

# STURBRIDGE TOURIST ASSOCIATION

A COMMITTEE OF THE TOWN OF STURBRIDGE

## REGULAR MEETING AGENDA

6/12/2019 – 6PM – CENTER OFFICE BUILDING, LARGE CONFERENCE ROOM

*Revised Agenda – revised on 06/10/2019 at 11:30am.*

1. Call to Order
2. Review of Previous Minutes – 22 May 2019
3. Treasurers Report
4. New Business
  - a. Chamber of Commerce – Funding Application – Second Review
    - i. GeoFest
    - ii. Harvest Festival
  - b. End of Year Budget Considerations
5. Old Business
  - a. RFP Discussion
  - b. Business Recognition Program – Update
6. EDTC Update
7. Correspondence
8. Next Meeting
9. Adjourn

**The items listed which may be discussed at the meeting are those reasonably anticipated by the Chair. Not all items listed may in fact be discussed and other items not listed may also be brought up for Meeting to the extent permitted by law.**

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# STURBRIDGE TOURIST ASSOCIATION

A COMMITTEE OF THE TOWN OF STURBRIDGE

## REGULAR MEETING MINUTES – 05/22/2019

### MEMBERS PRESENT

Brian Amedy (BA), Chair; Tom Chamberland (TC); Nick Salvador (NS); Jeff Ardis (JA)

### STAFF PRESENT

Kevin Filchak (KF), Economic Development and Tourism Coordinator

### MINUTES

1. Call to Order – BA called the meeting to order at 6:01pm
2. Review of Previous Minutes – 17 April 2019 – **TC MOVED to approve [the minutes] as printed. BA seconded (3-0-1).** JA abstained as he was absent from the previous meeting.
3. Treasurers Report – KF provided update noting that he had omitted from the budget the \$3,000 Pintastic line item approved at the December meeting; KF checked and that was only error. He noted that though money had been over allocated, it should not adversely affect the budget as the allocated funds are not always completely spent. JA asked about Tourism line item and KF gave basic overview. BA asked that KF look into the purpose of the Tourism line item again and provide explanation. General discussion on flagging on Route 20. KF also noted that there is a discrepancy with the Grant Report from the Town Accountant. BA noted that TC and KF had a productive meeting with Finance Committee. JA asked questions about allocations leading to a lengthy discussion on the budget. BA asked if the Special Events Committee would be spending their allocation, KF said he anticipated they would. NS asked if the SEC could work with the Cedar Lake Boat Association, KF said it was possible. KF also noted that there was also a small discrepancy in the Grant and Special Revenue reconciliation, but that the budget reconciliation was correct; he is working with Town Accountant to identify the discrepancy. **BA MOVED to accept report as written, TC seconded. APPROVED. 4-0.**
4. New Business
  - a. Funding Request - Chamber of Central MA South – First Meeting

- i. GeoFest – BA gave overview of the event. BA asked when the event is being held, KF explained that it appears that the Chamber is asking for the money in advance of their 2020 event to pay for marketing and gear. General discussion on the timeframe for ordering items for events in advance of a fiscal year. JA asked about the Chamber’s \$1800 - \$2000 of revenues that they are receiving. TC noted that two of GeoFest’s events for this year are being held outside of Sturbridge, events that were previously held at Sturbridge businesses. BA question how it was known how many people are staying for the event. General discussion on overnight stays. TC suggested that the Chamber be brought in for additional discussions on data for the 2019 event. KF will inquire about a breakdown for the \$4,300 request, and an explanation of data for overnight stays at the event. General discussion on events. JA asked if for events where the STA is providing a majority of the funding, does the STA provide require budget. KF said no but the new application being reviewed later in the evening would require that. Members reviewed GeoFest’s budget. TC noted that the Chamber, based on the budget, appears that they are operating at a loss. General questions about the budget leading to members asking that the Chamber better define their budget. General discussion about how to support any event over a period of years, raising questions amongst members of sponsoring nonprofit organizations for purposes of fundraising. KF summarized questions for Chamber; TC asked that the Chamber also provide a summary of where the participants are coming from.
- ii. Harvest Festival – BA provided summary and noted the budget and the chamber’s potential for a second sponsor. BA asked who the potential second sponsor is. TC asked about the 10% out of state participants and the overnight stays generated from that. Members questioned whether vendors and/or participants utilize the hotels. TC noted the loss from the festival of the taste of Sturbridge. BA noted that if this should draw patrons from outside of the region, it should be marketed. JA asked for the difference between generating positive events for the community versus supporting fundraisers. Members reviewed the budget supplied. TC noted that the Chamber does not note the STA’s annual contributions to them in their annual report or their budgets. General discussion on the value of the event. BA discussed potential ways to get feedback from hotels regarding STA ad campaigns that support events such as this, KF supported the idea and the members discussed how that could work and the value of the data. JA suggested that the STA should consider reducing funding year after year, regardless of the data received from hotels. TC asked how should the STA define that level of support year on year. JA asked if there was a percentage drop and how the funding could occur. TC suggested that there should be hotel room data that should use to determine funding levels. KF noted that some of that data is being suggested for the application update. JA

noted that STA won't have that data from the harvest fest, suggested that for events like this event organizers use intent to stay instead. General discussion on Chamber marketing. KF reviewed questions; JA asked if trend lines could be provided for several years for harvest fest.

iii. Post Event Evaluations (GeoFest, Harvest Festival & Fall Marketing) – No discussion.

b. Funding Request - IAATO – First Meeting – KF provided background for the group. Members questioned value of sponsoring a conference, noting that it is not an open to the public and are concerned that it is not going to provide a value to the town. TC noted that the only thing that may be able to be funded would be speaker, but otherwise was not keen to support the event. **TC MOVED to not invite IAATO as the event is a closed event as it doesn't fit the funding profile. BA seconded. APPROVED (4-0).**

c. Discussion of Branding and Marketing RFP's – KF explained the reasoning for the posting and then removal of RFP's. General discussion on Chapter 30B and posting requirements and quote solicitation. JA spoke about different ways to solicit quotes. NS supported the idea. Extensive discussion on how best to post and solicit quotes and/or RFPs. **BA MOVED To transfer \$100 from Community Support to Marketing to properly post the RFP, JA seconded. APPROVED (4-0). TC MOVED to authorize KF and BA to develop and post the RFP. BA seconded APPROVED (4-0).** JA asked about timeframe leading to general discussion.

d. Discussion on Business Recognition Program – KF provided broad overview of the program. JA asked about how job creation might tie in with tourism and if that falls under their mandate. He moved on to say that this type of award is usually managed by the Chamber. General discussion on how to award to various industries. TC asked about funding leading to general question of funding non-tourist businesses. General discussion on how to fund the event and possibly seeking Board of Selectmen support at a special town meeting to help fund the program. TC discussed categories for awards and JA suggested various options for consideration such as restaurant and food, entrepreneur, business concept, employer of the year, suggested looking at other chambers. KF will report back in June following conversations with BoS.

