1650 · Equipment	32.72%
1655 · Furniture	0.0%
1660 · Glass & Studio Equipment	0.0%
1670 · Accumulated Depreciation	-26.83%
Total Fixed Assets	-2.9%
Other Assets	
1300 · Suspense Account	100.0%
Total Other Assets	100.0%
TOTAL ASSETS	1.73%
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2110 · Accounts Payable	724.77%
Total Accounts Payable	724.77%
Other Current Liabilities	
2200 · Deferred Income	1,172.73%
2340 · Scholarship Fund Rivermark CCU	-100.0%

CHEHALEM CULTURAL CENTER
Balance Sheet Prev Year Comparison
As of December 31, 2016

	<u><u>% Change</u></u>
Total Other Current Liabilities	<u>1,027.14%</u>
Total Current Liabilities	<u>961.43%</u>
Total Liabilities	961.43%
Equity	
3200 · Net Assets	100.0%
3100 · Unrestricted Assets	-95.96%
3140 · Temporarily Restricted Assets	100.0%
Net Income	<u>-92.53%</u>
Total Equity	<u>0.79%</u>
TOTAL LIABILITIES & EQUITY	<u><u>1.73%</u></u>