



# STURBRIDGE TOURIST ASSOCIATION

A COMMITTEE OF THE TOWN OF STURBRIDGE

## REGULAR MEETING AGENDA – 22 MAY 2019

**\*\*REVISED\*\* - 20 May 2019 at 2pm**

*Center Office Building – 301 Main Street – 6pm*

1. Call to Order
2. Review of Previous Minutes – 17 April 2019
3. Treasurers Report
4. New Business
  - a. Funding Request - Chamber of Central MA South – First Meeting
    - i. GeoFest
    - ii. Harvest Festival
    - iii. Post Event Evaluations (GeoFest, Harvest Festival & Fall Marketing)
  - b. Funding Request - IAATO – First Meeting
  - c. Discussion of Branding and Marketing RFP's
  - d. Discussion on Business Recognition Program
5. Old Business
  - a. Visitsturbridge.org domain renewal
  - b. STA Application Revisions
6. EDTC Report
7. Correspondence
8. 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.**

# Page Break



# STURBRIDGE TOURIST ASSOCIATION

A COMMITTEE OF THE TOWN OF STURBRIDGE

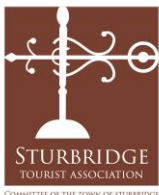
## REGULAR MEETING AGENDA – 22 MAY 2019

*CENTER OFFICE BUILDING – 301 MAIN STREET – 6PM*

1. Call to Order
2. Review of Previous Minutes – 17 April 2019
3. Treasurers Report
4. New Business
  - a. Funding Request - Chamber of Central MA South – Multiple Applications
  - b. Funding Request - IAATO – First Meeting
  - c. Discussion of Branding and Marketing RFP's
5. Old Business
  - a. Visitsturbridge.org domain renewal
  - b. STA Application Revisions
6. EDTC Report
7. Correspondence
8. 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.**

# Page Break



# STURBRIDGE TOURIST ASSOCIATION

A COMMITTEE OF THE TOWN OF STURBRIDGE

## REGULAR MEETING MINUTES – 17 APRIL 2019

*Town Hall, 308 Main Street – Julian Meeting Room– 6:00pm*

### MEMBERS PRESENT

Brian Amedy (BA); Nick Salvador (NS); Tom Chamberland (TC)

### MEMBERS ABSENT

Jeff Ardis (JA) [excused]

### STAFF PRESENT

Kevin Filchak (KF); Jeff Bridges (JB)

### GUESTS

Maxine Carter Lome (MCL); Doug Quigley (DQ); Connie Pion (CP); Doug Horan (DH)

#### 1) Call to Order

- a. BA called the meeting to order at 6:13pm, with a quorum being present. BA made introductions.

#### 2) Review of Previous Minutes – 13 March 2019

- a. **TC MOVED to approve minutes as presented, BA seconded. APPROVED (3-0).**

#### 3) Treasurers Report

- a. KF gave treasurer's update. BA noted that KF investigated the Chambers 'discretionary' allocation and that those funds are intended to be spent prior to end of fiscal year. **BA moved to approve treasurer's report as written. TC seconded. APPROVED 3-0.** General discussion about STR reports.

#### 4) New Business

- a. Funding Request – 2<sup>nd</sup> Meeting – Weathervane Enterprises
  - i. BA gave introductions. MCL explained the history of the show. Explained the various publications that Weathervane supports and how it ties in with the antiques show. MCL noted that in the heyday of the previous iteration of the show, there were approximately 1000 visitors and 29 hotel rooms used. MCL

noted that she's making a commitment to 10 hotel rooms for this first year. Said that most of the dealers are regional or local and as such do not need a hotel for this purpose. She noted that in the future when this show is on a weekend this may change. The show this year is only open New Year's Day and will have 65 vendors and 72 booth spaces. MCL will use Weathervane's capabilities to promote the show. BA explained the challenges with current level of funding. MCL said that she has startup costs and branding with first run marketing expenses. The funding request is centered on marketing. MCL noted that her magazine is already running ads and they will be placing ads in other magazines as well. BA asked if branding is priority, she said yes. NS asked if vendors pay to participate, MCL said yes \$135 - \$150 per booth, but there are fees from the Host and fees to assemble booth spaces. MCL noted she just wants to break event in year one. Guests charged \$10 at the door or \$8 if tickets are bought in advance. General discussion about the previous show. **BA MOVED to allocate from the marketing line item \$1,000 for branding of the Antiques Collectibles show to support Weathervane Enterprise's revival of the New Year's Eve/Day Antiques Show. TC seconded.** TC asked about available funding and there was general discussion on that item. **APPROVED (3-0).** General discussion about the finance committee and fiscal year approvals. MCL left.

