



**TRANSIENT LODGING TAX AD HOC COMMITTEE AGENDA
JUNE 6, 2018, 4:00 PM
NEWBERG CITY HALL, 414 E FIRST STREET**

- I. CALL MEETING TO ORDER**
- II. ROLL CALL**
- III. APPROVAL OF MINUTES – MAY 2, 2018**
- IV. MINUTES OF THE MARKETING SUBCOMMITTEE – APRIL 16, 2018**
- V. PUBLIC COMMENTS**
- VI. MARKETING SUBCOMMITTEE – MARKETING PROPOSAL**
- VII. STATUS OF SMALL GRANT AWARDS FY 2016-2017 – CAMELLIA FESTIVAL FINAL REPORT**
- VIII. STATUS OF SMALL GRANT AWARDS FY 2017-2018 – OREGON TRUFFLE FESTIVAL FINAL REPORT**
- IX. STATUS OF DESTINATION DEVELOPMENT-MARKETING GRANTS**
- X. TLT MEMBER UPDATES**
- XI. NEXT MEETING JULY 6, 2018**
- XII. 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
MAY 2, 2018, 4:00 PM
Permit Center Conference Room, Newberg City Hall
414 E First Street**

Chair Lewis called the meeting to order at 4:10 p.m.

ROLL CALL

| | | |
|------------------|------------------------|-----------------------------|
| Members Present: | Dennis Lewis, Chair | Shelia Nicholas, Vice Chair |
| | Megan Carda | Rob Felton |
| | Kyle Lattimer (4:26) | Lori Louis |
| | Brian Love | Mayor Andrews, Ex Officio |
| | Joe Hannan, Ex Officio | |

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|-----------------|--------------------------|--------------------------|
| Members Absent: | Jessica Bagley (excused) | Robert Griffin |
| | Matthew Murray (excused) | Ashley Lippard (excused) |
| | Loni Parrish (excused) | |

Staff Present: Doug Rux, Community Development Director

Guests: Carr Biggerstaff

WORK SESSION:

Chair Lewis noted Page 16 contains the material the Marketing Subcommittee developed on possible options.

Member Felton indicated that the marketing person could be housed at the Chamber or Newberg Downtown Coalition. The dollars at either location are different with Newberg Downtown Coalition less expensive. He noted the Power Point slide where \$40,000 goes to the Chamber for Tourism Marketing. The Chamber could keep the funds for marketing or the funds redirected to another organization.

Member Louis asked what is the benefit of housing the person at the Newberg Downtown Coalition.

Member Love commented that he thought Visit McMinnville was not a location where people could walk into.

Member Carda indicated you can walk in at Visit McMinnville and be treated as a visitor.

Chair Lewis indicated that Newberg Downtown Coalition and Visit McMinnville are both designated as 501c6, and for a new organization it would take about a year to get 501c3 status.

Carr Biggerstaff clarified that Visit McMinnville is a 501c6 organization.

Member Louis noted that a marketing person would need a place for meetings and they would be out in community at wineries & hotels.

Vice Chair Nicholas inquired if the Visitor Center could remain at the Chamber for perhaps 2 years.



Member Louis indicated it needs to be clear the new marketing person is not involved in Visitor Center functions.

Chair Lewis noted the marketing person would have their own phone. They would need the ability to make photo copies and need a laptop. The Newberg Downtown Coalition cost would be about \$135 month and referred to the cost spreadsheet in the packet.

Member Carda inquired if this was the cost after two years.

Member Felton recapped that the Chamber contract is for \$139,000 of which \$39,000 is for marketing, \$47,000 for Visitor Center, and \$52,000 for overhead & Chamber staff.

Carr Biggerstaff clarified that \$100,000 (includes tourism personnel) & office. If only a Visitor Center \$47,860, \$52,000 is the portion of visitor center staff and overhead.

Chair Dennis Lewis called the official meeting to order at 4:26 pm

APPROVAL OF MINUTES:

Doug Rux noted changes to April 4, 2018 minutes.

MOTION: Rob Felton and Sheila Nicholas moved to approve the April 4, 2018 TLT Meeting Minutes. The motion carried (7 Yes/ 0 No).

PUBLIC COMMENTS: none

MARKETING SUBCOMMITTEE – MARKETING PROPOSAL:

Member Felton outlined the option of a marketing person located at Newberg Downtown Coalition (NDC) or at Chamber of Commerce.

Member Louis inquired where the NDC office is located and would it be a nice environment for a person.

Chair Lewis summarized utility costs at NDC of \$135.00 a month.

Vice Chair Nicholas inquired as the longevity of NDC building and Chair Lewis responded 4-5 years.

Member Carda inquired if we have to keep the Chamber contract for the Visitor Center and Member Felton indicated the City keep the Visitor Center contract.

Member Carda inquired on the cost to have a marketing person at the Chamber. Chair Lewis noted it would be approximately \$52,000.

Carr Biggerstaff clarified that if a marketing person was located at the Chamber the cost would be \$24,000 if no support at all. If the Chamber assisted the person the cost would be \$52,000 a year.

Vice Chair Nicholas noted on the low end the cost is \$2,000 a month.



Member Carda noted that the Chamber could kick back \$52,000 and \$39,000 of the current marketing contract if the marketing person is not located at the Chamber.

Carr Biggerstaff indicated that if the Visitor Center is kept at the Chamber then they would need to renegotiate the City contract.

Member Louis inquired about how much is spent on tourism.

Member Felton noted that Page 20 of the packet shows the comparisons of marketing models.

Vice Chair Nicholas asked about the monthly overhead fee at NDC with Chair Lewis note it is \$135.00 a month.

Member Carda asked if there is any space expansion at either the Chamber or NDC locations. Carr Biggerstaff noted the Chamber has some space and the lease is up in about 1.5 years.

Member Love noted the Chamber wants to move back downtown so why separate activities. Why not just have the marketing person and let them build the business.

Member Louis noted she understands what Member Love is saying.

Member Carda noted an extra \$1,800 month goes along way.

CDD Rux stated the NDC location may have issues in occupying 2nd floor and he would have to talk to the Building Official.

Chair Lewis asked the Committee how we want to administer the tourism funds. We are getting lost in weeds and details of where the person would be located. Do we have funds for a position and marketing? If go to Visit McMinnville model then Page 17 #2 & page 18 #2 go together nicely.

Vice Chair Nicholas inquired if that approach eliminates small grants.

Chair Lewis indicated the marketing person could direct people to other grant opportunities. We have left dollars on the table by not going after Travel Oregon grants.

Member Louis noted a marketing person could leverage additional funding, \$20,000 is a lot of money for marketing and it's a better investment to not do grants.

Vice Chair Nicholas asked if someone needs to do a motion on a proposal.

Chair Lewis asked how we do that.

Vice Chair Nicholas indicated #2 page 18, put on hold Grants (small/large) and the person needs to be able and adept at coordinating and leveraging.

Member Love inquired if it is legal to put in job description to go out and leverage grants.



Ex Officio Hannan – Most descriptions go out leveraging grants is prohibited.

CDD Rux recapped memorandum that was in the packet on the options available.

Member Love - moved the Visit McMinnville model with motion #2, with idling the grant program.

Chair Lewis indicated the need to refine and define

Member Felton asked what clarification is necessary.

CDD Rux – restricted motion, outlined work session & June 4 Council meeting.

MOTION: Brian Love and Lori Louis moved the Visit McMinnville model with motion #2, with idling the grant program,
The motion carried (7 Yes/ 0 No).

Chair Lewis inquired about the location of the marketing person.

Member Carda noted do we need to discuss the location.

Chair Lewis indicated the governing body and how that would look like needs to be clarified. Membership needs to represent lodging, restaurants, George Fox University, business and Ex Officio's. On May 21 at the meeting will need to have a discussion on board structure.

Member Love inquired about the process to create a board.

CDD Rux referred Committee members to Page 18 of the packet and reviewed the questions posed. He noted the City Council would have to charter a board.

Member Louis inquired on how a person get paid, who does payroll and benefits.

Chair Lewis indicated the Board would have to oversee the marketing person.

Member Louis inquired on how benefits get administered until a 503c3 is established.

Member Felton indicated the Chamber is better suited to deal with accounting and other employee issues than NDC.

CDD Rux recapped that City Council would have to charter a Board of Directors and there would need to be a contract between the City and a Board of Directors.

Chair Lewis suggested talking to Mike Ragsdale about a 20 hour a week administration person to provide support at NDC.

Member Carda indicated using the Visit McMinnville model for a Board of Directors and representation in Newberg.



Chair Lewis commented that we need professions staff. Board of Director representation could be two people from the hotel industry, two people from restaurants. The membership should be a minimum of seven members and a maximum of twelve and there should also be Ex Officio members.

Member Louis noted the Chamber (Sheryl) had done marketing for tourism and could the City have a contract with the Chamber on tourism marketing.

CDD Rux recapped possible meeting dates of the Marketing Sub Committee may 21, Council/TLT Committee Work Session May 21 and TLT Committee meeting June 6, 2108.

Meeting Adjourned at 5:19 pm

Approved by the Newberg Transient Lodging Tax Ad Hoc Committee this 6th day of June, 2018.

Dennis Lewis,
TLT Ad Hoc Committee Chair

Doug Rux,
Community Development Director



**TRANSIENT LODGING TAX AD HOC COMMITTEE
MARKETING SUBCOMMITTEE**

**April 16, 2018 8:30 am
Newberg City Hall, 414 E. First Street**

The meeting was called to order by Chair Rob Felton at 8:32 a.m.

ROLL CALL:

Members Present: Rob Felton, Chair
Shelia Nicholas (8:34 a.m.)

Jessica Bagley
Lori Louis

Members Absent: Dennis Lewis and Ashley Lippard (excused)

Staff Present: Doug Rux, Community Development Director

Guests: Carr Biggerstaff

APPROVAL OF MINUTES

Approval of the minutes of March 19, 2018.

MOTION: Bagley/Felton moved to approve the March 19, 2018 meeting minutes. The motion carried 4 Yes/ 0 No).

PUBLIC COMMENTS:

None.

TOURISM MARKETING ACTIVITIES – SUBCOMMITTEE PROPOSAL

Chair Felton indicated the intent was to take a marketing proposal to the full TLT Committee at their next meeting on May 2, 2018. He shared a slide deck on the proposed budget options. Comments were provided that Dundee may have \$30,000 to contribute to marketing. The Chehalem Valley Chamber of Commerce contract with the City of Newberg is roughly for the Visitor Center, there are unspent marketing funds of approximately \$80,000 for this fiscal year, and indicated that there will be unspent rollover funds from the Large grant program of approximately \$130,000.

Carr Biggerstaff indicated separating the Visitor Center from marketing. Some of the funds go to marketing. There is approximately \$139,000 for the visitor Center and marketing of which roughly \$40,000 goes to marketing.

Member Nicholas asked for additional clarification on the possible funds available.



CDD Rux distributed the proposed FY 2018/2019 budget and reviewed the numbers. There is proposed \$131,773 for Tourism Promotion, \$145,342 for the Visitor Center which includes marketing, \$20,000 for the Small Grant program, and \$586,260 for the Destination Development-Marketing Grant program.

Member Louis indicated we are not applying for Travel Oregon grants. Dollars should be spent on increasing more lodging stays in Newberg.

Member Bagley indicated we need to get the word out on marketing and Travel Oregon grant opportunities.

Member Louis noted that Small Grants are not being effective in attracting tourists.

Chair Felton shared that some of the rollover funds are committed for the Destination Development-Marketing Grant program from past awards.

CDD Rux noted approximately \$400,000 total for all tourism activities.

Chair Felton indicated the Committee consider funding based on the slides provided for options. This includes roughly \$280,000 which includes \$40,000 from the Chamber contract and excludes the \$109,000 for the Visitor Center. The cost for a person is roughly \$80,000.

Carr Biggerstaff noted the rounded numbers for the Visitor Center is \$100,000 and marketing person cost would be approximately \$80,000. If the person is located at the Chamber the overhead cost is covered.

Member Nicholas inquired if there could be a rental of Chamber staff.

Carr Biggerstaff referred to the original Chamber model that was in the packet. That model is less expensive than running the tourism program through the City.

Chair Felton reviewed new model at the Newberg Downtown Coalition with overhead of roughly \$40,000.

Carr Biggerstaff shared that the \$100,000 for the Visitor Center includes \$70,000 for staffing the Visitor Center and \$40,000 for overhead.

Member Bagley suggested suspending the Large Grant (Destination Development-Marketing Grant) program for two years.

CDD Rux inquired about the cost of developing a marketing strategy. Would the person doing marketing have experience in preparing and developing a marketing strategy as well as doing the marketing activities.

Member Louis noted the person would do both. The Chamber already has a marketing plan and we already have a tourism strategy.

CDD Rux clarified that the Newberg Tourism Strategy identifies preparing a marketing strategy.

Carr Biggerstaff noted that the Chamber marketing plan is a tactical plan. He shared that the Chamber provided funds to the Oregon Truffle Festival of \$3,000 and Chehalem Cultural Center Camellia Festival of \$4,000. The funds came from the marketing funds in the Chamber/City contract.



Chair Felton noted that a Board would provide oversight to a marketing person.

CDD Rux recapped the projected FY 2019/2020 budget numbers where there would be roughly \$280,000 available if you rolled all of the available funds together excluding the Visitor Center contract.

Carr Biggerstaff indicated holding the Visitor Center contract at \$100,000 and there would be \$49,000 for marketing in FY 2019/2020.

Member Bagley suggested suspending the Large Grant program. There are three models that Chair Felton has shared.

Carr Biggerstaff noted if no staffing support for a tourism marketing person at the Chamber then the dollars go down to \$70,000 for the Visitor Center.

Member Nicholas proposed going to the full TLT Committee with three plans. A new marketing person could assist in procuring grants and it would be good to keep the Small Grant program.

Member Louis shared her view to postpone all grants. She inquired what the impact is the Small Grants to generate overnight stays.

Member Bagley made a motion.

MOTION: Bagley/Louis moved to bring the three proposals to the TLT Committee and suspend the grant programs. The motion carried 4 Yes/ 0 No).

CDD Rux posed several questions including who does the marketing person report to? What is the structure of the Board? Does the marketing person report to the TLT Committee?

Carr Biggerstaff shared a concept that the Board could be like the Chehalem Valley Innovation Accelerator operating under the Chamber Board.

CDD Rux noted that a proposal needs to be clear to Council on steps, process and organizational structure.

Member Bagley shared that the marketing person should report to the TLT Committee.

Member Nicholas inquired if we have a job description.

CDD Rux indicated that we have a draft job description, draft marketing plan outline, concepts on dollars for a marketing person, and concepts on a stair step organizational structure.

Chair Felton indicated he and CDD Rux would meet to go over the budget numbers.

CDD Rux noted the next full TLT Committee meeting in May 2, 2018.

Member Nicholas provided an update on the Rain or Shine program. There are over twenty reservations so far.

Member Bagley shared that Storrs Smokehouse did not get their information in to participate.

ADJOURNMENT: Chair Felton adjourned the meeting at 9:40 a.m.



Approved by the Transient Lodging Tax Ad Hoc Committee Marketing Subcommittee this 21st day of May, 2018.

Rob Felton
TLT Ad Hoc Committee
Marketing Subcommittee Chair

Doug Rux, Community Development Director



Community Development Department
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503-537-1240 ▪ Fax 503-537-1272 ▪ www.newbergoregon.gov

MEMORANDUM

TO: Transient Lodging Tax Ad Hoc Committee Marketing Subcommittee
FROM: Doug Rux, Community Development Director
SUBJECT: Transient Lodging Tax Ad Hoc Committee Marketing Proposal
DATE: June 6, 2018

TLT Ad Hoc Committee Marketing Proposal

The attached Request for Council Action presented and discussed at the joint City Council/Transient Lodging Tax Ad Hoc Committee Work Session on May 21, 2018 is attached. The proposal will be further discussed and developed based on feedback from the City Council in order to bring back an official proposal to the City Council at a future date.

Attachments: 1. Request for Council Action with Attachments

REQUEST FOR COUNCIL ACTION

DATE ACTION REQUESTED: May 21, 2018

| | | | | |
|------------------|----------------------|-----------------------|-------------------|-------------------------------------|
| Order ___ | Ordinance ___ | Resolution ___ | Motion ___ | Information <u>XX</u> |
| No. | No. | No. | | |

SUBJECT: City Council/Transient Lodging Tax Ad Hoc Committee Work Session

**Contact Person (Preparer) for this Item: Doug Rux, Director
Dept.: Community Development
File No.:**

RECOMMENDATION:

Information Only.

EXECUTIVE SUMMARY:

TLT Marketing Subcommittee Proposal

Utilize the Visit McMinnville Model. This alternative would create a separate non-profit. To implement this alternative a separate non-profit would have to be established and would have an independent Board of Directors to oversee marketing activities.

Hire a person or organization to conduct marketing by eliminating the grant program (Small Grant and Destination Development-Marketing Grant) to cover the cost. The estimated budget would be approximately \$290,000 and includes \$40,000 already in the Chamber tourism contract. This would be between \$60,000 - \$80,000 for a person or organization with the balance of the funds for developing a marketing plan, and marketing including items such as web site, ads, conferences, networking, FAM tours, etc. The person or organization would also apply for grants. Leverage marketing activities with Dundee and Yamhill County available funds.

Background

The City Council established the organizational structure for the Transient Lodging Tax (TLT) Ad Hoc Committee on October 17, 2016 establishing the following activities:

1. An Ad Hoc Committee be established by the City Council that would operate for no less than two and no more than four years.
2. The Ad Hoc Committee consist of not more than 13 members drawing from members of the TLT Advisory Group plus a person representing Airbnb/VRBO's, a City Council member, a general at-large citizen and Ex Officio members of the Mayor and City Manager.
3. The Ad Hoc Committee would be staffed by existing city staff.
4. The Ad Hoc Committee's role would be to solicit for tourism related facility projects, review proposals and make recommendations to the City Council.
5. The City Council would make the decision on what tourism related facility projects get funded.
6. The Ad Hoc Committee would make recommendations on the small grant program to the City Council.
7. During the two year period the Ad Hoc committee continues the discussion of an organizational model appropriate for Newberg given the funding available and report their recommendations back to the City Council.

8. The City discuss with the Chehalem Valley Chamber additional services that could be provided such as FAM's, Marketing and Destination Development. Funding for these services would come out of the Tourism Promotion expense line.
9. Funds be allocated for a consultant to conduct an assessment of existing marketing material and provide recommendations for updating or modifying marketing material.

The TLT Ad Hoc Committee Marketing Subcommittee (Marketing Subcommittee) has been discussing a proposal for marketing activities since February of 2017. Activities have included assessment of marketing materials for both electronic media and hard copy materials along with personnel resources to advance a marketing program. In October of 2017 the Marketing Subcommittee concluded that assistance was necessary in the form of an individual or organization to assist in developing and promoting tourism marketing activities. In response the Chehalem Valley Chamber of Commerce (Chamber) engaged in discussions with the Marketing Subcommittee on the concept of the Chamber possibly providing additional marketing services beyond the marketing services they currently provide under a contract with the City of Newberg for Visitor Center and Destination Marketing Services. The Marketing Subcommittee prepared a proposed marketing strategy which is included as Attachment 1.

The Marketing Subcommittee met on February 26, 2018 and discussed five possible alternatives for marketing services which include:

1. Chehalem Valley Chamber of Commerce Proposal (Attachments 2 and 3). Under this proposal a person would be hired by the Chamber to prepare a marketing strategy and implement the strategy. The Chamber would provide management oversight and the individual would coordinate with the Marketing Subcommittee and the TLT Ad Hoc Committee on marketing activities. Funds for the position would come from the approximately \$40,000 the City provides to the Chamber for Destination Marketing Services and approximately \$80,000 from TLT Funds the TLT Ad Hoc Committee provides recommendations on to the City Council for grants. Under this alternative the amount of funds for the Destination Development-Marketing Grant program would need to be reduced by \$80,000. Attachment 4 is a budget concept of what this alternative would provide for marketing services and grants.
2. Visit McMinnville Model. This alternative would create a separate non-profit. To implement this alternative a separate non-profit would have to be established and would have an independent Board of Directors to oversee marketing activities. Attachment 5 is a financial model the City Council looked at in the fall of 2016 with estimated costs. With this model there would be a significant reduction in the grant program funding. Attachment 6 is the Business Plan & Budget for Visit McMinnville.
3. Independent non-profit like Newberg Downtown Coalition. This alternative would be similar to the Visit McMinnville model but would utilize an existing organization that is established in Newberg.
4. City Staff Personnel. This alternative would hire a person as a City employee to administer tourism marketing. The staff person would attend all TLT Ad Hoc Committee and Marketing Subcommittee meetings. Attachment 7 is a financial model that City Council reviewed in the fall of 2016.

5. Outside Contractor. This alternative would be under a contract for services with the City of Newberg to provide marketing services for strategy development and implementation. The contractor could be an individual or an organization.

The Marketing Subcommittee discussed the five options and focused in on a Visit McMinnville/Independent Non-Profit or an Outside Contractor as the preferred alternative. Either alternative comes with pros and cons related to cost to implement, impacts on the grant programs, where does the individual or organization reside, coordination with the City of Newberg and long-term impacts on the type of Visitor Center services that could or should be provided in the future.

The Marketing Subcommittee met again on March 19, 2018 and further discussed the proposal and refined the concept down to two options:

1. Hire a person or organization to conduct marketing by reducing the grant program amount cover the cost. The estimated amount for marketing at the bottom end of the range is \$120,000 and the upper end of the range at \$200,000 and includes the \$40,000 already provided to the Chamber. This would be between \$60,000 - \$80,000 for a person or organization with the balance of the funds for developing a marketing plan, and marketing including items such as web site, ads, conferences, networking, FAM tours, etc. The person or organization would also apply for grants. Leverage marketing activities with Dundee and Yamhill County available funds.
2. Hire a person or organization to conduct marketing by eliminating the grant program (Small Grant and Destination Development-Marketing Grant) to cover the cost. The estimated amount for marketing would be approximately \$280,000 and includes the \$40,000 already provided to the Chamber. This would be between \$60,000 - \$80,000 for a person or organization with the balance of the funds for developing a marketing plan, and marketing including items such as web site, ads, conferences, networking, FAM tours, etc. The person or organization would also apply for grants. Leverage marketing activities with Dundee and Yamhill County available funds.

On April 16 the Marketing Subcommittee met again and further refined the concepts developing three alternatives of:

1. Position plus marketing
2. Hybrid of Alternative 1 which includes a Small Grant Program
3. Position plus marketing located at Newberg Downtown Coalition (includes hybrid for Small Grants)

These three alternatives are further described as follows:

1. Hire a person to be located at the Chamber to conduct marketing. Based on FY 2019-2020 budget estimates there would be approximately \$280,000 available for salaries (\$80,000) and marketing/overhead costs (\$160,000). This option includes roughly \$40,000 from the Chamber's visitor center contract spent on tourism personnel. The Chamber retains the Visitor Center function.
2. Hire a person to be located at the Chamber to conduct marketing. Based on FY 2019-2020 budget estimates there would be approximately \$280,000 available for salaries

(\$80,000) and marketing/overhead costs (\$140,000). This alternative includes roughly \$40,000 from the Chamber's visitor center contract spent on tourism personnel. The option includes allocating \$20,000 for Small Grants. The Chamber retains the Visitor Center function.