## 5. Old Business

a. Visitsturbridge.org domain renewal – **TC MOVED to allocate \$93.44 out of Marketing for the purpose of domain renewal. NS seconded. APPROVED. 4-0.**

- b. STA Application Revisions – KF gave overview. TC raised question about terminology, and how this event might be open to the public. KF said the question can be added, TC suggested adding this to question 12 and how will this engage the public. General discussion on that question and adding language to bring people. Consensus to make edits and upload. TC suggested the addition that within 60 days the follow up report. JA suggested not having any punitive actions in the application if the report is not provided.
6. EDTC Report – KF provided thorough updated. TC asked question about Pilot station leading to general discussion. Members had a discussion on the STR report. TC asked about Brimfield Fair leading to general discussion on fair. JA asked about STA’s sponsorship of the concerts on the commons.
7. Correspondence
8. Adjourn – Next meeting June 12<sup>th</sup>. **BA MOVED to adjourn the meeting at 8:15. JA seconded. APPROVED (4-0).**

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<b>Community Support</b>	<b>FY2019</b>	<b>FY2018</b>	<b>FY2017</b>	<b>FY2016**</b>
July	94%	33%	36%	
August	96%	33%	36%	
September	97%	33%	36%	
October	97%	35%	41%	
November	101%	36%	56%	
December	101%	36%	56%	
January	101%	73%	56%	
February	101%	88%	73%	
March	104%	97%	73%	
April	107%	97%	73%	
May	107%	98%	92%	
June		98%	98%	
<b>Marketing</b>	<b>FY2019</b>	<b>FY2018</b>	<b>FY2017</b>	<b>FY2016</b>
July	81%	54%	30%	
August	83%	55%	30%	
September	83%	62%	43%	
October	83%	72%	50%	
November	87%	82%	53%	
December	87%	82%	53%	
January	89%	93%	62%	
February	97%	99%	65%	
March	104%	81%	95%	
April	105%	93%	95%	
May	105%	101%	101%	
June		101%	101%	

**Spending Totals / Comparisons**

<b>Community Support</b>	<b>FY2019</b>	<b>FY2018</b>	<b>FY2017</b>	<b>FY2016**</b>
July	5%	13%	7%	
August	18%	15%	9%	
September	43%	15%	9%	
October	68%	15%	9%	
November	84%	27%	21%	
December	85%	28%	21%	
January	85%	28%	27%	
February	85%	60%	37%	
March	87%	79%	58%	
April	90%	80%	59%	
May	95%	86%	59%	
June		96%	86%	
<b>Marketing</b>	<b>FY2019</b>	<b>FY2018</b>	<b>FY2017</b>	<b>FY2016</b>
July	1%	3%	0%	
August	11%	6%	2%	
September	19%	7%	5%	
October	32%	45%	5%	
November	49%	54%	25%	
December	70%	54%	29%	
January	72%	60%	32%	
February	72%	48%	34%	
March	78%	48%	35%	
April	81%	49%	37%	
May	84%	71%	45%	

June		93%	88%	
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**Remaining Totals / Comparisons**

<b>Community Support</b>	<b>FY2019</b>	<b>FY2018</b>	<b>FY2017</b>	<b>FY2016**</b>
July	95%	87%	93%	
August	82%	85%	91%	
September	57%	85%	91%	
October	32%	85%	91%	
November	16%	73%	79%	
December	15%	72%	79%	
January	15%	72%	73%	
February	15%	40%	63%	
March	13%	21%	42%	
April	10%	20%	41%	
May	5%	14%	41%	
June		4%	14%	
<b>Marketing</b>	<b>FY2019</b>	<b>FY2018</b>	<b>FY2017</b>	<b>FY2016</b>
July	99%	97%	100%	
August	89%	94%	98%	
September	81%	93%	95%	
October	68%	55%	95%	
November	51%	46%	75%	
December	30%	46%	71%	
January	28%	40%	68%	
February	28%	52%	66%	
March	22%	52%	65%	
April	19%	51%	63%	
May	16%	29%	55%	
June		7%	12%	

\*Anything approved before the fiscal year is accounted for in July.

\*\*FY 2016 only has data for end of the year at this time; in addition "Special Events" and "Community Support" are combined in this total as both accounts have since been combined.

% Spent = the amount spent at the end of that calendar month divided by the total allocated
% Remaining = the amount of funds remaining in the account at the end of that calendar month divided by the total allocated
% Allocated = the amount of fund allocated for certain events as was approved by the STA divided by the total allocated



Marketing and Advertising - 56551	
Original Total	\$97,532.60
Spent	\$85,841.50
Revised Total	\$11,691.10

Date	Item	Expenditure	Details
7/25/2018	Worcester Magazine	\$750.00	Fall Campaign (print)
7/31/2018	Worcester Magazine	\$250.00	Fall Campaign (print)
8/6/2018	Worcester Magazine	\$250.00	Fall Campaign (print)
8/6/2018	Worcester Magazine	\$1,500.00	Fall Campaign (digital)
8/20/2018	Discover Central MA	\$3,000.00	Yankee Magazine campaign
8/22/2018	Weathervane Enterprises	\$200.00	Sturbridge Express Marketing
8/27/2018	Rapscallion Brewery	\$1,770.00	Sturbridge Express Marketing
8/29/2018	The Republican	\$2,664.00	Summer/Fall Tourism
8/29/2018	Mass Live Media	\$669.00	Summer/Fall Tourism
8/29/2018	Your Hometown Shopper	\$75.00	GeoFest
9/12/2018	Worcester Magazine	\$1,250.00	Worcester Magazine Campaign (Print)
9/12/2018	Worcester Magazine	\$500.00	Worcester Magazine Campaign (Online)
9/14/2018	Retroactive Northeast	\$2,705.43	New England Shake Up
9/20/2018	The Republican	\$2,664.00	Summer/Fall Tourism
9/20/2018	Mass Live Media	\$669.00	Summer/Fall Tourism
9/20/2018	Times Union	\$6,333.33	Summer/Fall Tourism
9/20/2018	Chamber of Central MA	\$7.09	Postage et al.
10/3/2018	Center of Hope	\$46.00	Geofest 2019 Marketing
10/3/2018	CMS Chamber	\$8.83	Postage et al.
10/15/2018	Worcester Magazine	\$1,065.00	Fall Campaign (print)
10/15/2018	Worcester Magazine	\$2,375.00	Fall Campaign (digital)
11/5/2018	Discover Central MA	\$2,000.00	Yankee Magazine campaign
11/14/2018	Albany Times Union	\$6,333.34	Summer/Fall Tourism
11/14/2018	Brimfield Publication	\$300.00	Harvest Festival
11/14/2018	Your Hometown Shopper	\$195.00	Harvest Festival
11/14/2018	Strategen Advertising	\$398.00	Harvest Festival
11/14/2018	Chamber of Central MA	\$16.58	Tourism Line / Fulfillment
11/14/2018	The Republican	\$2,664.00	Summer/Fall Tourism
11/14/2018	Mass Live Media	\$669.00	Summer/Fall Tourism
11/14/2018	Times Union	\$6,333.33	Summer/Fall Tourism
11/15/2018	GateHouse New England	\$500.00	Worcester Magazine Campaign (Print)
11/15/2018	GateHouse New England	\$1,700.00	Worcester Magazine Campaign (Online)
12/10/2018	Chamber of Central MA	\$2,300.00	T&G Harvest Fest
12/17/2018	GateHouse New England	\$1,000.00	Worcester Magazine Campaign (Print)
12/17/2018	GateHouse New England	\$1,396.80	Worcester Magazine Campaign (Online)
12/27/2018	OSV	\$3,300.00	Christmas by Candlelight Ads
12/27/2018	OSV	\$9,900.00	Christmas by Candlelight Ads
12/31/2018	TLGV	\$530.00	Walktober Adverts
1/9/2019	GateHouse New England	\$1,355.20	Worcester Magazine Campaign (Online)
1/9/2019	GateHouse New England	\$1,000.00	Worcester Magazine Campaign (Print)
2/13/2019	GateHouse New England	\$48.00	Worcester Magazine Campaign (online)
3/18/2019	DCM	\$600.00	AAA Travel Show
3/18/2019	DCM	\$3,450.00	Yankee Magazine campaign
3/25/2019	Pagio, Inc.	\$1,080.00	DCM Advert
3/25/2019	Sturbridge Herbfest	\$525.00	Ad in Spirit of Change Magazine
4/1/2019	Sturbridge Herbfest	\$219.00	Wisdom Magazine
4/8/2019	Global Design & Publishing	\$950.00	Full pg. Ad in Area Guide
4/23/2019	Weathervane Enterprises	\$1,000.00	Antiques Show
5/16/2019	GateHouse New England	\$500.00	Spring Campaign
5/20/2019	Pintastic	\$101.52	Pintastic Campaign
5/20/2019	Power Play Marketing	\$1,750.00	CCMS - Discretionary
5/20/2019	Chamber of Central MA	\$11.60	February Postage
5/20/2019	Chamber of Central MA	\$7.44	March/April Postage
5/29/2019	Herbfest	\$219.00	Herbfest
5/29/2019	Herbfest	\$400.00	Herbfest
5/30/2019	Tom Chamberland	\$90.32	VisitSturbridge.org Domain
6/3/2019	Pintastic	\$456.69	Facebook Adverts
6/10/2019	GDP	\$2,490.00	Area Guide Subsidies
6/10/2019	GDP	\$1,300.00	Area Guide Additional Publishing