b. Funding Request – 2<sup>nd</sup> Meeting – Central MA Working Dog Club

- i. BA provided introduction. JH explained that this is the 2019 Working Dog Show and it is a national show; this is the first time the show has been in Central MA. Noted that he expects two-hundred people coming for a meet and greet for this event. Explained that there were issues with Tantasqua, but that they will be using Memorial Park in Spencer, MA. JH said that the group would be coming back in September for a regional show; the Publick House will be primary host for that event. Explained that several judges are coming in internationally. CP noted that there are over 200 room nights booked at the Publick House alone coming to over \$30,000 in revenue. The major draw night will bring over two-hundred people. JH noted that their organization is looking at a site for the next international show. JH is bringing in bleachers for the show, explained other costs associated with the show to set up the event. BA asked about down time at this event. JH noted that they are encouraging people to visit and patronize the area. General conversation about the show and potential show space. CP recommended considering 508 International for future space. NS asked where the previous national events were held; JH noted various past show locations. JH said they're at 66 teams currently but he expects about 75 entries total. CP asked about future funding, BA explained next fiscal year funding. TC noted that this is the first time funding an event outside of Sturbridge, but noted that it is a new precedent for the town. **TC MOVED to approve \$1,000 from the Community Support line item to fund the Central Massachusetts Working Dog**

**Club event in Spencer in May of this year. NS seconded. APPROVED (3-0).** JH and CP left.

- c. Funding Request – 2<sup>nd</sup> Meeting – Discover Central MA FY 2020 Campaign
  - i. **Discussed after item 4.f. which was moved ahead of this and subsequent agenda items.** BA gave overview and noted that the total amount for the DCM campaign was asked to be lessened for this month's review. KF discussed the changes. TC asked about the complimentary memberships and there were general discussions on that, possibly tying it with annual awards to businesses. General discussion about the value of the campaign and the money saved. General discussion about the motion, BA talked about the value in notifying DCM of the campaign decision. **TC MOVED to allocate from the FY2020 Marketing line item \$16,890 for a marketing campaign with Discover Central Massachusetts, pending approval of the budget at the Annual Town Meeting. NS seconded APPROVED (3-0).**
- d. Funding Request – 1<sup>st</sup> Meeting – Jaguar Association of New England (JANE)
  - i. BA provided explanation for the show, explaining the request is to cover the costs of a tent. NS asked if there was a head count for the show. KF said no, just that the show has more value now that the show can operate in inclement weather. TC asked if the STA pays permit fees for other show, KF said no. KF said a motion can be made to avoid that. TC suggested that this would need to be brought before the Selectmen; JB said that he would not be inclined to wave the fees. General discussion about fees including police fees and having groups cover fees; JB suggests that the sponsors should cover those town costs. BA noted that willing to allocate full amount now and not have them come back for a second meeting, KF noted it is in the STA's policy that a request in this amount would require two month review, but said if the committee wanted to change it they could adjust it. General discussion on costs of the rental. **TC MOVED to approve the request of the JANE for the amount of \$3,095 from FY2020 Community Support pending town meeting approval. BA seconded APPROVED (3-0).** TC suggested capping JANE next year at \$3,000, and there was general agreement from the committee.
- e. Funding Request – 1<sup>st</sup> Meeting – Recreation Committee
  - i. **TC MOVED to approve \$3000 from FY 2020 Community Support for Concerts on the Commons pending approval at Town Meeting, BA seconded. APPROVED (3-0).**
- f. Funding Request – 1<sup>st</sup> Meeting – Sturbridge Historical Society
  - i. **Discussed after Item 4.B.** DQ noted that this event has been held over the past 25 years and explained the history of the event as well as the program. TC asked