- 3a. Hire a person to be located at the Newberg Downtown Coalition to conduct marketing. Based on FY 2019-2020 budget estimates there would be approximately \$280,000 available for salaries (\$80,000) and marketing/overhead (\$160,000). This alternative includes roughly \$40,000 from the Chamber's visitor center contract spent on tourism personnel being reallocated to the position, marketing activities and overhead (reduces the Chamber's current contract by \$40,000). The Chamber retains the Visitor Center function.
- 3b. Hire a person to be located at the Newberg Downtown Coalition to conduct marketing. Based on FY 2019-2020 budget estimates there would be approximately \$280,000 available for salaries (\$80,000) and marketing/overhead (\$160,000). This alternative includes roughly \$40,000 from the Chamber's visitor center contract spent on tourism personnel being reallocated to the position, marketing activities and overhead (reduces the Chamber's current contract by \$40,000). The alternative includes allocating \$20,000 for Small Grants. The Chamber retains the Visitor Center function.

These alternatives are reflected in Attachment 8 and includes the hybrid to the Newberg Downtown Coalition alternative to have a Small Grant program.

The TLT Ad Hoc Committee met again on May 2, 2018 and discussed the four alternatives and identified the following alternative as their preference by a 7 to 0 vote:

Utilize the Visit McMinnville Model. This alternative would create a separate non-profit. To implement this alternative a separate non-profit would have to be established and would have an independent Board of Directors to oversee marketing activities.

Hire a person or organization to conduct marketing by eliminating the grant program (Small Grant and Destination Development-Marketing Grant) to cover the cost. The estimated budget would be approximately \$290,000 and includes \$40,000 already in the Chamber tourism contract. This would be between \$60,000 - \$80,000 for a person or organization with the balance of the funds for developing a marketing plan, and marketing including items such as web site, ads, conferences, networking, FAM tours, etc. The person or organization would also apply for grants. Leverage marketing activities with Dundee and Yamhill County available funds.

The TLT Ad Hoc Committee additionally discussed what a Tourism Board might look like such as representation from lodging accommodations, restaurants, business, wineries, Georg Fox University, etc., and that the Board size could range from 7 – 12 members. They also discussed Ex Officio members such as the City of Newberg.

Other topics of discussion were how the City Council would establish a Tourism Board through the City Council chartering the Board and selecting the first Board members, a contract between the City and the Tourism Board, overhead costs to have the tourism marketing functions (excluding the Visitor Center) housed at the Newberg Downtown Coalition (Attachment 9), need for professional staff.

FISCAL IMPACT:

Not Applicable.

STRATEGIC ASSESSMENT (RELATE TO COUNCIL PRIORITIES FROM SEPTEMBER 2017):

Goal 11: Implement Newberg Economic Development Strategy. This discussion furthers the Tourism & Hospitality pillar and the goal to “Make Newberg/Chehalem Valley a regional, national & international tourist destination.” The specific strategies are 4.1 Increase Tourist/Visitor Counts in Newberg and 4.3 Transient Lodging Tax Program.

- Attachments:
1. Marketing Subcommittee Marketing Strategy Concept
 2. Chamber Proposal
 3. Chamber 2017-2018 Destination Marketing Plan
 4. Budget based on Chamber Proposal
 5. Financial Model for Independent Organization Fall 2016 – Attachment D
 6. Visit McMinnville Business Plan & Budget
 6. Financial Model City Staff Personnel Fall 2016 – Attachment B
 7. Marketing Subcommittee Alternatives
 8. Newberg Downtown Coalition Costs

Proposed Marketing Strategy: Newberg

Excluding the George Fox audience, the typical Newberg tourist (those from more than 50 miles or overnight guests) comes for wine tasting. One of our primary differentiators from our local competition is our proximity to Portland, where most tourists will be beginning their visits.



BRAND PROMISE

The best place to start your Oregon wine country vacation

TAGLINE

The first destination in Oregon wine country

BRAND ATTRIBUTES

PROXIMITY TO PORTLAND - Willamette Valley's closest wine region to Portland

WINE - Growing international reputation for Pinot Noir, dozens of tasting rooms and wineries

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

FRIENDLY - Small town community feel

HISTORICAL - Hoover-Minthorn Museum, Champoeg,

CULINARY - JORY, Painted Lady and other acclaimed restaurants

ART - Art Elements, Cultural Center, The Allison, George Fox

MARKETING GOALS

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

AUDIENCES

Target Audiences

- Wine tasting visitors
- George Fox Audience

Top geographic markets

- Portland
- Seattle
- San Francisco

STRATEGIES

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

ONLINE MARKETING

WEBSITE

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

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

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

SEO

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

SEARCH ENGINE MARKETING (GOOGLE, BING)

Target keywords that are difficult to rank organically for

REMARKETING ADS

Create display ads to remarket to previous visitors to the site

SOCIAL MEDIA

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

SOCIAL MEDIA ADVERTISING

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

MEDIA RELATIONS

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

FAM TOURS

OREGON WINE TRAIL W/ DUNDEE/NEWBERG

- Hire wine writer to create Oregon Wine Trail similar in concept to the Romantic Road in Germany. Trail starts in Newberg/Dundee.
- Create Web site
- Promote via media relations, SEO and advertising

See <https://tualatinvalley.org/forest-grove-wine-trail/>

DOWNTOWN BANNERS

"The first destination in Oregon Wine Country"

PRINT

Evaluate current pieces for cost effectiveness

- Rack piece/brochure
- Newberg city/Yamhill County map
- Monthly event brochure
- Chehalem Valley Field Guide
- Group travel brochure

TOURISM TRAINING

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

SECONDARY MARKETING PROJECTS

SIGNAGE

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

RACE TOURISM

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

NEWBERG HISTORIC WALKING TOUR

Create plaques/markers for a Newberg historic walking tour. The Newberg Downtown Coalition already has the bones of a tour created here.

PROMOTION OF CONFERENCES

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

NOTE ABOUT GEORGE FOX AUDIENCE

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

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

About the Chamber, its Visitor Center, and Tourism

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

Moving Forward: Promoting Tourism in Chehalem Valley

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

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

Issues Currently Under Discussion by the Marketing Committee

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

Proposed Interim Approach

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

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

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

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

Position Title: Tourism Coordinator

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

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

General Statement of Duties:

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

Examples of duties and responsibilities:

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

Education:

- Bachelor degree in Marketing or related field

Minimum Tourism Skills and Experience Required:

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

- Knowledge of publication layout, design and graphics as well as related editing and writing skills
- Knowledge of Media Relations - public/community/news - accessible and open to all media
- Social media management experience (FB, Instagram, Twitter)
- Ability to establish and maintain strong working relationships with city staff, the public, and business community and to present ideas effectively, verbally and in writing
- Ability to do community outreach; comfortable giving speeches and presentations
- Interested in people; possesses a positive self-image; confident but not arrogant; approachable; a team player; respects people; understand the importance of first impressions

Additional Requirements:

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



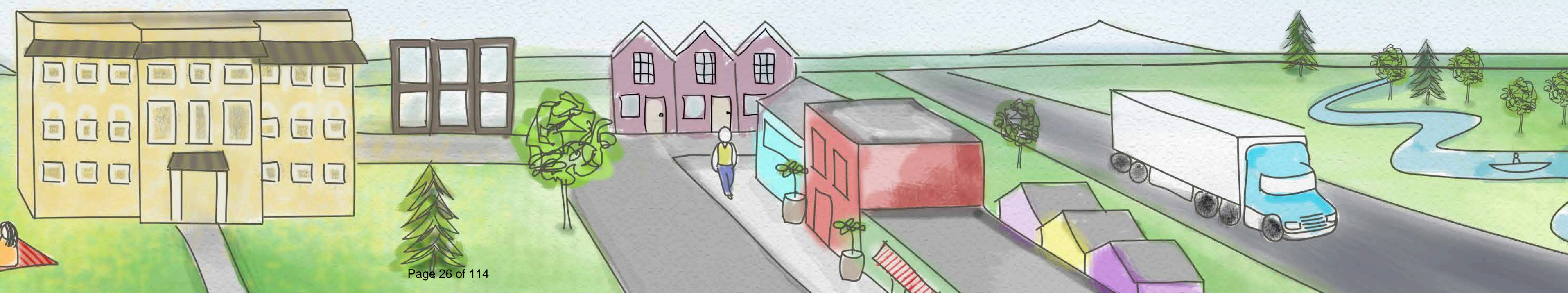
Chehalem Valley 2017-18 DESTINATION MARKETING PLAN

Executive Summary

The Chehalem Valley Chamber of Commerce (CVCC), through a marketing service agreement with The City of Newberg, works in partnership with many community stakeholders to grow tourism in the Newberg Community. Together, we deliver programs and activities that enhance visitor experiences, encourage overnight stays and improve the quality of life for residents.

An effective destination development and marketing program benefits and enhances the quality of life for residents and provides a healthy return on the investment of the transient room tax since visitors are often attracted to a destination by the same types of services, amenities and activities that enhance resident lifestyle. The additional spending by visitors in local communities results in a positive economic impact.

In addition to the Destination Marketing Contract that the City of Newberg signed with the CVCC in 2015, the City created a Transient Lodging Tax Ad Hoc Committee to manage Transient Lodging Tax funds that are dedicated to tourism over and above the contract with the CVCC. While that committee has been active in creating a small and large grant application procedure that funds tourism events and facilities they are also looking at ways to collaborate with the existing CVCC Destination Marketing plan to create and define the Newberg brand and apply those changes to the existing website and marketing vehicles. A secondary discussion has started about the value of contracting with a Public Relations professional to manage media relations and familiarization tours also in collaboration with the CVCC efforts.

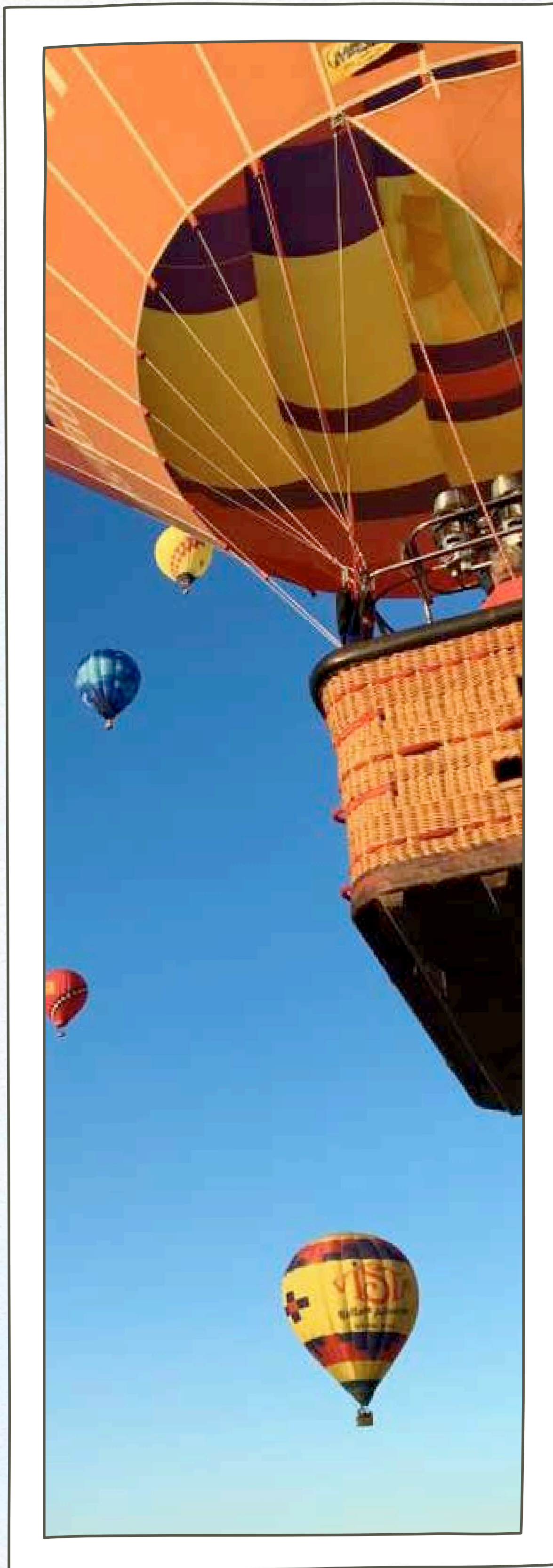


EXECUTIVE SUMMARY, *Continued*

It should be noted that because the CVCC contract is “fixed”, there is limited funding to market the community of Newberg over and above staffing and operating the Newberg Visitor’s Center on an annual basis. The City of McMinnville, a regional competitor to the Newberg area, funds Tourism marketing at \$496,000 per year. (Staffing is an additional \$125,000 and overhead is \$90,000). The CVCC Destination Marketing Budget for Newberg is \$42,500. While the CVCC continues to look for ways to expand our marketing reach by applying for grants and leveraging relationships with Travel Oregon, it is impossible to make up the difference in the destination marketing budget. Newberg requires additional funding for destination marketing to maintain a competitive edge and to keep and attract local small businesses that are supported through tourism.

Tourism continues to grow on a regional, statewide and national basis. Americans have more discretionary income for travel than they have had since 2007. Newberg offers an amazing array of desirable tourism attractions with Wine and Culinary assets at the very top. The recent recognition for the Willamette Valley as Wine Enthusiasts Wine Region of the year has garnered unprecedented attention to this beautiful area. We have an excellent opportunity to compete effectively for the Baby Boomer and Millennial markets if we invest and budget additional marketing dollars to promote and support the wonderful businesses and people in the great town of Newberg.





National Outlook for Travel and Tourism

The US Travel Industry Association is predicting a healthy increase for domestic and international travelers to the United States.

Spending on travel by U.S. residents has bounced back to pre-recession levels. Purchasing decisions regarding travel are changing as well, which indicates that after a couple years of last-minute trip planning, travelers are once again beginning to plan and book vacations well in advance of their travel dates. The booking window is lengthening toward three-to-six months out, giving destination marketers more time to reach their customers.

2017 promises to be a banner year for travel with nearly one-third of American adults saying they are more likely to take time off this year compared to 2016, according to a recent AAA survey.

Overall, 42 percent of Americans are planning to take a vacation in 2017 – with most planning trips to the warm weather destinations in the U.S. and abroad. And while flight prices are predicted to be 8 percent higher than last year, they are still down 9 percent compared to two years ago.

As the economy and family budgets have improved, U.S. adults have returned to taking fewer and longer leisure trips, resulting in a decline in the average number of leisure trips taken each year. However, research indicates that travel expectations and interest in travel for the coming year are at their highest levels since February 2008.

USTA also reports personal finances available for travel are at their highest point since March 2007, suggesting that price, deals and discounts are considered among the least important determinates on current travel plans.

(Source AAA and US Travel Industry Association)

Oregon Travel Trends

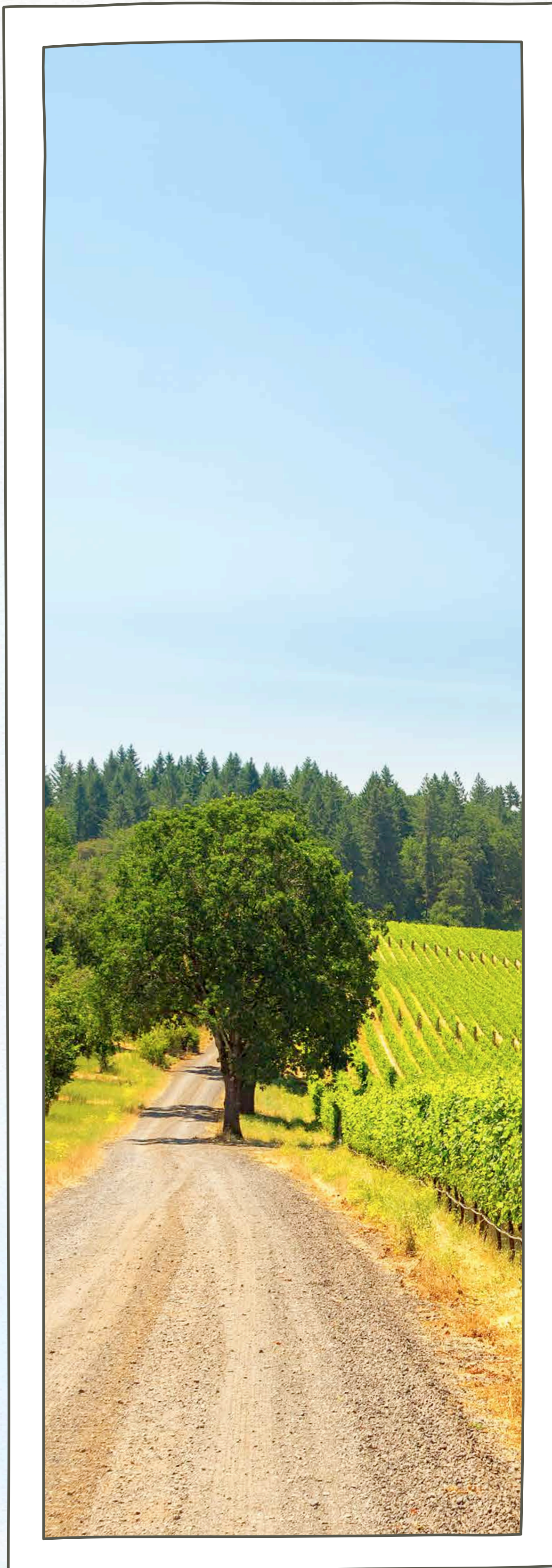
According to the 2015 Longwood's study travelers on overnight trips to Oregon were more likely to travel in their own car and less likely to arrive by plane than the national average. Travelers on overnight trips to Oregon were most likely to engage social media by reading travel reviews, posting photos online and looking at travel photos online. Oregon travelers, as a whole, use social media to plan travel at a higher rate than the national average.

The top states of origin for overnight trips were Oregon, Washington, California and Idaho. The states of Virginia, New York, Florida and Texas follow in that order. The top DMA's of origin were Portland, Seattle, Eugene, Medford-Klamath Falls, Los Angeles and San Francisco. The top five main reasons travelers made overnight trips to Oregon were Touring, Outdoors, Special Events, City Trips and Resorts the top two trip planning information sources were referrals from relatives and friends and destination websites.

Direct Travel Spending in Yamhill County in 2015 reached \$104.2 Million reflecting a 5.8% increase over the prior year and an all-time high for the region.



Newberg ... is target central of Oregon's wine country" - The Oregonian



Wine Drives Local Tourism Economy

Since the first grapes were planted in the state 50 years ago, Oregon is now recognized as one of the world's elite winemaking regions. With 18 designated wine growing areas located in four diverse regions, Oregon boasts more than 700 wineries producing wine from dozens of grape varieties.

Oregon has more than 500 wine tasting rooms with the majority of wineries only a short drive from Newberg.

All of this made wine touring one of Oregon's top draws. In 2013 (the most recent year for which statistics are available), wine-related tourism contributed an estimated \$207.5 million in revenues to the Oregon economy. (Oregon Wine Board)

Companies located outside of Oregon have made headlines with substantial investments in the state since 2013. Firms that have expanded their vineyard holdings in recent years include:

Ste. Michelle Wine Estates of Woodinville, Washington for **Erath** in Dundee, Oregon

Domaine Drouhin Oregon in the Dundee Hills region of the Willamette Valley, Oregon

Precept Wine of Seattle, for **Primarius** in the Willamette Valley, Oregon

Battle Creek Vineyards' for **Unconditional**, in the Willamette Valley, Oregon

Jackson Family Wines of Santa Rosa, California purchased a winery and vineyards in Oregon, adding several Willamette Valley Pinot Noirs to its **La Crema** line

Maison Louis Jadot of Burgundy, France acquired a vineyard in the Yamhill-Carlton region of the Willamette Valley and unveiled **Résonance Pinot Noir**, the company's first venture outside of France.

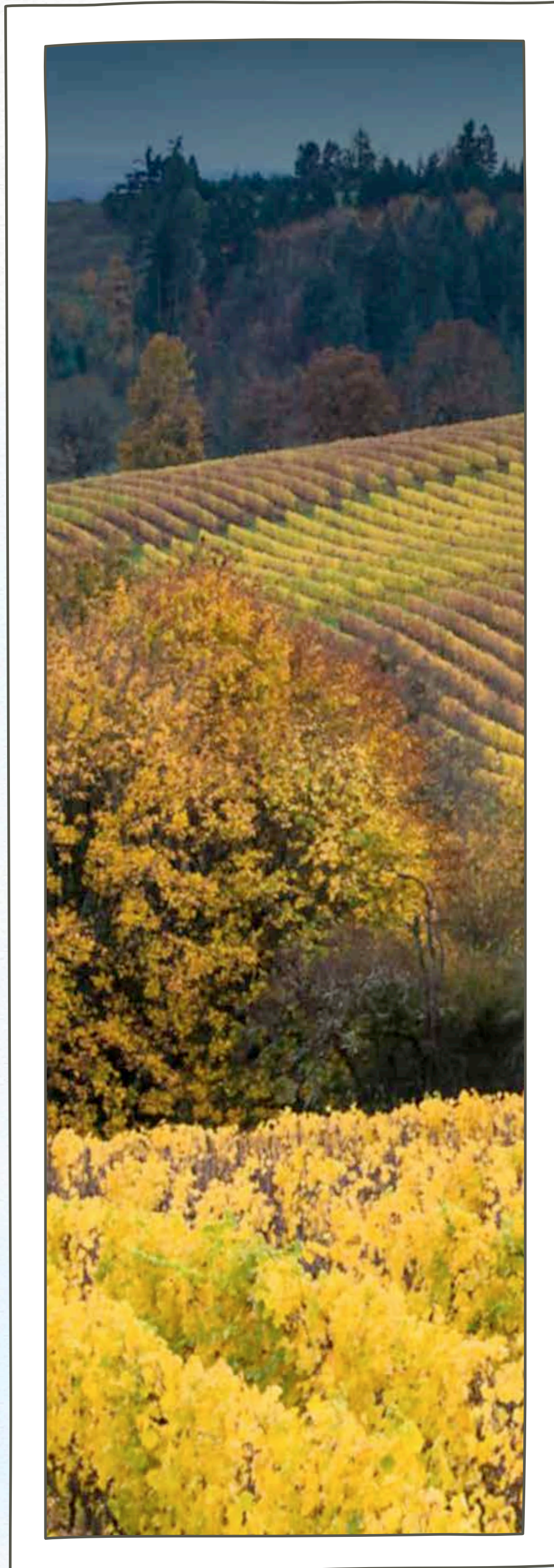
Joe Wagner's Copper Cane Wines & Provisions—based in Rutherford, California and known for launching the Meiomi label, now owned by Constellation Brands—debuted the Oregon-sourced wine **Elouan**.

Healdsburg, California's Foley Family Wines acquired **The Four Graces** in the Willamette Valley

Judy Jordan—founder and former owner of Russian River Valley's J Vineyards—purchased a Chehalem Mountain vineyard for her new Santa Rosa, California-based The Capra Co.

As the supply of land shrinks, Oregon-based wineries are also snapping up vineyards.

(MarketWatchMag, February 2016)



WINE DRIVES LOCAL TOURISM ECONOMY, *Continued*

As local investment in the wine industry swells so has other tourism-driven business in the area. Jason Lett is credited with planting the first grapes in Yamhill County in 1965 and soon others followed with a vision of growing and making exceptional Pinot Noir.

The late Joan Austin, great philanthropist and matriarch of the Newberg based A-dec Dental Manufacturing Company should be credited with driving the vision of a world-class resort in Newberg that would serve the demand of the luxury wine travelers. The Allison Inn and Spa, built in 2009 continues to garner world-wide acclaim as a destination resort and spa in the heart of Oregon Wine Country in Newberg Oregon.

