



**TRANSIENT LODGING TAX AD HOC COMMITTEE AGENDA
FEBRUARY 7, 2018, 4:00 PM
WASTEWATER TREATMENT PLANT, 2301 WYNOOSKI ROAD**

- I. CALL MEETING TO ORDER**
- II. ROLL CALL**
- III. APPROVAL OF JANUARY 3, 2018 MINUTES**
- IV. MINUTES OF THE MARKETING SUBCOMMITTEE – DECEMBER 18, 2017**
- V. REVIEW OF SMALL GRANT PROPOSALS**
- VI. TLT MEMBER UPDATES**
- VII. NEXT MEETING MARCH 7, 2018**
- VIII. 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 MEETING MINUTES
JANUARY 3, 2018, 3:30 PM
Public Safety Building, 401 E Third Street**

Chair Lewis called the meeting to order at 3:52 p.m.

Chair Lewis introduced Robert Griffin, a new Committee member and he gave a brief summary on his background.

ROLL CALL

Members Present:	Dennis Lewis, Chair	Shelia Nicholas, Vice Chair
	Rob Felton	Stephen McKinney
	Megan Carda	Jessica Bagley
	Brian Love	Robert Griffin
	Loni Parrish	Kyle Lattimer
	Bob Andrews, Ex Officio	Joe Hannan, Ex Officio

Members Absent: Ashley Lippard, Lori Louis – both excused, Sheryl Kelsh

Staff Present: Doug Rux, Community Development Director

APPROVAL OF MINUTES

Approval of the December 6, 2017 Minutes

MOTION: Love/Parrish moved to approve the December 6, 2017 meeting minutes. The motion carried 7Yes/ 0 No/ 1 absent)

MARKETING SUBCOMMITTEE – MARKETING PROPOSAL

Chair Lewis noted that the Marketing Sub-committee proposal would be delayed and moved to February 7, 2018, and the Marketing Sub-committee would meet on January 29, 2018 at City Hall.

UPDATE ON SMALL GRANT SOLICITATION (FY 2016-2017)

CDD Rux provided an update on the 2016-2017 program noting that the Cultural Center Camellia Festival would occur in April 2018.

PRESENTATIONS BY APPLICANTS FOR THE TLT SMALL GRANT PROGRAM

Truffle Festival – Leslie Scott

Ms. Scott provided an overview of her proposal and a Power Point presentation which included: Oregon one of the top five truffle locations in the world, people travel the world to Oregon, truffles sell for \$600 lb, abundance in N. Willamette Valley in Jory soil, expanded the festival in 2015 to Newberg, Travel Oregon is one of their partners, there is also event in Eugene Oregon, she reviewed the 2016 recap noted the two events,



the Chehalem Cultural Center is key partner for the Newberg event, in Eugene they have a hotel partner, the Truffle Festival encourages lodging in Newberg for the event, millennials are attracted to the event, sponsor page recap.

2017 Truffle Festival recap: explored science of truffles, truffles deconstructed, 100 overnight guests to the Chehalem Valley, 3-4 international media, writers/panelists from around country, two star chefs participation, people spend multiple nights and travel to Oregon, Media coverage, advertising, 1889 has been a media magazine sponsor, reviewed sponsor/partner participation.

Media Kit 2018: Feb. 16-18 event, changed date to have enough truffles and for people to travel from east coast, trained truffle dogs, truffles grow in Douglas Fir tree stands.

James Beard – Producer of show will present film on James Beard (Americas First Foodie Film)

Noted that Truffle beer – Wolves & People, Truffle Market- Honest Chocolates, Willamette Valley Wineries Association Wine Enthusiasts, Black Tie Tours, and Friday night dinner at Ruddick-Wood would be part of the program. Relationship with Painted Lady & Recipe as partners and lodging is coordinated with Lifestyle Properties as a partner.

Member Parrish asked what specifically the grant is for.

Ms. Scott noted that destination marketing is focus of grant funds. People were used to Eugene and the grant funds were a match for dollars already spent for marketing. Filming market place events and photography would be part of the grant expenditures.

Member Griffin inquired on how you distribute information on local businesses.

Ms. Scott indicated through the Chamber locally, promote area, social links, e-blasts. Focus is Newberg as gateway to wine country.

Member Griffin asked how you promote local restaurants.

Ms. Scott indicated almost all information is electronic, links to restaurants and businesses.

Member Felton asked who they use for public relations.

Ms. Scott noted it was Play Nice in Portland.

Hoover-Minthorn – Sarah Munro

Ms. Munro shared a Power Point on her proposal. In summary it included: The focus is Hoover's boyhood and Quaker history, Jesse Edwards came to Newberg in 1881, The Hoover House is the first house Edwards built, Minthorn started Friends Pacific Academy. Quaker's came for cheap land, fruit industry, farms, Hobson was the first Quaker in Newberg, in 1885 Hoover arrived by train, in Salem the Oregon Land Company operated by the Minthorn's, Hoover one of Americas greatest engineers.

Marketing Plan - Dan Prow a local person to work on marketing, create branding (words & pictures), Chase Estep will work on social media marketing, promotions for Chehalem Cultural Center Exhibit, yearly calendar.



Ms. Munro showed a slide on Newberg's Tourism plan goals highlighting five goals and how her proposal meets the goals. She reviewed the proposed budget.

Chair Lewis asked if this was a one-time shot on the exhibit.

Ms. Munro noted the exhibit could be used again at other locations.

Chair Lewis inquired if there is any other outside marketing to bring people to Newberg and how many new heads/beds.

Ms. Munro responded none yet, but through the marketing plan the intent is to get people to stay.

Member Felton asked if the budget include dollars for marketing.

Ms. Munro noted a small amount.

Member Griffin asked about the 10 hours of in kind contribution at \$23 hour.

Ms. Munro noted the number came from someone else.

Member Griffin inquired on how you promote other businesses; is there a list?

Ms. Munro indicated there could be a list at Chehalem Cultural Center and Hoover-Minthorn.

Member Parrish asked if there could be a traveling exhibit to raise awareness of Hoover.

Vice Chair Nicholas inquired if the grant funds are to create a marketing plan.

Ms. Munro responded that funds are to help develop the exhibit and for Dan Prow to put together a marketing plan and for Facebook ads.

Member Griffin asked how many visitors there are to the Hoover House.

Ms. Munro noted 1,100 – 1,200 annually.

Member McKinney noted he would hope for partnerships, Hoover feed Europe after 1st World War, and that coordination with George Fox University are important.

Cultural Center –Carissa Smith-Burkett/Brian Stewart

Ms. Smith-Burkett and Mr. Stewart shared a PowerPoint on the Camellia Festival Run/Walk. Information included: Run/walk last year had 600-700 people participants, performers celebrate cultures, annual Bloom Show, free event, local business's passport program with local businesses, the grant request is for dollars for marketing the 2017-2018 events, use Facebook, postcards, 10th Annual Festival – new promotional program with 10,000 being printed, promotion through Oregonian, Asian Reporter, Willamette Weekly. They want to grow the festival in the future to a multiday festival.

Mr. Stewart noted the Oregon Senate by a Concurrent Resolution recognized Newberg as the official Camellia City in Oregon, National Camellia Convention held in 2017 in Newberg with people from all over the United



States attending, the America Camellia Journal recapped the convention in Newberg, the Newberg Camellia has been registered and 600 plants are being propagated by a grower in California and another 400 are being propagated with a different grower in California.

Chair Lewis inquired if there was going to be a national convention in Newberg in 2018.

Mr. Stewart noted the national convention would like to come back maybe in 3 years.

Chair Lewis asked how many people come from out of the Newberg area.

Mr. Stewart indicated 70% for walk/run come from Portland, Seattle and Oregon. He also shared that tea is a plant of the Camellia family.

Member Love noted that he just got mail to sign up for the walk/run.

Member McKinney noted that Mr. Stewart has grown the festival and the Committee should support it. He also inquired if one of our Sister Cities have a Newberg Camellia.

Member Carda inquired about the \$3000 from last year.

Ms. Smith-Burkett indicated yes and it's been spent for 2018.

Member Griffin asked how you get on passport.

Mr. Stewart noted that 60 people turned in a passport in 2017. All you have to do is approach businesses to be part of passport program.

Member Carda inquired if there is a 1st Friday for event coordinated with the festival?

Mr. Stewart noted that the event is on a Saturday.

Member Carda asked if they could you do something on Friday evening?

Mr. Stewart indicated that the Hello Kitty costume is part of the event.

Member McKinney asked if the event did you do banners last year?

Mr. Stewart indicated yes and this year there will also be banners in Dundee and the billboard across from Dairy Queen will be used.

Ex Officio Andrews asked if they have reached out to St. Cousair.

Mr. Stewart noted that they have reached out to them.

Kart Rally - Rob Lewis / Nancy Lewis

Mr. Lewis noted that they are not grant writers. He went on to share through photographs and narrative the following: the business was founded in Multnomah Village, Anvil Academy teaches kids, link to order



technology, committed to community, referenced a project at Champoeg Park, aligned with Woodwork Career Alliance Program, carriage auction people come from out of State. Columbia Gorge Hwy Bike trail, ODOT behind schedule but they are working with ODOT on a Kart Rally. Dennis Thomas – cycle/karts out of Arizona, Two groups in Arizona, Scottsdale Arizona is focused on racing cars, Seattle has handmade cars and not production cars in Arizona. ODOT in 2019 will open the next section, in 2022 ODOT opens the bike route from The Dalles to Troutdale where they want to have a Cycle Kart rally over two days.

Newberg Grand Prix a precursor to the Columbia Gorge events, want to make Newberg epicenter for Oregon on Cycle Karting, sanctioning body for high schools in cycle kart, at Newberg Old Fashioned Festival want to do a hot lap at end of the parade, working on a Kart in the Rose Festival parade to promote Newberg, people came in on Friday, Saturday have display of Karts, Rally at a TBD location at a winery, Saturday evening event.

Portland Market for Makers, need marketing, working with George Fox University and World of Speed.

Chair Lewis noted TLT is really focusing on Shoulder Season events, could that be done?

Mr. Lewis noted that a swap meet could be in Shoulder Season but not the rally.

Member Card commented that if looking at Newberg Old Fashioned Festival weekend there is already a lot of community impact and there is also a wine event that same weekend. She encouraged looking at another weekend.

Member Griffin asked if selling poster for \$50 is realistic.

Mr. Lewis indicated that yes it is doable.

Member Griffin inquired about the profit & loss of the business.

Mrs. Lewis indicated they were a startup business and the information reflects their first year.

Member Griffin noted the Scottsdale Arizona event is downtown and asked if they were proposing that in Newberg?

Mr. Lewis responded that they are trying the Old Fashioned Festival parade route.

Member Griffin noted that Scottsdale and Newberg are demographically very different.

Vice Chair Nicholas indicated it would be great to be in the Rose Festival Parade.

Mr. Lewis restated that the Newberg rally would be an annual event and people would come from out of State to participate.

Vice Chair Nicholas inquired if the rally could go out to St Paul and Champoeg.

Mrs. Lewis indicated they want to start small and grow.

Mr. Lewis stated he hoped to tie the Newberg rally to the Indy car event for promotion. He shared the top speed of the Karts would be 35 mph.



Member Felton asked if our local classic car dealer has a show.

Member Parrish inquired if they could do a wine country rally?

Member Love noted that the cars are like the cars from Little Rascals.

Nancy – Indy Car Promotion – Nancy Lewis

Mrs. Lewis stated the intent of the grant request is to support booth Space to promote Newberg & Kart Rally. The funds would be used to build a booth to promote Karts.

NEXT MEETING FEBRUARY 7, 2018

ADJOURNMENT

Meeting adjourned at 6:00 p.m.

Approved by the Transient Lodging Tax Ad Hoc Committee this 7th day of February, 2018.

Dennis Lewis,
TLT Ad Hoc Committee Chair

Doug Rux,
Community Development Director

**TRANSIENT LODGING TAX AD HOC COMMITTEE
MARKETING SUBCOMMITTEE
December 18, 2017 8:30 am
Chehalem Valley Chamber of Commerce
2119 Portland Road**

The meeting was called to order by Vice Chair Rob Felton at 8:34 a.m.

ROLL CALL:

Members Present:	Rob Felton, Vice Chair	Sheila Nicholas
	Sheryl Kelsh	Dennis Lewis
	Stephen McKinney	

Members Absent: Ashely Lippard (excused), Jessica Bagley, Kyle Lattimer

Staff Present: Doug Rux, Community Development Director

Guests: None

APPROVAL OF MINUTES

<p>MOTION: McKinney/Lewis moved to approve the October 16 and November 20, 2017 meeting minutes. The motion carried 4 Yes/ 0 No).</p>
--

TOURISM MARKETING ACTIVITIES – SUBCOMMITTEE PROPOSAL

Member Lewis noted that there has been a change in the Chair position of the subcommittee and Member Felton will be Chairing the Subcommittee.

Member McKinney asked for a recap and background on the marketing proposal.

Chair Felton recapped that after one-year of discussion that it would be effective to have a person to implement marketing activities. The concept is \$35,000 from Chamber contract and balance from the Transient Lodging Tax fund.

CDD Rux referred members to the proposed budget in the packet where \$37,000 of the Chamber budget and the balance from the TLT fund would fund the position. This means reallocating funds from the Destination Development – Marketing Grant to fund a position. In the fiscal year 2019/2020 and beyond it would leave slightly over \$130,000 for the Destination Development – Marketing Grant program.

Member Lewis asked if Member Kelsh had talked to anyone about the possibility of a position.

Member Kelsh explained that she was at a conference recently and had discussed the possibility with people and there is interest.

Chair Felton noted that he would like to have someone with marketing online experience and believes that will reach more online rather than face to face.

Member Kelsh indicated she was ok with that approach.

Member Lewis indicated some online marketing coordination is necessary and would need to be coordinated with George Fox University and have a strong social media presence.

Member Kesh shared that the Chamber survey work shows training on social media is a priority of members but people do not attend training sessions. She has brought in PCC Climb in the past for training.

Chair Felton inquired what is the Naked Map.

Member Kelsh shared that it is a generalized map that that local businesses can use to draw directions to a location a visitor is recommended to visit.

Member Nicholas inquired if there are any restrictions like zip code in the job description to focus on the City of Newberg.