about having the Historical Society coming before the STA earlier to help better market the event. DQ talked about the historical campaign to promote the event and using the Sturbridge Community page on Facebook. Extensive discussion about promoting the event in the future. **TC MOVED to allocate \$500 from the Community Support line item to fund the Sturbridge Historical Society's 1775 Colonial Muster. BA seconded. APPROVED (3-0).**

g. Funding Opportunity – DCM Meeting and Event Planner Guide

- i. KF explained that there is limited funding. General discussion on the limited funding. BA noted that there may be unspent funding coming back but it is unclear. **TC MOVED to transfer from Community Support to Marketing the amount of \$100, NS seconded APPROVED (3-0). TC MOVED to purchase a ¼ add in the DCM Meeting and Event Planner Guide out of Marketing. NS seconded. APPROVED (3-0).**

h. Funding Opportunity – Mystic Seaport

- i. **TC MOVED to table Mystic Seaport. Acclimation.**

i. Introductory meeting with Town Administrator, Jeff Bridges

- i. JB gave overview of his background. TC noted the challenges with measuring the benefits of tourism here in town, general discussion on data. BA talked about the hotel market in Sturbridge and the transient population who comes to town. TC talked about the challenges with the Host, general discussions regarding the hotel.

5) Old Business

a. Requests for Proposals

- i. KF noted that the RFPs are posted and provided a timeline for submission and review.

6) EDTC Report

- a. KF provided update. TC asked questions related to the Farmers Market.

7) Correspondence

a. The Last Green Valley

- i. General discussion on the value of supporting the 15<sup>th</sup> Annual Tastes of the Valley feast and fundraiser at the Publick House in August. **TC MOVED to appropriate \$300 from Marketing from FY 2020 pending approval at Town Meeting BA seconded APPROVED.**

b. American Trails



- i. **BA MOVED to approve \$100 from Community Support to renew membership in American Trails, NS seconded. APPROVED (2-0-1).** TA asked that it be listed as Town of Sturbridge.

8) Next Meeting

- a. KF will send out information.

9) Adjourn

- a. TC MOVED to adjourn the meeting at 7:54. BA seconded. APPROVED (3-0).

DRAFT

# Page Break

## Sturbridge Tourist Association | Fiscal Year 2019 Budget

Account	Account #	Original Total	Revenue Adjustments	Revised Total	Expenditure	Current Total Balance
Community Support	24400 56552	\$36,024.88	\$11,900.00	\$47,924.88	\$44,384.75	\$3,540.13
Marketing and Advertising	24400 56551	\$109,332.60	-\$11,900.00	\$97,432.60	\$80,878.05	\$16,554.55
EDTC	24400 51130	\$36,863.52	\$0.00	\$36,863.52	\$26,502.87	\$10,360.65
Tourism	58618	\$0.00	\$20,140.00	\$20,140.00	\$8,195.00	\$11,945.00
Total		\$182,221.00	\$20,140.00	\$202,361.00	\$159,960.67	\$42,400.33

## EDTC Update

[illegible]

Community Support Allocations	
Total Allocated	\$51,370.95
Spent	\$44,384.75
Remaining Allocated	\$6,986.20
Remaining Unallocated	-\$3,446.07
Un-Used Funding	\$3,558.05
Total Available Funds	\$111.98

[illegible]

Marketing Allocations	
Total Allocated	\$102,384.00
Spent	\$81,040.49
Remaining Allocated	\$21,343.51
Remaining Unallocated	-\$4,951.40
Un-Used Funding	\$2,017.57
Total Available Funds	-\$2,933.83