Other bullish investors have followed suit. Steve Down invested millions in the Fall Event Center formerly Evergreen Aviation Museum. McMinnville also recently announced the opening of a new, 36 room luxury hotel that will open downtown on 3rd street in Spring of 2018. New restaurants are popping up around the county. Building vacancy in downtown Newberg is at an all-time low.





Top Travel Trends

Specialization

Luxury Travel Exchange International (LTX) suggests that becoming more niche focused in your destination marketing will be beneficial. Niches to focus on include weddings and honeymoons, “volun-tourism” (a form of tourism in which travelers participate in voluntary work, although this is typically for charity we have an opportunity to develop opportunities to volunteer in local wineries), spa and wellness, family/multi-generational travel, adventure/sports and meetings/conferences. By designing custom and unique niche packages for travelers, the Chehalem Valley area can differentiate itself, creating a reputation in specialization.

Technology

With anticipated new devices, like the Apple Watch, more people will be accessing the Internet on the go, making mobile device apps, responsive websites and mobile-friendly booking more important than ever. It is predicted that over 35% of online travel bookings will take place on a mobile device by 2018.

Authenticity

The modern traveler is becoming more and more interested in experiencing their chosen destination authentically. This means they want to interact with locals, avoid tourist traps, go where the locals go, and do what the locals do. One way to market to authentic travelers is through storytelling. Travelers looking for a truly authentic experience will be emotionally driven to explore a destination if there is a great story attached to it.

Experiential Travel

According to Terry Dale, President and CEO of the United States Tour Operators Association, today’s traveler continues to crave culturally immersive experiences and experiential tour packages remain in high demand. Nearly three-fourths (71%) of USTOA members provide travel and tour packages that offer art and culture, with 64% offering culinary and more than half (57%) providing adventure-focused packages. Vacationers want to broaden their experiences. Museum passes, show tickets, dining packages and helicopter tours are all great examples of offerings for the experiential traveler.



Top Travel Trends, CONTINUED

Millennials Lead the Way

Millennials are one of the most important demographics in travel today. As the largest generation to date, they are helping to define what the major trends and tastes of the coming decades will be. Millennials have grown up in the Digital Age. Online booking options are crucial, while online reviews and user-generated content on social media are part of the research process for most millennials. Destinations that attract millennial travelers make their online presence a priority and emphasize user-generated content.

Don't Leave Out the Boomers

Baby Boomers (born between 1946 and 1964) are traveling more than ever. Bucket list experience is the high-ranking motivator for travel among Boomers, meaning they're looking to invest in activities rather than simply relaxation. They will be influenced by good value, as budget can be a factor for those with a fixed income. Like Millennials, they are looking for experiences that are authentic and high-quality.

Food Tourism

Food has always been a huge part of travel, but seeking out authentic food experience has increasingly become a motivator for travel. Food experiences don't exclusively refer to "dining out", food markets, tasting sessions, cooking lessons and visits to farms or vineyard now make up 95% of all food experiences.

(Source: JackRabbit, Travel Trends and Treksoft Trend Report 2017)

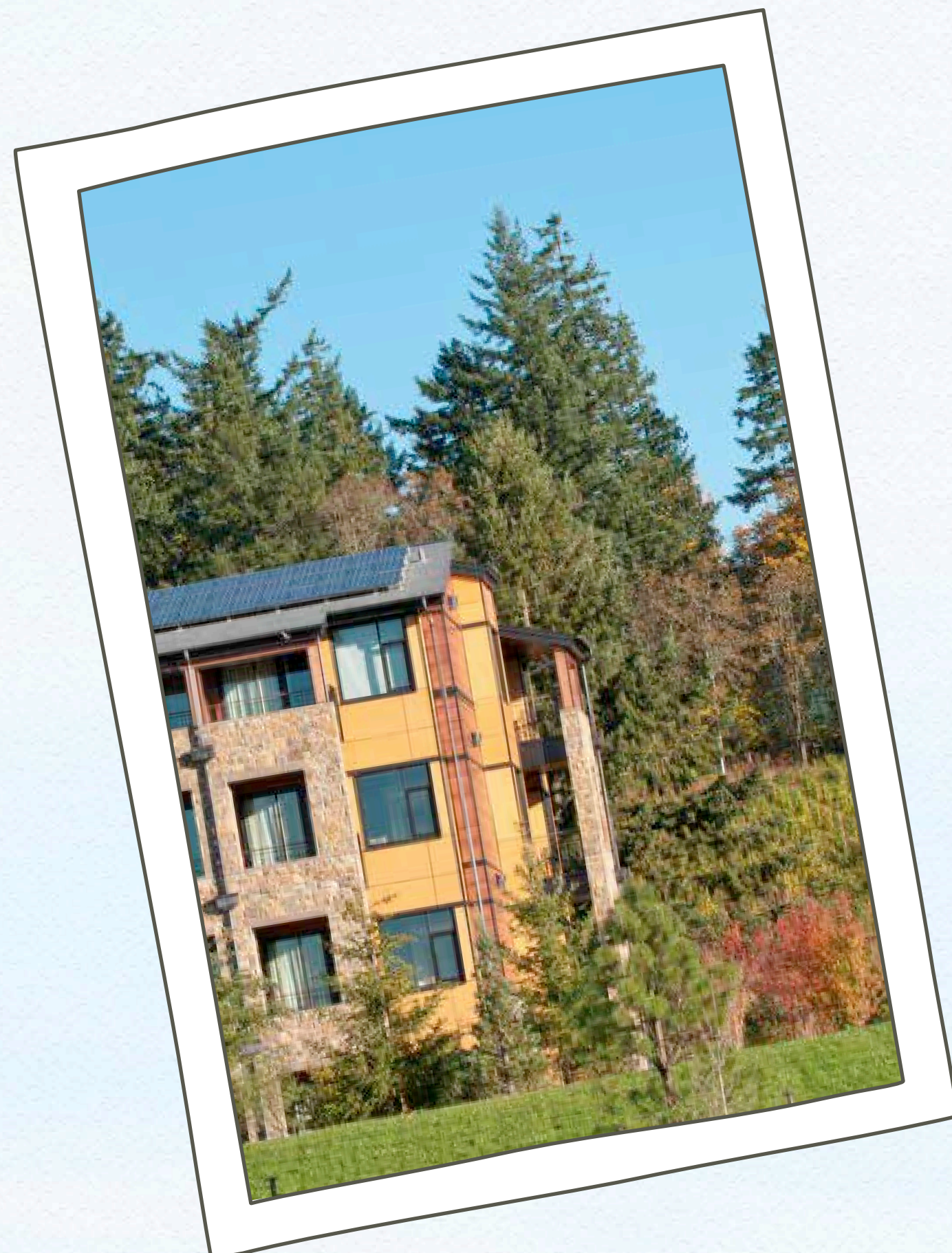
Situation Analysis

Tourism Product

Newberg's overarching "reason to visit" is its location at the epicenter of Oregon Wine Country, which draws travelers from around the world.

Other unique offerings include:

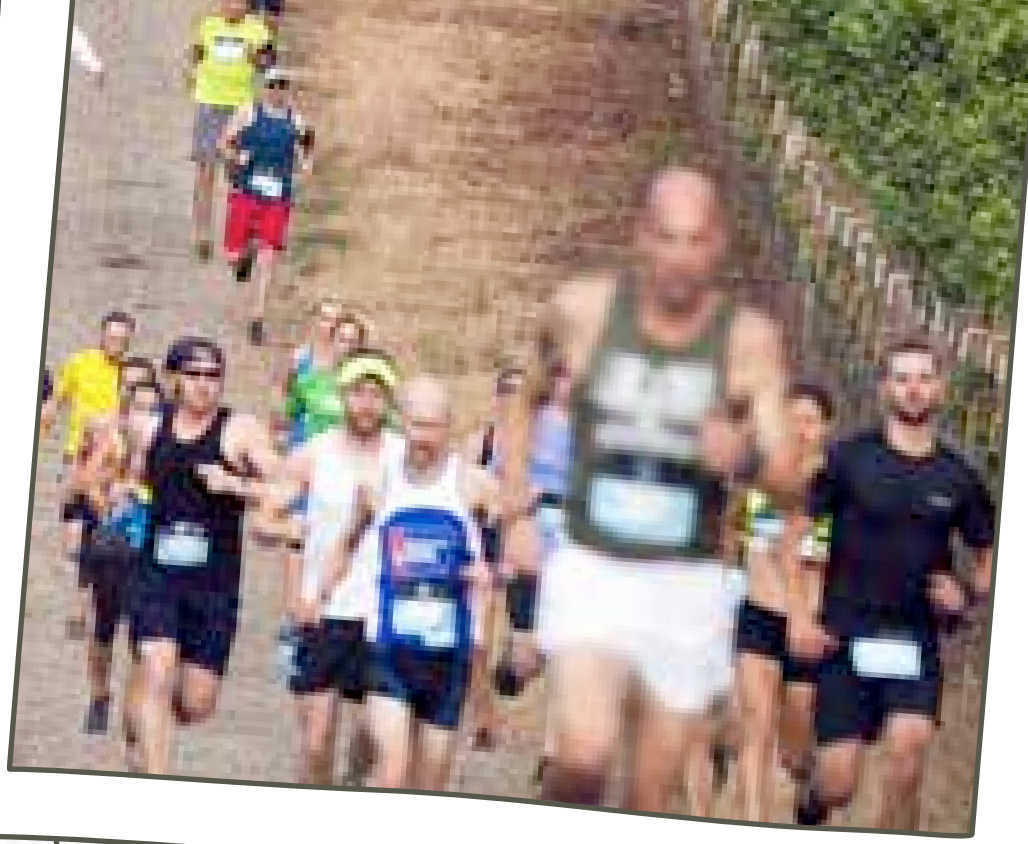
- World-Class Resort and Spa: The Allison Inn & Spa
- World-Class Dining: The Painted Lady and JORY at The Allison Inn & Spa
- Unique wine country touring adventures such as horseback riding, helicopters, hot air balloons and the trolley
- Widely acclaimed 18-hole public golf course
- One of three remaining Drive-In theaters in the State
- Growing cultural opportunities through The Chehalem Cultural Center and area galleries and shops



SITUATIONAL ANALYSIS • S.W.O.T. ANALYSIS
(Strengths, Weaknesses, Opportunities, Threats)

Strengths—present advantages

- National interest in Pinot Noir and the Willamette Valley
- The Allison—Already attracting luxury travelers
- Easily accessible within State and to Portland
- Small Town—Scenic Americana Profile
- Friendly town
- Chehalem Cultural Center
- Home of George Fox University (Sports, Lecture Series & Music)
- En-route to Oregon Coast
- Several Annual Festivals /events (Memorial Day Wine Tasting Weekend, Memorial Day Boat Races, St. Paul Rodeo, Old Fashioned Festival, Tunes on Tuesday, Brews & BBQ, First Friday Art Walk, Camellia Festival)
- Proximity to regional historical sites (Hoover-Minthorn House, Champoeg Park)
- Outdoor Recreation (Hot Air Ballooning, Skate Park, Chehalem Glenn Golf Course, Champoeg Biking/Hiking Trails, Bicycle Wine Country)
- Sportsman Airpark
- Key Attractions (Spruce Goose and Omnimax Theater, Spirit Mountain Casino)
- Knowledgeable staff at the Visitor Center
- Temperate and low-precipitation summer climate





SITUATIONAL ANALYSIS • S.W.O.T. ANALYSIS (Strengths, Weaknesses, Opportunities, Threats)

Weaknesses—present disadvantages

- Although the downtown is improving there are still deteriorating building facades and a business mix that is too heavily non-retail
- Downtown is not pedestrian friendly (Loud trucks, one-way traffic, traffic volume).
- Lack of additional routes to/from Portland and Hwy 99 Traffic
- Some downtown homes and businesses falling into disrepair
- Lack of variety of restaurants
- Absence of evening entertainment
- Low resident awareness and support of tourism
- Lack of retail shops
- Lack of downtown retail space
- Shortage of buildable land
- Lack of affordable housing
- Lack of safe cycling routes or outfitters
- Limited Public Transportation
- Limited Meeting Space
- Fragmentation of tourism effort throughout Yamhill County

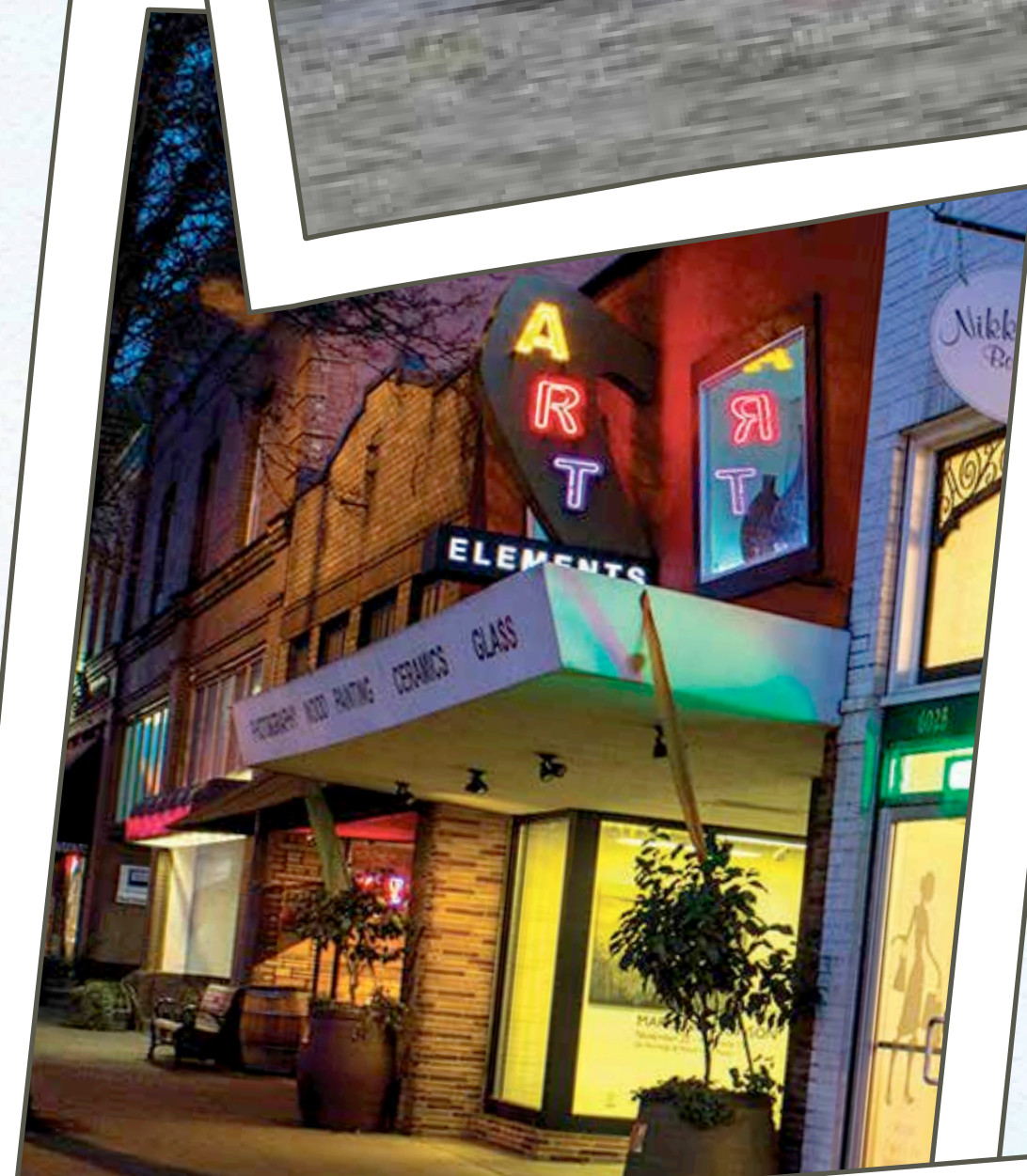
*"This former pass-through town now has the quality food, sips, and art you used to find only deeper inside the Willamette Valley."
—Sunset Magazine*

SITUATIONAL ANALYSIS • S.W.O.T. ANALYSIS
(Strengths, Weaknesses, Opportunities, Threats)

Opportunities – potential advantages

- Completion of the Bypass
- Austin 450-acre development
- Riverfront development
- Alternative lodging
- Mid-tier hotel recruitment
- Public accessibility to Willamette River
- Downtown Re-development
- Expand shoulder season events
- Capitalize on Portland convention market:
pre- and post-event connection and meeting planners in Portland
- Completion of the Aquatic Center
- Completion of the Chehalem Trail System
- Expand cross-marketing with GFU audience
- Expanded “engagement” of visitor experiences
(outdoors, vineyards, culinary classes)

SITUATIONAL ANALYSIS • S.W.O.T. ANALYSIS • BRAND STRATEGY





(Strengths, Weaknesses, Opportunities, Threats)

Threats—potential disadvantages

- Community congestion due to traffic on 99W
- Insufficient Dining Choices
- Lack of retail development
- Shortage of lodging during peak season
 - Lack of mid-range lodging choices
 - Limited Destination Marketing Budget
 - Competition from other destinations—significant expansion in competitors' destination marketing budgets

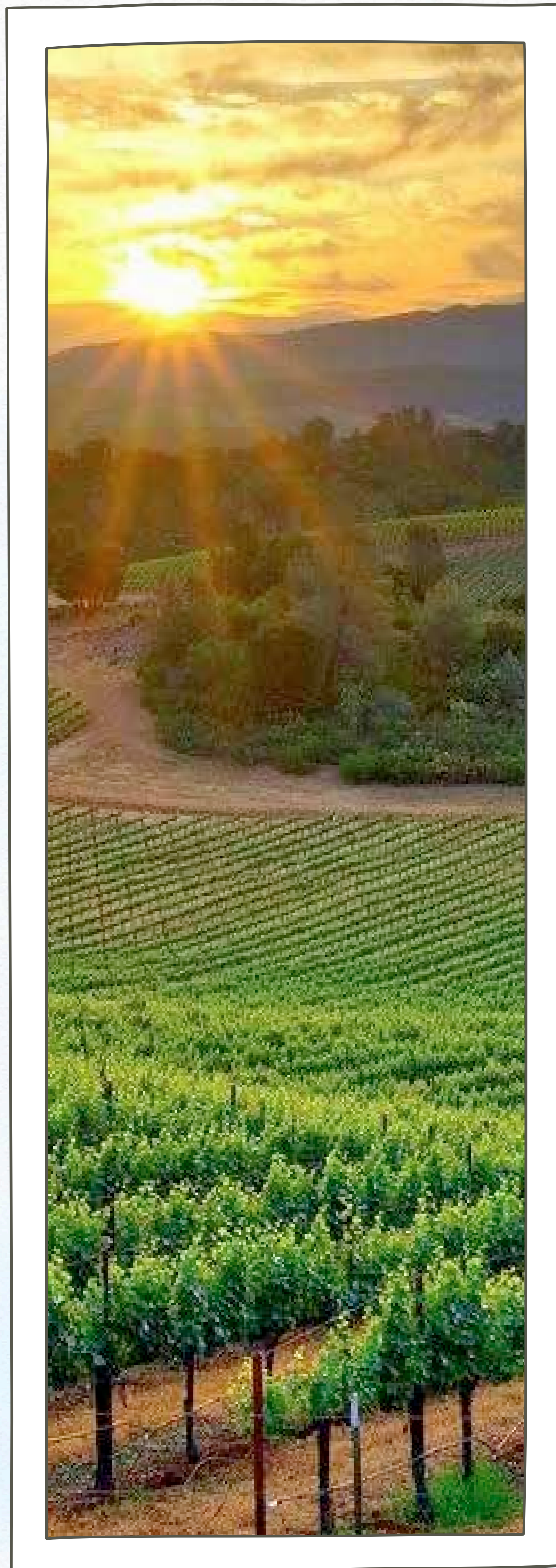
Brand Strategy

To determine Newberg's position it is important to first identify its uniqueness, differentiation from the competition and value to the customer. In doing this, Newberg is set apart from other wine destinations that are vying for the business of the same traveler/target audience.

The Chehalem Valley Chamber of Commerce (CVCC) is currently working collaboratively with the Newberg Transient Lodging Tax Ad Hoc Committee's Marketing Subcommittee to define Newberg's brand strategy. The CVCC will work closely with the Newberg Transient Lodging Tax Ad Hoc Committee to implement that strategy through our existing marketing channels once that work has been completed.

Perhaps Redmond can be an example of what will happen in downtown Newberg, once the initial phase of the Newberg Dundee Bypass is complete in 2016... If anything, downtown Newberg has the potential to blossom even brighter than Redmond.

—The Oregonian



Competition for Out-of-State Visitors to other Wine Regions

Napa

Sonoma

Walla Walla

San Luis Obispo

Santa Barbara County

Texas Hill Country

Finger Lakes New York

Competition for In-State Visitors and Visitors to this Region

Portland

Bend/Redmond

McMinnville

Carlton

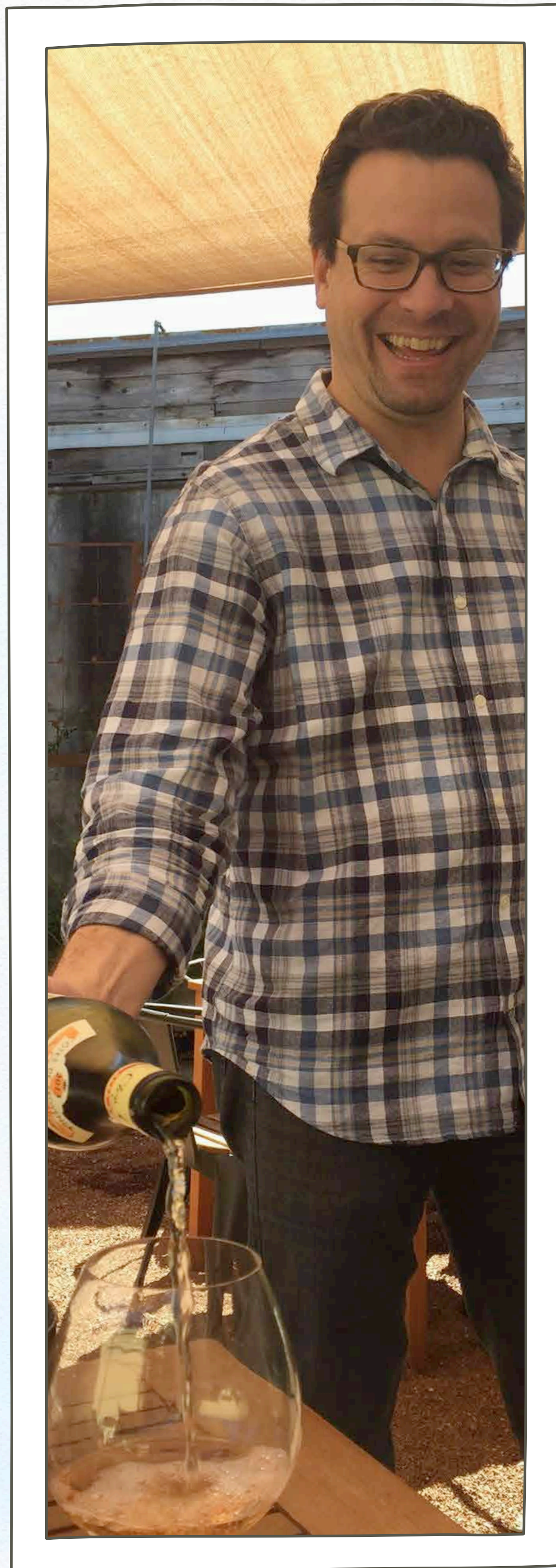
Salem

Eugene

Grants Pass

Ashland

Columbia Gorge/Hood River



Target Audience • Personas

According to the recently commissioned Newberg Tourism Strategy, Newberg's Target Audience can be defined as:

Wine Country Adventurers

Are we ready for them? Somewhat

- Need trail connectors, integrating parks & tourism, river access

Millennial Explorers

Are we ready for them? Somewhat

- Need consistent business hours and more variety downtown
- Develop / Integrate classes from cultural center with local tasting rooms & craft makers (e.g., chocolate shop to feature culinary classes)

George Fox Network

Are we ready for them? Yes, except ...