Member Kelsh noted she needs to work with partners and go beyond the city limits of Newberg.

Member Nicholas asked if the charge of the Committee was to focus on Newberg.

Member Lewis noted the approach is Newberg as the hub for hotels, restaurants and places to stay

CDD clarified that in the grant program it refers to the Newberg zip code and the Strategic Plan even reference Champeog State Park.

Member McKinney shared that the City Council may ask that same question so the Subcommittee needs to be clear on the focus area. The Committee also needs to assist City Manager Hannan and CDD Rux in attracting hotels.

Member Kelsh shared that there is a priority on FAM tours that are outside the City of Newberg but they directly impact Newberg.

CDD Rux reminded the Subcommittee that we only have two vineyards within the city limits, the Allison Inn and Anam Cara.

Member Kelsh shared that McMinnville looks at a 20 mile radius around their community for marketing.

Member Lewis inquired if apportioning funds could be restricted to have more dollars to the Transient Lodging Tax fund rather than going to the general fund.

Member Kelsh reminded the Subcommittee that State law establishes the apportionment of funding.

Member McKinney noted that the City can now annex land unlike past State and local law limitations on annexation.

CDD Rux shared that he hoped from this meeting that the Subcommittee formulates a recommendation to the full Transient Lodging Tax Committee on an approach for marketing.

Chair Felton shared that he wants the job description reworked for more online marketing experience and not all focused on tourism. He also reviewed the material in the packet on the proposed marketing strategy. He also shared that Newberg is the first destination in to wine country and recapped the various sections of the marketing strategy.

Member Kelsh stepped out of the meeting at 9 am and returned at 9:11 am.

Member McKinney noted that Freindsview is an audience and they bring people into the community. He also inquired about other agricultural activities and agri-tourism opportunities like hazelnuts.

Chair Felton noted it is ok to have a focus on agri-tourism program if necessary though it is a small market niche on hazelnuts.

Member Kelsh shared that from her perspective the number one focus is wineries and number two is restaurants. At the Visitor Center people inquire on their way to the coast on restaurants and then visit two or three wineries on their trip. At the Visitor Center they influence behavior to stay in Newberg.

Member McKinney noted he likes the information shown and the concept of influencing behavior as an interim approach.

Member Kelsh noted there needs to be a discussion about urls at some point in the marketing discussion.

Member McKinney asked about the Sunset Magazine article on Wolves & People and if we could get the rights to the article.

Member Nicholas shared that Sunset wrote an article several years ago on Newberg as a vacation location.

CDD Rux shared that the Subcommittee proposal will go to the full Transient Lodging Ad Hoc Committee on January 3. An alternative if the Subcommittee does not develop a recommendation today is that it would go to the full Committee in February. A proposal will go to the City Council in either February or March depending on when the full Transient Lodging Tax Committee reviews the proposal. He also noted that there would need to be either a modification to the contract with the Chamber or a separate contact for additional marketing activities.

Member McKinney inquired who the contributor of funds for marketing activities is. The Chamber and City, any others?

CDD Rux shared that the goal is to have approximately \$60,000 to hire a person based on the Subcommittee discussions.

Chair Felton posed to the Subcommittee the question if there will be time on the January 3 agenda given the Small Grant presentations.

Member Lewis noted that if people review the material beforehand there should be enough time.

Chair Felton inquired if the Transient Lodging Tax Ad Hoc Committee could meet at 3 pm on January 3. CDD Rux noted he will check on space and availability. There was a general discussion about starting at 3:30 pm on January 3.

Member Nicholas asked if the position title could be changed to “Newberg Tourism Coordinator”.

CDD Rux asked if Member Kelsh could forward a Word version of the position description for distribution to Subcommittee members.

MOTION: McKinney/Lewis to forward a recommendation to the Transient Lodging Tax Ad Hoc Committee for the proposed Marketing Strategy and Position description in the packet. The motion carried 5 Yes/ 0 No).

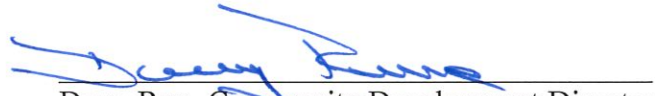
CDD Rux asked that if there are any suggested modifications of the documents that they are sent to him by the end of the day on December 22 for inclusion in the Transient Lodging Tax Ad Hoc Committee packet.

ADJOURNMENT: Chair Felton adjourned the meeting at 9:35 a.m.

Approved by the Transient Lodging Tax Ad Hoc Committee Marketing Subcommittee this 29th day of January, 2018.



Rob Felton
TLT Ad Hoc Committee
Marketing Subcommittee Chair



Doug Rux, Community Development Director

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**

Funding Request \$ 7,500.00

Criteria	Score Range	Lewis	Nicholas	Bagley	Carda	Felton	Griffin	Lattimer	Lippard	Louis	Love	Parrish
1. What is the projected return on investment												
a. Predicted number of tourists attracted/overnight guests	0 - 5	0	2	3	2	2	2	2	2	2	1	2
b. Will it have lasting impact and utility	0 - 5	0	5	4	0	2	3	2	3	1	3	4
2. Demonstrated history of attracting tourists/overnight guests	0 - 3	3	2	3	1	2	2	2	2	1	3	2
3. Does it engage and energize local tourism partner(s)	0 - 3	3	3	2	2	1	3	2	3	3	1	2
4. Does it enhance Newberg as a destination	0 - 5	0	5	5	2	4	4	1	4	3	3	4
5. Does it enhance Newberg as a location for Makers and Doers	0 - 3	0	3	2	1	1	3	1	2	1	2	2
6. Does it catalyze downtown development	0 - 3	0	1	2	1	3	2	2	2	2	0	3
7. Is it likely to increase visitor spending	0 - 5	0	1	3	1	2	3	2	3	1	1	2
8. Does it enhance tourism from October – May or any Sunday – Thursday Visitation	0 - 5	0	1	3	0	3	4	2	4	2	3	3
9. Does this project align with at least one of the four target audiences (Wine Country Adventurers, Millennial Explorers, George Fox Network, Luxury Wine Travelers)	0 - 5	5	3	5	2	2		2	3	3	1	3
	42											
Total		11	26	32	12	22	30	18	28	19	18	27

Total Points Possible 462
Total Points 243
Average 22.09

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

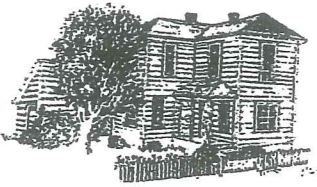
Request amount: \$7,500

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)

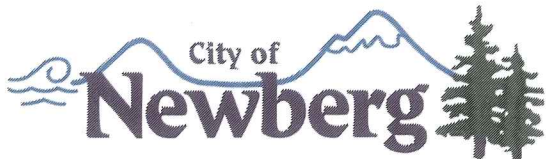
Please let me know if I can provide any additional information. Thank you so much for your consideration.

Very truly yours,

Sarah B. Munro
Director, Hoover-Minthorn House Museum

RECEIVED

DEC 15 2017



RECEIVED

DEC 15 2017

Initial: DRR

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

	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					
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					
Actual expenses 12-17					
Amount over budget 12-17					
Pacific Crest painting porch in spring 2018					
Actual expenses spring 2018					



December 12, 2017

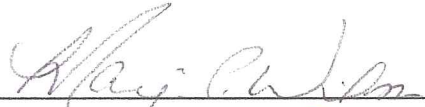
Doug Rux, Community Development Director
City of Newberg
Newberg City Hall
414 East First Street
Newberg, OR 97132

Dear Mr. Rux:

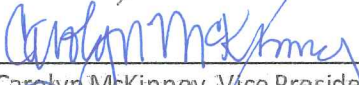
On behalf of The National Society of The Colonial Dames of America in the State of Oregon (NSCDA-OR), the below listed officers of the NSCDA-OR authorize an application to the City of Newberg Transient Lodging Tax Small Grant Program for funding support of an exhibit at the Chehalem Cultural Center in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



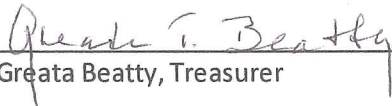
Carolyn McKinney, Vice President



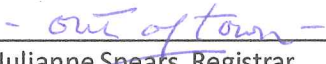
Patty Thompson, Second Vice President and
Corresponding Secretary



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	

© 2017 Oregon Secretary of State. All Rights Reserved.



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". The signature is written in a cursive style.

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".

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.

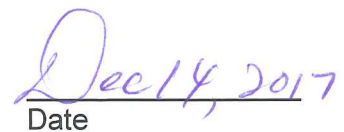
I agree that all publicity, press releases, publications, materials and or media advertising produced as part of this proposed project/program/event will acknowledge the grant program as follows:

"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

EXHIBIT AT CCC AND MARKETING PLAN



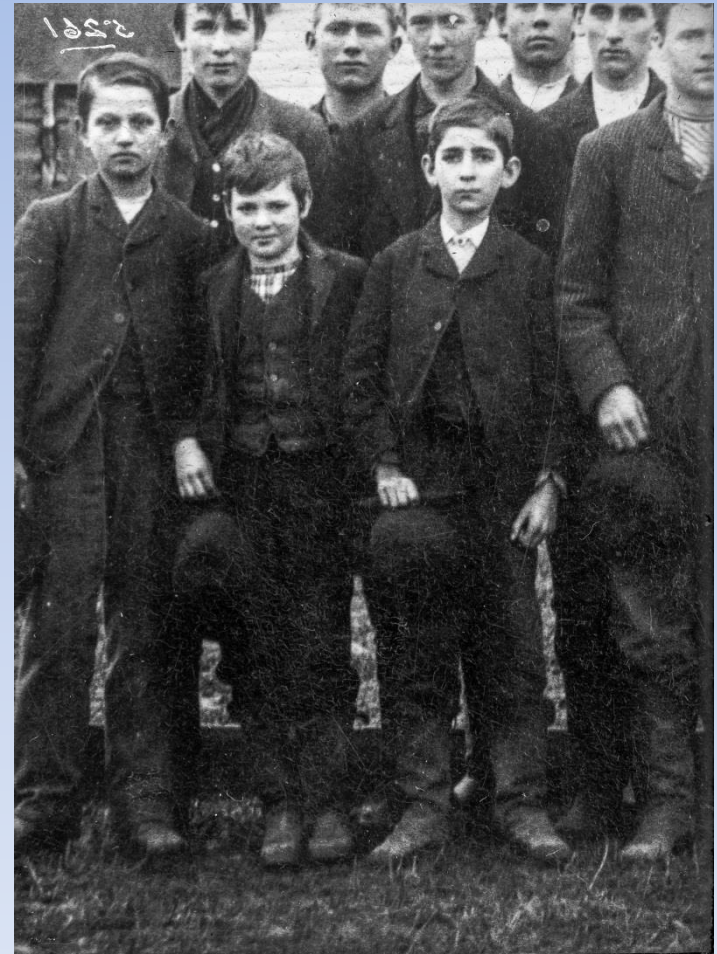
FOUNDATIONS OF A QUAKER COMMUNITY IN NEWBERG



ARRIVAL



FRIENDS PACIFIC ACADEMY



HOOVER & MINTHORNS IN SALEM



ROAD FROM PROSPERITY TO PUBLIC SERVICE



OVERVIEW OF MARKETING PLAN

- CONDUCT AUDIT – WHAT HMHM IS DOING NOW
- SURVEY STAKEHOLDERS – INCLUDES COMMUNITY
- CREATE BRANDING IN WORDS AND PICTURES – EVALUATE LOGO AND TAGLINE
- DEVELOP FOCUSED PROMOTIONS FOR CCC EXHIBIT - INCLUDES FACEBOOK ADS & FLIERS, ETC.
- CREATE YEARLY MARKETING CALENDAR FOR HMHM – LASTING IMPACT OF PROJECT

HOW PROJECT ALIGNS WITH NEWBERG'S TOURISM STRATEGIC PLAN GOALS

GOAL	PROJECT
Newberg as a destination of artisan makers & doers, attracts target audiences, engages community partners	Creates opportunity for a new experience for makers & doers, targets audiences of GFU network, CCC, NHS, & community
History of attracting tourists	Expands opportunities for tourists, historically 1/3 rd of HMHM visitors
Enhances Newberg as a destination & catalyzes downtown development	Encourages visitors to travel between CCC & HMHM, providing opportunity to stop at restaurants, coffee shops, tasting rooms, bakeries, food carts & galleries
Timeframe	Exhibit dates May 29 – July 28, Opening on June 1 with reception & speaker, Marketing targeted to begin April 1
Lasting Impact	Marketing plan of yearly calendar of HMHM events & promotional activities

BUDGET

INCOME	Amount	Source	Use
Committed	\$5,000	YCCC & NSCDA-OR	Exhibit , Marketing Plan, Reception & Speaker
In kind	\$2,300	NSCDA-OR, NHS, CCC, Other	Reception & Speaker
TLT Small Grant	\$7,500	City of Newberg	Exhibit , Marketing Plan, Reception & Speaker
TOTAL	\$14,800		
COSTS			
Exhibit	\$6,039		
Marketing Plan	\$5,776		
Reception & Speaker	\$2,950		
TOTAL	\$14,765		

HOOVER-MINTHORN HOUSE MUSEUM

Turn this



Into this



Anvil Academy - Newberg Grand Prix Cycle Kart Rally

Funding Request \$ 10,000.00

Criteria	Score Range	Lewis	Nicholas	Bagley	Carda	Felton	Griffin	Lattimer	Lippard	Louis	Love	Parrish
1. What is the projected return on investment												
a. Predicted number of tourists attracted/overnight guests	0 - 5	3	2	2	4	1	1	2	3	3	2	4
b. Will it have lasting impact and utility	0 - 5	4	2	2	4	2	2	2	3	3	2	3
2. Demonstrated history of attracting tourists/overnight guests	0 - 3	0	0	0	1	0	0	0	2	2	1	3
3. Does it engage and energize local tourism partner(s)	0 - 3	2	2	2	2	1	1	1	2	3	1	2
4. Does it enhance Newberg as a destination	0 - 5	4	2	2	4	1	1	2	3	3	1	3
5. Does it enhance Newberg as a location for Makers and Doers	0 - 3	3	3	2	3	3	1	3	3	2	2	2
6. Does it catalyze downtown development	0 - 3	1	0	1	0	1	1	1	2	2	0	2
7. Is it likely to increase visitor spending	0 - 5	4	2	3	1	1	1	1	3	3	1	2
8. Does it enhance tourism from October – May or any Sunday – Thursday Visitation	0 - 5	0	0	0	0	0	3	1	3	1	0	0
9. Does this project align with at least one of the four target audiences (Wine Country Adventurers, Millennial Explorers, George Fox Network, Luxury Wine Travelers)	0 - 5	4	5	4	1	1	1	2	2	3	1	2
	42											
Total		25	18	18	20	11	12	15	26	25	11	23

Total Points Possible 462
Total Points 186
Average 16.91

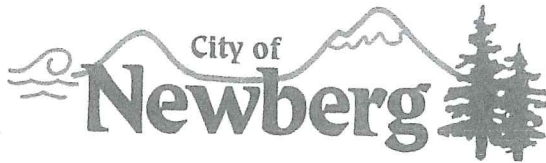
Anvil Academy - Newberg Grand Prix Cycle Kart Rally

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

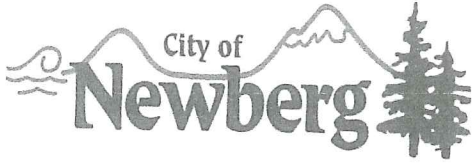
Date: 12-15-17

*****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	Amount
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.

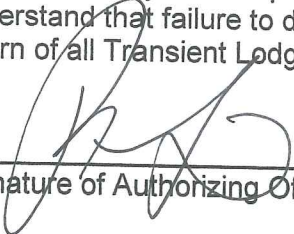
Signature and Certification Letter:

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."