Spent
83%
Allocated
105%
Un-Allocated
-5%

Item	Allocated	Spent	Remaining	Date Approved
Old Sturbridge Village	\$14,000.00	\$13,200.00	\$800.00	5/2/2018
New England Shake Up	\$3,075.00	\$2,705.43	\$369.57	5/30/2018
Harvest Festival	\$3,300.00	\$3,193.00	\$107.00	5/30/2018
GeoFest	\$1,370.00	\$316.00	\$1,054.00	5/30/2018
Phone line and Fulfillment	\$850.00	\$449.54	\$400.46	5/30/2018
Albany Times Union	\$19,000.00	\$19,000.00	\$0.00	5/30/2018
MassLive	\$10,000.00	\$9,999.00	\$1.00	5/30/2018
Discretionary	\$2,000.00	\$1,750.00	\$250.00	5/30/2018
Worcester Magazine (Print Advert)	\$6,500.00	\$6,065.00	\$435.00	6/20/2018
Worcester Magazine (Digital)	\$9,000.00	\$8,875.00	\$125.00	6/20/2018
Transfer (Community Support)				6/20/2018
Yankee Magazine (DMC)	\$5,000.00	\$5,000.00	\$0.00	6/20 + 10/24
Trail Guides	\$5,285.00	\$0.00	\$5,285.00	6/20 & 8/15
Sturbridge Express Marketing	\$2,000.00	\$1,970.00	\$30.00	8/15/2018
Pintastic	\$3,000.00	\$101.52	\$2,898.48	12/12/2019
TLGV	\$680.00	\$530.00	\$150.00	12/12/2018
DCM - AAA Travel Show	\$600.00	\$600.00	\$0.00	1/23/2019
DCM Spring/Summer 2019 Visitor Guide	\$1,080.00	\$1,080.00	\$0.00	1/23/2019
STA Visitor Guide Subsidies	\$5,000.00	\$0.00	\$5,000.00	2/13/2019
2019 Visitor Guide Back Cover	\$950.00	\$950.00	\$0.00	2/13/2019
Additional Visitor Guide	\$2,000.00	\$0.00	\$2,000.00	2/13/2019
Gatehouse New England	\$1,500.00	\$500.00	\$1,000.00	3/13/2019
HerbFest	\$1,369.00	\$306.00	\$1,063.00	3/13/2019
DCM - Yankee Magazine	\$3,450.00	\$3,450.00	\$0.00	3/13/2019
Antiques Show - Branding	\$1,000.00	\$1,000.00	\$0.00	4/17/2019
TRANSFER FROM COMMUNITY (\$100)		\$0.00	\$0.00	4/17/2019
DCM Meeting Guide	\$375.00	\$0.00	\$375.00	4/17/2019
		\$0.00	\$0.00	
		\$0.00	\$0.00	
		\$0.00	\$0.00	
		\$0.00	\$0.00	
		\$0.00	\$0.00	
		\$0.00	\$0.00	
		\$0.00	\$0.00	
		\$0.00	\$0.00	
		\$0.00	\$0.00	
		\$0.00	\$0.00	

		\$0.00	\$0.00	
<b>Document Guide</b>				

**Total Allocated** = Sum of all items listed in the "Allocated" column

**Spent** = Sum of all items listed in the "Spent" column

**Remaining Allocated** = Sum of all items listed in the "Remaining" column

**Remaining Unallocated** = Current total balance (found on cover page) - Total Allocated

**Un-Used Funding** = Sum of "Remaining" column for those items that have closed

**Total Available Funds** = Sum of "Remaining Unallocated" funds and "Un-Used Funding"

**Item** = Project approved by the STA

**Allocated** = Amount assigned by the STA

**Remaining** = "Allocated" - "Spent"

**Date Approved** = The date the STA approved the project

Community Support	FY2019	FY2018	FY2017	FY2016**
July	93%	33%	36%	
August	96%	33%	36%	
September	97%	33%	36%	
October	97%	35%	41%	
November	100%	36%	56%	
December	100%	36%	56%	
January	100%	73%	56%	
February	100%	88%	73%	
March	104%	97%	73%	
April	107%	97%	73%	
May		98%	92%	
June		98%	98%	
Marketing	FY2019	FY2018	FY2017	FY2016
July	81%	54%	30%	
August	84%	55%	30%	
September	84%	62%	43%	
October	84%	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		101%	101%	
June		101%	101%	