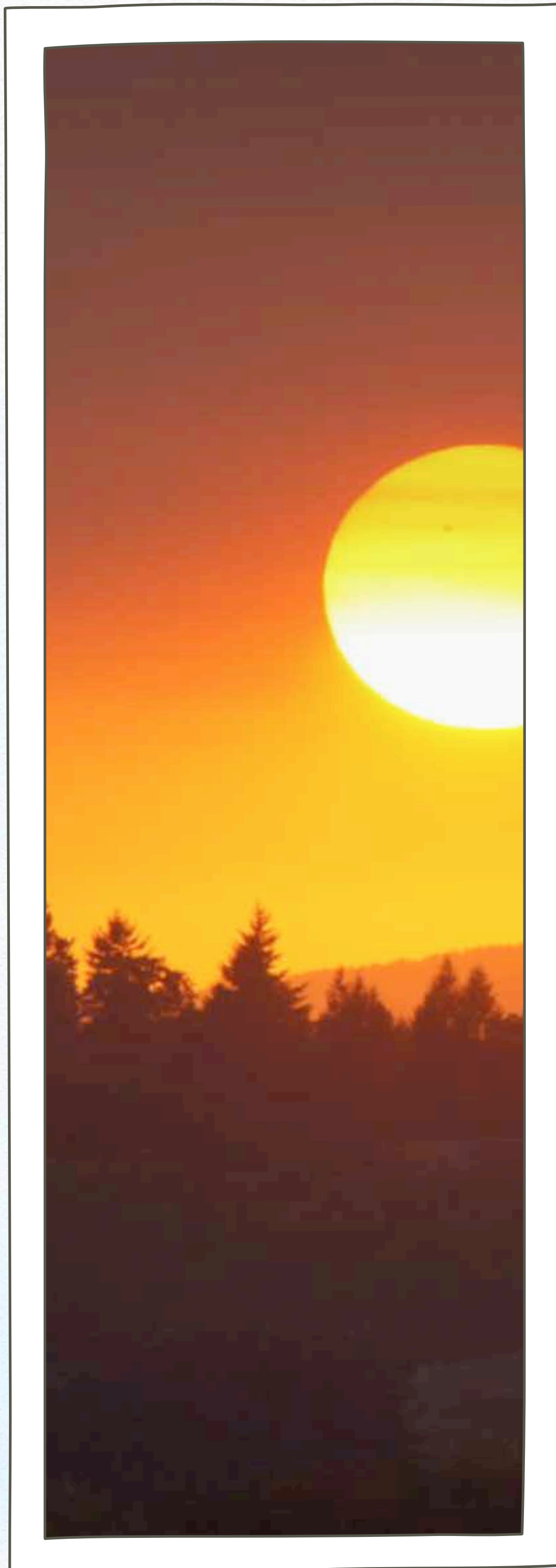
- Need upper/mid-level independently owned hotel downtown

The Luxury Wine Travelers

Are we ready for them? ... Not yet

- Newberg area already attracts this traveler to The Allison, & they tour the exceptional wineries nearby
- BUT downtown Newberg needs additional experiences that meet these traveler's desires: boutiques, more local restaurants, culinary classes, robust arts scene

Unfortunately, the Target Audience is weighted toward a future audience since the consultants themselves indicate that Newberg as a destination is not completely ready for these travelers.



Target Audience • Geographic

Utilizing the 2015 Longwood's report on Visitor Behavior for the Willamette Valley, our Primary markets include travelers from major cities in:

Oregon Washington

California Idaho

Secondary markets include major cities in:

Virginia New York

Florida Texas

Target Audience • Demographics

Focus on the visitors that represent the largest audience. We know based on research that the largest number of travelers in 2017 will be Boomers and Millennials. Utilize traditional advertising methods (i.e. visitor guides, travel magazines & social media to target the Baby Boomer crowd. Utilize social media and third party content to reach the Millennials).

The Allison is already marketing and reaching the Luxury Wine Traveler. Our marketing plan will seek ways to leverage their existing marketing and Public Relations but will not invest in specific programs to reach this audience.

This marketing plan will apply the same approach to reaching the GFU Network. More research needs to be done to determine how the Newberg Destination Marketing Plan can leverage the marketing that GFU is already doing to reach their alumni and family of students.

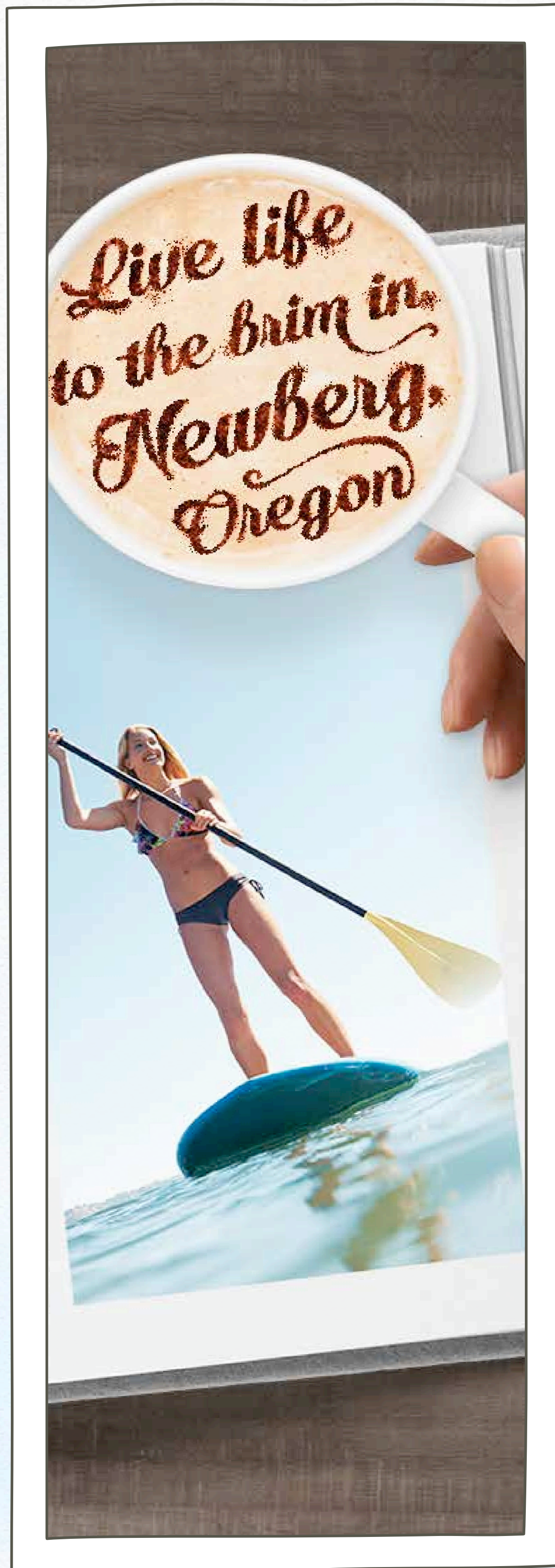


Key Destination Marketing Goals

- To increase visitor volume, visitor spending and the economic impact of tourism in Newberg
- Influence the long-term development of Newberg as a destination and its brand
- Increase leisure visitor volume, visitor spending, meeting, tours and group markets to the Newberg area through effective promotion with media and the travel-trade
- Inspire repeat visitors and word-of-mouth marketing through exceptional visitor center services
- Foster high-value relationships with our stakeholders
- Promote the importance of business and government investment in tourism

Key Destination Marketing Strategies

- Continue to improve our website as our key marketing tool in the areas of navigation, usability and content
- Collaborate with the Newberg Transient Lodging Tax Ad Hoc Committee to design and develop a high impact Newberg brand
- Integrate the “refreshed” Newberg brand into all existing marketing channels
- Enhance the efficiency of targeting digital media
- Continue to leverage the CVCC’s role in the travel decision-making process by focusing on generating target market awareness via marketing and media relations
- Increase knowledge of Newberg visitors through research



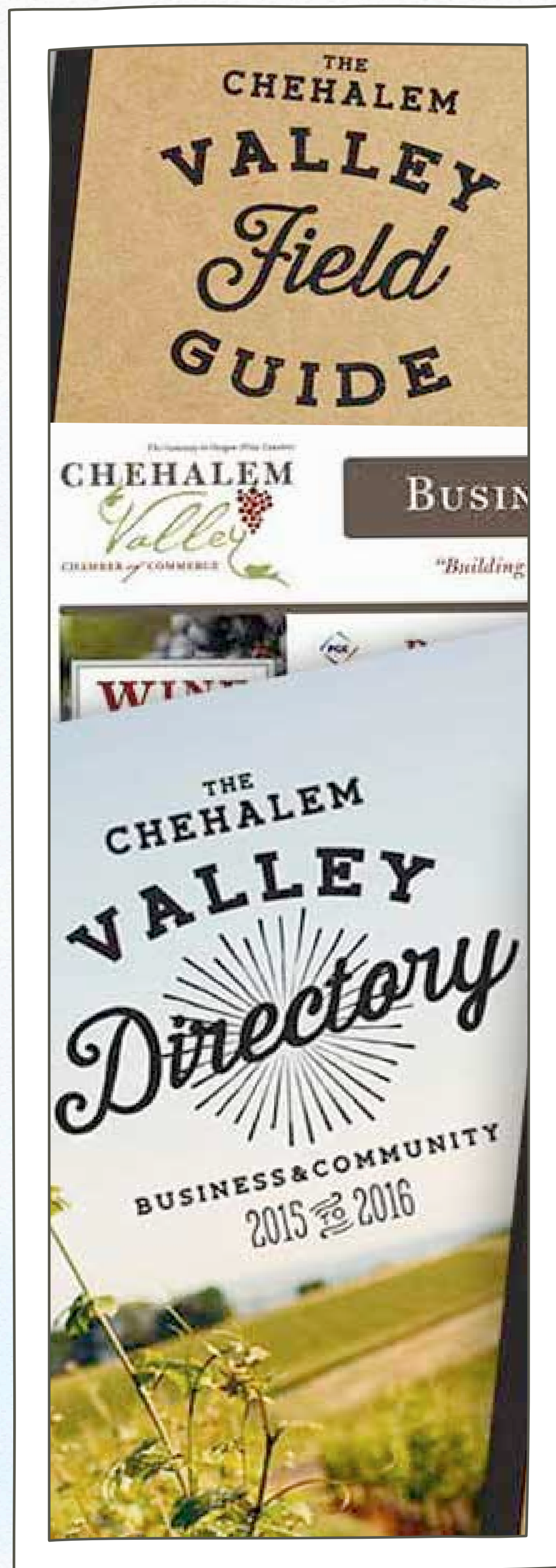
Key Destination Marketing Tactics

Website: visit.chehalemvalley.org

- Search Engine Optimization (SEO)—Continue to optimize our website with key search words/terms and content for major search sites including Google, Bing, MSN, Yahoo, etc.
- Continue to update and enhance our website weekly with blogs featuring interesting travel itineraries, new travel partners, visitor testimonials, seasonal specials, family reunion planning information, photos, maps and more
- Tracking – Expand use of Google Analytics to track visits, unique visits, users, referrers, page views, etc.
- Landing Pages – Utilize special landing pages in order to track ad campaigns and promotions

Social Media

- Continue consistent posting strategy on Facebook and Twitter. Expand social media activity to include Instagram, Pinterest and YouTube
- Use effective social media tactics to build relationships with leisure travelers and media. Tactics include “share,” “like,” “forward,” “retweets,” contests, etc.
- Encourage and assist local tourism partners on effective social media strategies for their business
- Serve content in a timely, consistent manner, using content calendars, and advance post scheduling
- Highlight positive media coverage about Newberg



Public Relations

(Suggest that this is funded outside the existing contract)

Collaborate with Newberg Transient Lodging Tax Ad Hoc Committee to contract with a Public Relations Professional to manage the following media relation activities:

- Press Trips—Host regional, national and international travel writers and editors on individualized and/or group press trips
- Media Leads—Continue to respond to leads, and forward leads to members from Travel Oregon and the Willamette Valley Visitors Association
- Pre-publication editing & fact checks—Offer to edit articles and guidebook sections for accuracy
- Distribution of semi-annual e-newsletter—Select media that highlights what is new and interesting in the Newberg area
- Media Kit – Develop an electronic media kit that highlights the outstanding tourism assets in Newberg and the surrounding area
- Build a more expansive photo and video library that is available for media requests, ads, and our website.

Publications

- Publish and distribute 19,000 Chehalem Valley Field Guide (tourism magazines)
- Publish Newberg City/Yamhill County map
- Publish Group Travel Brochure
- Publish monthly event brochure for visitors (also distributed to area lodging partners)



Leverage Partner Relations

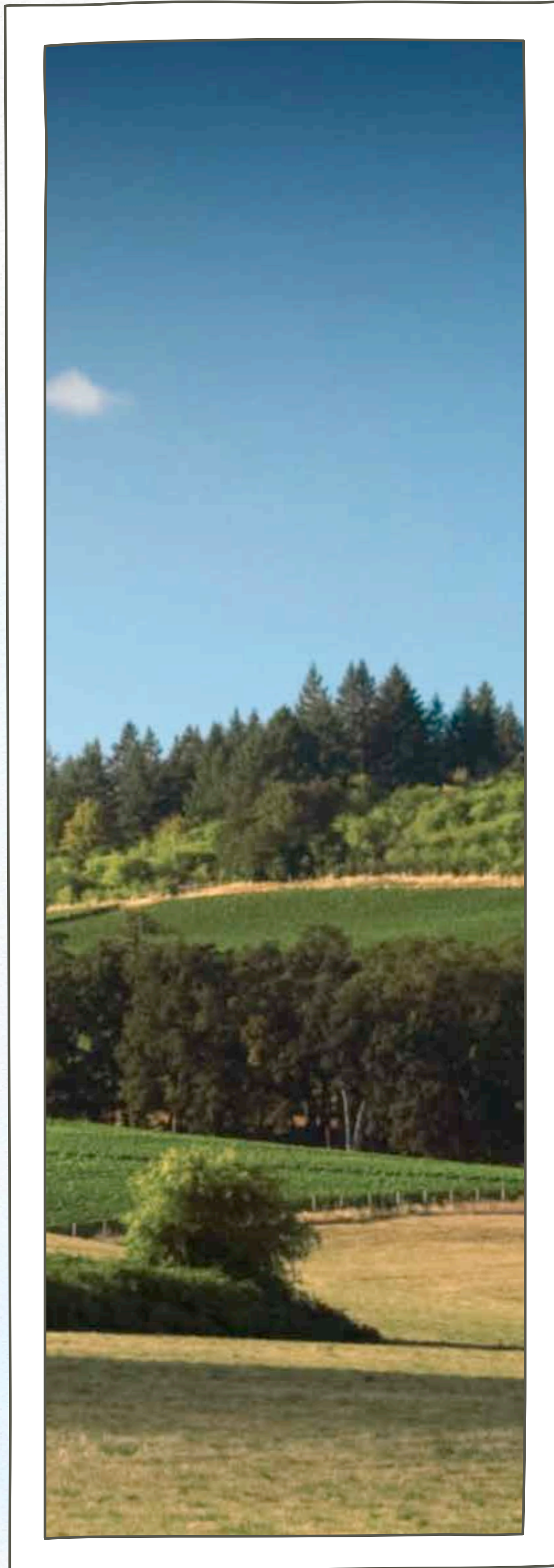
- Promote local tourism events through Willamette Valley Visitors Association, Travel Yamhill Valley and Travel Oregon’s websites

Event Sponsorship & Support

- Transportation and Volunteer Sponsor for the Oregon Truffle Festival in January; In addition, the CVCC took over management of Sunday’s Truffle Marketplace
- Presenting Sponsor for the Annual Camellia Festival in April
- Event organizer for Brews & BBQ in July

Visitor Services

- Maintain well-stocked Visitor Center with over 1,000 different maps and brochures of Newberg and the surrounding area
- All CVCC staff is Q-certified (Travel Oregon Customer Service Training) within 90 days of employment
- CVCC staff stays current with new/closed businesses and tourism partners through weekly outbound calls and staff “Familiarization Tours”
- CVCC staff receives ongoing hospitality training (Customer Service seminars, Governors Conference on Tourism, Western Association of Chamber Executives)
- CVCC staff assists all walk-in and telephone visitors with complimentary itinerary planning
- Email and telephone requests for visitor information are fulfilled within one work-day
- Publish a monthly events publication for visitors
- Visitor Center is open and staffed 7 days per week from Memorial Weekend to the last weekend in September and 5 days per week October 1st up to Memorial Weekend
- Local and state maps and visitors magazines are stocked in 24-hour access location at the entrance to the Visitors Center



Meetings/Retreats

- Continue to promote Newberg as a destination for small meetings or pre- and post-convention trips from the Portland Convention market
- Continue to support efforts of The Allison Inn & Spa's group sales team through the collaboration of a group travel brochure for the Newberg area

Workforce Development

- Continue to develop the workforce for the wine industry through the expansion of classes at the Oregon Wine Education Center; the Oregon Wine Education Center has trained over 150 Tasting Room Associates in the last 18 months
- Create a class for front-line employees to educate them on the unique tourism assets of Newberg and the surrounding community

Community & Government Relations

- Present at area service clubs on the importance of the local tourism industry
- Submit news releases to local media regarding CVCC tourism activities
- Continue to actively participate and collaborate with the Newberg Transient Lodging Tax Ad Hoc Committee on activities to advance Newberg tourism
- Member of Newberg Economic Development Committee with responsibilities for Newberg Tourism

Industry Relations

- Serve on Newberg’s Transient Lodging Tax Ad Hoc Committee
- Serve on Board of Travel Yamhill County
- Serve on Board of Willamette Valley Visitors Association and represent interests of Yamhill County
- Member of Oregon Destination Marketing Association
- Member of Travel Portland



Newberg is a Gem of a Town, One of the Best of Its Size (22,000) in the Northwest" by Jerry Richard - The Oregonian



Newberg in the News Click on a quote to view article

“Where to Eat in Oregon Wine Country Right Now” by Michael Russell —*The Oregonian*

“Newberg is a Gem of a Town, One of the Best of Its Size (22,000) in the Northwest” by Terry Richard —*The Oregonian*

“Beginning in the town of Newberg and extending south to the capital city of Salem, Oregon’s Willamette Valley is characterized by rolling hills and lush valleys. This is Oregon’s principal wine region, and while it may not be as well known around the world as California’s Napa Valley, it is no less breathtaking.” —*USA Today*

“This former pass-through town now has the quality food, sips, and art you used to find only deeper inside the Willamette Valley.” —*Sunset Magazine*

“This gateway to Yamhill County wine country is only 30 minutes south of Portland, but there’s so much to do along Newberg’s main drag of East First Street that you may not get to any actual wineries. No matter, since there are plenty of tasting rooms and restaurants where you can sample classic Oregon pinot noir.” Quick Day Trips by Grant Butler —*The Oregonian*

“(Pulp & Circumstance) which opened in June, is another effort by Loni Austin Parrish’s attempt to turn downtown Newberg into the hippest place in Oregon.” —*The Oregonian*

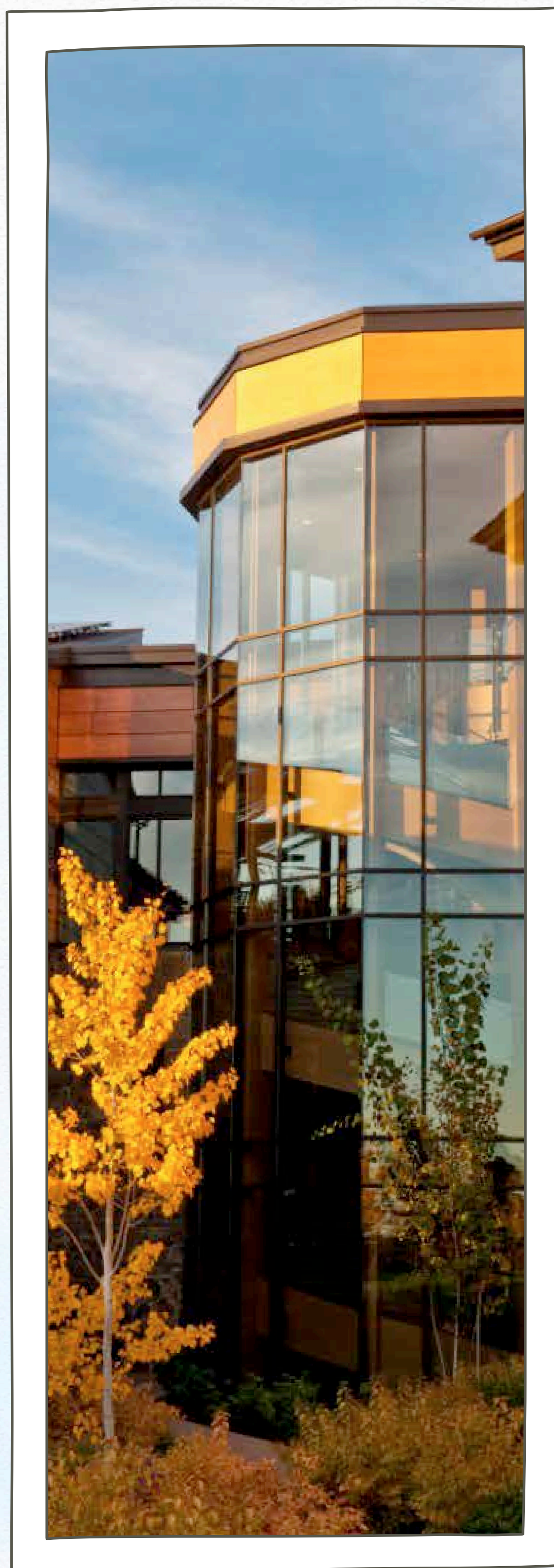


The First Destination in Oregon Wine Country Click on a quote to view article

“Newberg ... is target central of Oregon’s wine country” —*The Oregonian*

“California’s Napa Valley isn’t the only place in the country to find great wineries. Oregon has some up-and-comers that will give wine aficionados a reason to head north.” Wineries in Newberg & Dundee, Oregon —*USA Today*

“McMinnville and Newberg regularly vie for the title of top wine-country town . . . While McMinnville typically has shined brightest in size—and in scope of eating and shopping options—Newberg and Dundee have boasted the lion’s share of wineries and tasting rooms. Recent additions to both towns’ arsenal of attractions, though, have evened the field.” A Toast of Two Cities —*Portland Monthly*



The Allison Inn and Spa (Newberg) [Click on a quote to view article](#)

“Besides having some of the best lodging in Yamhill wine country, indeed in all of Oregon, the inn has become a popular day visit for Portlanders for its spa services and its JORY Restaurant.” —*The Oregonian*

“So what about that Allison Inn? Since it opened in 2009, it has cemented its reputation as one of the premier luxury resorts in Oregon, even earning a rare national recognition for quality of lodging in the state. Travel + Leisure magazine’s October issue will name the Allison as the top hotel spa in the continental United States ... Newberg also has three restaurants right up there in quality with the best of Portland.” —*The Oregonian*

TripAdvisor.com names The Allison Inn one of the top 10 pet friendly places to stay in the U.S. —*Oregon Public Broadcasting*