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
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

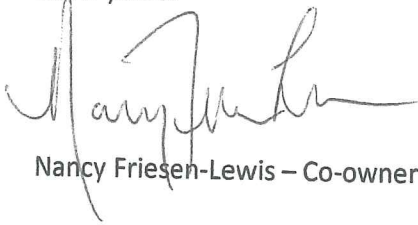
NANCY FRIESEN-LEWIS

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 cursive script, appearing to read "Nancy Friesen-Lewis".

Nancy Friesen-Lewis – Co-owner Anvil Academy

Newberg Grand Prix Cycle Kart Rally

January 3, 2018





























www.shutterstock.com · 121161031































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

Funding Request \$ 10,000.00

Criteria	Score Range	Lewis	Nicholas	Bagley	Carda	Felton	Griffin	Lattimer	Lippard	Louis	Love	Parrish
1. What is the projected return on investment												
a. Predicted number of tourists attracted/overnight guests	0 - 5	0	0	2	1	1	1	1	2	3	2	1
b. Will it have lasting impact and utility	0 - 5	3	0	5	3	1	2	1	3	2	2	1
2. Demonstrated history of attracting tourists/overnight guests	0 - 3	0	0	0	1	0	0	0	2	2	1	1
3. Does it engage and energize local tourism partner(s)	0 - 3	3	1	2	0	1	1	1	2	1	1	0
4. Does it enhance Newberg as a destination	0 - 5	4	5	1	3	2	1	2	4	3	1	2
5. Does it enhance Newberg as a location for Makers and Doers	0 - 3	3	3	3	2	2	1	3	3	2	2	2
6. Does it catalyze downtown development	0 - 3	0	0	2	0	1	1	0	2	1	0	0
7. Is it likely to increase visitor spending	0 - 5	0	0	2	1	1	2	1	4	2	1	0
8. Does it enhance tourism from October – May or any Sunday – Thursday Visitation	0 - 5	4	1	3	0	0	3	1	2	1	0	0
9. Does this project align with at least one of the four target audiences (Wine Country Adventurers, Millennial Explorers, George Fox Network, Luxury Wine Travelers)	0 - 5	5	3	5	1	1	3	1	3	2	1	2
	42											
Total		22	13	25	12	10	15	11	27	19	11	9

Total Points Possible 462
Total Points 174
Average 15.82

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

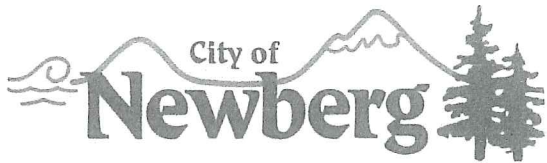
Request amount: \$10,000

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: 

Title: OWNER

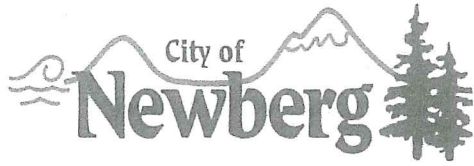
Date: 12-15-17

*****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.

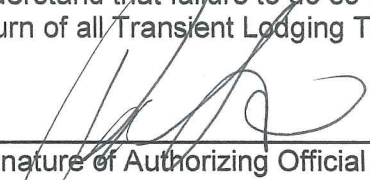
Signature and Certification Letter:

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
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

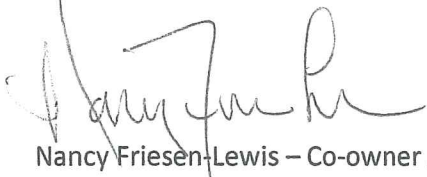
NANCY FRIESEN-LEWIS

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". 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

Funding Request \$ 9,250.00

Criteria	Score Range	Lewis	Nicholas	Bagley	Carda	Felton	Griffin	Lattimer	Lippard	Louis	Love	Parrish
1. What is the projected return on investment												
a. Predicted number of tourists attracted/overnight guests	0 - 5	5	5	4	5	3	4	3	4	1	3	3
b. Will it have lasting impact and utility	0 - 5	5	4	0	4	3	4	2	4	2	2	2
2. Demonstrated history of attracting tourists/overnight guests	0 - 3	3	2	3	3	3	3	2	3	2	1	3
3. Does it engage and energize local tourism partner(s)	0 - 3	3	2	2	3	3	2	3	3	2	2	2
4. Does it enhance Newberg as a destination	0 - 5	5	5	1	5	3	4	4	3	3	1	3
5. Does it enhance Newberg as a location for Makers and Doers	0 - 3	3	3	2	3	2	3	2	3	3	2	1
6. Does it catalyze downtown development	0 - 3	0	1	1	2	3	2	2	1	3	1	1
7. Is it likely to increase visitor spending	0 - 5	5	1	2	4	4	4	2	2	4	2	2
8. Does it enhance tourism from October – May or any Sunday – Thursday Visitation	0 - 5	5	5	3	5	5	4	4	4	3	2	4
9. Does this project align with at least one of the four target audiences (Wine Country Adventurers, Millennial Explorers, George Fox Network, Luxury Wine Travelers)	0 - 5	5	5	5	5	5	4	4	5	5	2	3
	42											
Total		39	33	23	39	34	34	28	32	28	18	24

Total Points Possible 462
Total Points 332
Average 30.18

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: [Handwritten Signature]

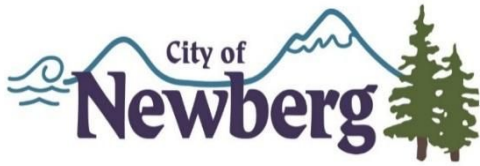
Title: General Manager

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	\$6,100.00*
Newberg Fresh Truffle Marketplace	\$5,600.00-includes Venue*
Newberg Transportation	\$3,500.00*
Newberg Lodging	\$1,000.00*
Newberg Travel	\$1,000.00
Newberg Contract Labor	\$1,500.00
Newberg Equipment	\$1,000.00
Photography	\$1,500.00
Admin Assistant	\$1,000.00
Website	\$2,500.00
Design Services	\$5,000.00
PR/Marketing-Play Nice	\$11,000.00
Insurance	\$1,582.00
Newberg Event Print Ads	\$5,500.00
Truffles	\$5,000.00
Additional Admin Budget	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

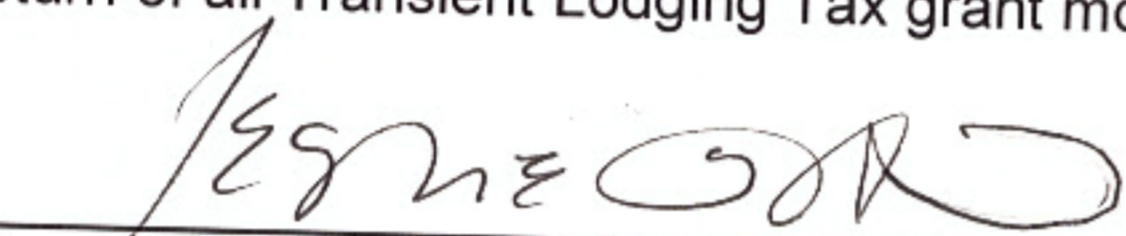
Signature and Certification Letter:

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.

 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	253,675.62
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



TABLE OF CONTENTS

FESTIVAL STATISTICS.....3

DEMOGRAPHICS*

 NEWBERG TO McMINNVILLE4

 EUGENE AREA.....6

MEDIA COVERAGE.....8

ADVERTISING & SOCIAL MEDIA.....9

MARQUEE EVENTS

 NEWBERG TO McMINNVILLE 10

 EUGENE AREA 12

THE JORIAD™ 11

EDUCATIONAL EVENTS..... 13

SPONSORS & PARTNERS..... 14

2018 FESTIVAL DATES..... 15

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



Katherine Elseser

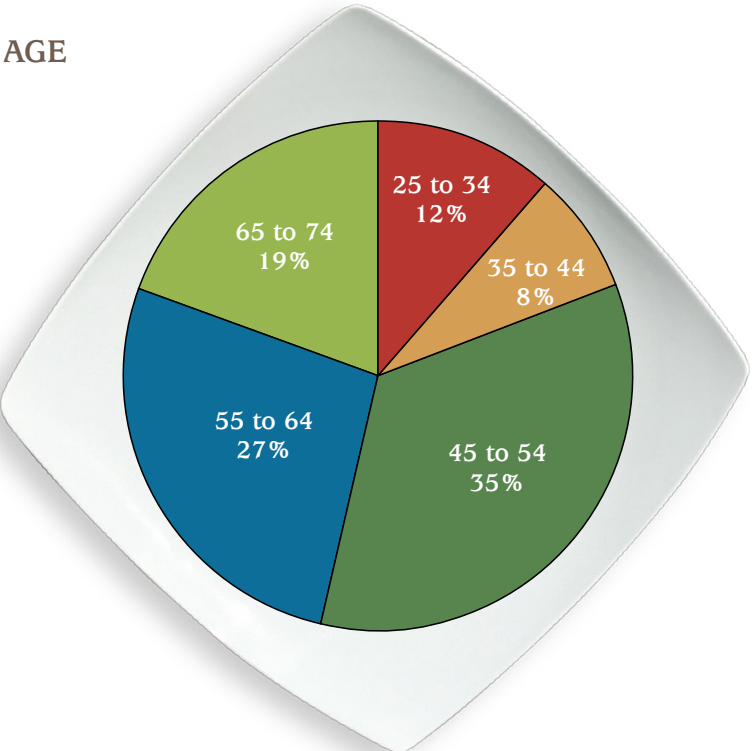
OTF attendees seek out adventuresome travel and elegant food and drink experiences that feed body, mind and spirit.

"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!"

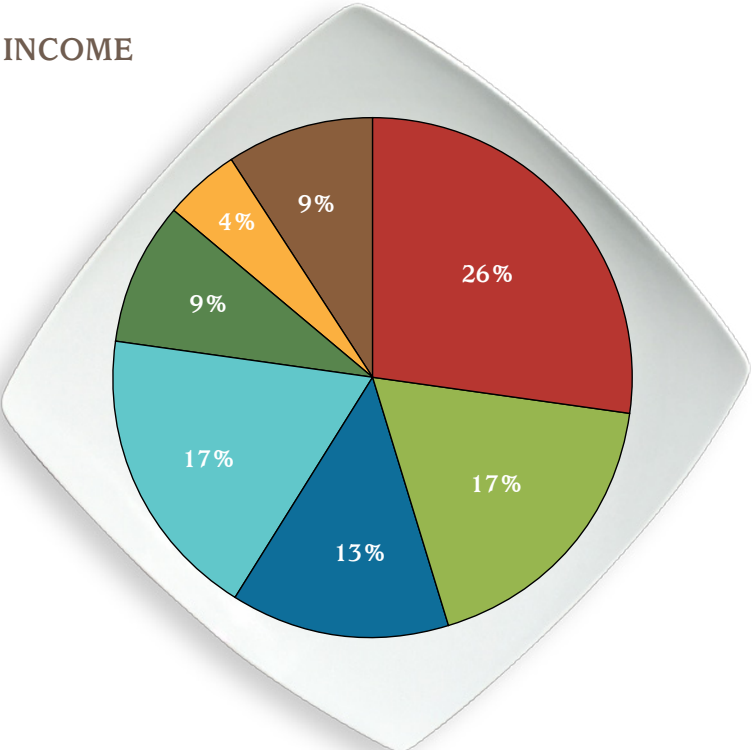
Sunny D., WA

DEMOGRAPHICS – NEWBERG TO McMINNVILLE

AGE



INCOME



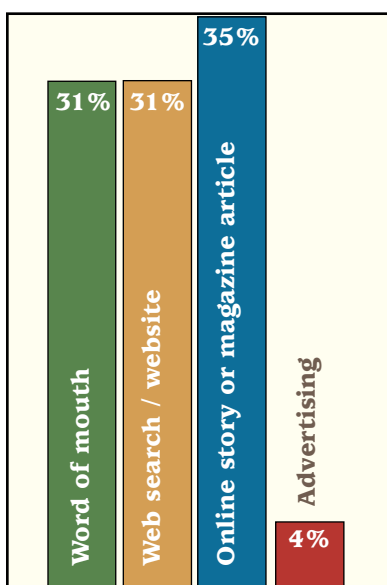
- \$500,000 or more
- \$400,000 to \$449,999
- \$300,000 to \$399,999
- \$250,000 to \$299,999
- \$150,000 to \$199,999
- \$100,000 to \$149,999
- \$50,000 to \$99,999



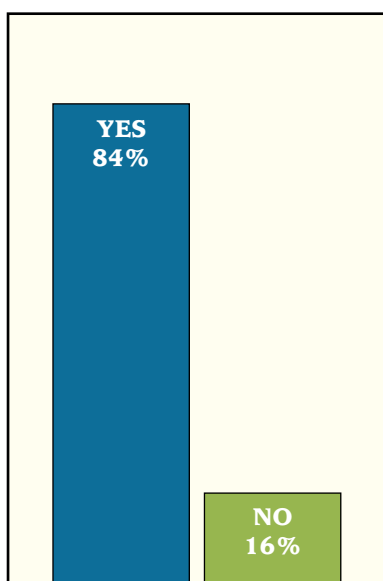
DEMOGRAPHICS – NEWBERG TO McMINNVILLE

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.