EDTC Salary - 51130	
Original Total	\$36,863.52
Spent	\$32,762.55
Revised Total	\$4,100.97

Date	Item	Expenditure	Details
7/31/2018	July	\$2,086.56	
8/31/2018	August	\$3,477.60	
9/30/2018	September	\$2,836.92	
10/31/2018	October	\$2,782.08	
11/30/2018	November	\$3,477.60	
12/31/2018	December	\$2,782.08	
1/31/2019	January	\$3,477.60	
2/28/2019	February	\$2,782.08	
3/31/2019	March	\$2,800.35	
4/30/2019	April	\$6,259.68	
5/31/2019	May		
	June		

## Sturbridge Tourist Association Definitions

*Community Support:* This considers costs for sponsoring or co-sponsoring the communities, organizations, or residents within Sturbridge, to implement local initiatives within the Town that present opportunities to enhance, increase or support visitor and community wide experiences. Consideration for funding include beautification and maintenance sponsorship, such as town maintained trails or streetscape improvements, or the administration of studies to better understand the tourist climate for recommendation to the committee when establishing goals. This also includes the costs associated with sponsoring or co-sponsoring an event intended to entice an audience of people to an attraction in the attempt to generate and facilitate tourism to Sturbridge. Intended costs would be equipment rentals, permit fees, police and fire details, portable restroom facilities, trash receptacles, and/or entertainment as related to the community event or activity. It also includes printing costs associated with Town brochures and signs, installation costs of signs, maintenance costs for beautification projects, or other related promotional costs. Examples of such activities that have been funded and may continue to be funded, fully or in part, include: Wayfinding signs, the Trails Tourism Booklet, Concerts on the Common, Harvest Festival, GeoFest, and Pintastic.

*Marketing and Advertising:* This includes costs associated with the promotion of tourism with a portion to be used directly for the marketing of all Sturbridge businesses involved in tourism, as well as the advertising efforts to attract people to an event or tourist related business. Advertising costs related to producing advertisements for products, services or ideas using the following media may be funded: radio, television, newspaper, billboard, sandwich boards, posters, cards, online and domain name (search engines) that aids in the communication to people/customers or groups of people/customers aware of Sturbridge's economy or market in the expectation to draw them into Sturbridge. A clear and concise advertising strategy should be outlined in the application form and presented for consideration. Advertising is the specific action taken to promote tourism. Promotion is the idea to attract people, promote and expand tourism in Sturbridge, and induce them to come to Sturbridge for an event, an attraction, a business, or to take advantage of the Town's natural resources. Such promotions may include costs associated with consumer promotions (i.e., discounts, coupons, contests, promotion banners, direct mail, and merchandise), trade discounts, incentive awards, or public relations (i.e., news releases about happenings in town, donations to a town cause, or campaign to encourage people to shop, eat, stay in Town) as part of the overall promotional methods used to increase awareness and inform people of the positive reasons to come to Sturbridge.

## **Sturbridge Tourist Association**

### **Definitions**

*Economic Development & Tourism Coordinator Salary:* This person will staff STA meetings, be the business conduit for the community and be responsible for implementing aspects of the Master Plan and Commercial Tourist District plan as it relates to economic development. It is further expected that this person is responsible for grant writing to bring other resources to the Town as it relates to promotion of tourism, business development and community activities within the Town. This person should be trained in the field of economic development and/or tourism development and have demonstrated success in this field.

# Budget Reconciliation

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<b>Department</b>	<b>Sturbridge Tourist Association</b>
<b>Month</b>	<b>May</b>
<b>Balance Agree</b>	
<b>Balance Does Not Agree</b>	<b>X</b>

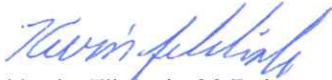
Explanation of Variance:

The STA transferred in April and again in May the total sum of \$200 from Community Support to Marketing. So my totals are \$200 positive in Marketing (\$16,647.11) and \$200 negative in Community Support.

However in Community Support there is a \$45 difference I cannot explain. The numbers should be \$3,440.13, but the number in the reconciliation is \$3,595.13. Now \$155 of that can be explained by the transfers, but the remaining \$45 should not be there. I double checked and my expenses match with the budget breakdown printed for me.

I have no explanation apart from a technical error for this \$45 discrepancy.

Please contact me with questions.



Kevin Filchak, M.P.A.

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Department Head



6 June 2019

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Date

06/04/2019 10:41  
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TOWN OF STURBRIDGE  
STA MAY 2019

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FOR 2019 11

ACCOUNTS FOR: 244	STURBRIDGE TOURIST ASSN	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
<hr/>								
24400 STURBRIDGE TOURIST ASSN								
<a href="#">24400 51130</a>	<a href="#">SALARIES/WAGES</a>	36,864	0	36,864	32,762.55	.00	4,100.97	88.9%
<a href="#">24400 56551</a>	<a href="#">MARKETING/ADVERTISI</a>	109,333	-12,000	97,333	80,885.48	.00	16,447.12	83.1%
<a href="#">24400 56552</a>	<a href="#">COMMUNITY SUPPORT</a>	36,025	12,000	48,025	44,429.75	.00	3,595.13	92.5%
<a href="#">24400 58618</a>	<a href="#">TOURISM IMPROVEMENT</a>	0	20,140	20,140	16,577.31	.00	3,563.00	82.3%
TOTAL STURBRIDGE TOURIST ASSN		182,221	20,140	202,361	174,655.09	.00	27,706.22	86.3%
TOTAL STURBRIDGE TOURIST ASSN		182,221	20,140	202,361	174,655.09	.00	27,706.22	86.3%
TOTAL EXPENSES		182,221	20,140	202,361	174,655.09	.00	27,706.22	

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# STA Evaluation Worksheet

For Use on All Applications Received by the Sturbridge Tourist Association

Last Updated: 13 September 2018

Note: Any item listed with a \* should not be counted against an applicant if it does not apply to them.

## I. General

Criteria	3 Points	2 Points	1 Point	0 Points
<b>Application [Basic]</b>	Applicant has completed online application and provided all appropriate documentation.	Applicant has completed online application and has, upon request, provided additional clarifying documentation.	Applicant has completed online application and has not, after request(s), provided additional documentation.	Applicant has submitted a partially completed application.
<b>Application [Content]</b>	Applicant has prepared a thorough application, and has considered all applicable variables. <sup>1</sup>	Applicant has prepared a thorough application, and has considered most variables, excluding minor variables.	Applicant has prepared an application, and has failed to consider some important variables.	Applicant has prepared an incomplete application and has not considered important variables.
<b>Communication</b>	Applicant is responsive and forthcoming with information.	Applicant is relatively responsive and is generally forthcoming with information.	Applicant is slow to respond and requires reminders.	Applicant is not responsive or communicative.
<b>Previous Interactions*</b>	Applicant provided all documents in a timely manner and adhered to all STA policies throughout the process.	Applicant provided all documents, and mostly adhered to all STA policies throughout the process.	Applicant provided all documents but required EDTC to request them, and had difficulties in adhering to the STA policies.	Applicant did not provide all documents required by the STA and proved difficult to work with.
<b>Transparency</b>	The applicant's finances, organization, et al. are clearly defined and all relevant information, including historical data, is shared with the STA.	The applicants finances, organization, et al. are clearly defined and most relevant information is shared with the STA.	The applicants finances, organization, et al. are mostly defined and some relevant information is shared with the STA.	The applicant's finances, organization, et al. are not defined and relevant information is not shared with the STA.