“Oregon is perhaps best known for its pinot noirs. You can sample many of these by the glass at the 85-room Allison Inn & Spa restaurant in the heart of the wine-producing Willamette Valley.” — The Big Six: Wine country hotels —*The Independent (UK)*

“You can get a good taster in a day visit, but it’s more rewarding if you hire a car and spare three days or so to work your way down the bucolic valley, cherry-picking the best producers. Leave Portland on Route 99W and head south towards Newberg. This is where the real wine country starts.” Tuscany? Provence? No – it’s Oregon. —*The London Sunday Times*

“The birthday girl’s husband had booked our group at The Allison based on magazine and Internet accolades and because of its location in Newberg, a central base from which to explore the region’s 200-plus wineries. He chose wisely. The Allison Inn and Spa opened in September 2009 and in a little over two short years has become the place to stay when wine touring in Oregon. It made Condé Nast Traveler’s 2010 Hot Hotels and Hot Spas list and CNN named The Allison and Oregon Wine Country as one of the Top 9 Spots in the World for Savvy Luxury Travellers.” —*Ottawa Citizen*



The Opportunity for Downtown Click on a quote to view article

“Perhaps Redmond can be an example of what will happen in downtown Newberg, once the initial phase of the Newberg-Dundee Bypass is complete in 2016... **If anything, downtown Newberg has the potential to blossom even brighter than Redmond.**

—*The Oregonian*

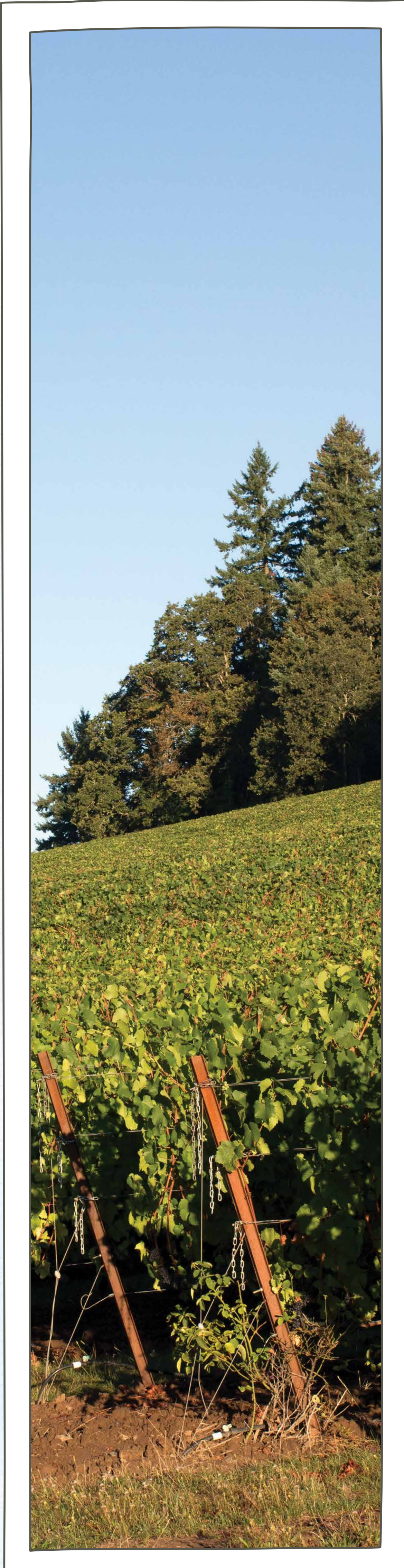
“Downtown Newberg will still be busy, because it will remain on Oregon 99W and the bypass will be routed as Oregon 18. **But Newberg will get its chance to fully embrace its location in the heart of Oregon’s wine country.**” —*The Oregonian*

“... if you live in Newberg or Dundee, **the best thing about the new bypass — 25 years in the making — is that it gives you the chance to rethink, rebuild or recover the charm of your wine-country town.** Now that the first phase of the bypass is a reality, it opens up possibilities for each city and allows the conversation to begin — or accelerate — about the shape of the future. For Newberg, the opportunity to reclaim its remarkably intact and historic downtown in a lasting and meaningful way is another building block in its ongoing growth and revitalization. Even without the bypass, Newberg has great potential; even with the traffic, we are seeing a resurgence,” he says. **“Downtown has great potential. It’s got great buildings and density”** Mike Ragsdale, *On the Road* —*Oregon Business Magazine*

“Work is under way on one of northwest Oregon’s long-awaited and most-highly anticipated highway projects, the Newberg-Dundee Bypass.” —*The Oregonian*

“It will get truck traffic and significant auto traffic out of Dundee and Newberg and give the downtowns back to the communities,” Torres said. —*The Oregonian*

“Newberg spruces up downtown to coax some of that traffic to stop” —*The Oregonian*



2017-18 Budget

REVENUE:

| | |
|-----------------------------|---------------------|
| City of Newberg | \$139,886.00 |
| City of Dundee Contribution | \$2,500.00 |
| TOTAL REVENUES: | \$142,386.00 |

EXPENSES:

| | |
|------------------|--------------------|
| Personnel | \$62,000.00 |
|------------------|--------------------|

CEO
 Wine Education Center Manager & Instructors
 Office Administrator
 Visitors Center Coordinator
 Visitors Center – Seasonal Help
 Benefits – Health Insurance & Retirement
 Taxes
 Allocated by percentage of time spent on Visitor Center or Tourism Promotion Activities

| | |
|------------------|--------------------|
| Marketing | \$42,000.00 |
|------------------|--------------------|

Print Advertising
 Social Media Marketing
 Chehalem Valley Field Guide
 Travel Yamhill Valley Tourism Guide Ad
 Willamette Valley Visitors Association—Co-op Ad Opportunities
 Governors Conference on Tourism—Oregon Destination Marketing Conference
 First Friday Artwalk participation/Trolley Sponsorship
 Camellia Festival Presenting Sponsor
 Newberg Christmas Lights Seasonal Electricity
 Event Marketing—Camellia Festival, Tunes on Tuesday, Brews & BBQ
 Website Modifications
 SEO Fees
 Travel Oregon Tourism Guide Ad
 Familiarization Tour Expenses
 Contingency Marketing Dollars Set-Aside for Unique Opportunities

| | |
|---------------|--------------------|
| Shared | \$47,979.00 |
|---------------|--------------------|

Calculated as 1/3 of overhead in Chamber Budget applicable to tourism
 Includes: Dues/Subscriptions, Bank Fees, Insurance, Internet/Web
 Miscellaneous, Supplies, Postage, Leases, Printing, Rent, Capital
 Improvements, Repair/Maintenance, Telephone, Utilities
 Professional Fees
 Mileage

| | |
|------------------------|---------------------|
| TOTAL EXPENSES: | \$151,979.00 |
|------------------------|---------------------|

| | |
|--------------------|--------------------|
| DIFFERENCE: | -\$9,593.00 |
|--------------------|--------------------|

Chehalem Valley Chamber funds any negative balance per contract.

BUDGET TLT MARKETING SUBCOMMITTEE PROPOSAL

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

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

Assumptions

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

26.5% of Visitor Center Contract for Marketing Services

73.5% of Visitor Center Contract for Visitor Center Operation

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

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

TLT NEW ORGANIZATION MODEL

| Revenue | FY 16/17 | FY 17/18 | FY 18/19 | FY 19/20 | FY 20/21 |
|-------------------------------------------------|------------------|------------------|------------------|------------------|------------------|
| Transient Lodging Tax | 1,025,522 | 1,056,288 | 1,087,977 | 1,120,616 | 1,154,234 |
| Beginning Fund Balance (2016/17) | 149,857 | | | | |
| Estimated Additional Funds | | | | | |
| Interest | 2,564 | 2,580 | 2,600 | 2,620 | 2,640 |
| Total | 1,177,943 | 1,058,868 | 1,090,577 | 1,123,236 | 1,156,874 |
| Expenses | | | | | |
| Transfers out General Fund | 665,905 | 685,883 | 706,460 | 727,653 | 749,482 |
| Visitor Center Contract | 137,548 | 141,674 | 145,924 | 150,302 | 154,811 |
| Tourism Promotion (undefined) | 374,490 | 228,731 | 235,593 | 242,661 | 249,941 |
| Tourism Consultant | 40,000 | | | | |
| Tourism Director - Salary ¹ | 55,000 | 56,100 | 57,222 | 58,366 | 59,534 |
| Tourism Director - Taxes, Insurance (18%) | 9,900 | 10,098 | 10,300 | 10,506 | 10,716 |
| Tourism Manager - Admin Support ² | 4,100 | 4,182 | 4,266 | 4,351 | 4,438 |
| Tourism Director - Recruitment | 1,000 | | | | |
| Tourism Director - Meetings, Travel, Networking | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| Tourism Marketing | 10,000 | 10,000 | 10,000 | 10,000 | 10,000 |
| Fundraising | 10,000 | 10,000 | 10,000 | 10,000 | 10,000 |
| Office Space Lease/Utilities ³ | 18,000 | 20,700 | 23,805 | 27,376 | 31,482 |
| Furniture/Desk/Computer/Phone | 10,000 | 500 | 500 | 500 | 500 |
| Office Supplies | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| Secretary of State filings | 100 | 100 | 100 | 100 | 100 |
| Subtotal | 164,600 | 118,180 | 122,693 | 127,699 | 133,270 |
| Audit (ongoing) | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 |
| Tourist Related Facilities | 187,890 | 91,131 | 93,500 | 95,582 | 97,311 |
| Small Grant Program (pilot program) | 20,000 | 20,000 | 20,000 | 20,000 | 20,000 |
| Total | 1,177,943 | 1,058,868 | 1,090,577 | 1,123,236 | 1,156,874 |

¹ 2% annual COLA

² 2% annual COLA

³ 1,500 sft at \$1.00 sft at 1.5% annual increase

— visit —
M C M I N N V I L L E
— oregon —



BUSINESS PLAN & BUDGET
FISCAL YEAR 2018

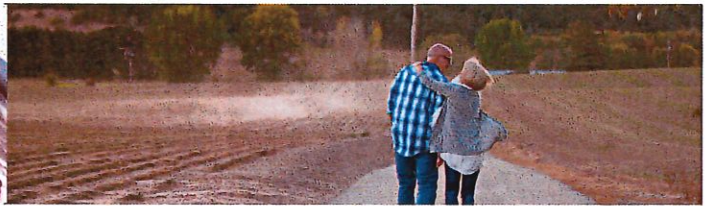
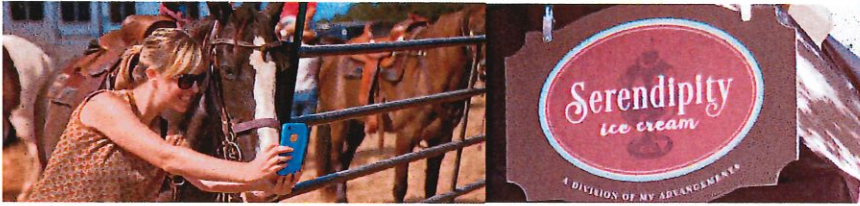
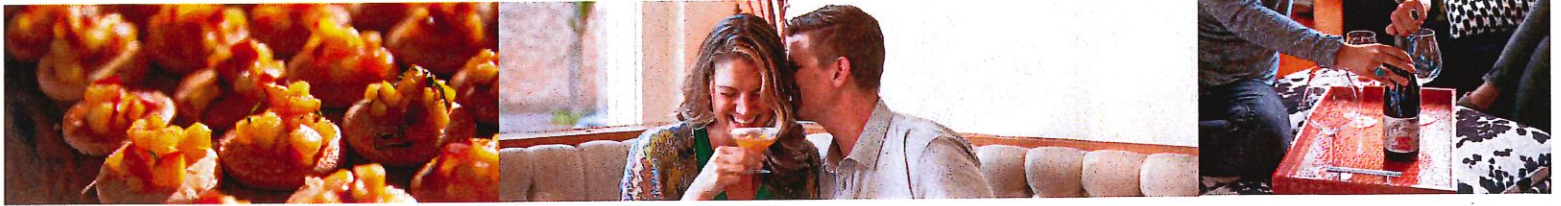


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BOARD MEMBERS & STAFF

ERIN STEPHENSON

Board Chair
Co-Owner
3rd Street Flats & Atticus Hotel

MARIA STUART

Board Vice Chair
Partner
R. Stuart & Co. Winery

ELLEN BRITTAN

Board Treasurer
Co-Owner
Brittan Vineyards

CINDY LORENZEN

Board Member
Owner
Sage Restaurant

TY ROLLINS

Board Member
Owner
Comfort Inn

EMILY HOWARD

Board Member
Owner
Thistle Restaurant

JENNIFER FEERO

Board Member-At-Large
Willamette West Realtors
Real Estate Broker

COURTNEY CUNNINGHAM

Board Member-At-Large
Glint Creative
Owner

KELLIE MENKE

Board Member (Non-Voting)
City Councilor
City of McMinnville

JEFF TOWERY

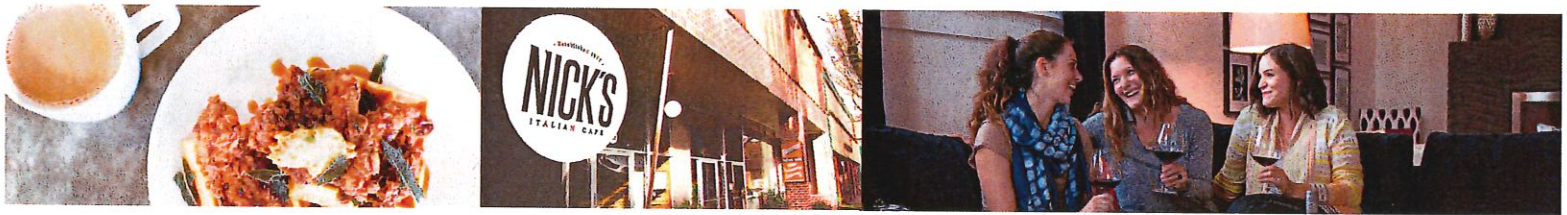
Board Member (Non-Voting)
City Manager
City of McMinnville

JEFF KNAPP

Executive Director
Visit McMinnville

KITRI MCGUIRE

Marketing Manager
Visit McMinnville



WHAT IS VISIT McMINNVILLE?

Visit McMinnville is an innovative marketing organization dedicated to enhancing McMinnville's economy by attracting as many visitors as possible to the City, and once they're here, ensuring those visitors spend as much money as possible with local businesses.

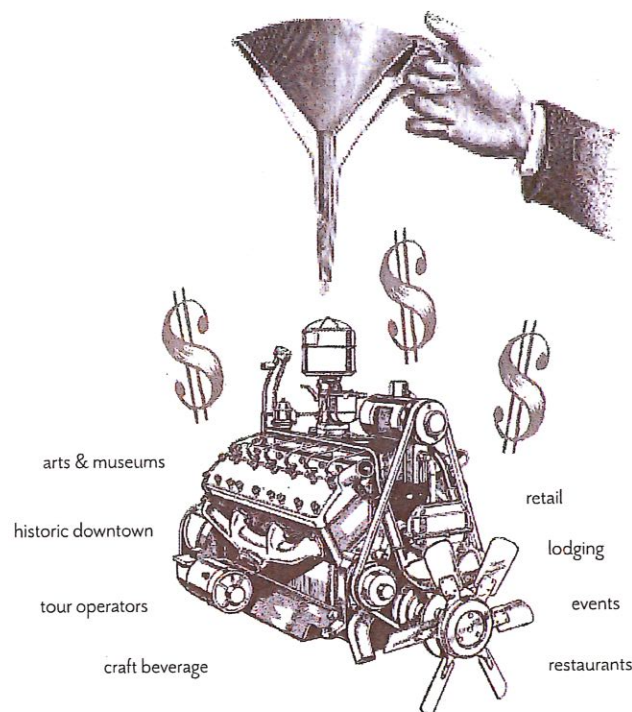
VISIT McMINNVILLE'S MISSION STATEMENT

Visit McMinnville's mission is to enhance the economic vitality of our community by promoting McMinnville as a year-round visitor, convention, and event destination by maximizing collaborative partnerships, efficiently activating transient lodging tax revenue into effective sales and marketing programs, and cultivating a world class visitor experience.



VISIT McMINNVILLE'S MARKETING MODEL

TV ADVERTISING - RADIO ADVERTISING - PRINT ADVERTISING - SEO / SEM
 CITYWIDE EVENTS - PUBLIC RELATIONS - SOCIAL MEDIA - DIGITAL MARKETING
 BROCHURE DISTRIBUTION - GROUP SALES & RECRUITMENT - PROMOTIONS



Virtually everything Visit McMinnville does is designed to drive traffic to VisitMcMinnville.com. Visit McMinnville's marketing model is founded on the fundamental strategy of generating customers through a comprehensive mix of marketing, sales, and public relationship programs, then driving those customers to VisitMcMinnville.com where they are connected to McMinnville's tourism stakeholders.

As a non-membership, publicly funded organization, Visit McMinnville offers free listings on VisitMcMinnville.com to tourism stakeholders to ensure transient lodging tax dollars benefit the entire tourism industry.

The premise is, we attract visitors to McMinnville and provide opportunities for local businesses to convert those visitors to customers.

Visit McMinnville's website is the engine that converts Visit McMinnville's marketing efforts to revenue for local businesses.



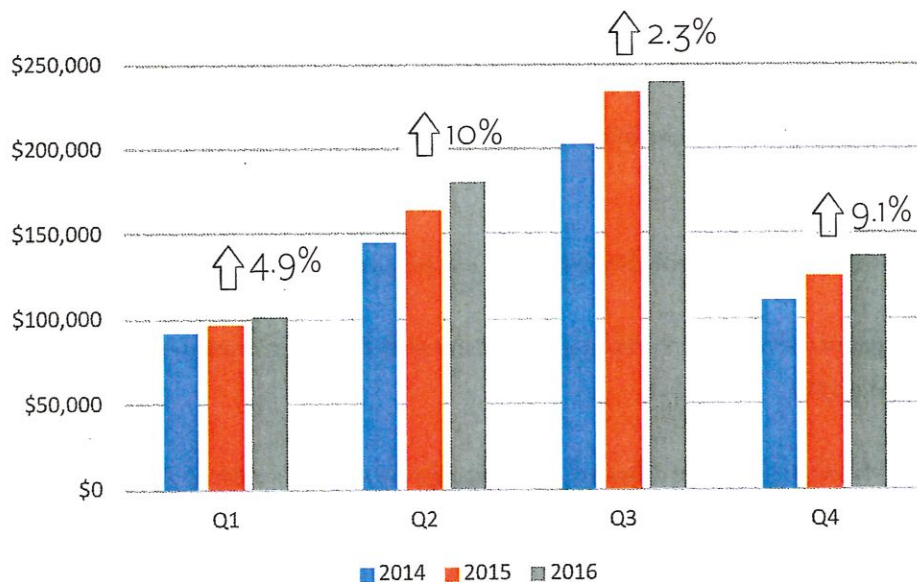
FISCAL YEAR 2017 IN REVIEW

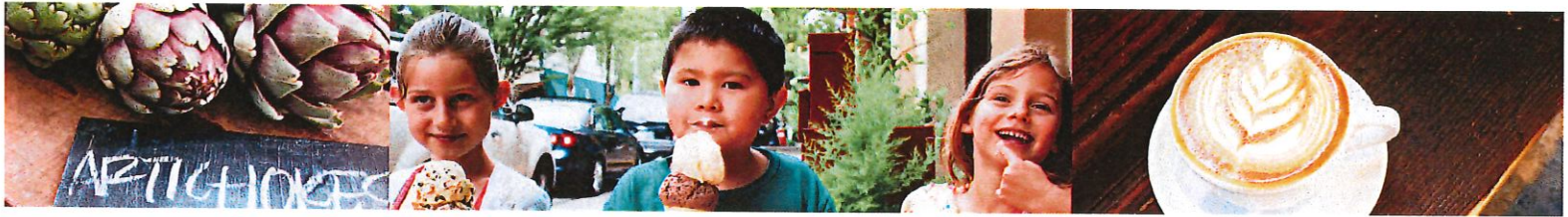
- Increased transient lodging tax (TLT) by 6.5% in the 2016 calendar year
- McMinnville visitor survey strategy executed, data collected, and report delivered
- Over 76,000 unique website visitors to visitmcminnville.com, July 2016 through April 2017 (2016 numbers exceeded Travel Oregon's expectation for a new DMO site by 400%)
- All social media channels have or are on pace to exceed 100% growth goals in FY17
- Created Winter TV Ad (now running on Comcast & Xfinity), using visitor survey data to target travelers most likely to visit McMinnville
- Over 941,000 earned media impressions (estimated coverage views + social shares) gained through media relations efforts, July 2016 through April 2017 (outpacing goal of 1,000,000 impressions)
- Engaged a well-known travel photographer as an artist-in-residence, capturing images at 10 staged shoots, local events, and day to day wine country life
- Created an engaging Winter campaign with print & digital creative used in targeted media buys in key shoulder and low season months
- Executed board-level strategic planning retreat, focused on building a 1-3 year plan
- Collaborated on founding the McMinnville Community Wayfinding Committee, whose focus is to create easily accessible information systems that guide people to and through town
- Brought regional, national and international media and FAM tours to town with custom itineraries to showcase McMinnville as a premium tourism destination
- Enhanced the visitmcminnville.com user experience with a homepage redesign, new header and footer navigation options, and optimized page speed
- Engaged influencers and media at Portland's FEAST food festival



- Distributed McMinnville lookbooks and Wine Walk passports to Welcome Centers around the state and to premier corporate partners like Boeing, Intel, and AAA
- Worked with the city, local interests, and other economic development organizations to contribute to a cohesive, long term economic development plan
- Created 8 vignette videos to bring awareness to a wide variety of businesses and attractions in McMinnville
- Partnered with the Oregon Truffle Festival to bring high income food and wine enthusiasts to McMinnville during the off season
- Created the McMinnville Umbrella Share program to encourage shoulder and off season shopping with 100 Wine Walk branded golf umbrellas available for guest use throughout McMinnville's Downtown & Granary districts
- Created a Wine Walk app for Apple and Android with maps, geolocation stamps, and winery information