### Spending Totals / Comparisons

Community Support	FY2019	FY2018	FY2017	FY2016**
July	5%	13%	7%	
August	18%	15%	9%	
September	43%	15%	9%	
October	67%	15%	9%	
November	83%	27%	21%	
December	85%	28%	21%	
January	85%	28%	27%	
February	85%	60%	37%	
March	86%	79%	58%	
April	90%	80%	59%	
May		86%	59%	
June		96%	86%	
Marketing	FY2019	FY2018	FY2017	FY2016
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	73%	60%	32%	
February	73%	48%	34%	
March	78%	48%	35%	
April	81%	49%	37%	
May		71%	45%	
June		93%	88%	

#### Remaining Totals / Comparisons

Community Support	FY2019	FY2018	FY2017	FY2016**
July	95%	87%	93%	
August	82%	85%	91%	
September	57%	85%	91%	
October	33%	85%	91%	
November	17%	73%	79%	
December	15%	72%	79%	
January	15%	72%	73%	
February	15%	40%	63%	
March	14%	21%	42%	
April	10%	20%	41%	
May		14%	41%	
June		4%	14%	
Marketing	FY2019	FY2018	FY2017	FY2016
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	27%	40%	68%	
February	27%	52%	66%	
March	22%	52%	65%	
April	19%	51%	63%	
May		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

Community Support - 56552	
Original Total	\$47,924.88
Spent	\$44,384.75
Revised Total	\$3,540.13

Date	Item	Expenditure	Details
7/1/2018	Golden Bough Productions	\$1,000.00	Concerts on the Commons
7/1/2018	John Lampson	\$1,500.00	Concerts on the Commons
8/20/2018	JYL Transportation	\$1,000.00	Sturbridge Express Pilot Program
8/21/2018	JANE	\$1,533.20	Tent Rental for JANE
8/21/2018	JANE	\$1,320.00	Tent Rental for JANE
8/27/2018	JYL Transportation	\$1,000.00	Sturbridge Express Pilot Program
8/29/2018	Chamber of Central MA	\$500.00	Harvest Fest
8/29/2018	Custom Business Products	\$581.41	GeoFest
8/29/2018	Custom Business Products	\$331.00	GeoFest
9/5/2018	Outdoor Insurance Group, Inc.	\$5,195.00	The Big MOE - HRGC
9/10/2018	JYL Transportation	\$1,000.00	Sturbridge Express Pilot Program
9/10/2018	JYL Transportation	\$1,000.00	Sturbridge Express Pilot Program
9/19/2018	Sturbridge Fire Dept.	\$839.52	Team Hoyt Race Detail
9/19/2018	Sturbridge Police Dept.	\$3,625.42	Team Hoyt Race Detail
10/3/2018	JYL Transportation	\$1,000.00	Sturbridge Express Pilot Program
10/3/2018	JYL Transportation	\$1,000.00	Sturbridge Express Pilot Program
10/3/2018	JYL Transportation	\$500.00	Sturbridge Express Pilot Program
10/15/2018	Baba Sushi	\$500.00	For Fire Performers
10/15/2018	JYL Transportation	\$1,000.00	Sturbridge Express Pilot Program
10/22/2018	Knight's Airport Limo Service	\$5,323.00	New England Shake Up
10/31/2018	Hamilton Rod and Gun	\$695.00	Volunteer Food - Big Moe
10/31/2018	Hamilton Rod and Gun	\$500.00	Pond Restocking
11/13/2018	Custom Business Products	\$592.63	GeoFest
11/13/2018	MassCor	\$82.76	Polo Shirts
11/13/2018	MassCor	\$700.00	Padfolios
11/14/2018	Antiques and Collectibles at Fort.	\$660.00	Harvest Fest

Marketing and Advertising - 56551	
Original Total	\$97,432.60
Spent	\$80,878.05
Revised Total	\$16,554.55

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	<i>The Republican</i>	\$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)

EDTC Salary - 51130	
Original Total	\$36,863.52
Spent	\$26,502.87
Revised Total	\$10,360.65

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	
	April		
	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.