<sup>1</sup> Variables are defined as considering all potential costs, having a marketing plan, having a venue identified, etc. A minor variable could be considered awaiting final quote for service, notifying committee that there may be small fluctuations in budget due to unforeseen circumstances, etc. A major variable could be considered lacking a budget, defined marketing plan, or not having a venue (if applicable).

<b>After Action Report (AAR)*</b>	Applicant has provided a complete AAR with no omissions in detail.	Applicant has provided a nearly complete AAR with only minimal information omitted.	Applicant has provided a partially completed AAR with major omissions	Applicant has not provided an AAR.
<b>Total Possible Points</b>	18 / 12			
<b>Total Points Awarded</b>				

## II. Budget

<b>Criteria</b>	<b>3 Points</b>	<b>2 Points</b>	<b>1 Point</b>	<b>0 Points</b>
<b>Budget</b>	Applicant has provided a completed and accurate budget with clearly identified costs and revenues.	Applicant has provided a complete budget, but the committee has questions regarding formatting.	Applicant has provided a budget but there are questions regarding totals or general arithmetic.	Applicant has provided an incomplete or inaccurate budget.
<b>Previous Allocations*</b>	Applicant used their entire previous allocation and stayed within their spending cap.	Applicants used most of their allocated amount and stayed within their spending cap.	Applicant used some of their allocated amount and stayed within their spending cap.	Applicants either did not use their allocated funds OR spent over their allocated amount.
<b>Return on Investment*</b>	The applicant has proven with quantitative data that this activity brings revenues to Sturbridge, specifically to the hotel community.	The applicant has proven with quantitative data that this activity brings revenues to Sturbridge.	The applicant has indicated that this activity has brought revenue to Sturbridge but cannot produce evidence.	The applicant is unable to demonstrate that the activity has brought revenues to Sturbridge.
<b>Revenues Collected</b>	Applicant does not intent to make revenue from event and/or if they do it is reinvested in future events.	Applicant anticipates making some revenue from the event and intends to put most towards future events with the remaining going to the Applicants general fund (or equivalent).	Applicant anticipates making revenue from the event and will put some towards future events with the remaining going to the Applicants general fund (or equivalent).	Applicant anticipates making revenue from the event and it is unclear where said revenue will go and/or it will go towards the Applicants general fund (or equivalent).
<b>Returning Applicant Request*</b>	Applicant has reduced their request from the previous amount requested as the activity becomes more self-sufficient.	Applicant has maintained their request from the previous year.	Applicant has maintained their request from the previous year or has increased it to match with increasing cost of services due to economic factors, but has not added services from the	Applicant has increased their request from the previous year to include new services.



			previous year.	
<b>Ability to Manage Program</b>	Event would not be possible without STA support.	Major aspects of the program would not be possible without STA support.	Some aspects of the event would not be possible without STA support.	If the STA does not participate, it will not adversely affect the event.
<b>Total Possible Points</b>	18 / 9			
<b>Total Points Awarded</b>				

### III. Event\*

<b>Criteria</b>	<b>3 Points</b>	<b>2 Points</b>	<b>1 Point</b>	<b>0 Points</b>
<b>Number of Participants</b>	> 500 participants	499 – 250 participants	249 – 50 participants	< 49 participants
<b>Location of Event</b>	Event takes place entirely in Sturbridge.	Event takes place almost entirely in Sturbridge.	Event takes place in multiple communities, of which Sturbridge is one of them.	Event does not take place in Sturbridge.
<b>Cost to Participants</b>	This event is free and open to the public.	This event is open to the public but requires a minimal per person fee (< \$50) for entry.	The event is open to the public, but requires a sizeable per person fee (> \$50) for entry.	This event is not open to the general public.
<b>Overnight Stays</b>	Applicant has confirmed guests will stay multiple nights in local hotel(s), and confirmed others will visit just for the day.	Applicant has confirmed that guests will stay overnight in local hotel(s), and confirmed others will visit just for the day.	Applicant anticipates guests will stay overnight in local hotel(s), and confirmed others will visit just for the day.	Applicant does not anticipate guests will stay overnight and confirms that others will visit just for the day.
<b>Total Possible Points</b>	12			
<b>Total Points Awarded</b>				

### IV. Marketing / Promotion

<b>Criteria</b>	<b>3 Points</b>	<b>2 Points</b>	<b>1 Point</b>	<b>0 Points</b>
<b>Marketing</b>	Applicant is promoting Sturbridge as a whole and gives equal opportunity to promote all businesses in Town.	Applicant is promoting Sturbridge as a whole but gives preferences to a select group of businesses.	Applicant is promoting Sturbridge in part and also gives preferences to a select group of businesses.	Applicant is not promoting Sturbridge.
<b>Track Record*</b>	Marketing campaign has been proven with quantitative data that it brought visitors to Sturbridge who visited businesses or stayed in local hotels.	Marketing campaign has been proven with quantitative data reach a large audience but is unclear who may be coming to Sturbridge	Marketing campaign has been supported with colloquial data that it reaches a large audience but is unclear who may be coming to Sturbridge	It is unclear what the marketing campaign has accomplished.

		because of advert.	because of advert.	
<b>Total Possible Points</b>	6			
<b>Total Points Awarded</b>				

## V. STA Mission

<b>Criteria</b>	<b>3 Points</b>	<b>2 Points</b>	<b>1 Point</b>	<b>0 Points</b>
<b>Use of local businesses</b>	Applicant is only using Sturbridge businesses / vendors to support this activity.	Applicant is mainly using Sturbridge businesses / vendors to support this activity.	Applicant is using some Sturbridge businesses / vendors to support this activity.	Applicant is not using Sturbridge vendors to support this activity.
<b>Supporting Mission of STA</b>	This activity supports the mission of the Sturbridge Tourist Association	This activity mostly supports the mission of the Sturbridge Tourist Association	This activity in part supports the mission of the Sturbridge Tourist Association.	This activity does not support the mission of the Sturbridge Tourist Association.
<b>Community Event</b>	Event is considered a major community event.	Event is a significant event in Sturbridge.	Event is in Sturbridge.	Neither a significant nor community event.
<b>Other</b>	Points awarded at the discretion of the Sturbridge Tourist Association Members.			
<b>Total Possible Points</b>	12			
<b>Total Points Awarded</b>				

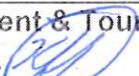
## VII. Summary

<b>Overall Points Awarded</b>		
<b>Possible Points Awarded</b>		
<b>Project Approved for Interview?</b>	Yes	No

# Page Break



# Town of Sturbridge

Economic Development & Tourism Coordinator  
Kevin Filchak, M.P.A. 

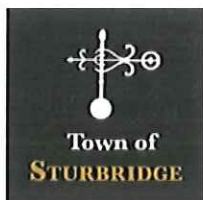
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Date: 10 June 2019  
To: Sturbridge Tourist Association  
Subject: Chamber of Commerce Applications

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As of the drafting of this memorandum, I have not received any response to the questions raised at the last meeting of the STA for either the GeoFest or Harvest Festival applications.

If any response is received it shall be provided to the members.



# TOWN OF STURBRIDGE

ECONOMIC DEVELOPMENT & TOURISM COORDINATOR  
KEVIN FILCHAK, M.P.A.

Date: 20 May 2019  
To: Sturbridge Tourist Association  
Subject: Chamber of Central MA South – GeoFest & Harvest Fest Applications; Post Event Evaluations

## OVERVIEW

The Chamber of Commerce (CCMS) is requesting STA support for two events in FY 2020: the GeoFest and the Harvest Festival. In addition, CCMS has provided post-event evaluations for the previous year's event as well as their evaluation of the fall 2019 marketing campaign the STA funded. It was noted in an email directly to the EDTC that the Chamber would not pursue their usual marketing request as the STA is currently pursuing a branding/marketing study.

Below is a breakdown of the Chamber's request for their GeoFest and Harvest Festival.