TRANSIENT LODGING TAX GROWTH



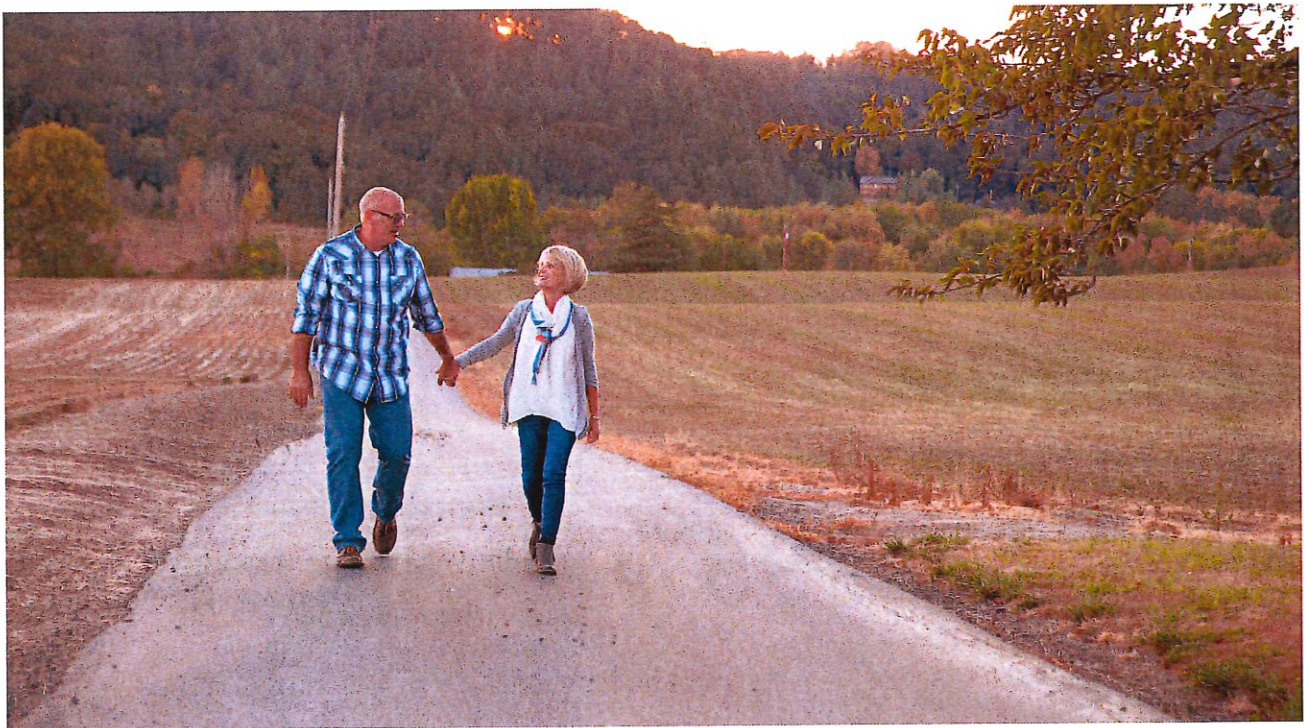


FISCAL YEAR 2018 GOALS & OBJECTIVES

- Increase annual transient lodging tax (TLT) revenue by 7%
- Execute strategy to attain 120,000 unique website visitors; a projected 30% increase over expected FY17 unique visitors to visitmcminnville.com
- Execute shoulder and low season (November–April 2018) promotional campaign to improve healthier seasonality mix in the McMinnville tourism industry
- Increase focus on brand awareness of Visit McMinnville’s Wine Walk promotion
- Increase all social media channel audiences by 50%
- Secure regional and national non-paid media coverage resulting in 1.25 million impressions
- Optimize visitmcminnville.com by launching a new database, and measure use/success by increase in time spent on site, page views, and referrals to stakeholders’ sites
- Enhance investments in visitmcminnville.com increasing organic traffic by 30% through maximizing search engine optimization (SEO) and search engine marketing (SEM)
- Manage and lead the development of a McMinnville Community Wayfinding Master Plan through collaboration with the McMinnville Community Wayfinding Committee and Sea Reach
- Execute Visit McMinnville’s current marketing plan by adding additional winter creative content, videography and photography
- Research McMinnville market feasibility study for convention, event, and sports opportunities
- Design and implement program to attract group visits with focus on shoulder and low season (November–April 2018)
- Expand Visit McMinnville’s current branding campaign by adding a new lookbook, a newly designed map, two new radio spots and new video edits



- Build consumer email list to fuel quarterly consumer E-newsletters
- Complete plan for 2018/19 videography and photography projects to kick off Summer 2018
- Plan and execute second successful board retreat and strategic visioning in January 2018
- Collaborate with McMinnville Downtown Association (MDA), McMinnville Economic Development Partnership (MEDP), and the McMinnville Chamber of Commerce on supporting the execution of a city-wide hospitality/service/concierge service program
- Collaborate with MDA, MEDP, and the Chamber on a citywide economic development plan





McMINNVILLE TOURISM BY THE NUMBERS

63%

visitors who live outside Oregon

6.5% increase in TLT in 2016

39%

visitors who stay overnight

8% visitors from outside the USA

100,077

unique visits in 2016 to VisitMcMinnville.com

3.4

average number of nights stayed by overnight visitors

80%

overnight visitors who spent time on 3rd Street

1,609

jobs in Yamhill County because of tourism

(Dean Runyan & Assoc., 2015)

31%

visitors from Portland

\$143,000

average annual household income of visitors

120

pieces of earned media coverage (4/16-12/16)

95% visitors who gave McMinnville a 4 or 5 rating (on a 5 pt scale)



WEBSITE PERFORMANCE – 2016

| | |
|--------------------------------------|------------------------------------------------------------------|
| 100,077 unique visits | 8,340 average monthly visits |
| 196,451 total page views | 29.1% visitors who find us through organic search |
| May most monthly visits | 1:55 average time on site |
| January fewest monthly visits | 23.4% visitors who clicked through to a partner's website |

MEDIA RELATIONS PERFORMANCE – 2016

Tracking of media performance began in April 2016. From April-December, McMinnville received 998,800 coverage views, 120 unique pieces of coverage, and hosted 25 writers and editors. Below is a selection of McMinnville's 2016 media coverage.

| | | | |
|---------------------------------------------------|-----------------------------------------------------------------------------|-----------------------------|----------------------------------------------------------------------------------------------|
| Sunset | "The West's Best Places to Live" | The New York Times | "Your Next Lesson- Oregon Pinot Noir" "Putting Together the Details of Oregon Pinot Noir" |
| ARCHITECTURAL DIGEST | "Take a Weekend Wine Trip to Oregon's Willamette Valley" | Portland MONTHLY | "The Best Local Food Festival You've Never Heard Of" "Oregon's 50 Best Wines" |
| 1859 <small>Oregon's Magazine</small> | "Best Places to Live. Work. Play." | the Portland MERCURY | "Lush Life: Mixing with Wine" "McMinnville's Passport to Wine" |
| FOX 12 <small>OREGON</small> | Wine Walk App TV Coverage SIP Event TV Coverage | VICE | "I Escaped an Alcohol Free Iran to Make Wine in Oregon" |
| OREGONLIVE <small>The Oregonian</small> | "The Cocktail Hour" "12 Beautiful Places to Stay in Oregon Wine Country" | THRILLIST | "Best Small US Cities with World-Class Food Scenes" |
| OREGON WINE PRESS | "Smack in the Middle" | via AAA | "Weekender: McMinnville, Oregon" |



FISCAL YEAR 2018 BUDGET

| REVENUE | TOTAL \$ | TOTAL % | MARKETING EXPENSES | TOTAL \$ | TOTAL % |
|-----------------------|------------------|----------------|-----------------------|------------------|--------------|
| City Funding | 471,088 | 91.6% | Employee Compensation | 110,500 | 22.0% |
| Advertising Revenue | 3,000 | 0.6% | Employee Benefits | 13,879 | 2.8% |
| Grant Funding | 40,000 | 7.8% | Payroll Taxes | 10,224 | 2.0% |
| | \$514,088 | 100% | Travel & Meals | 4,800 | 1.0% |
| | | | TV | 38,500 | 7.7% |
| | | | Trade Shows | 4,850 | 1.0% |
| | | | Radio | 7,500 | 1.5% |
| | | | Production | 26,000 | 5.2% |
| | | | Print | 12,000 | 2.4% |
| | | | Photo | 13,000 | 2.6% |
| | | | Online Marketing | 28,800 | 5.7% |
| | | | Special Projects | 5,000 | 1.0% |
| | | | Collateral | 7,000 | 1.4% |
| | | | Postage | 1,200 | 0.2% |
| | | | Media Relations | 45,000 | 9.0% |
| | | | Research | 11,800 | 2.3% |
| | | | Website Dev. & Maint. | 28,400 | 5.7% |
| | | | Other | 6,000 | 1.2% |
| | | | | \$374,453 | 74.6% |
| GENERAL ADMIN. | TOTAL \$ | TOTAL % | | | |
| Employee Compensation | 51,562 | 10.3% | | | |
| Employee Benefits | 3,802 | 0.8% | | | |
| Payroll Taxes | 4,176 | 0.8% | | | |
| Non-Capital IT | 1,920 | 0.4% | | | |
| Network & Telco | 6,600 | 1.3% | | | |
| Interest Expense | 2,255 | 0.4% | | | |
| Professional Fees | 32,200 | 6.4% | | | |
| Education & Training | 1,000 | 0.2% | | | |
| Insurance | 1,948 | 0.4% | | | |
| Office Supplies | 2,400 | 0.5% | | | |
| Building Lease | 10,800 | 2.2% | | | |
| Equip. Lease & Maint. | 2,160 | 0.4% | | | |
| Dues & Subscriptions | 6,876 | 1.4% | | | |
| | \$127,699 | 25.4% | | | |

TLT CITY MODEL

| Revenue | FY 16/17 | FY 17/18 | FY 18/19 | FY 19/20 | FY 20/21 |
|----------------------------------|------------------|------------------|------------------|------------------|------------------|
| Transient Lodging Tax | 1,025,522 | 1,056,288 | 1,087,977 | 1,120,616 | 1,154,234 |
| Beginning Fund Balance (2016/17) | 149,857 | | | | |
| Estimated Additional Funds | | | | | |
| Interest | 2,564 | 2,580 | 2,600 | 2,620 | 2,640 |
| Total | 1,177,943 | 1,058,868 | 1,090,577 | 1,123,236 | 1,156,874 |

| Expenses | FY 16/17 | FY 17/18 | FY 18/19 | FY 19/20 | FY 20/21 |
|--------------------------------------------------------------------------|------------------|------------------|------------------|------------------|------------------|
| Transfers out General Fund | 665,905 | 685,883 | 706,460 | 727,653 | 749,482 |
| Visitor Center Contract | 137,548 | 141,674 | 145,924 | 150,302 | 154,811 |
| Tourism Promotion (undefined) | 374,490 | 228,731 | 235,593 | 242,661 | 249,941 |
| Tourism Consultant | 40,000 | | | | |
| Tourism Manager - Salary ^{1,2} | 59,600 | 60,792 | 62,008 | 63,248 | 64,513 |
| Tourism Manager - Benefits (health, retirement, etc.) (18%) ³ | 43,000 | 47,300 | 52,030 | 57,233 | 62,956.3 |
| Tourism Manager - Recruitment | 1,000 | | | | |
| Tourism Manager - Meetings, Travel, Networking | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| Tourism Marketing | 10,000 | 10,000 | 10,000 | 10,000 | 10,000 |
| Computer/Phone | 600 | | | | |
| Fundraising | 10,000 | 10,000 | 10,000 | 10,000 | 10,000 |
| Subtotal | 169,200 | 133,092 | 139,038 | 145,481 | 152,469 |
| Tourist Related Facilities | 185,290 | 78,219 | 79,155 | 79,800 | 80,112 |
| Small Grant Program (pilot program) | 20,000 | 20,000 | 20,000 | 20,000 | 20,000 |
| Total | 1,177,943 | 1,058,868 | 1,090,577 | 1,123,236 | 1,156,874 |

¹ Range 163, Step 1

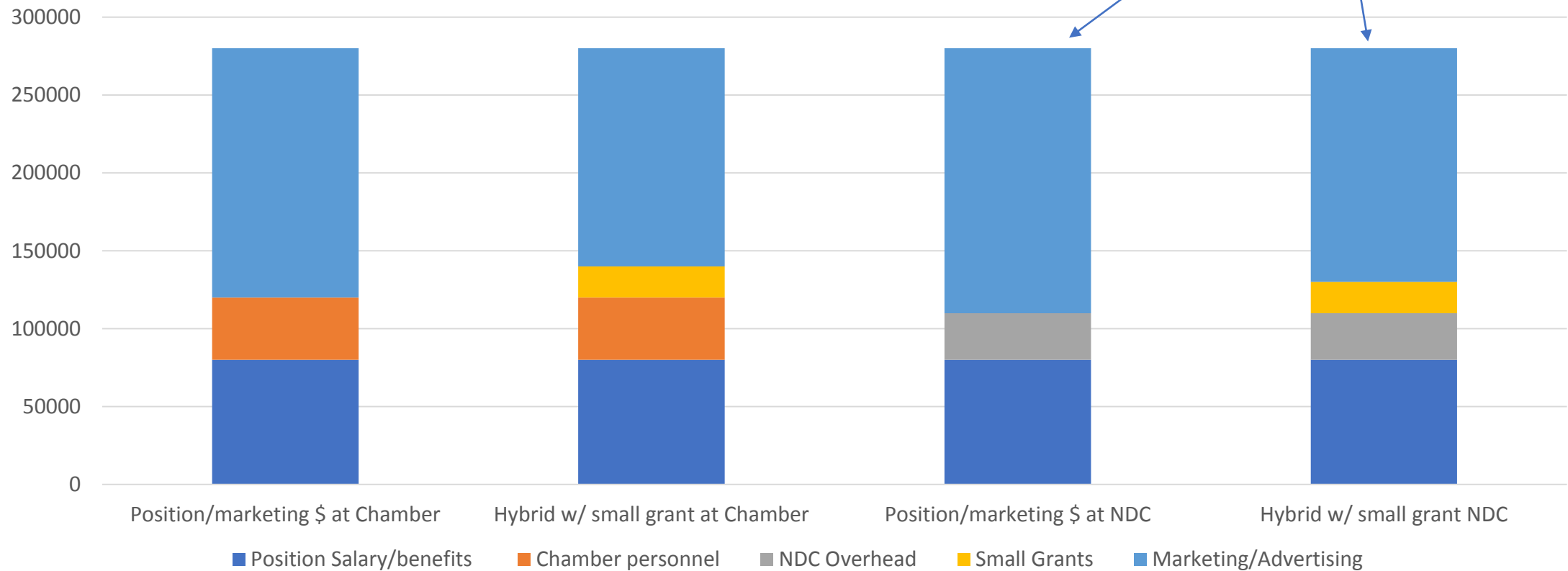
² 2% annual COLA

³ 10% annual increase

Options for funding marketing position

Based upon 2019-20 budget of ~\$280,000

Includes \$40,000 shifted from Chamber contract for tourism personnel



Source of \$280,000 budget

- \$240,000 are TLT funds allocated for Tourism Promotion, which in 2017-18 was used to fund small grants, large grants, marketing, and miscellaneous staff expenses.
- \$40,000 of Chamber visitor center annual contract is spent on tourism personnel

Additional Potential TLT funds

Annual Funds

- Dundee TLT annual contribution (est. \$30,000)
- \$70,000 of Chamber annual contract is spent on visitor center. Contract runs through June 2020.

One-time Funds

- Rollover funds from unspent 2017-18 marketing budget (\$80,000)
- Rollover funds from unallocated 2017-18 large grant funds (\$130,000)

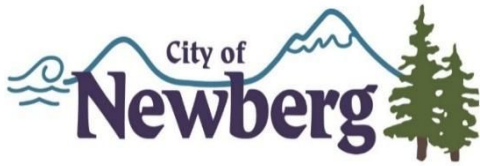
Questions

- Where does this person work?
 - Newberg Downtown Association
 - Chamber
 - City
 - Home
- Makeup of Non-profit board
 - Members – hotel/B&Bs, restaurant, winery, George Fox, community at-large, city council, NDC, cultural district
 - Who selects members?
- Which non-profit status is best for our purpose?

Other options

- Move \$105,000 from Chamber visitor center contract to kiosk / grants.
- Media relations
 - Visit McMinnville annually budgets \$45,000 to pay a PR agency to handle the bulk of the media relations, to attract national writer/editor visits and cover the costs of fam tours.

| <u>Item</u> | <u>Charge/monthly</u> | <u>Charge/one time</u> |
|----------------|-----------------------|------------------------|
| Internet | 30.00 | 50.00 |
| Utilities | | |
| Garbage | 5.00 | |
| Elec. | 50.00 | |
| Printer/Copier | <u>50.00</u> | |
| | 105.00 | |



**City of Newberg 2016 - 2017
Transient Lodging Tax - Small Grant Program Reports**

To be completed and returned: Progress Report by Carissa Smith-Burkett.

To be completed and returned by May 15, 2018

Attach receipts, paid invoices for monies spent and a check to the City of Newberg for any unspent grant funds.

Project Title: Newberg Camellia Festival and Run/Walk

Name of Organization requesting funds: Chehalem Cultural Center

Mailing address: 415 E. Sheridan

Contact name: Carissa Smith-Burkett

Phone: 503-487-6883

Email: carissa@chehalemculturalcenter.org

1. Detail of Income and Expenses as compared to budget submitted (must be as detailed as possible)

NOTE: Please attach receipts or a spreadsheet that documents both income and expenses

| Budgeted Income Sources | Amount | Actual Income Sources | Amount |
|----------------------------------------------------|-----------------|--------------------------------------------------|-----------------|
| Item Sales | \$6,000 | Item Sales | \$5,566 |
| Sponsorship | \$15,000 | Sponsorship | \$14,950 |
| TLT Grant Funds 2017 | \$3,000 | TLT Grant Funds 2017 | \$3,000 |
| TLT Grant Funds 2018 | \$8,000 | TLT Grant Funds 2018 | \$5,000 |
| Event Income | \$500 | Event Income | \$500 |
| Total Budgeted Project/Program/Event Income | \$32,500 | Total Actual Project/Program/Event Income | \$29,016 |

| Budgeted Expenses | Amount | ACTUAL EXPENSES | Amount |
|---------------------------------|-----------------|---------------------------------|-----------------|
| Personnel Expenses | \$22,455 | Personnel Expenses | \$22,400 |
| Contract Labor Expenses | \$9,370 | Contract Labor Expenses | \$9,427 |
| Program Supplies | \$855 | Program Supplies | \$1,072 |
| Sales Expenses | \$4,500 | Sales Expenses | \$3,747 |
| Volunteer Support | \$1,200 | Volunteer Support | \$1,143 |
| Equipment Rentals | \$7,000 | Equipment Rentals | \$ 5,161 |
| Other Operating Expenses | \$700 | Other Operating Expenses | \$700 |
| Liability Insurance | \$800 | Liability Insurance | \$800 |
| License and Permits | \$50 | License and Permits | \$50 |
| Merchant Account Fees | \$500 | Merchant Account Fees | \$147 |
| Marketing Costs | | | |
| Printed Collateral | \$4,088 | Printed Collateral | \$3,710 |
| Signage | \$550 | Signage | \$550 |
| Other Advertising | \$2,550 | Other Advertising | \$5,578 |
| Email Marketing fees | \$200 | Email Marketing fees | \$200 |
| Website Fees | \$500 | Website Fees | \$500 |
| Total Marketing Expenses | \$7,888 | Total Marketing Expenses | \$10,538 |
| Total Event Expenses | \$55,318 | Total Event Expenses | \$55,185 |
| Expenses Minus Personnel | \$32,863 | Expenses Minus Personnel | \$32,785 |

2. Do you have unused City funds remaining? If so how much?

All funds were used

- 3. Date project, program or event was (or will be) completed:** The project using the funds distributed from the 2016-17 grant cycle was completed on April 7, 2018.

4. Results achieved with project, program or event. Did you reach your target audience or goal? Discuss your measurement of success.

The Tenth Annual Newberg Camellia Festival and Run/Walk was the largest attended festival to date. This year's goal was to increase both the run/walk participation as well as the foot traffic throughout the day, and we had over 600 participants in the Run/Walk (up from 500 the year before) and close to 5,000 attendees throughout the day (up from 4,000 the year before). Additionally, we had over 60 participants complete the Camellia passport. This initiative was to encourage festival goers to explore the downtown business by challenging them to get six stamps from participating businesses and return the passport to receive a free potted Camellia. With the TLT grant funds we were able to design and print off 20,000 programs for the first time to promote the festival to broader audiences. The programs were distributed in the Willamette Weekly to Portland Metro and surrounding areas, which we feel contributed greatly to the increase in attendance. Additionally we were able to market the festival through a billboard for the first time, allowing more visibility of the festival to all who drove through Newberg. We are still inputting all of the data collected through our survey during the festival so that we can pinpoint which marketing tools were most successful in getting people to attend, so that we can continue to focus our marketing strategies for next year.

5. Please include data that supports how many room nights you believe this project, program or event helped generate.

We collected data through surveys from guests, which helped us gather information on zip codes that people were traveling from. Based on the Run/Walk registration, our surveys and zip code of origin data, we would estimate that 276 visitors stayed overnight.



**GEORGE FOX
UNIVERSITY**

INVOICE

BILL TO:

Carissa Burkett
Chehalem Cultural Center
415 E Sheridan St.
Newberg, OR 97132

REMIT TO:

George Fox University
Attn: Rob Felton
414 N Meridian St 6069
Newberg, OR 97132

Date December 12, 2018

Terms: Upon receipt

Service/Description

Outfront Media advertising display at W/L Hwy 99W 45 FT S/O 2nd Way,
Newberg, OR
Posting/Install Date: March 12, 2018
Vinyl production/install fee \$750
Advertising dates: 3/12/18-4/9/18

Total due to George Fox University: \$750



Invoice

Remit to: EAGLE WEB PRESS
 4901 INDIAN SCHOOL RD NE
 SALEM OR 97305

Bill to: CHEHALEM CULTURAL CENTER
 415 E SHERIDAN STREET
 NEWBERG OR 97132

50233

Invoice Number: **89789**
 Invoice Date: 3/8/2018
 Page: 1 of 1
 Tax ID: 1

| Quantity | Description | Amount |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| | Job: 89789 Ship to: Salesperson: GUSTAFSON, SHARON Purchase Order: | |
| 20.000 | CAMELLIA FESTIVAL PROGRAM 24 PAGE SIGNATURE 40# GLOSS BOOK 4C ALL PAGES SADDLE STITCH & TRIM 10,000 SKID PACK FOR CHEHALEM CULTURAL CENTER 10,000 SKID PACK FOR WILLAMETTE WEEK DELIVERY TO NEWBERG | 2,402.00 |
| 1 | ADDITIONAL DELIVERY TO QUAD GRAPHICS | 125.00 |
| | DUE UPON RECEIPT | |
| | Subtotal: | 2,527.00 |
| | Job Total: | 2,527.00 |
| | Invoice Total: | 2,527.00 |



Willamette Week
2220 NW Quimby
Portland, OR 97210

Invoice # 772
Invoice Date 03/29/2018
Customer Chehalem Cultural Center, ID: 34155
Payment Terms Due Upon Receipt
Due Date 03/30/2018
Customer PO #

BILLING ADDRESS

Madeline Sorenson
Chehalem Cultural Center
415 E Sheridan St
Newberg, OR 97132

ADVERTISER

Chehalem Cultural Center, ID: 34155
415 E Sheridan St
Newberg, OR 97132

| IO/AD ID | MEDIA | EDITION | ISSUE DATE | PAGE | AD SIZE | QTY | RATE | TOTAL |
|----------|-----------------|------------|------------|--------|---------|-------------------|-------------------------------|----------|
| 215082 | Willamette Week | Cheap Eats | 3/21/18 | Center | Insert | 10,000 @ \$65 cpm | \$650.00 | \$650.00 |
| Message: | | | | | | | Subtotal | \$650.00 |
| | | | | | | | Tax | \$0.00 |
| | | | | | | | Payments & Credits | \$0.00 |
| | | | | | | | BALANCE DUE | \$650.00 |

REMITTANCE STUB TO WILLAMETTE WEEK

| | | | | | |
|-------------------------|-----|-------------|------------|--------------------|-------------------------------------|
| Invoice # | 772 | Date | 03/29/2018 | Customer ID | ID: 34155, Chehalem Cultural Center |
| Amount Enclosed: | | | | | |

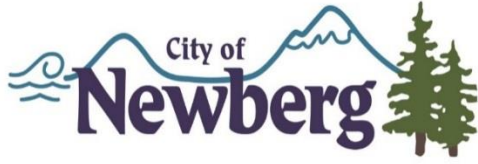
Make Checks Payable to: Willamette Week

Willamette Week
2220 NW Quimby
Portland, OR 97210

PHONE (503) 445-3658
FAX (503) 243-1115

Credit Card Information

Master Card _____ Visa _____ American Express _____ Name on card: _____
Credit Card Number: _____ Exp. Date: _____ Security Code: _____
Card Holder Signature: _____ Amount to charge: _____



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

To be completed and returned: Progress Report by _____.

