



STA Funding Policies

Last Updated: 13 September 2018

Introduction

The Sturbridge Tourist Association is a Town committee comprised of local residents and business owners whose authority comes from Chapter 1.90 of the Town's Bylaws. In said chapter, the goals of the STA are stated as:

1. *Aid and support Sturbridge businesses directly involved in the Sturbridge Tourism industry.*
2. *Promote, expand and facilitate tourism in Sturbridge keeping in mind the general character of the Town and its natural resources.*
3. *In order to fulfill its obligations to the tourism industry and businesses in Sturbridge, it may, as necessary, request and conduct studies to understand the tourist climate, request/submit articles for review and inclusion in the Town Meeting Warrant with relation to its mandated purpose, and approach Town Boards for permits necessary to implement its events/promotions and products.*
4. *Develop goals and a vision for tourism in Sturbridge keeping in mind the general character of the Town and its natural resources, the Commercial Tourist and Historical Commercial Zones and the best interest of Sturbridge tourist-related businesses.*

To that end, the STA serves as the fiduciary for 16.5% of the Town's Hotel/Motel Tax Revenues. Using this funding source, the Sturbridge Tourist Association awards grants to supports various projects and initiatives related to the aforementioned goals. These include:

- Community Support projects (i.e. event funding, purchase of supplies, etc.)
- Marketing projects (i.e. marketing campaigns, promotion of events, etc.)
- Economic Development and Tourism Coordinator (EDTC) staff position

Any and all questions related to these policies can be directed to the STA via their email at sturbridgetourism@gmail.com or by contacting the Economic Development and Tourism Coordinator at 508-347-2500 ext.1411.

Policies

I. General:

- a. All funding requests must directly support or benefit Sturbridge businesses, organizations, events, or policies.
- b. If the event takes place in multiple towns including Sturbridge, the applicant must disclose that fact and explain in detail how Sturbridge benefits from this investment. Events that take place entirely outside of Sturbridge are ineligible to receive funding from the STA, however should the event be deemed to be an economic value to the Town of Sturbridge; the STA reserves the right to exempt this clause.
- c. The STA reserves the right to deny an application on the basis that its members believe that the funding request in question does not benefit Sturbridge businesses or if the funding yields a larger benefit to businesses located outside of Sturbridge.

II. Applying for Funding:

- a. To apply for funding, the Applicant must complete and submit the STA “Funding Application” found on the STA website at www.town.sturbridge.ma.us/sturbridge-tourist-association.
- b. All applications must be submitted no later than one (1) week prior to a scheduled STA meeting. This ensures that the application will be included in the STA member’s packet for consideration. If an application is submitted after the one (1) week deadline, then the application will be considered at the following STA meeting.
- c. All applications will be discussed at a publically scheduled meeting that is open to the general public, and is posted in accordance with Open Meeting Law under Massachusetts General Law.
- d. The STA reviews all applications in two stages which takes place over the course of two (2) meetings.
 - i. In the first month, the STA will first review a candidate’s application during an open and properly posted public meeting; having a formal discussion on each application amongst members of the STA only. Members will grade each

application and determine whether or not to invite the applicant to participate in a formal interview.

1. If the applicant is invited to participate in the next stage, the applicant will be notified and placed on the next available agenda. The applicant may also be requested to provide the STA with additional information ahead of the next posted meeting.
 2. If the applicant is not invited to participate in the next stage, the applicant will be notified that their applicant has been rejected and will be notified of the reasoning behind that decision.
- ii. In the second month, the STA will invite the selected applicant to an open and properly posted public meeting for an interview and formal discussion of their application. At this time the STA may raise questions identified the previous month, ask new questions, and/or listen to new information provided by the applicant.
- e. In the event that the STA deems this event to be an economic value to the Town, the STA reserves the right to expedite the review of this application.
- i. An application where the sum of the entire request is under \$1,000 automatically is considered for expedited review.
 - ii. An application where the sum of the entire request is between \$1,000 and \$2,500 may be considered for expedited review, but is left at the discretion of the STA.
 - iii. An application where the sum of the entire request is over \$2,500 requires the comprehensive review process.
- f. When considering each application, the STA will initially use a rubric to fairly weigh each application against one another. The STA reserves the right to consider other factors when reviewing an application if deemed appropriate.
- g. The STA will then vote at the second meeting whether or not to approve, approve with conditions, deny or delay the application in question.