### GEOFEST

The Chamber is requesting \$4,300 to support their sixth<sup>1</sup> annual C-Mass GeoFest, a five day (7/15 – 7/19) family friendly event that brings visitors from many states in the northeast and beyond. At this time the July event has 200 people signed up to participate. The event will take place across the town and surrounding communities but the main event will take place at the Westville Dam area. A schedule of events has been attached to their application along with their 2018 Budget.

The event will receive funding from food trucks and from sale of beverages. The Chamber anticipates making roughly \$1,800 - \$2,000 from the event, though it is not entirely clear where the money will be going.

Given that this event has been funded by the STA for several years, and the Chamber is making money off of this event, I would recommend that the STA consider reducing their funding for this event going forward, similar to what they have done for other similar events.

### HARVEST FESTIVAL

The Chamber is seeking \$7,760 in funding for their 30<sup>th</sup> Annual Harvest Festival this October 19<sup>th</sup> and 20<sup>th</sup>. The event will feature live entertainment, food trucks, vendors, and more. It is used as

<sup>1</sup> They reference it being their fifth elsewhere. Unclear.

an annual fundraiser for the Chamber of Commerce. Their 2018 budget is attached to this application.

Of note this year, the Chamber is soliciting a second sponsor for the event beyond the STA's usual support. There has been little interest but the Chamber has said that if they secure a second vendor they will reduce their ask from the STA by \$5,000.

This event is an important annual event for the Town. That said, given that the Chamber is making revenue from this event, the STA should inquire more about this aspect of the finances as they consider funding this event. Furthermore, the STA should investigate the overall financial impact on the community, specifically how it impacts hotels, restaurants and merchants not participating in the festival.

### SUGGESTED MOTION

If it is the prerogative of the STA to invite the Chamber to its next meeting, it is recommended that the STA ask that the Chamber provide the following information:

- An explanation of where revenues collected from the GeoFest will go;
- A status update on securing additional sponsorship for the Harvest Festival;
- An explanation of the financial impact of the Harvest Festival (i.e. hotel rooms are referenced in the application, estimate on the number of rooms sold for the event).

If the members concur, the following motion would be in order:

*MOVE to invite the Chamber of Central MA South to the next meeting of the STA to discuss their applications for GeoFest and the Harvest Festival.*

# Sturbridge Tourist Association - Funding Request Form

Below is the Sturbridge Tourist Associations funding request form. If you have an event that you would like supported, you must complete and submit this form to the Economic Development and Tourism Coordinator so that it can be added to the next available agenda.

## Email address \*

alexandra\_mcnitt@cmschamber.org

## Contact Person (name & title) \*

Alix McNitt, Executive Director

## Contact Person Phone Number \*

508-347-2761

In order for you to receive funding you must (A) complete this application and (B) review and agree to the Sturbridge Tourist Association Funding Request Policy (policy is found here:

[https://www.town.sturbridge.ma.us/sites/sturbridgema/files/uploads/sta\\_funding\\_policy-09132018.pdf](https://www.town.sturbridge.ma.us/sites/sturbridgema/files/uploads/sta_funding_policy-09132018.pdf)). Check the box below confirming you have read and understand the STA Funding Request Policy. \*

I have read and agree to follow the STA funding request policy.

## Name of Organization \*

Chamber of Central Mass South

## Address

46 Hall Rd., Sturbridge

## Website and Social Media pages (please include links)

cmschamber.org, sturbridgetownships.com, <https://www.facebook.com/sturbridgetownships/>,  
<https://www.facebook.com/cmschamber/>, <https://www.facebook.com/CMassGeofest/>

---

## Is this the first time you are seeking funding?

Yes

No

---

## Funding Information

In this section you will detail your monetary request from the STA and explain how your project will support tourism in Sturbridge.

### Funding Amount Requested \*

\$4300

---

### Please provide a detailed explanation of why you are seeking funding from the Sturbridge Tourist Association? \*

This will be the sixth annual C-MASS GEOFEST. It is a family friendly 5-day festival. Last year's festival had visitors from MA, CT, RI, NH, ME, NJ, NY, PA and FL. The 2019 Geofest is 2 months away but we already have over 200 people logging in that they'll be attending and most of those will have at least one other person with them. Even if geocachers cannot make it during the festival, they know Sturbridge is a geocachers haven with over 1,000 caches in the immediate area. Many of the participants stay several nights, and eat in our restaurants and spend money in our shops. Producing this event without STA support would not be possible.

---

### How will this event support Economic Development and Tourism in Sturbridge? \*

See above.

---



**Do you expect to receive funding from other sources? If so explain.**

Yes. At the main event, we will have a food truck and ice cream truck and they'll each pay the Chamber \$50. We'll sell beverages at the event for \$1 each and split the proceeds with the local Scouts. We also sell the t-shirts, geocoins, pathtags and swag to participants.

---

**Are you expecting to make any revenues from your project? If so where do those revenues go?**

Yes, we anticipate making roughly \$1800-2000 not including staff salaries

---

**Are there any other insights or information that you feel are important for the STA to know when considering your application?**

Many of the geocachers that participate come year after year, and they help promote this event at other geocaching events around the country. There are many geocachers among retirees, and every year we have couples tell us they altered their travel plans to attend this festival.

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## Event Information

If your project is not associated with an event that will take place in Sturbridge, you may skip this section and go to Section 4 - Review and Submit.

**What is the name of the event?**

C-MASS GEOFEST

---

**Where will the event be held?**

The main event will be at the Westville Dam at the pavillions and ballfield

---

Please add the event website and/or social media links.

<http://www.c-massgeofest.org/>, <https://www.facebook.com/CMassGeofest/>

Please add the start date for the event.

MM DD YYYY

07 / 15 / 2020

If a multi-day event, please add the end date for the event.

MM DD YYYY

07 / 19 / 2020

Please add the start time for the event.

Time

: AM ▼

Please add the end time for the event.

Time

: AM ▼

Will this event draw in visitors from outside of the region?

Yes

No

Is this an annual event?

Yes

No

Are you marketing this event? If you are how are you doing so? If not why are you not?

Yes. The best way to reach cachers is through geocaching.com. Each of the events during our festival will be listed there. We also use our facebook page, database of visitors, Discover Central Mass, eventbrite and more

---

Are there any other insights or information about your event that you feel are important for the STA to know when considering your application?

A schedule of activities for the 2019 geofest will be sent to Kevin with this request to give you a better idea of what we do. The activites themselves will change to keep things fresh, but generally similar

---

---

## Review and Submit

### Additional Requirements

- All applicants are required to adhere to the Funding Policy guidelines adopted by the Sturbridge Tourist Association. A link to the most recent iteration of the policy is found at the start of this funding application.
- Any and all funding is contingent upon the Sturbridge Tourist Association receiving recognition as a sponsor of the event in question. Failure to do so is cause for the STA to revoke the applicant's funding.
- Depending upon the size and scale of the event, the STA reserves the right to request additional information from the applicant.