To be completed and returned by 5-4-18 Final Report 30 days after project, program or event.

Attach receipts, paid invoices for monies spent and a check to the City of Newberg for an unspent funds.

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

Name of Organization requesting funds: ___Oregon Truffle Festival_____

Mailing address: P.O. Box 5275, Eugene, OR 97405_____

Contact name: ___Leslie Scott_____

Phone: ___541-913-3841___ Email: leslie@oregontrufflefestival.org

Alternate Phone: _____N/A_____

1. Detail of Income and Expenses as compared to budget submitted (must be as detailed as possible)

NOTE: Please attach receipts or a spreadsheet that documents both income and expenses

| Budgeted Income Sources | Amount | Actual Income Sources | Amount |
|---------------------------------------------|----------|-------------------------------------------|----------------|
| Ticket Sales | \$57,750 | Ticket Sales | \$64595 |
| Sponsorships | \$1,500 | Sponsorships | \$1,500 |
| Expense Reimbursement | \$1500 | Expense Reimbursement | \$5,500 |
| Grant Income | -0- | Grant Income | \$7,000 |
| Marketplace Merch +Truffle Sales* | 3550. | | \$4,386 |
| | | | |
| Total Budgeted Project/Program/Event Income | \$64,300 | Total Actual Project/Program/Event Income | \$82,981 |

*Not included in original Income projection

| | Amount | ACTUAL EXPENSES | Amount |
|-----------------------------------------------|--------|---------------------------------------------|--------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Total Budgeted Project/Program/Event Expenses | | Total Actual Project/Program/Event Expenses | |

SEE ATTACHED SPREADSHEET

2. Do you have unused City funds remaining? If so how much?

No; all funding 100% allocated

3. Date project, program or event was (or will be) completed:

February 20th, 2018; Still paying bills!

4. Results achieved with project, program or event. Did you reach your target audience or goal? Discuss your measurement of success.

Our post event customer satisfaction survey and our Recap document are our primary ways of determining success. Our survey of weekend guests indicated that 95% of people who responded intend to return in the future. We reached a broad demographic of ages and incomes, as well as people who traveled from as far away as Michigan and New York to attend. (2 Floridians cancelled at the last minute due to family illness)

Please see the attached Recap on pages 3, and 6 through 12 for information on tickets sold, relevant demographic information, and the extensive press OTF received.

In addition to our great local lodging and business partners, OTF was fortunate to partner with and receive support from Travel Oregon, the Willamette Valley Visitors Association, the Willamette Valley Wineries Association, the Chehalem Chamber of Commerce, and the Chehalem Cultural Center for the weekend of events. Our partners recruited and hosted media, supported venue, lodging and transportation costs, and provided most of our volunteer support. For us, these partnerships are the greatest barometer of our success. We couldn't do what we do to bring so many out of area guests to Newberg and the Yamhill Valley for the long weekend without them, nor would we want to...they are the life-blood of our non-profit, and some of our communities' greatest ambassadors.

We were honored to host the Director and Co-producer of the award winning film *James Beard: America's First Foodie*, and opened our Newberg weekend with a showing of the film at the CCC to an audience of just over 100 people. Below is a quote received from Co-producer Kathleen Squires, who is also an award winning food and travel writer based in New York. She mentions another measure of success we are very proud of, and that is the group of really

interesting people who travel to participate in OTF every year, and the relationships forged around the communal table. Feeding hungry minds at the same time we are building community one great truffle adventure at a time is invaluable to community identity and a strong sense of place, and are the somewhat less tangible but we believe equally vital attributes of success.

"Thank you again for a great weekend. Wonderful food, fascinating people, amazing wines, and terrific Oregon Truffles (not to mention a few cute dogs)... what could possibly be better?!"

Kathleen Squires, Co-producer, *James Beard: America's First Foodie*

5. Please include data that supports how many tourists and room nights you believe this project, program or event helped generate based on collected zip codes of attendees.

We have verified 86 room nights in the Newberg area from those who shared their lodging information with us. This includes The Allison, Le Puy, Yamhill Flats, Chehalem Ridge, Best Western, and 4 airbnb/VRBO homes in Newberg. Most of these guests stayed an average of 3 nights, Thursday-Sunday. We are quite certain that with as many tickets sold there are likely double that number of nights given that some 900 people attended one or more events.

Attached is a spreadsheet of zip codes collected from tickets sold through our on-line ticketing system, as well as attendees who either purchased outside of that system or were comped as sponsors, media and media hosts. There were several hundred other tickets sold at the door for which we do not have zip code information. In addition, many people bought 2 or more tickets, even though on-line sales only captures the zip codes of the individual purchasing the ticket.



2018 Oregon Truffle Festival



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Cover Photos Front
 1, 2, 5, 6 & 7 David Barajas
 3 Kathryn Elsesser
 4 Marielle Dezurick
 8 Gregor Halenda

| | |
|---|---|
| 1 | 2 |
| | |
| | 3 |
| 5 | 6 |
| | 7 |
| | 8 |

Cover Photos Back
 1, 5, 6 & 8 Kathryn Elsesser
 2, 4 & 7 David Barajas
 3 Public Domain

| | | | |
|---|---|---|---|
| 1 | | | |
| 2 | 3 | 4 | 5 |
| | 6 | 7 | |
| 8 | | | |

*Data from post festival survey



Marielle Dezurick / Urban Forager Weekend



2,512
TICKETS SOLD
+ 290 MEDIA,
SPONSORS AND
SPECIAL GUESTS

FESTIVAL STATISTICS

34 CULINARY EVENTS

42 CHEFS

26 CULINARY STUDENTS

22 SPEAKERS & TRAINERS

78 MARKETPLACE ARTISANS

25 WINERIES, BREWERS
& DISTILLERS

63 TRUFFLE DOGS

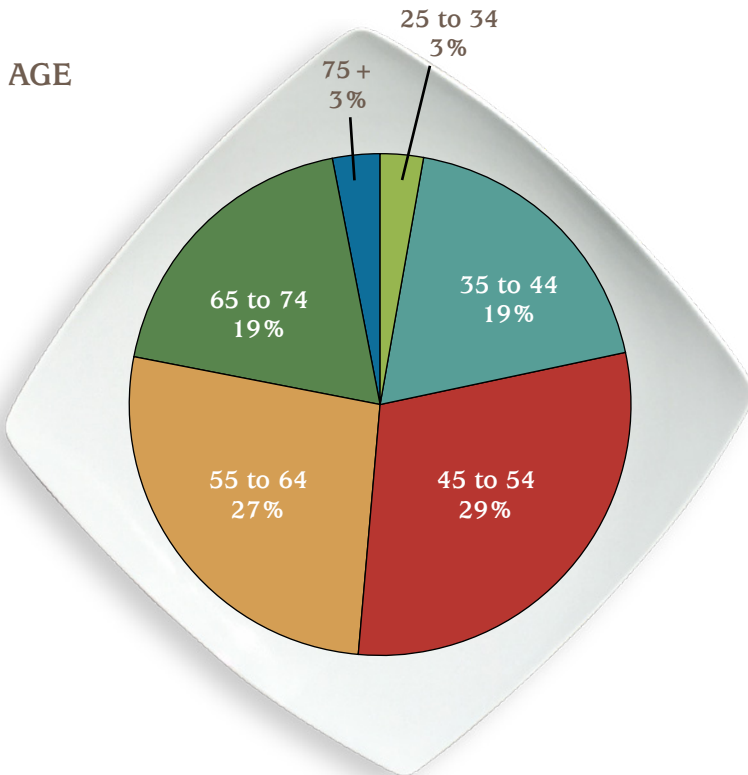
62 LBS OF BLACK TRUFFLES

54 LBS OF WHITE TRUFFLES

DEMOGRAPHICS – EUGENE & SURROUNDS



AGE

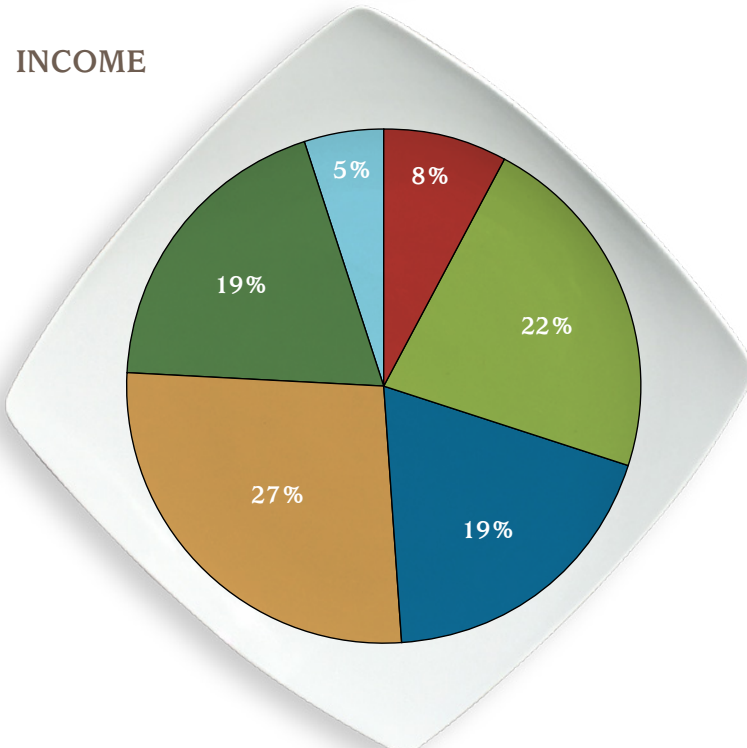


The Oregon Truffle Festival attracts a diversity of ages to indulge in this international culinary event.

It's an event full of everything we enjoy - friends, food, wine.

Eugene Weekend Attendee

INCOME

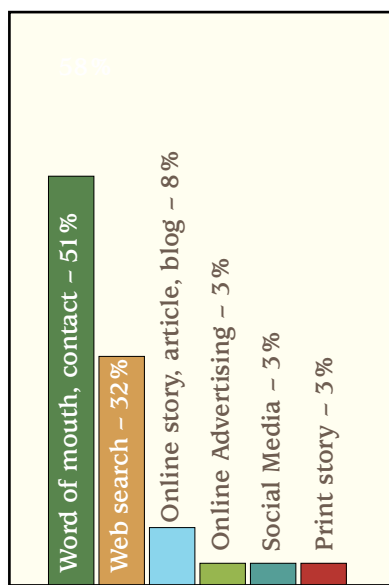




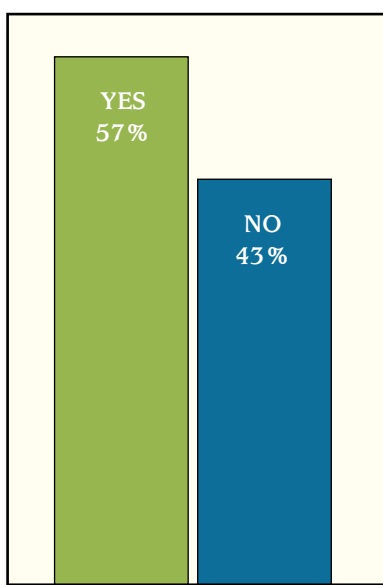
DEMOGRAPHICS – EUGENE & SURROUNDS

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

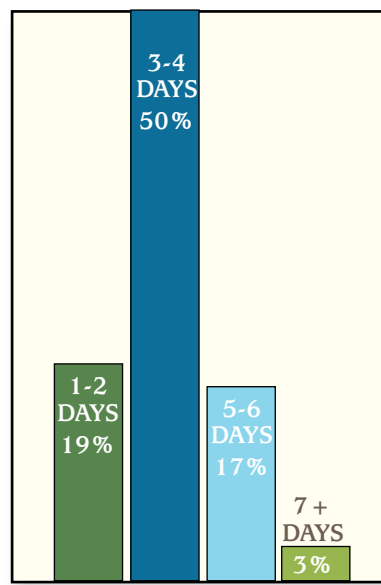
HOW DID YOU HEAR ABOUT THE OTF?



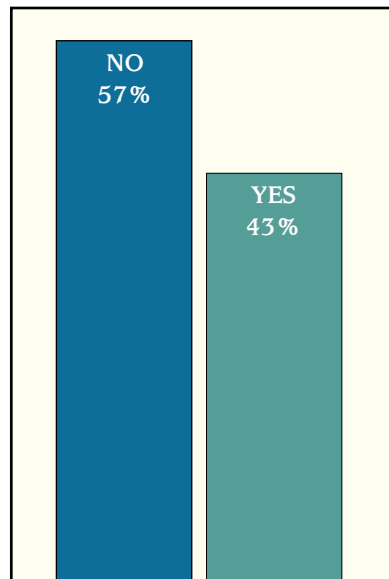
CULINARY TRAVELER



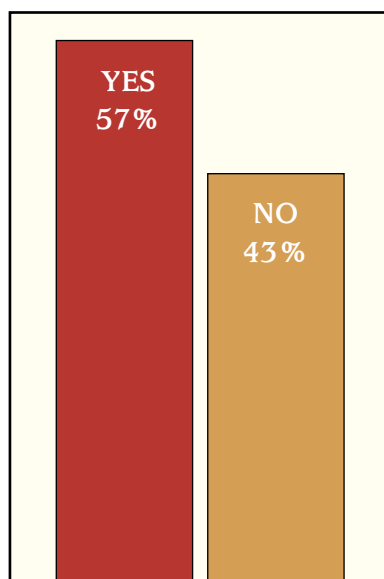
DAYS IN OREGON



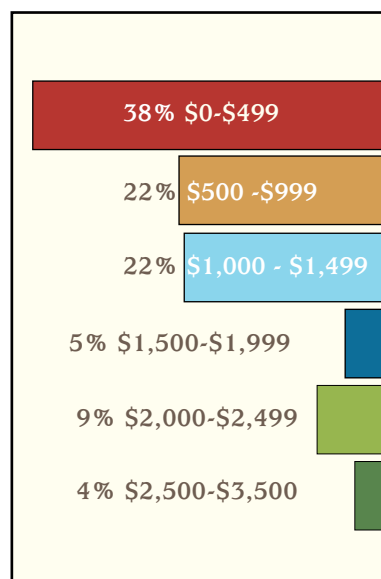
FIRST TIME ATTENDING THE FESTIVAL



EXPERIENCED OREGON BEYOND FESTIVAL



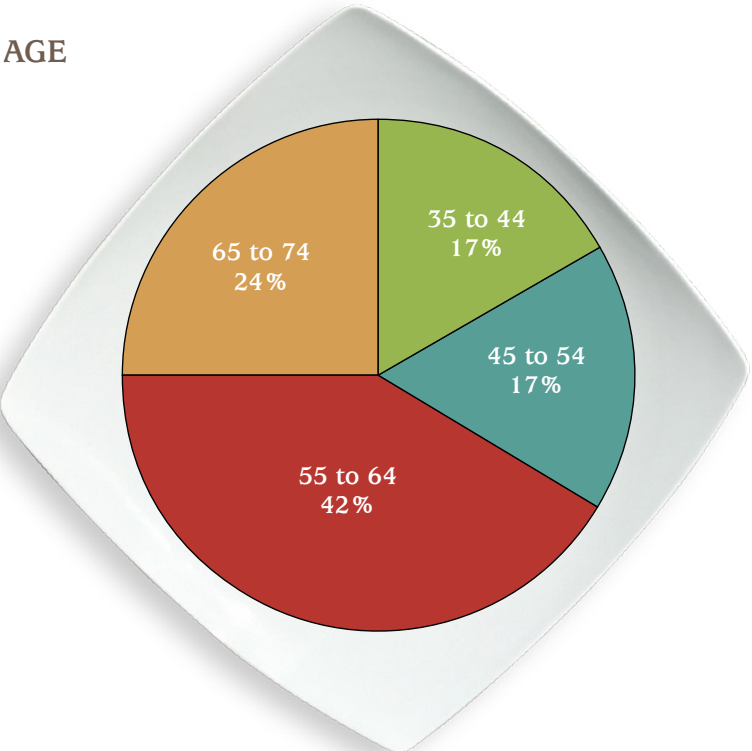
\$ SPENT BESIDES FESTIVAL TICKETS



DEMOGRAPHICS – YAMHILL VALLEY



AGE



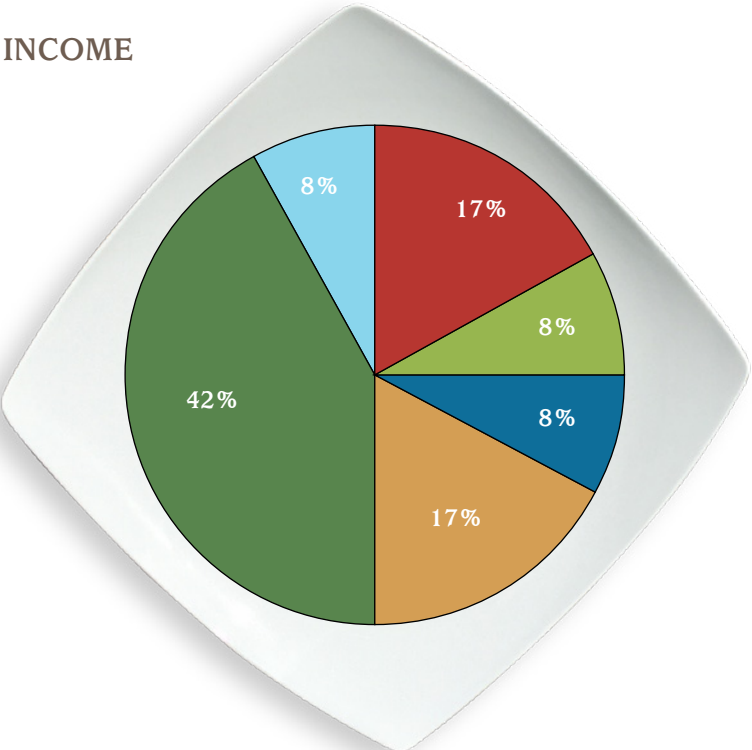
OTF attendees seek out adventuresome travel and elegant food and drink experiences that feed body, mind and spirit.

“My son and I had a most memorable experience. We are both foodies and we both agree this event is one of the best we attended in our travels. We are experienced gourmands and both look forward to next year’s event.

This will become my annual weekend getaway with my son.”

Yamhill Valley Weekend Attendee

INCOME



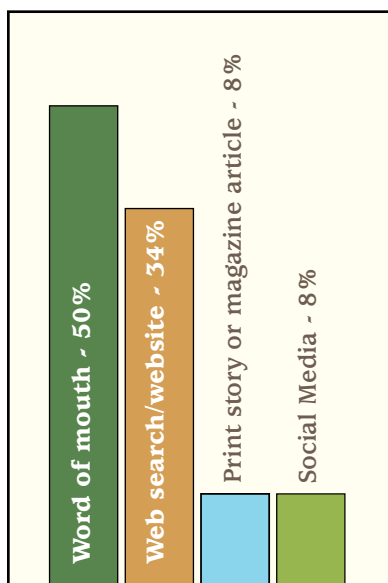
- \$300,000 to \$400,000
- \$200,000 to \$300,000
- \$150,000 to \$199,000
- \$100,000 to 149,999
- \$50,000 to \$99,000
- Less than \$50,000



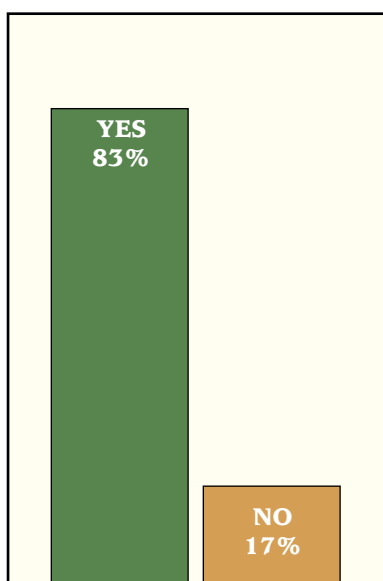
DEMOGRAPHICS – YAMHILL VALLEY

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.

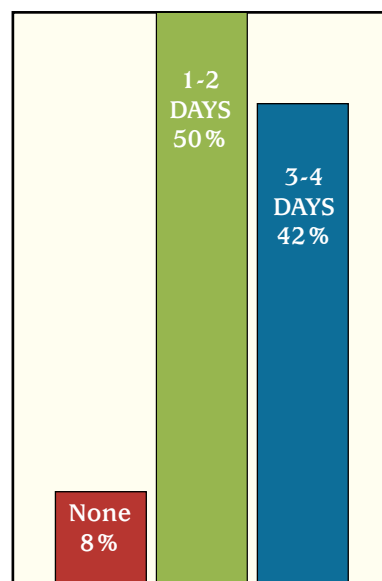
HOW DID YOU HEAR ABOUT THE OTF?



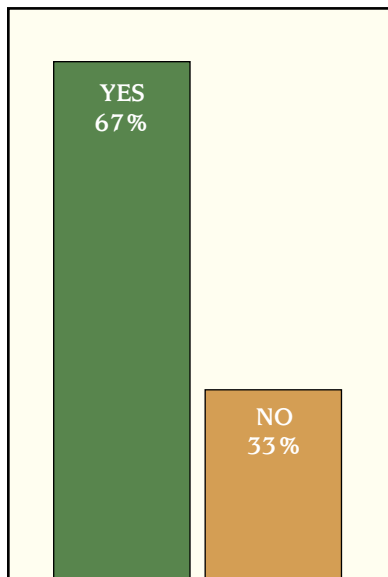
CULINARY TRAVELER



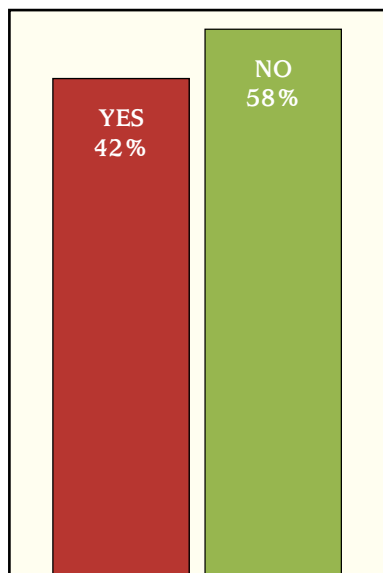
DAYS IN OREGON



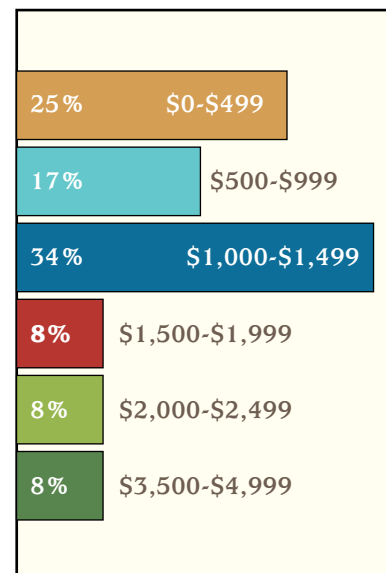
FESTIVAL INSPIRED TRIP



EXPERIENCED OREGON BEYOND FESTIVAL



\$ SPENT BESIDES FESTIVAL TICKETS



MEDIA COVERAGE
PRINT, ONLINE, SOCIAL MEDIA



84
 PIECES OF COVERAGE

92M
 COMBINED IMPRESSIONS

88M
 ONLINE IMPRESSIONS

4M
 PRINT CIRCULATION



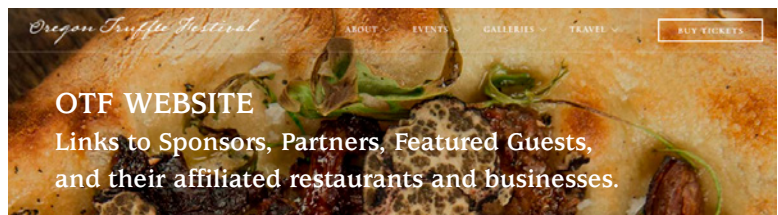
Click logo to view one media piece from each outlet.