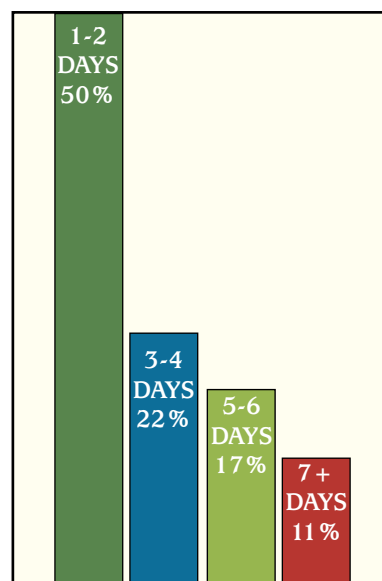
HOW DID YOU HEAR ABOUT THE OTF?



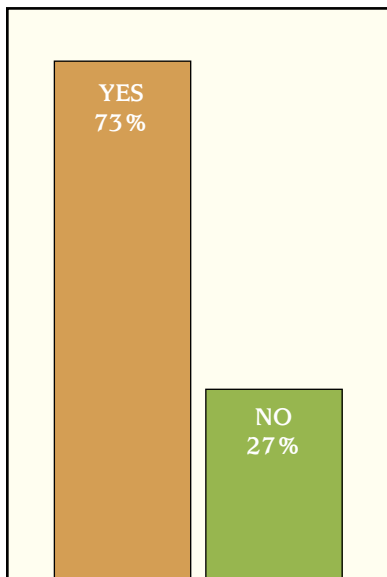
CULINARY TRAVELER



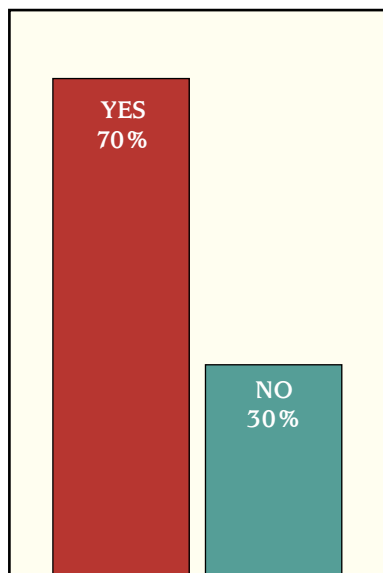
DAYS IN OREGON



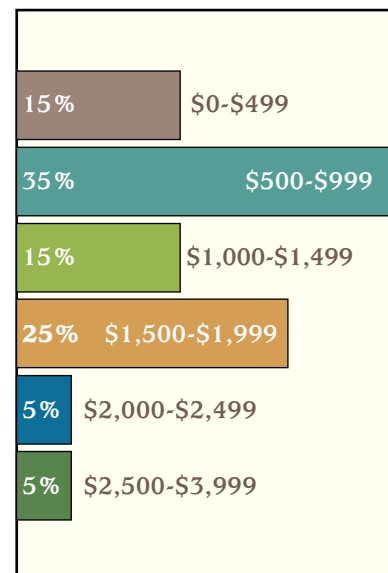
FESTIVAL INSPIRED TRIP



EXPERIENCED OREGON BEYOND FESTIVAL



\$ SPENT BESIDES FESTIVAL TICKETS

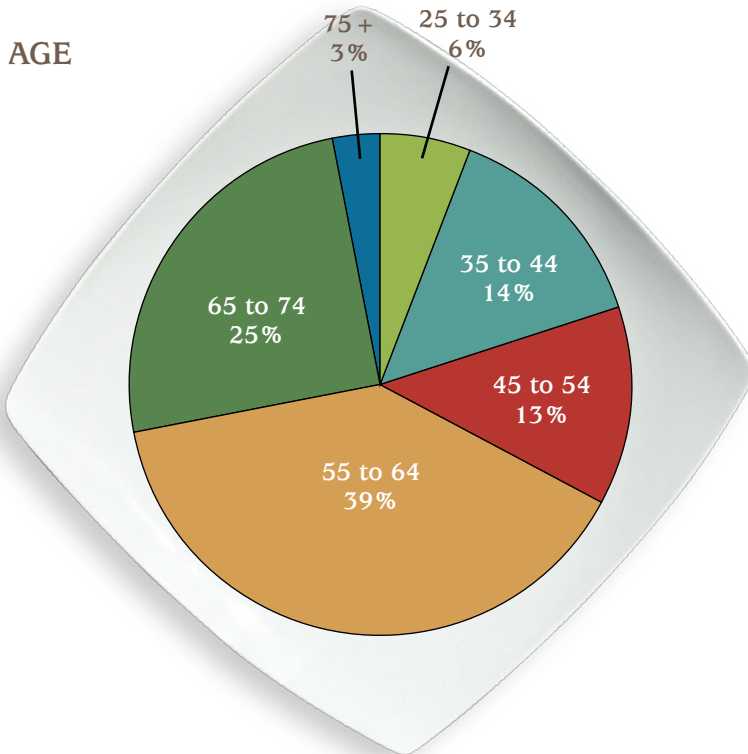


DEMOGRAPHICS – EUGENE & SURROUNDS



David Barajas

AGE

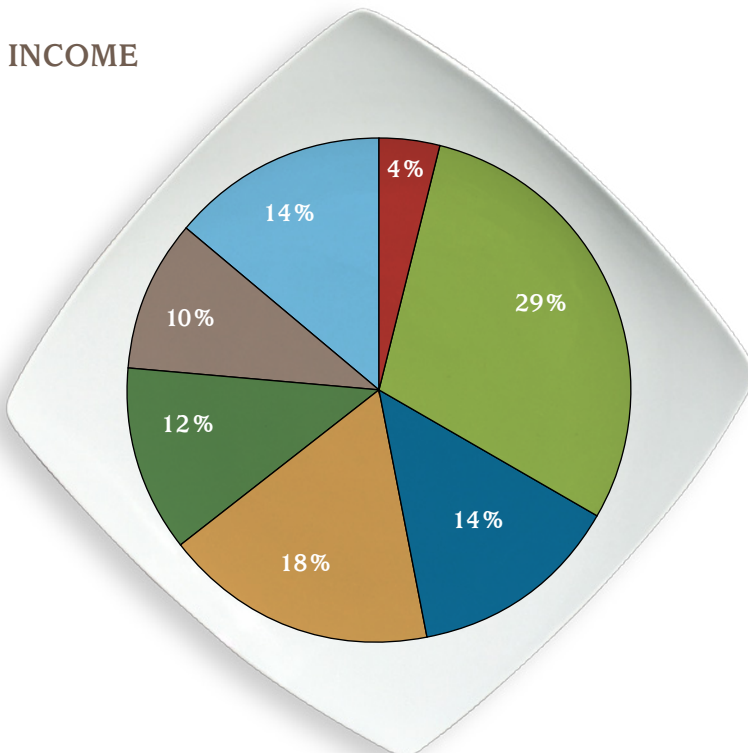


The Oregon Truffle Festival attracts a diversity of ages to indulge in this international culinary event.

“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

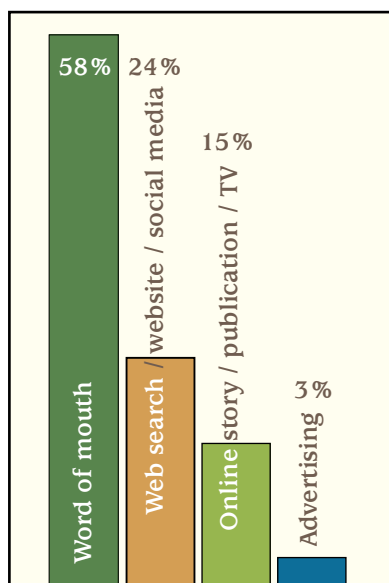




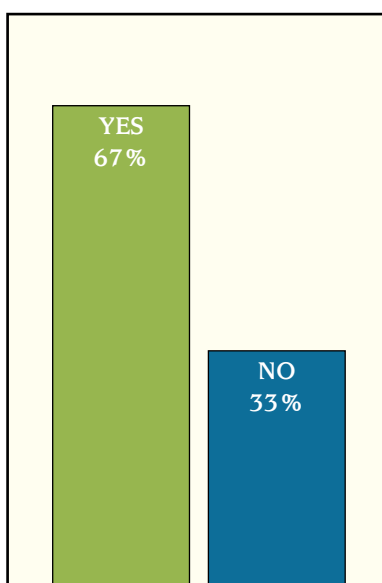
DEMOGRAPHICS – EUGENE & SURROUNDS

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

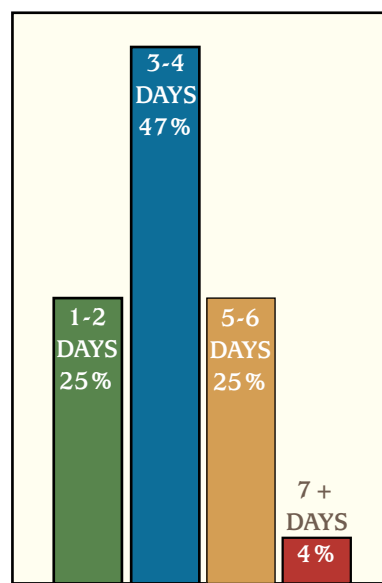
HOW DID YOU HEAR ABOUT THE OTF?



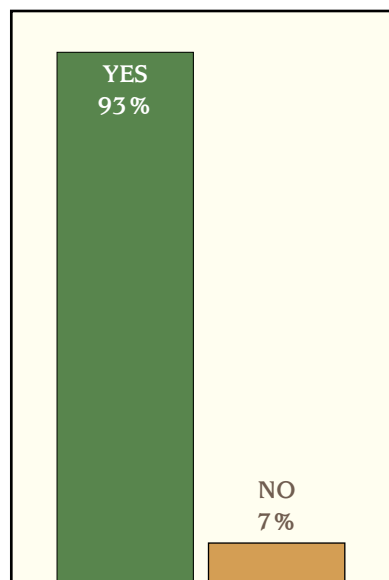
CULINARY TRAVELER



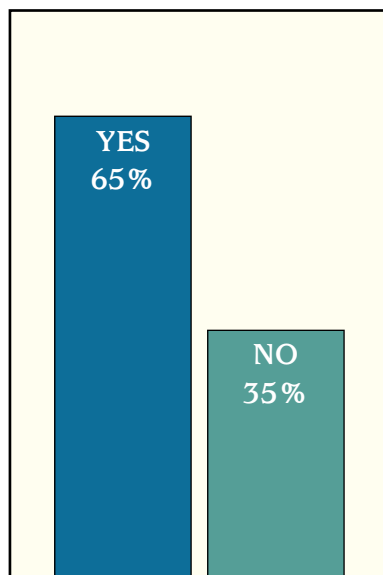
DAYS IN OREGON



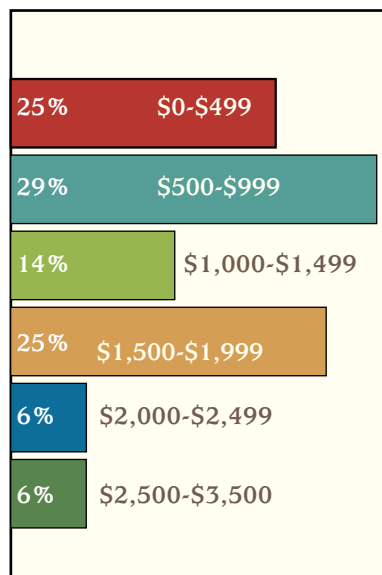
FESTIVAL INSPIRED TRIP



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.](#)



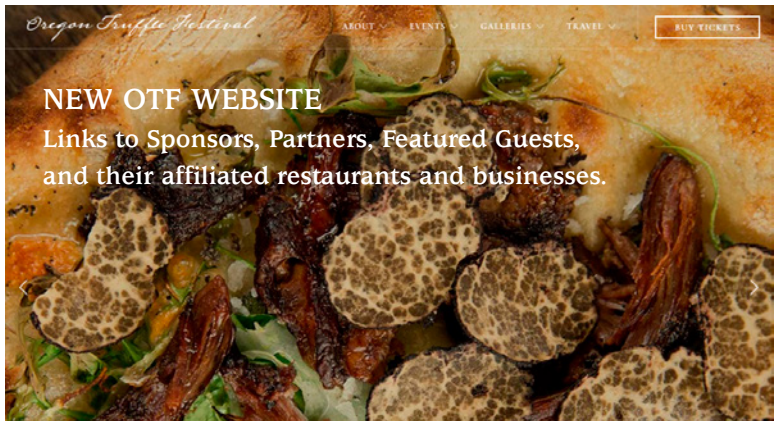
Gregor Halenda

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

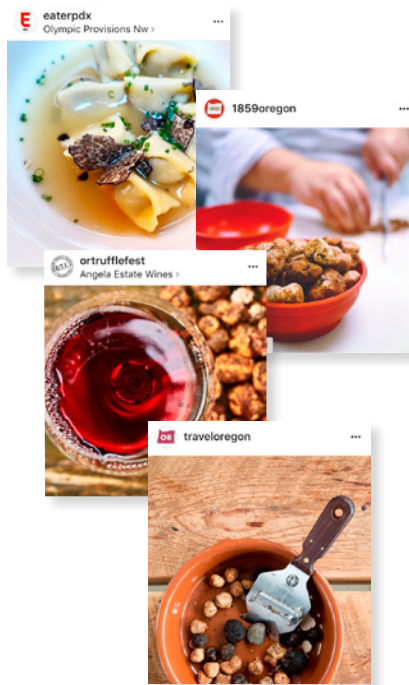
OTF purchases a wide range of print and online advertising including magazines, newspapers, and their respective websites, concert programs, online publications, blogs, and more.



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.