As grantee for the project as detailed in this application, I certify that these statements made herein are true and that the funds requested to be disbursed fulfill the purpose indicated in the approved application. [If your application was approved with a condition] I further certify that the conditions imposed on the project have been met. Furthermore I agree to adhere to any and all the policies and requirements of the Sturbridge Tourist Association as stated above and in their Funding Policy guidelines, acknowledge that failure to adhere to the aforementioned items could result in the revocation of any and all funding received. \*

I have read and agree to adhere to all STA policies and requirements as stated above

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Google Forms



## SCHEDULE

**Wednesday, August 15**

**Thursday, August 16**

**Friday, August 17**

**Saturday, August 18**

Trivia Night at Teddy G's, 8-10 pm

Canvas Painting at Brush It Off Paint & Sip, 6-8 pm

I Scream, You Scream at Westview Farms, 2-4 pm

Night Caching in the Brimfield Forest, 8-8:30 pm

**MAIN EVENT - Westville Dam Pavilions & Ballfield, 12-5pm**

Registration 12 - 5

Westville Caching 12 - 5

Kids Activities 12 - 4

Ammo Can Toss 12 - 4

1st Scouting Geocaching Badge Class at 12:30

Group Photo 1:00

Hands on Geocaching at 1:30

2nd Scouting Geocaching Badge Class at 2:30

GSAK at 2:30

Reviewers Q&A at 3:30

Raffles, 50/50.... at 4:00 (must be present to win)

**Sunday, August 19**

Kayak Cache Flotilla on Long Pond at 9:00-9:30 am

See You in '18 Send-Off at Rapscaillon, 2-4 pm

[www.c-massgeofest.org](http://www.c-massgeofest.org)

**Sponsored by**





## Schedule of Events

Wed., July 17	Music Bingo at Mexicali Mexican Grill 7-9 pm Like regular bingo but instead of numbers you match musical cues on a card
Thur., July 18	Canvas Painting with Brush It Off at the Publick House 6-8 pm ***We'll paint an 11"x14" canvas, subject to be determined, \$25 pp
Fri., July 19	I Scream for Ice Cream at Westview Farm 2-4 pm Enjoy some of the creamiest ice cream on the planet while watching baby goats frolic on the hilltop
Society 8 pm	Bonfire and the History of the Apollo Mission with the Aldrich Astronomical Astronomical Society,
Sat., July 20	Celebrate the 50 <sup>th</sup> Anniversary of the Moon Landing with the Aldrich stories about the Apollo program, and rocket launching with the kids Main Event at Westville Dam Registration 12 – 5 Vendors: Space Coast, JB's Mobile Café and Suzy Q's Ice Cream 12-5 Westville Caching 12 – 5 Kids Activities 12 – 4 Ammo Can Toss 12 - 4 1st Scouting Geocaching Badge Class with Scout338 at 12:30 Group Photo 1:00 Hands on Geocaching with 4Swans at 1:30 Build Your Own Birdhouse Class at 2:30 2nd Scouting Geocaching Badge Class with Scout338 at 2:30 ***History and Tour of the Westville Dam at 3:30 Raffles, 50/50.... at 4:00
Sun., July 21 am	Flotilla on Lake Siog up Quinebaug River Trail with Cider and Donut Launch at 9 This nationally designated National Recreational Trail is a flat-water course with no portages, approximately 5 miles in length, and several caches to pick up along the way. Send-Off at Rapscaillon Brewery 2-4 Enjoy a craft brew as we bring the C-MASS GEOFEST to a close for 2019

\*\*\* indicates details have not been fully finalized

# STA - Post Event Evaluation

As a recipient of STA funding, you are required to complete the following post funding evaluation form. This is intended to provide the STA with perspective on your event and ensure that the STA funds were used in a manner that supported its intended mission.

Future funding opportunities are contingent upon you completed and returning this form to the Sturbridge Tourist Association. Depending upon the nature of your event, the STA may request that you or a member of your organization be present at an STA meeting to discuss your findings.

## Email address \*

alexandra\_mcnitt@cmschamber.org

## Organization Name: \*

Chamber of Central Mass South

## Point of Contact (name, title, email, & phone number) \*

Alix McNitt, Executive Director, 508-347-2761

## Name of project or event \*

2018 C-MASS GEOFEST

## Event Information (location, date(s), time(s)) if applicable

August 15-19, 2018

**Total funds requested by applicant \***

\$4300.00

---

**Total funds allocated by STA \***

\$4300.00

---

**Total funds spent by applicant \***

\$4051.48 in STA funds, \$4972.47 without staff or volunteer time factored in

---

**Have all the bills been paid? \***

Yes

No

**Briefly describe your project or event**

The 2018 C-MASS GEOFEST was our 4th annual geocaching festival. Held over 5 days with 7 events in and around Sturbridge. The main event was held on the Sturbridge side of the Westville Dam and attracted participants from MA, CT, RI, NH, NJ, NY, PA, FL and ME.

---

**How was the STA funding intended to help your project?**

The funds were used for promotional purposes and geocaching related swag. It would not be possible to produce this festival without this sponsorship.

---



Please describe how you measured the success of your project? Did you meet those goals? Why or why not?

Part of holding this sort of event is keeping a participant log of attendees at each event. We saw modest increases in participation of the satellite events. We had a slight decrease in attendees for the main event, though that was not surprising as the forecast for the day was heavy rain. Happily, the rain held off that day until 3:30 when the skies opened up on us.

Knowing what you know now, would you change how you approached your project or event next time? If so how?

No, it went very well, and using Westville as the new main event location was a big hit. We are excited to return there in July of 2019.

How was your experience working with the STA? Is there anything that we can do differently to better serve your needs?

Fine. Can't think of anything.

Do you have any other comments or suggestions for the STA?

Not at this time

Will you seek funding from the STA in the future? \*

Yes

No

Maybe

**2018 C-MASS GEOFEST Financials**

<b>Income</b>		<b>Expense</b>	
\$910.00	STA Oakcoins	\$954.50	Oakcoins
\$387.00	STA Pathtags	\$387.00	Pathtags
\$800.00	STA T-shirts	\$953.03	T-shirts
\$46.00	STA Cache Cards	\$46.50	Cache Cards
\$788.48	STA Swag Bags	\$150.00	Logo Design Update
\$275.00	STA Frisbees	\$100.00	T-shirt Design
\$200.00	STA Koozies	\$788.48	Swag Bags
\$245.00	STA Golf Pencils	\$281.68	Frisbees
\$400.00	STA Website Updates	\$230.29	Koozies
\$1,021.91	Online Sales	\$245.06	Golf Pencils
\$1,175.50	Event Sales	\$400.00	Website Updates
<b>\$6,248.89</b>	<b>TOTAL</b>	\$15.99	Geofest Domain
		\$59.88	Mobile Site Hosting
		\$140.00	Westville Fees/Permits
		\$220.06	Signage & Event Materials
		<b>\$4,972.47</b>	<b>TOTAL W/O Staff &amp; Volunteers</b>
		\$2,010.00	Staff Time
		<u>\$5,481.18</u>	Volunteer Value*
		<b>\$7,491.18</b>	<b>Staff and Volunteer Value</b>

\*Based on the National average of \$25.43 as published by the Independent Sector; MA average is \$32.15

# Page Break

# Sturbridge Tourist Association - Funding Request Form

Below is the Sturbridge Tourist Associations funding request form. If you have an event that you would like supported, you must complete and submit this form to the Economic Development and Tourism Coordinator so that it can be added to the next available agenda.

## Email address \*

alexandra\_mcnitt@cmschamber.org

## Contact Person (name & title) \*

Alix McNitt, Executive Director

## Contact Person Phone Number \*

5083472761

In order for you to receive funding you must (A) complete this application and (B) review and agree to the Sturbridge Tourist Association Funding Request Policy (policy is found here:

[https://www.town.sturbridge.ma.us/sites/sturbridgema/files/uploads/sta\\_funding\\_policy-09132018.pdf](https://www.town.sturbridge.ma.us/sites/sturbridgema/files/uploads/sta_funding_policy-09132018.pdf)). Check the box below confirming you have read and understand the STA

Funding Request Policy. \*

I have read and agree to follow the STA funding request policy.

## Name of Organization \*

Chamber of Central Mass South

## Address

46 Hall Rd., Sturbridge

## Website and Social Media pages (please include links)

cmschamber.org, sturbridgetownships.com, <https://www.facebook.com/cmschamber/>,  
<https://www.facebook.com/sturbridgetownships/>, <https://www.facebook.com/CMassGeofest/>

---

## Is this the first time you are seeking funding?

Yes

No

---

## Funding Information

In this section you will detail your monetary request from the STA and explain how your project will support tourism in Sturbridge.

### Funding Amount Requested \*

\$7760 specifically, \$2000 for 3 bands, \$1000 for 2 magic acts, \$800 for portapotties and sinks, \$660 for tent, tables and chairs, and \$3300 in advertising (\$2400 T&G bundle, \$400 Sturbridge Times, \$300 Out Town and \$200 Hometown Shopper)

---

### Please provide a detailed explanation of why you are seeking funding from the Sturbridge Tourist Association? \*

The produce the 30th annual Harvest Festival. This 2-day event will attract up to 10,000 people if the weather cooperates. Crowd surveys in the past indicate about 10% of participants come from out of MA. It is a hugely popular event.