Kathryn Elseser

ADVERTISING & SOCIAL MEDIA

The OTF has built an engaged social media following with over 6,000 people across Instagram, Facebook, and Twitter. 800 of these followers were gained as a result of the 2018 festival. Facebook proved to be a popular place for our followers to engage with the festival and with other truffle lovers, demonstrated by the 154,000+ people who interacted with our 2018 event pages.



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

PRINT ADS

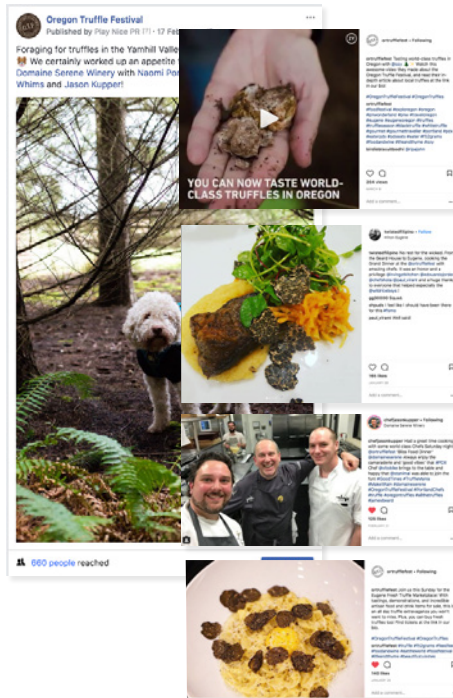
OTF purchases a wide range of print and online advertising including magazines, newspapers, and their respective websites, concert programs, online publications, blogs, and more.



SOCIAL MEDIA

#oregontrufflefestival #oregontruffles

- @oregontrufflefestival
- @otrufflefest
- @otrufflefest



EMAIL ADS

6 email Blasts
28,500 Total Sends



MARQUEE EVENTS – EUGENE AREA

Friday, 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. Attendees experienced firsthand why truffles are not solely the province of fine dining or Michelin stars. The MacDown provides a wonderful new "high comfort" twist to the gastropub experience.

Saturday, January 27

The Urban Forager Tour

This tour explores one of Eugene's oldest neighborhoods that has become a hub for great food, craft beer and urban wine tasting. Saturday's adventure included Ninkasi Brewing, Oregon Wine Lab, and lunch at Grit Restaurant, a standout in Eugene's local food scene. The Urban Forager tour concluded at Heritage Distilling for dessert. Each stop on the tour included truffle bites accompanied by beverage tasting.

Truffle Foray & Winery Luncheon

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

Grand Truffle Dinner, Hilton Eugene

Almost 300 guests enjoyed an evening of conviviality around the table, as we presented our 13th Grand Truffle Dinner. Oregon's native winter white and black truffles were designed and brilliantly executed in a six-course feast by award winning chefs known for their love of fresh, seasonal ingredients, and their skill and creativity with Oregon truffles.



David Barajas

Oregon Truffle Marketplace

Sunday, January 28

Eugene

The Eugene fresh truffle Marketplace buzzed with energy and excitement, as 44+ artisan food vendors, authors, fresh Oregon and European truffle vendors, and 9 craft distillers, brewers, and wineries offered their wares for tasting and sales. The Eugene Marketplace is accompanied by 2 cooking demonstrations, a lecture series, and a truffle dog demonstration.

*The food, the wine, to see
our "truffle friends" that
we have made over
the years...*

Eugene Festival Attendee



David Barajas

EDUCATIONAL EVENTS

January 26 & 27 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 newly planted orchard, a producing truffle orchard, and a winemaker's luncheon.

"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."

Truffle Growers' Forum Participant



David Barajas

January 26 & 27 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.

"Absolutely loved it! The instructors were very helpful. Was really fun to see the dogs working, and successfully at that. It was an incredible experience to be in a real truffle patch!"

Truffle Dog Training Participant



David Barajas

MARQUEE EVENTS – YAMHILL VALLEY

Friday, February 16

“America’s First Foodie.” The Legacy of James Beard told in film and story

Kicking off the 2018 Yamhill Valley weekend in grand style, Friday evening began with a winery reception featuring acclaimed pinots and chardonnays from Willamette Valley Vineyards, accompanied by truffled hors d’oeuvres from James Beard award winning chef Ken Forkish. Held in the Grand Ballroom at the Chehalem Cultural Center, the film’s Director and Co-Producer talked about James Beard’s Oregon roots, and what inspired them to create this lovely film. The film showing was accompanied by Oregon truffle beer and popcorn made especially for the evening.

Saturday, February 17

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

Each year, weekend package holders 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.

The Romance of Rosé followed by Bliss Food: A Sensual, luxurious dinner with James Beard honored chefs

Weekend guests attended a Rosé release tasting at the spectacular new Clubhouse at Domaine Serene. Beard film Director Beth Federici and Co-Producer Kathleen Squires joined guests for the evening. Following the Rosé release, guests moved upstairs to the gracious dining room for a four course dinner featuring Oregon black and white truffles paired with Domaine Serene’s award winning wines.



Sunday, February 18

Pinot + Chocolate, a Love Story

Angela Estate’s Pinot Noir wines paired with gourmet chocolate from Honest Chocolates created a perfect Valentine’s weekend finale.

Fresh Truffle Marketplace at the Chehalem Cultural Center

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

We had a great time, and really liked the whole experience. The truffle hunt with the dogs was excellent!

Yamhill Valley Weekend Attendee



David Barajas



David Barajas



David Barajas



David Barajas

FOR THE DOGS

The JORIAD™

4th Annual North American Truffle Dog Championship

Thursday, January 25, Eugene Round 1 Competition

Held at Lane County Fairgrounds, ticket holders got to watch some of the world’s most talented truffle dogs as they competed in the 4th annual Joriad™ Truffle Dog Championship. The Joriad™ began in the morning with a series of qualifying events where spectators cheered on the teams as they raced to search for hidden truffle-scented targets. Finalists were announced at the end of the morning’s qualifying events.

Championship Finals

The morning’s finalists advanced to the Joriad™ Field Trial in the afternoon for authentic head-to-head and nose-to-ground action in the wild where nature alone determines location, variety, and quantity of Oregon truffles. Because truffle hunting in the field does not lend itself to spectator participation, this event was not open to the public. Ticket holders were all 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.”

Joriad™ Participant

SPONSORS & PARTNERS

PRESENTING MEDIA SPONSOR



EUGENE HOST SPONSOR



YAMHILL VALLEY HOST SPONSORS



PRESENTING WINERY SPONSORS



DOMAINE SERENE

WILLAMETTE VALLEY
VINEYARDS

EVENT SPONSORS



SPONSORS & PARTNERS



Thank You!

*We could not have done it
without you.*



Oregon Truffle Festival 2019

*January
24*

The Joriad™ North American
Truffle Dog Championship

*January
25-27*

Eugene and the
surrounding countryside

*February
15-17*

Yamhill Valley
wine country

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

OTF 2942
Profit & Loss YTD Comparison
July 1, 2017 through May 3, 2018

| Ordinary Income/Expense | Jul 1, '17 - May 3, 18 | |
|---------------------------------------------|------------------------|------------------|
| | Budget | Actual |
| Income | | |
| Yamhill Weekend Marketplace: On-Site | | |
| Merchandise | 250.00 | 219.00 |
| Truffle Sales | 3,300.00 | 4,167.00 |
| Admissions | 3,750.00 | 4,525.00 |
| Total Marketplace On-Site | 7,300.00 | 8,911.00 |
| Yamhill Weekend Admissions | | |
| Domaine Serene event | 14,500.00 | 14,625.00 |
| Weekend Admissions-Advance Sales | 39,500.00 | 45,445.00 |
| Admissions Total | 54,000.00 | 60,070.00 |
| Yamhill Sponsorships | 1,500.00 | 1,500.00 |
| Reimbursed Expenses | 1,500.00 | 5,500.00 |
| Grant Income | | 7,000.00 |
| Total Yamhill Weekend Income | 64,300.00 | 82,981.00 |
| Yamhill Weekend Expense | | |
| Media Hosting-Travel | 1,000.00 | 875.16 |
| Transportation | 3,500.00 | 2,973.13 |
| Winery Luncheons | 800.00 | 800.00 |
| Staff Lodging & Meals | 800.00 | 942.00 |
| Print materials | | 286.30 |
| Print Ads | 5,500.00 | 4,963.00 |
| Equipment | 1,000.00 | 451.71 |
| Misc. Food ingredients | 500.00 | 803.76 |
| Truffles | 5,000.00 | 3,826.26 |
| Insurance | 1,582.00 | 1,582.00 |
| gas | | 145.86 |
| Email services (ISP, iContact) | | 305.00 |
| TOTAL | 19,682.00 | 17,954.18 |
| Saturday marque events | | |
| honorarium | 1,600.00 | 1,600.00 |
| ingredients | 4,000.00 | 1,483.71 |
| Service Staff | | 1,695.00 |
| Venue Expense | 500.00 | 450.00 |

OTF 2942
Profit & Loss YTD Comparison
July 1, 2017 through May 3, 2018

| | Jul 1, '17 - May 3, 18 | Jul 1, '17 - May 3, 18 |
|-------------------------------------|------------------------|------------------------|
| Total Saturday marquee event | 6,100.00 | 5,228.71 |
| Friday Night Marquee | 1,000.00 | |
| Reception and Film | 700.00 | 1,260.00 |
| Rentals | 1,000.00 | 1,141.72 |
| Friday dinner | 3,000.00 | 3,360.00 |
| Total Friday Night Marquee | 5,700.00 | 5,761.72 |
| Newberg Marketplace | | |
| Cooking demos | 900.00 | 690.93 |
| OLCC permits | 200.00 | 150.00 |
| Glassware | 1,000.00 | 570.24 |
| Rentals | 1,000.00 | 842.31 |
| Venue | 1,000.00 | |
| Total Newberg Marketplace | 4,100.00 | 2,253.48 |
| Contract Labor | | |
| Foray Assistants | | 375.00 |
| Mktplc Coordinator | 1,000.00 | 1,000.00 |
| Set-up labor | 500.00 | 500.00 |
| Total Contract Labor | 1,500.00 | 1,875.00 |
| Contracted Services | | |
| Post Survey | 250.00 | 290.00 |
| Photography | 1,500.00 | 1,100.00 |
| Admin. Assist. | 1,000.00 | 1,000.00 |
| Web Site | 2,500.00 | 1,737.50 |
| Design | 5,000.00 | 1,995.00 |
| PR/Marketing /Social - Design | | 1,032.50 |
| PR/Marketing -PlayNice | 11,000.00 | 15,390.00 |
| Total Contracted Services | 21,250.00 | 22,545.00 |
| Total Expense | 58,332.00 | 55,618.09 |
| Net Ordinary Income | 5,968.00 | 27,362.91 |

OTF 2942
Profit & Loss YTD Comparison
July 1, 2017 through May 3, 2018

Ordinary Income/Expense
Income

Most Budget projections based on 2017 actuals

Yamhill Weekend Marketplace: On-Site

Merchandise

Truffle Sales

Admissions

Total Marketplace On-Site

Yamhill Weekend Admissions

Domaine Serene event

Weekend Admissions-Advance Sales

Admissions Total

Yamhill Sponsorships

WV Friday night Reception and Film-Receipt

Reimbursed Expenses

Chamber \$3,000; WV \$2,500

Grant Income

Total Yamhill Weekend Income

Yamhill Weekend Expense

Media Hosting-Travel

All media lodging sponsored by: Chamber, TO, WVWA
partially reimbursed by Chehalem Chamber

Transportation

Winery Luncheons

Staff Lodging & Meals

No allocation for Staff Salaries
schedules & name tags

Print materials

Print Ads

\$2500 reimbursed by WV

Equipment

name tags & tote bags

Misc. Food ingredients

Truffles

Insurance

gas

Email services (ISP, iContact)

TOTAL

Saturday marque events

honorarium

ingredients

Still no invoices from 2 of 4 chefs for ingredients

Service Staff

Venue Expense

OTF 2942
Profit & Loss YTD Comparison
July 1, 2017 through May 3, 2018

Total Saturday marque event

| | |
|----------------------------------|----------------------------|
| Friday Night Marque | Venue sponsored by the CCC |
| Reception and Film | |
| Rentals | |
| Friday dinner | Ruddick Wood |
| Total Friday Night Marque | |

Newberg Marketplace

| | |
|----------------------------------|----------------------------|
| Cooking demos | Soter invoices outstanding |
| OLCC permits | |
| Glassware | |
| Rentals | |
| Venue | Sponsored by the CCC |
| Total Newberg Marketplace | |

Contract Labor

| |
|-----------------------------|
| Foray Assistants |
| Mktplc Coordinator |
| Set-up labor |
| Total Contract Labor |

Contracted Services

| | |
|--------------------------------------|--------------------------------------------|
| Post Survey | |
| Photography | Domaine Serene paid difference-see receipt |
| Admin. Assist. | |
| Web Site | Receipt |
| Design | Receipt |
| PR/Marketing /Social - Design | Receipt |
| PR/Marketing -PlayNice | Receipt |
| Total Contracted Services | |

Total Expense

Net Ordinary Income

| Postal / Zip - 1 |
|------------------|
| 97405 |
| 97070 |
| 90266 |
| 98177 |
| 98121 |
| 97396 |
| 97225 |
| 97201 |
| 97113 |
| 97128 |
| 97202 |
| 97124 |
| 97148 |
| 97229 |
| 97210 |
| 97062 |
| 97035 |
| 97201 |
| 97210 |
| 97068 |
| 97229 |
| 97239 |
| 97219 |
| 97217 |
| 97070 |
| 97056 |
| 98661 |
| 97035 |
| 97370 |
| 97211 |
| 97035 |
| 97062 |
| 85253 |
| |
| |
| |
| 98027 |
| 95128 |
| 97239 |
| 97106 |
| 92009 |
| 48864 |
| 97239 |

On-Line Sales

| Zip Code - 2 |
|--------------|
| 95128 |
| 98112 |
| 97239 |
| 95403 |
| 95403 |
| 98065 |
| 48864 |
| 98027 |
| 98026 |
| 98027 |
| 97201 |
| 97106 |
| |
| 97229 |
| 98201 |
| 98201 |
| 97068 |
| 97068 |
| 90048 |
| 90048 |
| 95403 |
| 95816 |
| 95762 |
| 98027 |
| 95762 |
| 98065 |
| 97201 |
| 90631 |
| 90631 |
| 98112 |
| 98112 |
| 97229 |
| 98112 |
| 98112 |
| 92009 |
| 95403 |
| 95403 |
| 98026 |
| 95816 |
| 48864 |
| 48864 |
| |
| |

Direct Sales

| |
|------------|
| 2554 |
| 95816 |
| 98112 |
| 98112 |
| 98026 |
| 95762-4044 |
| 97068 |
| 97229 |
| 48864 |
| 90048 |
| 97201 |
| 98201 |
| 20003 |
| 98065 |
| 90631 |
| 95403 |
| 97075 |
| 97115 |
| 97031 |
| 97219 |
| 98671 |
| 98512 |
| 97132 |
| 97224 |
| 97007 |
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| 97132 |
| 97148 |
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| 97225 |
| 97128 |
| 97703 |
| 97219 |
| 97008 |
| 97302 |
| 97225 |
| 97229 |
| 97209 |
| 97239 |
| 97302 |
| 97266 |
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| 97035 |
| 97080 |
| 97225 |

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| 97051 |
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| 10595 |
| 60625 |
| 97405 |
| 10014 |
| 97034 |

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| 97218 |
| 97007 |
| 97101 |
| 97378 |
| 98664 |
| 97132 |
| 97005 |
| 97317 |
| 97132 |
| 97459 |
| 97068 |
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| 97007 |
| 97206 |
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| 97034 |
| 97210 |
| 98034 |
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| 90049 |
| 97303 |
| 97034 |
| 97306 |
| 97214 |
| 97045 |
| 97141 |
| 97217 |
| 97132 |
| 97221 |
| 97209-3198 |
| 97132 |
| 97133 |
| 97038 |
| 94116 |
| 97116 |

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| 97070 |
| 97367 |
| 97210 |
| 97005 |
| 97307 |
| 97124 |
| 97045 |
| 93035 |
| 97223 |
| 22032 |
| 97006 |
| 97224 |
| 97111 |
| 97405 |
| 98664 |
| 98683 |
| 97203 |
| 97203 |
| 97140 |
| 97132 |
| 97229 |
| 98332 |
| 97219 |
| 97006-4628 |
| 97219 |
| 97070 |
| 97239 |
| 97214 |
| 97219 |
| 97211 |
| 96817 |
| 97214 |
| 97219 |
| 97007 |
| 97206 |
| 97128 |
| 97027 |
| 95713 |
| 97401 |
| 97123 |
| 97035 |
| 97219-3130 |
| 98661 |
| 97034 |
| 97209 |

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| 97006 |
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| 97132 |
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| 97132 |
| 97124 |
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| 97045 |
| 97210 |
| 83605 |
| 97209 |
| 97202 |
| 97008 |
| 97009 |
| 97060 |
| 98498 |
| 97140 |
| 97071 |
| 97219 |
| 97128 |
| 6897 |
| 97013 |
| 97229 |
| 97202 |
| 60126-2724 |
| 97209 |
| 97056 |
| 97132 |
| 97128 |
| 97201 |
| 97045 |
| 94022 |
| 97123 |
| 97221 |
| 97224 |
| 97267 |
| 97132 |
| 97124 |
| 95014 |
| 97219 |
| 97219 |
| 97008 |
| 98373 |
| 97113 |
| 97055 |

From: "Kathryn Elsesser Photography" <mailer@waveapps.com>
Subject: Payment Receipt for Invoice #299
Date: May 3, 2018 at 4:57:58 PM PDT
To: kathryn@kephotog.com
Reply-To: kathryn@kephotog.com

Payment Receipt

Invoice #299

for Leslie Scott
paid on Mar 20, 2018

Kathryn Elsesser Photography
335 SE 75th Avenue
Portland, Oregon 97215
United States

503.957.5143

<http://www.KathrynElsesserPhotography.com/>

Hi,

Here's your payment receipt for Invoice #299, for \$1,100.00 USD.

You can always view your receipt online, at:
<https://waveapps.com/s5msbz-wetphb>

If you have any questions, please let us know.

Thanks,
Kathryn Elsesser Photography

Payment Amount: \$1,100.00 USD

View Invoice

Or [View receipt on web](#)

Thanks for your business. If this invoice was sent in error, please contact kathryn@kephotog.com



INVOICE

Date: March 9, 2018
INVOICE # 1244

To:

Leslie Scott
Oregon Truffle Festival
PO Box 5275
Eugene, OR 97405

| Hours | Description | Unit Price | Line Total |
|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------|------------------|------------------|
| 162 Hours | PR, marketing and social media services for Newberg weekend of the Oregon Truffle Festival 2018. Date range of services: July 2017 – February 2018. | \$95 / hour | 15,390.00 |
| | | | |
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| | | | |
| | | Subtotal | 15,390.00 |
| | | Sales Tax | N/A |
| | | Total | 15,390.00 |

Make all checks payable to Play Nice Public Relations
Thank you for your business!

Play Nice Public Relations | 1033 SE Main Street, Suite 2 | Portland, OR 97214

Play Nice Public Relations
1033 SE Main Street
Suite 2
Portland, OR 97214



INVOICE NO. 1244 3/9/2018

| | |
|------------------------------------------------------------|-------------------|
| BILL TO | SHIP TO |
| Oregon Truffle Festival PO Box 5275 Eugene, OR 97405 | Same as recipient |

| HOURS | DESCRIPTION | UNIT PRICE | TOTAL |
|-----------|-----------------------------------------|------------|-------------|
| 162 hours | PR, marketing and social media services | \$95/hour | \$15,390.00 |

| | |
|------------------------------|--------------------|
| SUBTOTAL | \$15,390.00 |
| SALES TAX | N/A |
| SHIPPING & HANDLING | N/A |
| TOTAL DUE BY 4/9/2018 | \$15,390.00 |

Thank you for your business!

r e c e i p t

Leslie Scott
Oregon Truffle Festival
Web

date: April 17, 2018
RECEIPT #: OTF WEB

rate: Negotiated Creative Rate \$50/hr

projects:

9/1/17 thru 10/31/17

23.25 hrs

TOTAL \$ 1,162.50

PAID IN FULL 11/2/17

11/1/17 thru 12/1/17

4 hrs

TOTAL \$ 200.00

PAID IN FULL 1/8/18

12/15/17 thru 1/31/18

1.5 hrs

TOTAL \$ 75.00

PAID IN FULL 2/2/18

2/1/18 thru 2/28/18

6 hrs

TOTAL \$ 300.00

PAID IN FULL 3/8/18

GRAND TOTAL \$ 1,737.50



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r e c e i p t

Leslie Scott
Oregon Truffle Festival
PR Marketing

date: April 17, 2018
RECEIPT: OTF PR / Marketing

rate: Negotiated Creative Rate \$70/hr

projects:

8/1/17 thru 8/31/17

Media Kit Start (2)

TOTAL \$ 140.00

PAID IN FULL 9/10/17

9/1/17 thru 9/30/17

Media Kit Finish (1.75)

TOTAL \$ 122.50

PAID IN FULL 11/2/17

2/1/18 thru 3/1/18

Recap Start

TOTAL \$ 78.75

PAID IN FULL 3/8/18

GRAND TOTAL \$ 341.25



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r e c e i p t

Leslie Scott
Oregon Truffle Festival
Creative

date: April 17, 2018
RECEIPT: OTF Social Media

rate: Negotiated Creative Rate \$70/hr

projects:

9/1/17 thru 9/30/17

2 iContacts (2.75)

TOTAL

\$ 192.50

PAID IN FULL 11/2/17

11/1/17 thru 12/1/17

iContact Chef Lineup (4.5)

TOTAL

\$ 315.00

PAID IN FULL 1/1/18

12/13/17 thru 1/31/18

iContact 12/13/17 (1.25)

TOTAL

\$ 87.50

PAID IN FULL 2/2/18

2/1/18 thru 3/1/18

iContact (1.375)

TOTAL

\$ 96.25

PAID IN FULL 3/8/18

GRAND TOTAL

\$ 691.25



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r e c e i p t

Leslie Scott
Oregon Truffle Festival
Creative

date: April 17, 2018
RECEIPT #: OTF ADS

rate: Negotiated Creative Rate \$70/hr

projects:

9/1/17 thru 9/30/17

Portland Guide (1)

Oregon Wine Press Ad - (3.25)
Full Page

Wall Street Journal/Horizon Print Ad (10)
Video Spot (5.5)
Copywriting (2)

TOTAL \$ 1,522.50

PAID IN FULL 11/2/17

11/1/17 thru 12/1/17

1859 Banner Ads (2)

1859 Ad (1.5)

Oregon Wine Press Ad (1.75)

TOTAL \$ 367.50

PAID IN FULL 1/8/18

12/13/17 thru 1/31/18

PDX Pipeline (1.5)

TOTAL \$ 105.00

PAID IN FULL 2/2/18

GRAND TOTAL \$ 1,995.00



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