- h. The EDTC will be the STA's point of contact with each applicant throughout the funding process. All bills, invoices and other matters will be directed to the EDTC to act on behalf of the STA.

III. Responsibilities of Organizations Funded by the STA

- a. The STA requires that it be recognized as a sponsor for any event or campaign that it helps to fund. This recognition must be prominently displayed and identifiable to patrons or readers.
- b. The Town of Sturbridge is a Tax Exempt Organization meaning it does not pay tax on services that it sponsors. Therefore it is the applicant's responsibility to notify the vendor of this fact. Questions concerning the Town's Tax Exempt status can be directed to the EDTC.
- c. Any vendor used by an applicant must be recognized by the Town. To do this any potential vendor who has never worked with the Town before must submit a W9 form to the EDTC. Failure to do so will result in delayed or unprocessed payments.
- d. Applicant must present to EDTC all bills and invoices when they are received. These bills should be accompanied with the STA's "Cover Sheet for Reimbursement / Payment Requests" found at www.town.sturbridge.ma.us/sturbridge-tourist-association.
 - i. If the invoice comes directly from a vendor to the Town, the Applicant should notify the Town that an invoice should be expected using the format referenced in the above point.
- e. The STA's preferred method of payment is to reimburse the applicant for services purchased related to the approved application. The applicant is to submit invoices with proof of payment pursuant to Article III, Section D of this policy. The EDTC will then submit the invoices for reimbursement as per the STA's approval motion.
- f. In the event that the applicant is unable to pay for services directly, the applicant shall notify the STA and the EDTC that the payment must go directly to the vendor. In

- this instance the STA and/or the EDTC reserves the right to request additional information relating to said payment.
- g. Under no circumstances is the STA, the EDTC, or the Town of Sturbridge to be listed as the entity being billed. The invoice must always list the applicant as the customer.
 - h. If there are specific issues with vendors, it is the Applicants responsibility to contact the vendor and correct any conflicts as they arise in a timely fashion. Town Staff will notify Applicants of any conflicts found while processing invoices.
 - i. According to M.G.L. Chapter 30B, supplies and services that meet the following single contract values must follow the following procedure:
 - i. Under \$5,000 | Use sound business practices to identify and use
 - ii. \$5,000 to under \$25,000 | Three written quotes must be provided
 - iii. \$25,000 or more | Sealed bids or proposals (Request for Proposals)
 - iv. Marketing requests are exempt from the above rules.
 - j. In the event that the applicant purchases items or services that were not approved in the initial application, the STA will not fund those costs. The applicant is responsible for the full costs of those items or services not approved by the STA.
 - i. Furthermore the STA reserves the right to review the entirety of the funding requested by the applicant and revoke either the remainder of the applicant's initial funding, refuse to fund the organization in the future or take other actions as deemed appropriate by the STA.
 - k. Once the final bill/invoice has been submitted to the Town, the applicant must notify the EDTC so that the Town can close the file on that application.
 - l. Failure to adhere to all policies found in Section III can lead to a formal review of the applicant's application and possible alteration or revocation of the original funding award.

IV. Responsibilities of the STA

- a. Upon receipt of a bill or invoice, the EDTC will process the request in accordance with all applicable state and local laws and requirements.
- b. The EDTC will notify the applicant when their funding totals are nearly depleted or if there are issues with a reimbursement request.
- c. The STA and the EDTC will pay for all bills that have been approved in an open meeting of the STA.
- d. The STA will support applicant projects or marketing efforts on www.visitsturbridge.org, the Town's monthly event newsletter, and on social media.

V. Appealing a Decision

- a. A decision of the STA with regard to funding requests is final. There is no appeal process.
- b. An applicant denied by the STA is encouraged to listen to the member's feedback and reapply the following month.

VI. Policy Review

- a. The STA, through the EDTC, will maintain this policy.
- b. Any alterations in this policy will be voted on during an open meeting.
- c. This latest version of the policy, last updated on 13 September 2018, supersedes any previous version of this policy.