Katherine Elssner

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



TABLE OF CONTENTS

- FESTIVAL STATISTICS.....3

- DEMOGRAPHICS*

 - PORTLAND & YAMHILL4
 - EUGENE AREA.....6

- MEDIA COVERAGE.....8

- ADVERTISING & SOCIAL MEDIA.....9

- MARQUEE EVENTS

 - PORTLAND & YAMHILL 10
 - EUGENE AREA 12

- THE JORIAD™ 11

- EDUCATIONAL EVENTS..... 13

- SPONSORS & PARTNERS..... 14

- 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

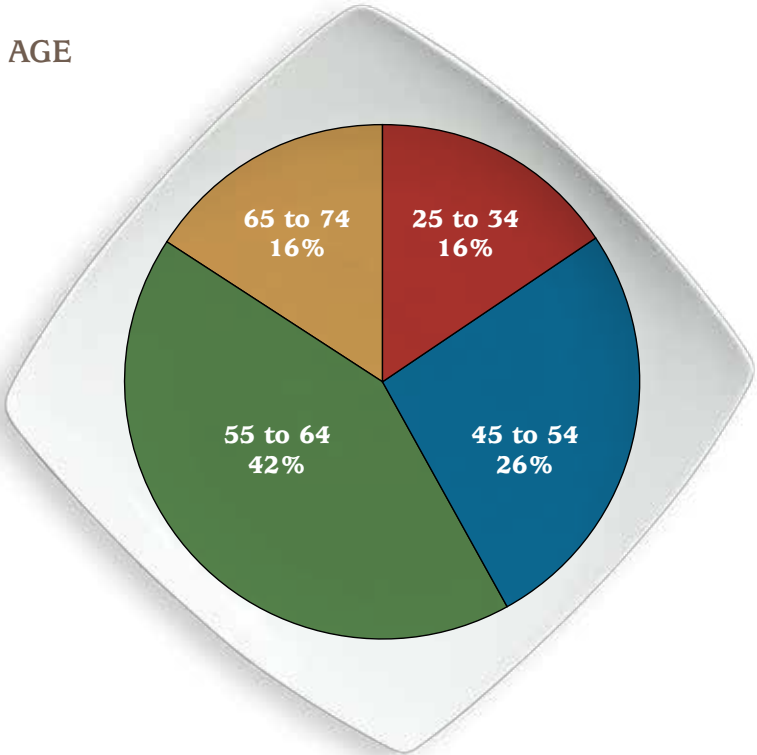
41 LBS OF BLACK TRUFFLES

93 LBS OF WHITE TRUFFLES



DEMOGRAPHICS – PORTLAND & YAMHILL

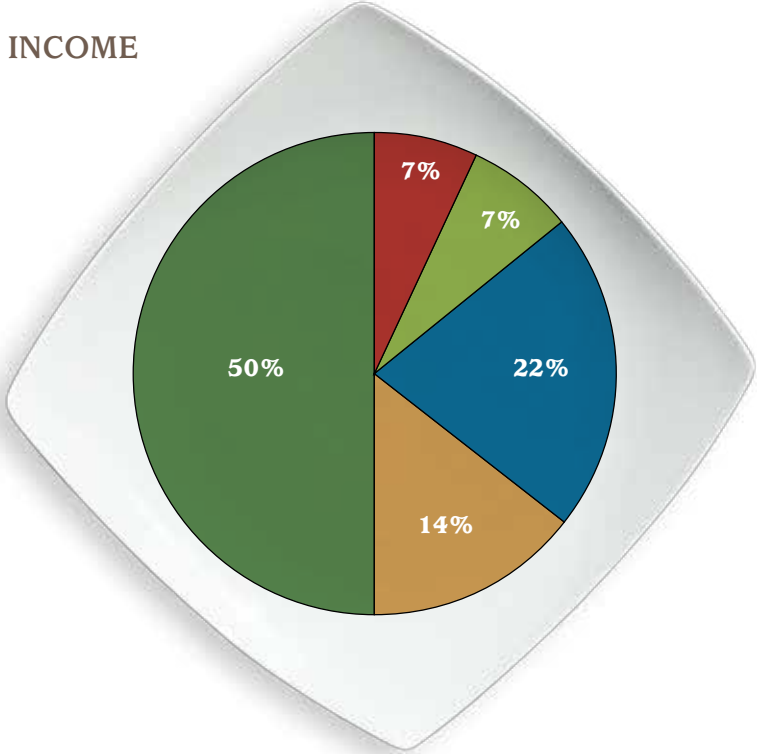
AGE



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

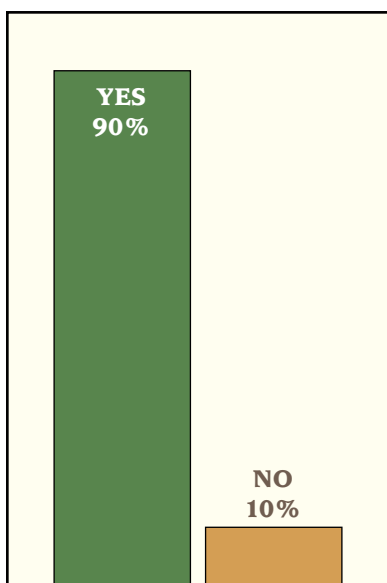


DEMOGRAPHICS – PORTLAND & YAMHILL

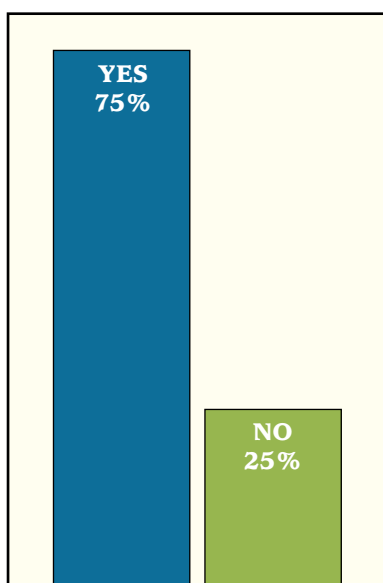
The Festival attracts new travelers to Oregon year after year. Many stay and enjoy our state before and after the festival, infusing the economy with tourist dollars.



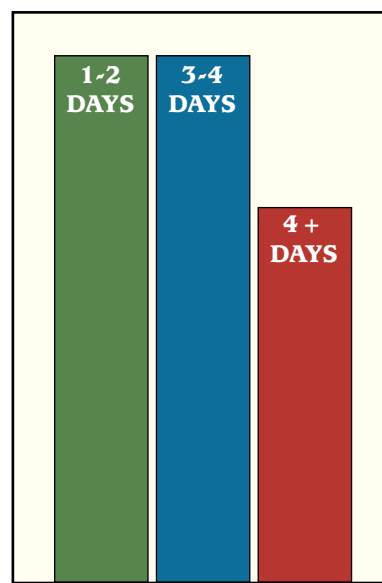
**FESTIVAL
INSPIRED TRIP**



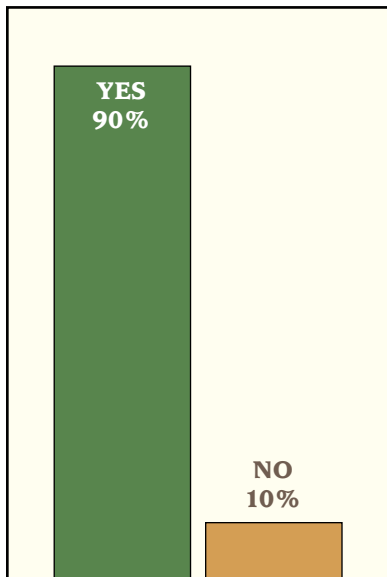
CULINARY TRAVELER



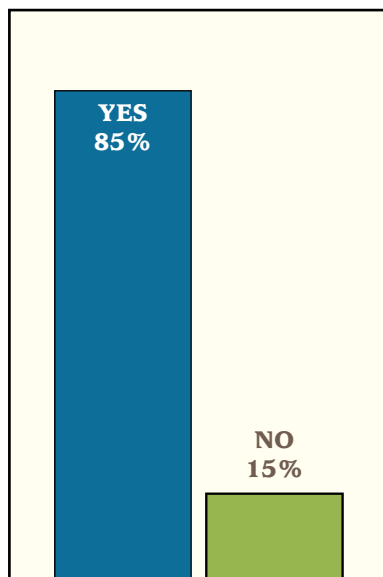
DAYS IN OREGON



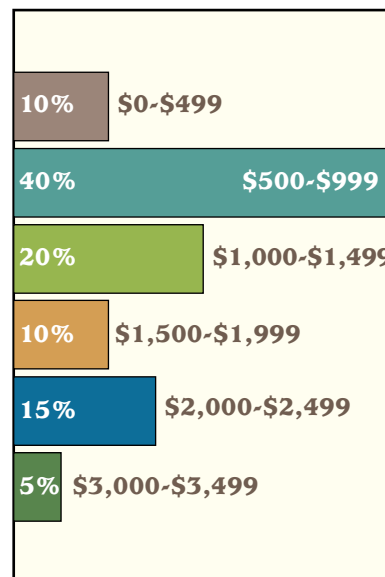
**TRAVELED MORE
THAN 200 MILES**



**EXPERIENCED OREGON
BEYOND FESTIVAL**



**\$ SPENT BESIDES
FESTIVAL TICKETS**





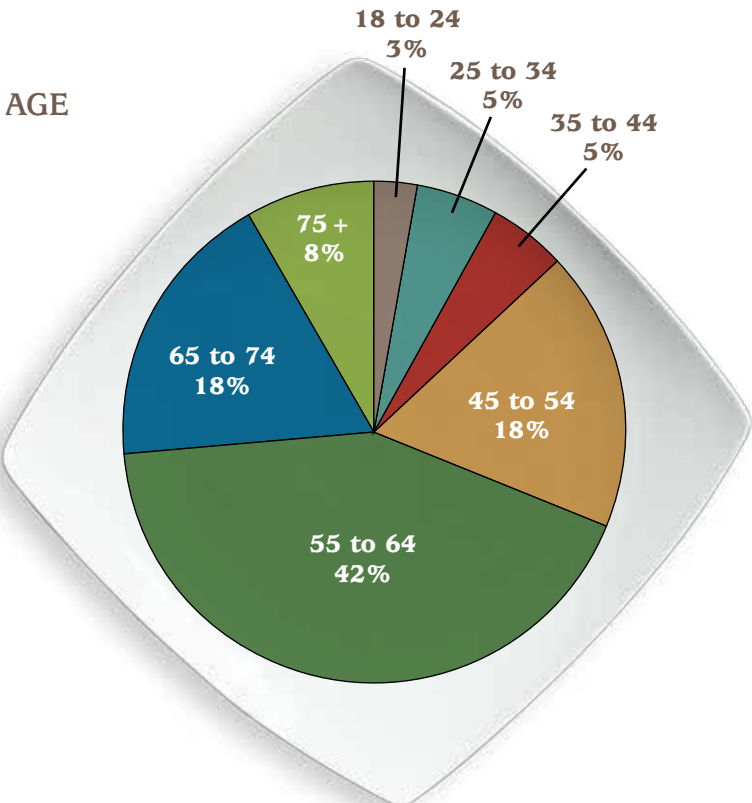
The Oregon Truffle Festival attracts a diversity of ages to indulge in this international culinary event.

“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.”

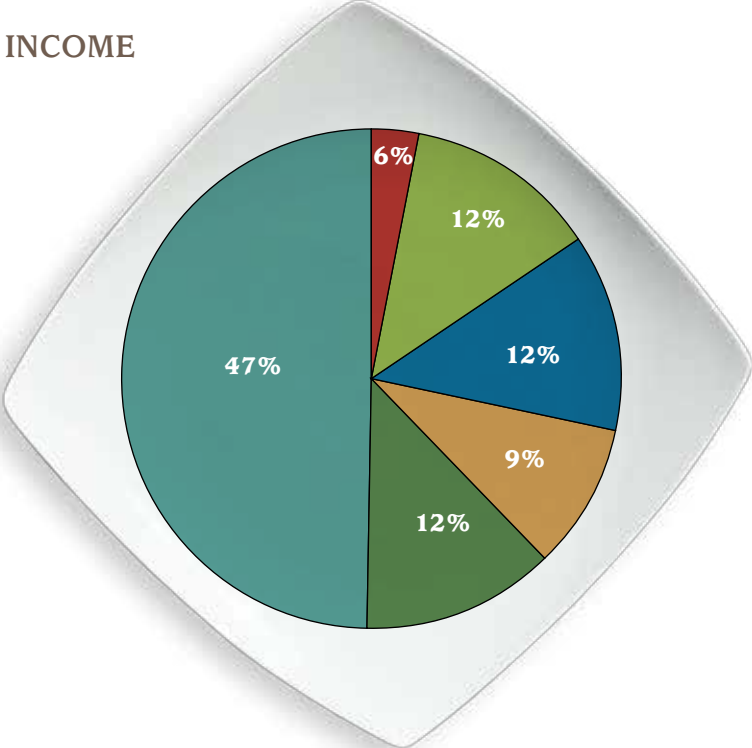
Chef Robin Jackson, Knight Inlet Lodge, Knight Inlet, B.C.