---

### How will this event support Economic Development and Tourism in Sturbridge? \*

It will generate overnight stays both from guests and some of the vendors, meals in restaurants, shoppers

---

**Do you expect to receive funding from other sources? If so explain.**

Yes, the Chamber charges a booth fee to the vendors and food trucks. Based on a previous meeting we have been seeking a second major sponsor, but thus far there have been no takers. The only other viable possible sponsor has been asked, but no commitment has been made. Should they agree to sponsoring, we would reduce our request here by \$5000

**Are you expecting to make any revenues from your project? If so where do those revenues go?**

Yes, the primary reason we produce this event is as a vital fundraiser for the Chamber to support operations.

**Are there any other insights or information that you feel are important for the STA to know when considering your application?**

You know this event pretty well

---

## Event Information

If your project is not associated with an event that will take place in Sturbridge, you may skip this section and go to Section 4 - Review and Submit.

**What is the name of the event?**

Harvest festival

**Where will the event be held?**

Sturbridge Town Common

Please add the event website and/or social media links.

sturbridgetownships.com, cmschamber.org and our facebook channels listed before

Please add the start date for the event.

MM DD YYYY

10 / 19 / 2019

If a multi-day event, please add the end date for the event.

MM DD YYYY

10 / 20 / 2019

Please add the start time for the event.

Time

10 : 00 AM ▼

Please add the end time for the event.

Time

05 : 00 PM ▼

Will this event draw in visitors from outside of the region?

Yes

No

Is this an annual event?

Yes

No

Are you marketing this event? If you are how are you doing so? If not why are you not?

---

Are there any other insights or information about your event that you feel are important for the STA to know when considering your application?

Not at this time

---

## Review and Submit

### Additional Requirements

- All applicants are required to adhere to the Funding Policy guidelines adopted by the Sturbridge Tourist Association. A link to the most recent iteration of the policy is found at the start of this funding application.
- Any and all funding is contingent upon the Sturbridge Tourist Association receiving recognition as a sponsor of the event in question. Failure to do so is cause for the STA to revoke the applicant's funding.
- Depending upon the size and scale of the event, the STA reserves the right to request additional information from the applicant.

As grantee for the project as detailed in this application, I certify that these statements made herein are true and that the funds requested to be disbursed fulfill the purpose indicated in the approved application. [If your application was approved with a condition] I further certify that the conditions imposed on the project have been met. Furthermore I agree to adhere to any and all the policies and requirements of the Sturbridge Tourist Association as stated above and in their Funding Policy guidelines, acknowledge that failure to adhere to the aforementioned items could result in the revocation of any and all funding received. \*

I have read and agree to adhere to all STA policies and requirements as stated above



# STA - Post Event Evaluation

As a recipient of STA funding, you are required to complete the following post funding evaluation form. This is intended to provide the STA with perspective on your event and ensure that the STA funds were used in a manner that supported its intended mission.

Future funding opportunities are contingent upon you completed and returning this form to the Sturbridge Tourist Association. Depending upon the nature of your event, the STA may request that you or a member of your organization be present at an STA meeting to discuss your findings.

## Email address \*

alexandra\_mcnitt@cmschamber.org

## Organization Name: \*

Chamber of Central Mass South

## Point of Contact (name, title, email, & phone number) \*

Alix McNitt, Executive Director, 508-347-2761

## Name of project or event \*

2018 Harvest Festival

## Event Information (location, date(s), time(s)) if applicable

Oct. 13 and 14, 2018

Total funds requested by applicant \*

\$7750

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Total funds allocated by STA \*

\$7750

---

Total funds spent by applicant \*

\$6983 in STA funds, \$7641.49 overall without staff or volunteer time included

---

Have all the bills been paid? \*

Yes

No

Briefly describe your project or event

29 Annual Harvest Festival with 3 bands, 2 magic shows, 80+/- crafters and specialty foods, and family fun

---

How was the STA funding intended to help your project?

To promote the event and cover the expense of rentals and entertainment

---

Please describe how you measured the success of your project? Did you meet those goals? Why or why not?

By attendance and vendor feedback. The first day of the festival wash freezing cold and wet but people still turned out. The second day was beautiful and attendance was higher than usual. Vendors expressed they more than made up fo traffic from the first day.

---

Knowing what you know now, would you change how you approached your project or event next time? If so how?

Yes, two things happened that need adjusting. First, due to a miscommunication with town police, we did not have detail officers as we normally would. The chief and I have already squared this for the future. There was also a change in use of the town common rules that we were not aware of that upset several neighbors. There is a meeting on May 20 with the Select Chair, Recreations, K. Filchak, neighbors and Chamber Executive Director and a Chamber Board member to rectify for the future.

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How was your experience working with the STA? Is there anything that we can do differently to better serve your needs?

Worked well

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Do you have any other comments or suggestions for the STA?

Not at this time

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Will you seek funding from the STA in the future? \*

Yes

No

Maybe

**2018 Sturbridge Harvest Festival Financials**

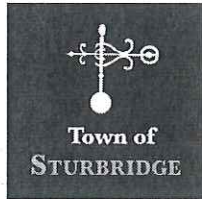
**Income**

\$500.00	STA Band Livestock
\$800.00	STA Band Nowhere Men
\$700.00	STA Band the Otters
\$1000.00	STA Golden Bough/Magician
\$790.00	STA Toilets/Sinks
\$398.00	STA Sturbridge Times
\$300.00	STA Our Town
\$2300.00	STA Telegram Bundle
\$195.00	STA Hometown Shopper
\$12,170.00	Vendors/Crafters/Food Trucks
<u>\$775.05</u>	Beverage Sales
<b>\$19,928.05</b>	<b>TOTAL</b>

**Expense**

\$570.00	Band Livestock
\$800.00	Band Nowhere Men
\$700.00	Band The Otters
\$1000.00	Golden Bough/Magician
\$815.00	Toilets/Sinks
\$398.00	Sturbridge Times
\$300.00	OurTown
\$2300.00	Telegram Bundle
\$195.00	Hometown Shopper
\$24.18	Signage
\$260.00	Waste Management/Casella
\$43.87	Miscellaneous
<u>\$235.44</u>	Beverages
<b>\$7,641.49</b>	<b>TOTAL W/O Staff &amp; Volunteers</b>
\$2,538.75	Staff Time
<u>\$1,432.02</u>	Volunteer Value*
<b>\$3,970.77</b>	<b>Staff and Volunteer Value</b>

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Break



# TOWN OF STURBRIDGE

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A.

Date: 3 June 2019  
To: Jeff Bridges, Town Administrator  
CC: Sturbridge Tourist Association; Jean Bubon, Town Planner  
Subject: EDTC – May 2019 Monthly Update

Below is a summary of my activities over the previous month. If you have questions regarding the contents of the report please feel free to contact me.

## BUSINESS LICENSE – NEW FORMAT

To help make the process of applying for a business license easier, I worked with the Town Clerk to develop a new business license form that is clearer, cleaner and provides staff with more detailed information. Rather than being a scanned copy of a document, it is now a PDF fillable form that applicants can complete almost entirely on a computer. While the form is easier to complete and follow it does not lessen our requirements. To view the new license, please follow this link:

[town.sturbridge.ma.us/sites/sturbridgema/files/uploads/business\\_license\\_-\\_05202019\\_0.pdf](http://town.sturbridge.ma.us/sites/sturbridgema/files/uploads/business_license_-_05202019_0.pdf)

## CENTRAL MA REGIONAL ECON DEV COUNCIL ENGAGEMENT SESSION

On 30 May I attended Lt. Governor Karen Polito's economic development engagement session at Clark University in Worcester. The meeting was an opportunity to speak directly with the administration about where local communities want the economic development focus to be over the next four years. I participated in two sessions: (1) Community & Neighborhood Development and (2) Business Growth. During both of these sessions I raised several points that I felt were important for Sturbridge. First I raised the concerns of some of our manufacturers that lack of housing is an issue (though did confirm that we have the 40B project) and how that is hindering recruitment. Secondly, I discussed the value of supporting our regional tourism board and tourism in general, citing several figures on what Sturbridge does for the sector and how it benefits from it. Third, I noted that the community has benefited from the Economic Development Incentives Program (EDIP) which has provided us with several recent TIF's. Finally, I noted challenges with massive infrastructure projects like Route 20 and our challenges dealing with the scope of that project (dealing with state, utilities studies, expense, etc.).