DEMOGRAPHICS – EUGENE & SURROUNDS

AGE



INCOME

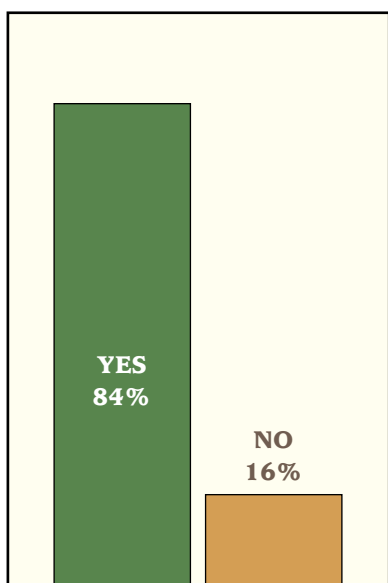




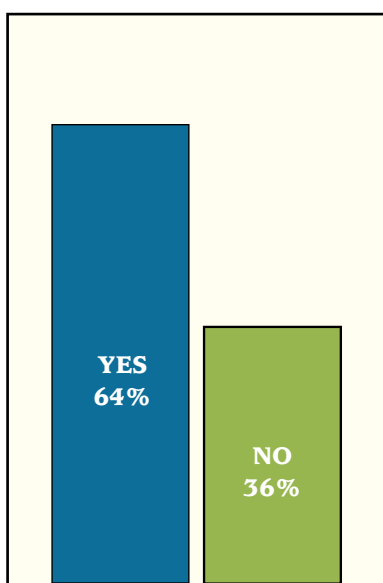
DEMOGRAPHICS – EUGENE & SURROUNDS

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

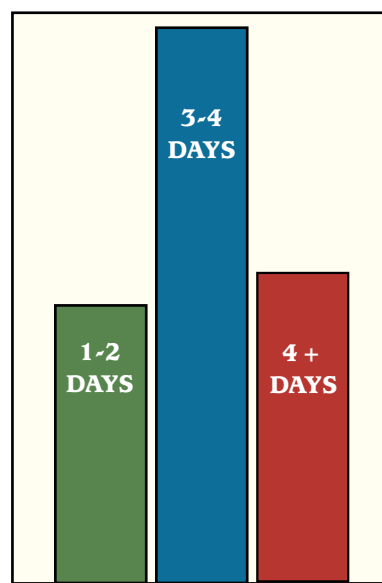
FESTIVAL INSPIRED TRIP



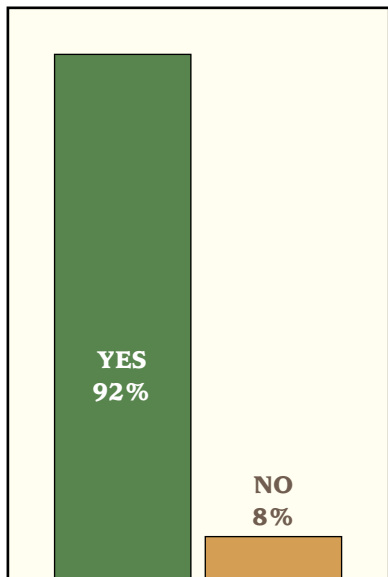
CULINARY TRAVELER



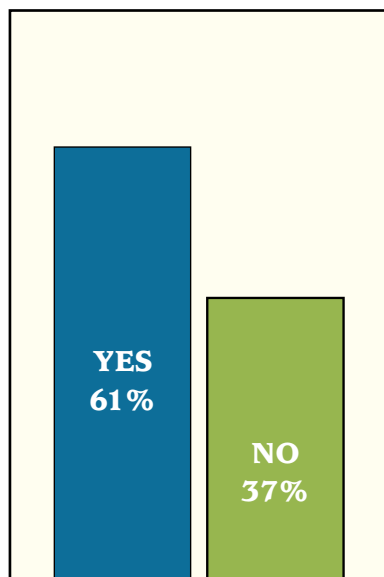
DAYS IN OREGON



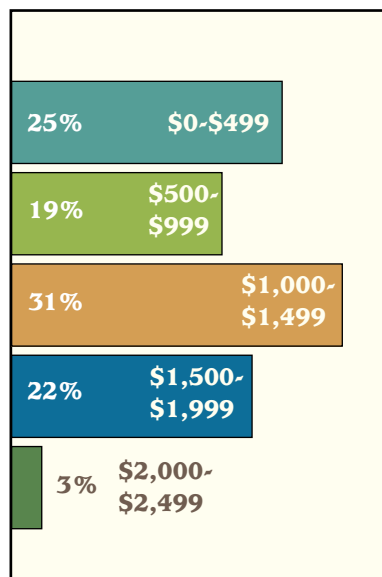
TRAVELED MORE THAN 200 MILES



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



Biggerstaff *Virtual Business Assistance*
taking business to the next level

carr@biggerstaffvba.com 503-680-1780 P.O. Box 3072, Newberg, OR 97132

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

OTF Destination Marketing: *The Terroir of Truffles*



Experience
the allure of Oregon
truffles and wine at the
**Oregon Truffle
Festival**

february 16, 17 & 18

tickets on sale
oregontrufflefestival.org

**WILLAMETTE VALLEY
VINEYARDS**



**Oregon's Willamette Valley.
A paradise for the palate.**

The secret lies deep in ancient volcanic Jory soil. Between the misty foothills of the Cascades and the coastal range, the terroir is elementally perfect for growing world class truffles and wine grapes. The result? A seductive offering of taste encounters that evoke a sense of place like no other.



Come discover The Terroir of Truffles. The Valley awaits...





2016 RECAP

JANUARY 16-17 THE JORIAD™
JANUARY 22-24 NEWBERG /
YAMHILL JANUARY 27-29
EUGENE AREA

www.oregontrufflefestival.com





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

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.

“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.”



Oregon Truffle Marketplace

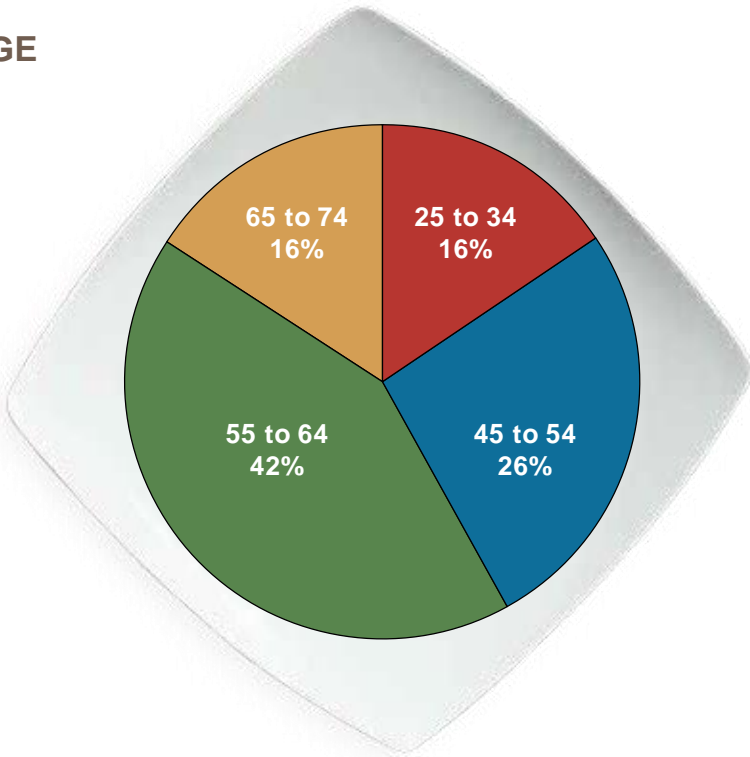
Sunday, January
24 **Newberg**

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.

DEMOGRAPHICS – PORTLAND & YAMHILL



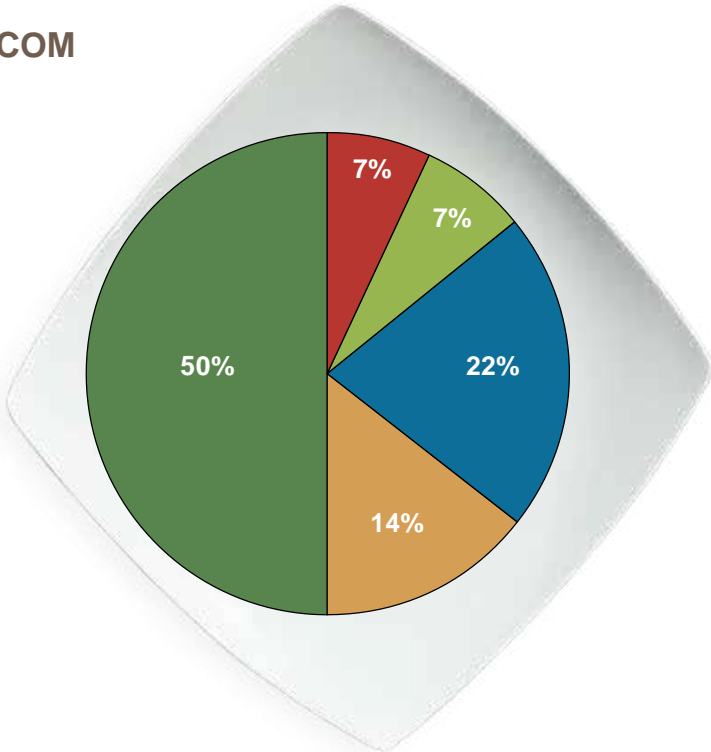
AGE



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



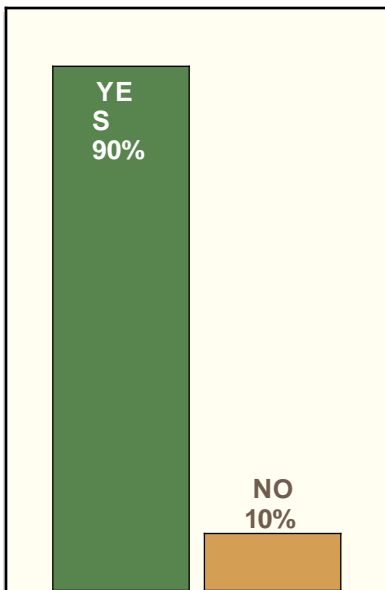
- \$200,000 & Up
- \$150,000 to \$199,999
- \$100,000 to \$124,999
- \$75,000 to \$99,999
- \$25,000 to \$49,999



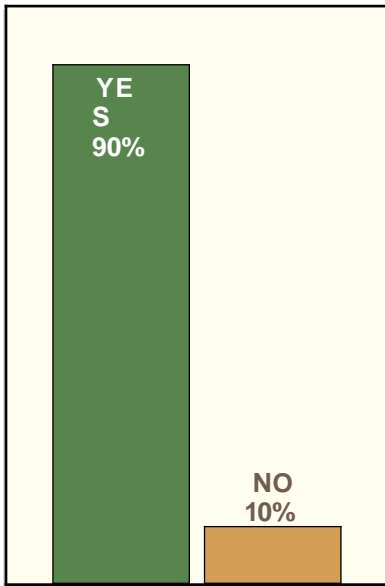
DEMOGRAPHICS – PORTLAND & YAMHILL

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.

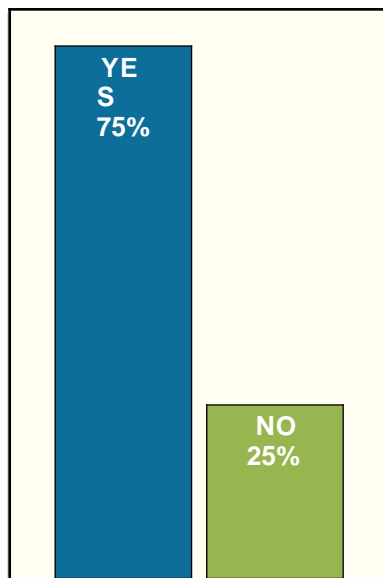
FESTIVAL INSPIRED TRIP



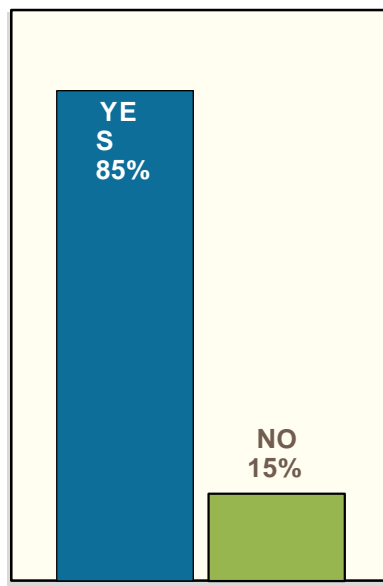
TRAVELED MORE THAN 200 MILES



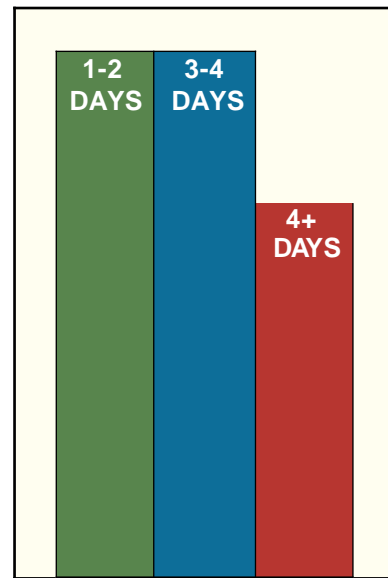
CULINARY TRAVELER



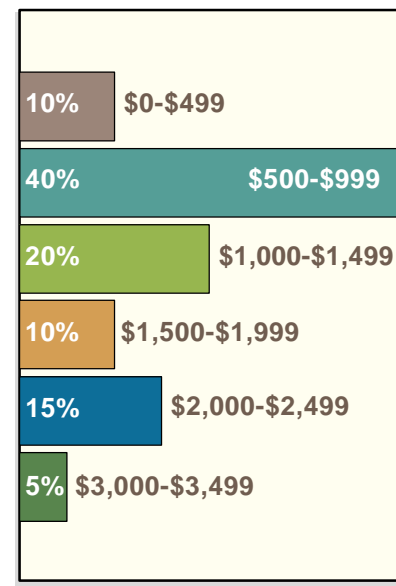
EXPERIENCED OREGON BEYOND FESTIVAL



DAYS IN OREGON



\$ 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

Oregon's Magazine **1859**

OREGON
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

ADVERTISING & SOCIAL MEDIA

EMAIL ADS

6 email Blasts
22,668 Total
Sends



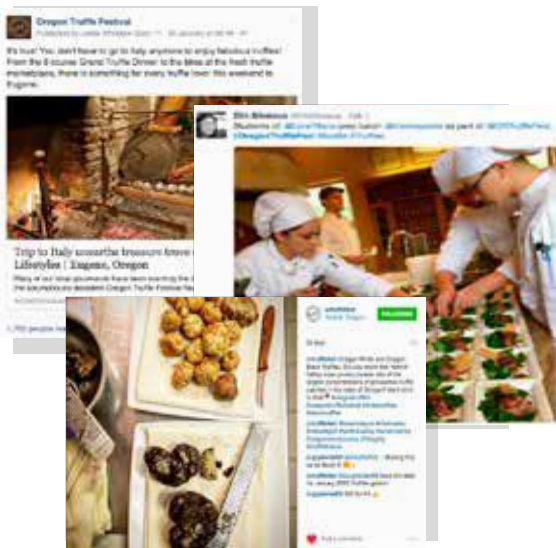
PRINT ADS

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

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



SPONSORS & PARTNERS

eugene host sponsor



presenting media sponsor



newberg/yamhill host sponsor



presenting winery sponsors



truffle growers forum sponsor

winery luncheon sponsors



sponsors & partners





RECAP

oregontrufflefestival.com

JANUARY 20–22 Newberg to McMinnville

JANUARY 26–29 Eugene and Surrounds



2017 Oregon Truffle Festival





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

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.