## CHARRETTE FOLLOW UP

Along with Ms. Bubon, we prepared a summary of the Route 15 charrette and proposed changes for the corridor. In short, the recommendation is to (1) remove the PUBD, (2) add in indoor/outdoor commercial recreational uses to the corridor, and (3) leave the rest unchanged.

To view the summary of the report please follow the link below:

## CMMPO – ADVISORY COMMITTEE

On 22 May I attended the monthly meeting of the CMMPO – Advisory Committee. We discussed the 2020 Long Range Transportation Plan, the FY 20 Unified Planning Work Program and the Transportation and Climate Initiative.

## DCM BOARD OF DIRECTORS MEETING

On 15 May I attended the bi-monthly Board of Directors meeting for Discover Central MA. Two items of note from that meeting are that DCM is (A) looking to recruit members, a perpetual goal, and (B) is looking to develop a grant program akin to what the STA does supporting local events, conferences, etc. I volunteered to serve on the committees that will be addressing those goals.

## FARMERS MARKET

The Sturbridge Farmers Market has met several times in May as they prepare for their first market coming up on 9 June. At this time there will be forty-four vendors who will participate this summer. Currently we are working to ensure all have provided their required liability and Board of Health paperwork. The group also has recently installed a shed on the Town Common where all their equipment for the market will be stored. They have also purchased a tablecloth for the market, and are in the process of purchasing a tent for the Market Managers. Additionally the volunteers are developing a website that will be used to promote the market. Finally, on 31 May I applied on behalf of the Farmers Market for a \$1,000 grant from Farm Credit East to support the farmers market.

I do feel that we may be nearing a point where I should reduce my level of commitment to these volunteers. The volunteers are relatively self-sufficient at this point, but I still am taking on a lot of responsibilities with them. As I am part-time and my hours are limited, and as I'm trying to take on more responsibility with economic development in town, I feel it is appropriate that I reduce my commitment to the volunteers while remaining a resource to them.

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*I am requesting direction for what my official level of commitment to this group should be.*

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## GOVERNOR BAKER'S "SPOTLIGHT ON HOUSING CHOICE"

On 30 May I was invited to join Governor Baker, Lt. Governor Polito and several other high ranking officials in Worcester to learn more about the administrations goals for their Housing Choice Initiative. The basic goal of this program is to reduce the approval requirements for zoning that relate to housing by reducing the approval needed at town meeting from a super majority to a simple majority thereby diminishing the barrier for developers to build new housing. This is not a mandate on localities, rather it allows that decision on whether to adopt or not at the local level. While there are other important aspects of the bill, their main argument is that this high bar for development is so prohibitive that it is hindering growth, adds to homelessness, reduces a person's sense of financial security and it will only get worse over time.

## MASSACHUSETTS OFFICE OF BUSINESS DEVELOPMENT (MOBD)

On 22 May I met with Kevin Kuros, the new Regional Director for MOBD in our area. We spoke about what MOBD can do with Sturbridge and focused on the three potential TIF projects that the town has in the

cue. Mr. Kuros is excited to help us as we move forward with these proposals and is looking forward to working with us. I will be arranging a meeting with Mr. Kuros and the town in June so he can see our community and get some more detail on the potential projects.

## NEWSLETTERS

I have recently published our June business and event newsletters. Links to both are found below:

[www.town.sturbridge.ma.us/businesses/news/business-newsletter-june-2019](http://www.town.sturbridge.ma.us/businesses/news/business-newsletter-june-2019)

[www.town.sturbridge.ma.us/visitors/news/event-newsletter-june-2019](http://www.town.sturbridge.ma.us/visitors/news/event-newsletter-june-2019)

## REGIONAL ECONOMIC DEVELOPMENT MEETING

On 14 May I joined the Town Administrator and Selectman Suprenant at the Regional Economic Development Meeting hosted by CMRPC at the Berlin Cabela's. It was a good meeting as we were able to hear from the Undersecretary for the Executive Office of Housing and Economic Development. I also provided the contact information for the General Manager of Cabela's to the hosts of the BigMOE to see if there could be some future collaboration.

## SIGN INVENTORY

I have continued to conduct an inventory of all commercial and industrial signs in Sturbridge. At this time Route 20 (from the intersection of 148 to the Tech Park), Route 131 and Route 15 have been inventoried. There are a few outstanding between Brimfield and 148, as well as some that were missed from the list above. However at this time I have taken several hundred photographs for this project and hope to have the pictures done by end of June. At that point we will move on to the second stage and connect the existing sign to those designs that were approved by the Design Review Committee.

## SPECIAL EVENTS COMMITTEE

The SEC met on 22 May; unfortunately I had a concurrent meeting with the STA and was unable to actively participate. As I understand the committee voted to allocate a number of funds from their betterment account to the Farmers Market to purchase equipment and to develop a website. Additionally they voted to host a pre-concert family picnic on the Town Common on 20 June. Following the meeting I spoke with the Recreation Director/Committee Chair about this. We both voiced concerns that no staff would be present for this event as both of us are occupied with personal or professional commitments. It was also raised that there would be limited volunteers from the committee to support the event. Therefore I emailed the committee and notified them that it was my position that if appropriate staffing could not be secured, the event should be postponed. Based on the feedback I received from individual committee members, I cannot guarantee staffing for the event and therefore it is my position that no action be taken on this matter until the next meeting of the SEC on 12 June where further instruction can be provided.

## STURBRIDGE TOURIST ASSOCIATION

On 22 May the STA met to discuss a number of items of which there were two items of note. The first was that the RFPs that the STA had posted were done so incorrectly as they did not meet all of the posting requirements in Chapter 30B. Therefore they were removed from the website. Upon discussion, the committee determined that they would repost the RFPs as one combined RFP so that they could get over the \$50,000 threshold to conduct an RFP (under \$50,000 would require three quotes). The second item was that due to an excel sheet error, the STA over allocated \$3,000 of their funds in the marketing line item. That said,



historically this is not an issue as many of our applicants do not spend their full allocation. For instance, since the STA meeting, one applicant who was allocated \$5,000 only plans to spend ~\$2,500. This should mitigate much of the concern, though if not the rest can be taken from the overtime of the EDTC.

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Break

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From:  "Connie Pion" <cpion@publichouse.com> Sat, Jun 08, 2019 11:42:41 AM 

Subject: Good morning Kevin

To:  **Kevin Filchak**

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Attachments:  Attach0.html / Uploaded File 11K

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I wanted to reach back out to you as it relates to potential funding for IAATO (International Association of Antarctic Tour Operators). I spoke to them Friday afternoon to see if they have given any additional thought to the possibly of making a component of their event open to the public and they have. A portion of the event with us will involve team building and one of the exercises/activities will include a pumpkin carving contest within the group that they would like to open and show the community. The contest would be relative to their industry (rules have not yet been set) and perhaps educational as well. In addition to the contest they are thinking of a brief presentation on what they do and a question and answer portion also.

Please let me know if you feel as though this could bring a favorable reply to their request for funds and what they should do next as it pertains to presenting or completing another application. I would imagine the application is still on file?

Thank you for your assistance Kevin, I have also reached out to all of the leads offered on their behalf.

**Warm regards,**

**Connie**

**Director of Sales**  
**Publick House Historic Inn- Sturbridge, MA**

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