“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!!”



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

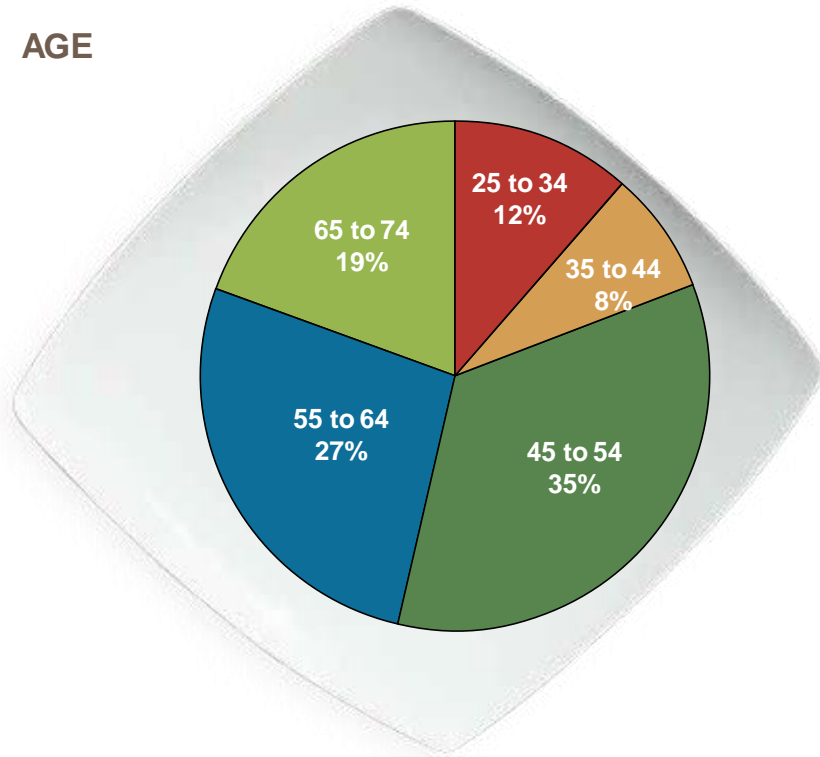
The Oregon Truffle Festival’s most popular culinary day-long experience concludes the weekend in grand style for a day of truffle cooking demonstrations with take-home recipes, wine, beer and spirits tasting, artisan foods samples, fresh Oregon truffles for sale and a truffle dog demonstration.

DEMOGRAPHICS – NEWBERG TO McMINNVILLE



Kathryn Elzeiser

AGE

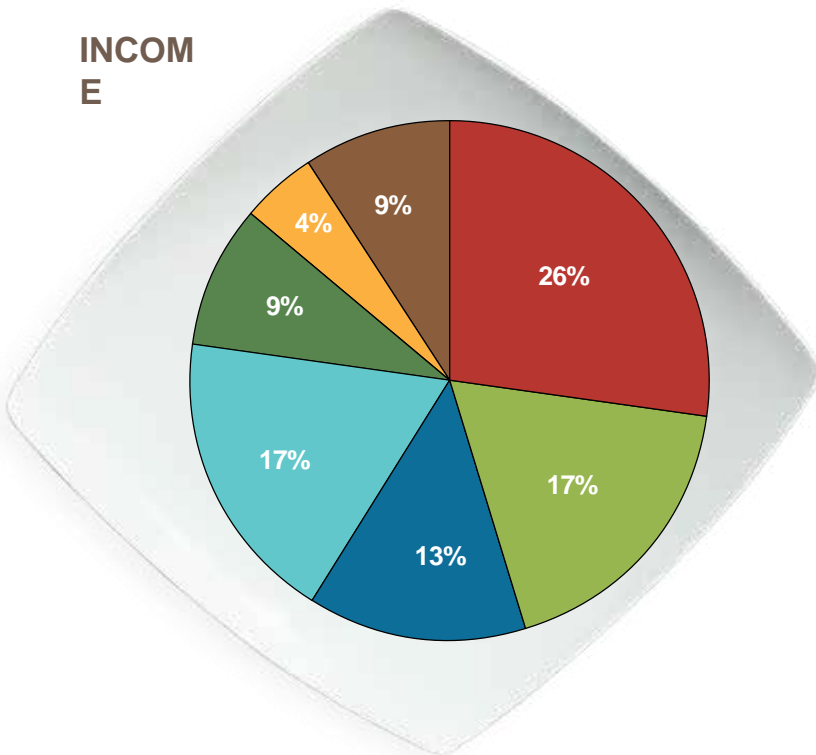


OTF attendees seek out adventuresome travel and elegant food and drink experiences that feed body, mind and spirit.

“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

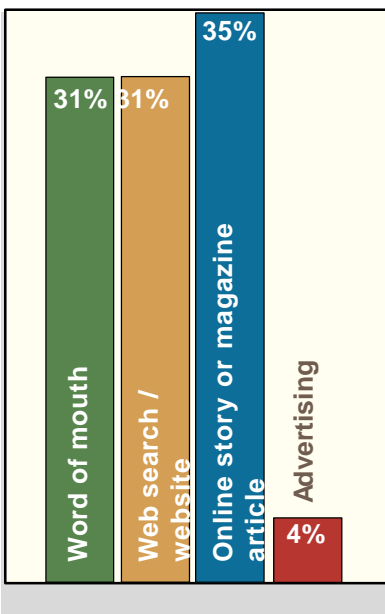




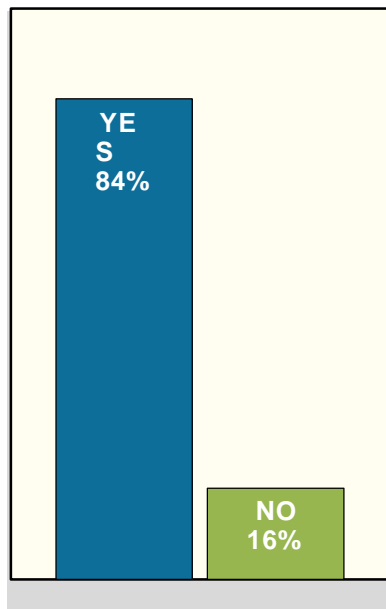
DEMOGRAPHICS – NEWBERG TO McMINNVILLE

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.

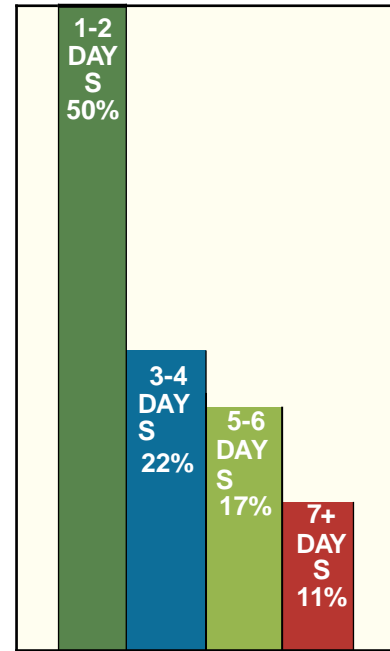
HOW DID YOU HEAR ABOUT OTF?



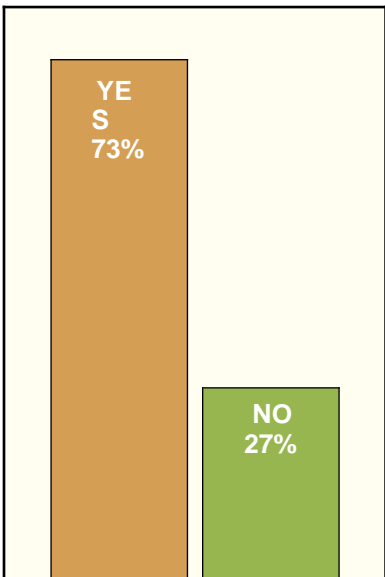
CULINARY TRAVELER



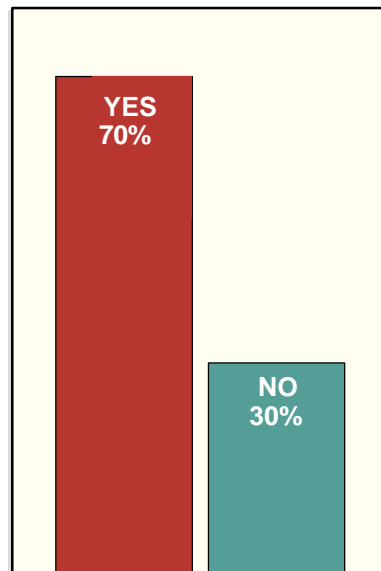
DAYS IN OREGON



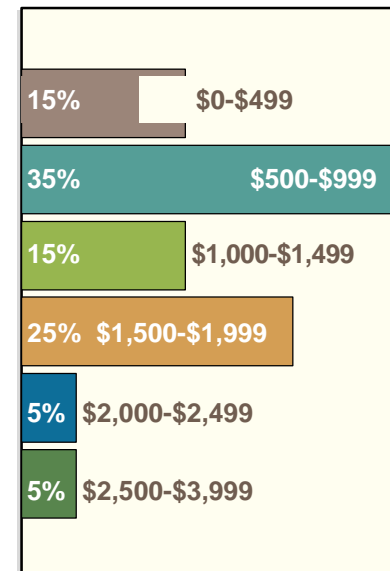
FESTIVAL INSPIRED TRIP



EXPERIENCED OREGON BEYOND FESTIVAL



\$ SPENT BESIDES FESTIVAL TICKETS



MEDIA COVERAGE

48

PIECES OF COVERAGE

(And more to come!)

131M

ONLINE READERSHIP

343K

ONLINE IMPRESSIONS

(Not including media shares)

952K

PRINT CIRCULATION

6.71K

SOCIAL SHARES

35

LINKS FROM COVERAGE



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



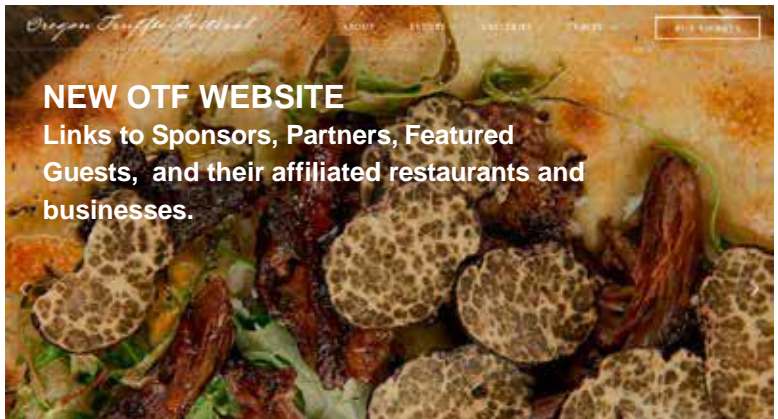
Gregor Halenda

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.



NEW OTF WEBSITE

Links to Sponsors, Partners, Featured Guests, and their affiliated restaurants and businesses.

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



2017 SPONSORS & PARTNERS

presenting media sponsor



newberg/mcminnville host sponsor

eugene host sponsor



presenting winery sponsor



winery luncheon sponsor



sponsors & partners





the Truffles are coming...

February 16-18

The James Beard Legacy: A Celebration of “America’s First Foodie” in Oregon’s wine and truffle country



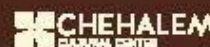
The Oregon Truffle Festival returns to Yamhill Valley in February of 2018 offering a Weekend Experience, The Terroir of Truffles, and a host of à la carte events including the popular Fresh Truffle Marketplace.

As an ode to James Beard and his advocacy for Oregon truffles, the 2018 Oregon Truffle Festival’s wine country weekend will celebrate James Beard’s culinary legacy.

See event descriptions on the next page.

YAMHILL VALLEY EVENT SPONSORS

1859 & 1889



DOMAINE SERRIN

WILLAMETTE VALLEY VINEYARDS



GRAN MORAINIE

ILLAHE

DRY SPARKLING | THE FALLS EVENT CENTER | JOEL PALMER HOUSE
OREGON WINE PRESS | RUDDICK/WOOD | TRAVEL OREGON
VISIT MCMINNVILLE | WOLVES & PEOPLE FARMHOUSE BREWERY

Play Nice PR, Kayt Mathers, kayt@playnicepr.com



In the beginning there was Beard **– Julia Child**

AMERICA'S FIRST FOODIE

Friday, February 16
***The James Beard
Legacy: A
Celebration***

of “America’s First Foodie” in Oregon’s wine and truffle country Our evening will begin with a winemakers’s reception with truffle bites, and move into the Grand Ballroom at the Chehalem Cultural Center where the film’s Director and Producer will talk about James Beard’s Oregon roots, and what inspired them to create this lovely film, which will be accompanied by Oregon truffle beer and popcorn!.

Terroir of Truffles, à la carte

JAMES BEARD WRIT LARGE

Saturday, February 17
An afternoon showing of “America’s First Foodie” in the beautiful 3D Digital Theater at

Evergreen Aviation in McMinnville. Introduced by the film’s Director and Co-producer, this acclaimed original work explores Beard’s Oregon roots and his international influence on the culinary world. OregonTruffle beer and popcorn available for purchase.

À la carte event

PINOT + CHOCOLATE, A LOVE STORY

Saturday, February 17
Grab this Valentine’s Intimate Presentation and tasting before it’s gone; only a few dozen tickets available. Includes Marketplace admission with wine tasting and complementary glass.

Terroir of Truffles, à la carte

SENSUAL BLISS FOOD DINNER

Saturday, February 17
Following the Rosé release, guests will move to the gracious Clubhouse dining room for a four course dinner featuring Oregon black and white truffles creatively paired with Domaine Serene’s award winning wines

Terroir of Truffles package only

FRESH TRUFFLE MARKET

Sunday, February 18
Our signature Fresh Truffle Marketplace brings together fresh Oregon truffles, spirits and wines, and artisan foods for tasting and sale. Find information related to the cultivated truffle industry, OTF merchandise, and author book signings. Attend truffle cooking demos with tasting and recipes, and a truffle dog demonstration.

Terroir of Truffles, à la carte

PHOTO CREDITS

front page top: [John Valls](#) middle &bottom: [Kathryn Elsassor](#)
this page left: [Kathryn Elsassor](#) center: [Dan Wynn](#) right: [John Valls](#)

2018 Yamhill Valley Weekend Media Coverage to Date

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

A small sampling of 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
 - Newberg Graphic
 - McMinnville News Register
 - 1859 Magazine
 - The Oregonian/OregonLive.com
 - NPR's The Salt
 - NPR's The Four Top Podcast
 - Seattle Dining
 - Travel Oregon
 - Portland Monthly
 - Thrillist
 - 1859 Magazine
 - Departures
 - Robb Report (print & online)
 - PDX Food Press
 - OPB - Oregon Field Guide
 - Sip Northwest
 - Wine Enthusiast
 - Seattle Met Magazine
 - Eater Portland
 - Conde Nast Traveler (online)
 - Alaska Airlines Magazine (print)
-

Total number of Publications that have written about the Yamhill Valley in 2017 thanks to the Oregon Truffle Festival: 38 for a monthly total of 129,541,308 impressions

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

Social Posts August - Present: **46 – Facebook, Instagram & Twitter**

Total Reach: 19,165

Number of 2018 unique OTF Facebook Events: **8**

Total Reach: 16,142

Total number of impressions to date from all sources: 140,617,612

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

Funding Request \$ 8,000.00

Criteria	Score Range	Lewis	Nicholas	Bagley	Carda	Felton	Griffin	Lattimer	Lippard	Louis	Love	Parrish
1. What is the projected return on investment												
a. Predicted number of tourists attracted/overnight guests	0 - 5	4	1	4	4	3	4	3	3	1	4	3
b. Will it have lasting impact and utility	0 - 5	5	1	4	4	3	4	3	3	2	3	3
2. Demonstrated history of attracting tourists/overnight guests	0 - 3	3	1	3	3	2	3	2	2	1	3	3
3. Does it engage and energize local tourism partner(s)	0 - 3	3	3	3	3	2	3	2	2	2	2	3
4. Does it enhance Newberg as a destination	0 - 5	5	2	3	5	3	4	2	4	2	3	4
5. Does it enhance Newberg as a location for Makers and Doers	0 - 3	3	2	3	3	3	3	1	1	2	2	3
6. Does it catalyze downtown development	0 - 3	2	1	2	2	3	3	1	2	3	2	2
7. Is it likely to increase visitor spending	0 - 5	5	1	4	4	3	4	2	4	2	2	3
8. Does it enhance tourism from October – May or any Sunday – Thursday Visitation	0 - 5	5	1	4	5	5	4	3	4	4	2	5
9. Does this project align with at least one of the four target audiences (Wine Country Adventurers, Millennial Explorers, George Fox Network, Luxury Wine Travelers)	0 - 5	5		5	5	3	4	3	4	4	2	3
	42											
Total		40	13	35	38	30	36	22	29	23	25	32

Total Points Possible 462
Total Points 323
Average 29.36

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

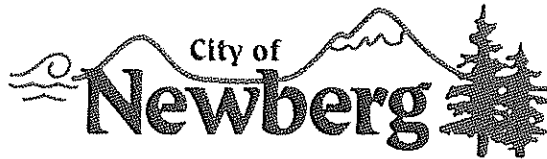
Request amount: \$8,000

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 Adventures, Millennial Explores, George Fox Network, and Luxury Wine Travelers)	X		Wine Country Adventurers, Millennials, George Fax 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.

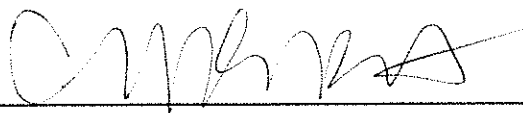
Signature and Certification Letter:

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.

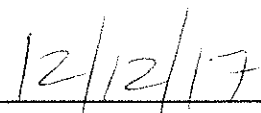
I agree that all publicity, press releases, publications, materials and or media advertising produced as part of this proposed project/program/event will acknowledge the grant program as follows:

"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:

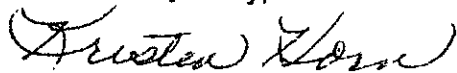
I am writing this letter in support of the Cultural Center's Grant request for funds to help with Camellia Festival.

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.

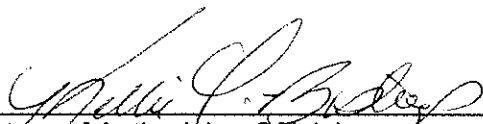
Very truly yours,

Sarah B. Munro
Director, Hoover-Minthorn House Museum

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

Signature and Certification Letter:

I certify that the Chehalem Center Association, which is the non-profit organization which operates the Chehalem Cultural Center, has had no bankruptcies nor any financial corruption over the past five years.



Signature of Authorizing Official

12/13/17

Date

KELLIE T. BISHOP, DIRECTOR OF OPERATIONS

Print Name of Authorizing Official



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

October 3, 2017

President
Mark Terry

Vice President
Cathy Redman

Secretary
Pierre Zreik

Treasurer
Mary Martin Miller

Directors
Allyn Brown
Deb Clagett
Stan Halle
Karen Halliday
David Harrelson
Kris Horn
Jody Kropf
Dennis Lewis
Barbara Palmer
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,


Signature MARK TERRY Print 10/2/2017 Date

Mark Terry, Board President

**Internal Revenue Service
Director, Exempt Organizations
Rulings and Agreements**

**Department of the Treasury
P.O. Box 2508
Cincinnati, OH 45201**

Date:

JUN 12 2009

Chehalem Center Association
P O Box 1029
Newberg, OR 97132

Employer Identification Number:
20-3569580

Person to Contact - ID#:
Sirijun Mayi - #0203227

Contact Telephone Number:
877-829-5500 Phone

Public Charity Status:
509(a)(1) and 170(b)(1)(A)(vi)

Dear Applicant:

Our letter dated November 2005 stated that you were exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code and classified as a public charity under section 509(a)(3) of the Code.

Based on the information you submitted, we have modified your public charity status to the Code section listed in the heading of this letter. Since your exempt status was not under consideration, you continue to be classified as an organization exempt from Federal income tax under section 501(c)(3) of the Code.

Publication 557, Tax-Exempt Status for Your Organization, provides detailed information about your rights and responsibilities as an exempt organization. You may request a copy by calling the toll-free number for forms, 800-829-3676. Information is also available on our Internet Web Site at www.irs.gov.

Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

If you have any questions, please call our toll free number shown in the heading of this letter.

Sincerely,



Robert Choi
Director, Exempt Organizations
Rulings and Agreements

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>



Chehalem Cultural Center
Festival co-chairs: Bryan Stewart and Carissa Smith-
Burkett

The Newberg Camellia Festival and Run/Walk creates a unique entry point for a wide variety of audiences to experience Newberg.





CPRD 5k/10k Run/Walk

Health, fitness, wellness



Learning about and celebrating the cultures of Asia and the Pacific Rim





Celebrating Newberg's City Flower: the Camellia

The Camellia Festival hosts the Oregon Camellia Society's annual bloom show. Last year we hosted the American Camellia National Convention, bringing Camellia lovers from all over the country!



This free, family event encourages visitors to get a taste of Newberg



New Marketing to grow the festival to a multi-day event

OREGON

2018 FESTIVAL & EVENTS CALENDAR MAGAZINE

ADVERTISING INFORMATION

LETTERHEADS
OREGON MEMBERS RECEIVE A FREE Table Listing
Special Festival & Events Listings
25% OFF (minimum \$50) with code: OREGON2018

ADVERTISING RATES
OREGON members receive discounted pricing

Front and Back Cover Wrap	1000	1000
Healthy Front Cover	\$3,100	\$3,100
Healthy Back Cover	\$3,100	\$3,100
Page 1	\$3,100	\$3,100
Page 2	\$2,100	\$2,100
Full Page opposite Page 1	\$2,400	\$3,400
Quarter Page	\$1,200	\$1,200
Full page	\$2,400	\$3,400
1/2 page	\$1,200	\$1,400
1/3 page	\$800	\$1,000
1/4 page	\$600	\$800
1/8 page	\$300	\$500

ADVERTISING INFORMATION
* Magazine rates include printing and mailing costs. All rates are in US dollars.
 * Payment due upon receipt of proof. All rates are in US dollars.
 * Payment due upon receipt of proof. All rates are in US dollars.
 * Payment due upon receipt of proof. All rates are in US dollars.

OREGON

2018 FESTIVAL & EVENTS CALENDAR MAGAZINE

DISPLAY ADVERTISING INFORMATION



NEWBERG
Camellia
FESTIVAL & CPRD RUN/WALK
SATURDAY
APRIL 7, 2018

CHEHALEM CULTURAL CENTER
 415 E SHERIDAN ST, NEWBERG, OREGON

FOR DISPLAY ADVERTISING CALL
877-546-9887 (Toll Free)
971-204-7896 (Direct)
Chris Sweet
 Advertising Representative
 ccsweet@pamplinmedias.com
 Fax: 503.638.3433

CALL CHRIS SWEET
 877-546-9887
 Toll Free 877-546-9887 or Fax: 503-638-3433
 email: ccsweet@pamplinmedias.com
 OregonEventsCalendar.com
 PamplinMedia.com
 PO Box 22100, Portland, OR 97209

SPONSORED BY





10TH ANNUAL



NEWBERG
Camellia
FESTIVAL & CPRD RUN/WALK

SATURDAY APRIL 7, AT



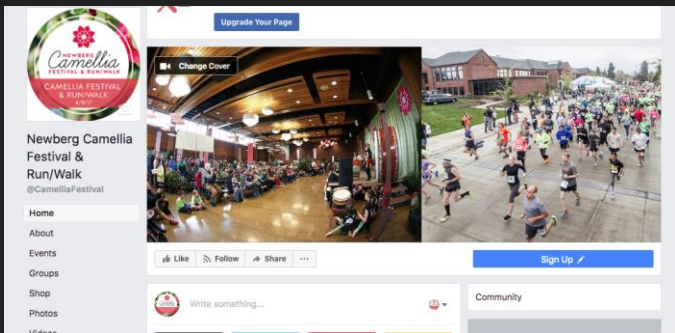
Purchased advertisements in Pamplin Medias Festival/Events Magazine and Calendars

Billboard on 99W

Facebook ads and boosts

post cards

Book marks distributed at regional libraries



FREE COMMUNITY EVENT
 9am Festival Kick off with CPRD Camellia Run/Walk (more info below)
 10am - 4pm Enjoy all-day festival performances, vendors and food, plant sales, and kids activities.
 Experience family fun, community, culture, and the Oregon Camellia Society Bloom Show!
 Visit newbergcamelliafestival.com

10th ANNUAL
NEWBERG Camellia FESTIVAL
 SATURDAY • APRIL 7, 2018

CPRD CAMELLIA RUN/WALK
 10K 9 am | 5K 9:05 am
 Starts at the Chehalis Cultural Center
 Registration info: cprdnewberg.org
 Participant swag includes a 1-gallon potted camellia, participation in the fitness jamboree, and if you register by March 20th you'll get a t-shirt too!
 Enjoy the FREE Camellia Festival after your run! (Flip card for more info)
 All proceeds from the Run/Walk benefit Chehalis Parks & Recreation District Youth Sports Programs

CHEHALEM CULTURAL CENTER

THANK YOU, SPONSORS AND EXHIBITORS!

NEWBERG Camellia CPRD RUN/WALK & FESTIVAL
 SATURDAY, APRIL 7, 2018

CHEHALEM CULTURAL CENTER

THANK YOU, SPONSORS!

FREE COMMUNITY EVENT

FUN!
CRAPTS
MEET HELLO KITTY!

Experience family fun, community, culture, and the Oregon Camellia Society Bloom Show!
 9am Festival Kick off with CPRD Camellia Run/Walk
 10am - 5pm Enjoy all-day festival performances, vendors and food, plant sales, and kids activities.
 Visit newbergcamelliafestival.com for full schedule and more information.

THANK YOU, SPONSORS AND EXHIBITORS!

PROVIDENCE
 Physical Therapist
PROVIDENCE
 Physical Therapist
PROVIDENCE
 Physical Therapist

All People's Choice, Best of Friends, Newberg Camellia, Therapeutic & Supportive Services, and Newberg Family Charismatic, Spring/Summer/Cherished and more!

SPONSOR THE 10TH ANNUAL
CAMELLIA FESTIVAL
AND BE FEATURED IN

THE NEW PROGRAM!!



We will be distributing 20,000 copies of a 10-15 page, magazine style program, distributed by the Oregonian and Asian Reporter to the surrounding counties.

We expect our reach to broaden exponentially through these additional marketing strategies and hope to expand upon them each year, growing the festival from it's current 4,000 person draw, to a multi-day festival that pulls in over 5,000. The TLT Grant can help us get there!



Transient Lodging Tax Ad Hoc Committee Roster 2/7/18

Committee Members

Dennis Lewis, Chair	dennis.lewis@newbergoregon.gov
Sheila Nicholas, Vice Chair	sheila.nicholas@newbergoregon.gov
Matthew Murray, City Council Member	matthew.murray@newbergoregon.gov
Jessica Bagley	jessica.bagley@newbergoregon.gov
Megan Carda	megan.carda@newbergoregon.gov
Rob Felton	rob.felton@newbergoregon.gov
Robert Griffin	Robert.griffin@newbergoregon.gov
Kyle Lattimer	kyle.lattimer@newbergoregon.gov
Ashley Lippard	ashley.lippard@newbergoregon.gov
Lori Louis	lori.louis@newbergoregon.gov
Brian Love	brian.love@newbergoregon.gov
Loni Parrish	loni.parrish@newbergoregon.gov

Ex Officio Members

Bob Andrews, Mayor	bob.andrews@newbergoregon.gov
Joe Hannan, City Manager	joe.hannan@newbergoregon.gov

Staff

Doug Rux, Community Development Director	doug.rux@newbergoregon.gov
Matt Zook, Finance Director	matt.zook@newbergoregon.gov