# Page Break



# 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.	
Total Possible Points	6			
Total Points Awarded				

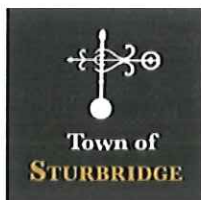
## V. STA Mission

<i>Criteria</i>	<i>3 Points</i>	<i>2 Points</i>	<i>1 Point</i>	<i>0 Points</i>
<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.			
Total Possible Points	12			
Total Points Awarded				

## 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.

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.

## 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

This content is neither created nor endorsed by Google.

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)

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

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

**Sunday, August 19**

[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 Society
Astronomical Society,	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
Sat., July 20	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	Flotilla on Lake Siog up Quinebaug River Trail with Cider and Donut Launch at 9 am
no portages,	This nationally designated National Recreational Trail is a flat-water course with approximately 5 miles in length, and several caches to pick up along the way. Send-Off at Rapsallion 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

### Income

\$910.00	STA Oakcoins
\$387.00	STA Pathtags
\$800.00	STA T-shirts
\$46.00	STA Cache Cards
\$788.48	STA Swag Bags
\$275.00	STA Frisbees
\$200.00	STA Koozies
\$245.00	STA Golf Pencils
\$400.00	STA Website Updates
\$1,021.91	Online Sales
\$1,175.50	Event Sales
<b>\$6,248.89</b>	<b>TOTAL</b>

### Expense

\$954.50	Oakcoins
\$387.00	Pathtags
\$953.03	T-shirts
\$46.50	Cache Cards
\$150.00	Logo Design Update
\$100.00	T-shirt Design
\$788.48	Swag Bags
\$281.68	Frisbees
\$230.29	Koozies
\$245.06	Golf Pencils
\$400.00	Website Updates
\$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

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.

---

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

Worked well

---

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 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	Our Town
\$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>

# Page Break

# 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 \*

Summer/Fall Marketing

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

n/a

Total funds requested by applicant \*

\$44,680

Total funds allocated by STA \*

\$31,850

Total funds spent by applicant \*

\$30,875.54 including bills submitted today

Have all the bills been paid? \*

☐ Yes

☒ No

Briefly describe your project or event

Tourism marketing and promotion. The only remaining bills will be for tourism fulfillment

How was the STA funding intended to help your project?

Mostly digital advertising to put heads in beds and meals in tummies

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

We measure CTR on the digital advertising. We did extremely well with the Albany Times Union. The MassLive/Republican was new for us, and while it did well compared to national averages, we would need to sustain a longer period of time to tweak better performance

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

Advertising is changing all the time, especially in the digital market, so it is crucial to keep exploring with media services their latest capabilities and KPIs

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

Works fine

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? \*

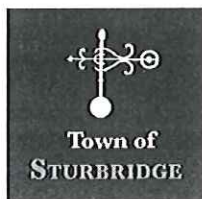
☒ Yes

☐ No

☐ Maybe



# Page Break



# TOWN OF STURBRIDGE

ECONOMIC DEVELOPMENT & TOURISM COORDINATOR

KEVIN FILCHAK, M.P.A. 

Date: 16 May 2019  
To: Sturbridge Tourist Association  
Subject: Funding Request – IAATO – First Review

---

## OVERVIEW

This is the first application for the nonprofit International Association of Antarctic Tour Operators (IAATO). They represent an international group of tour operators who take tourists to the Arctic and Antarctic. This meeting is the 2019 Polar Field Staff Conference and will bring approximately 100 guests and their families over a three night period to the Public House in September. This would not include the advanced staff that will arrive a few days before with their families. This event is only for IAATO and Arctic Expedition Cruise Operators (AECO) and will not be open to the public.

IAATO is requesting the following for their event:

- \$3,000 for transportation costs
- \$2,000 for the event reception
- \$500 for an OSV Speaker/Facilitator

This group has met with me previously to discuss their event/application. It is my recommendation that if the STA chooses to invite this group for a follow up interview, the STA requests at a minimum the following information:

- A quote for transportation costs
- A quote and explanation of reception costs

## SUGGESTED MOTION

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

*MOVE to invite IAATO to the next meeting of the Sturbridge Tourist Association to discuss their funding request.*

## 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 \*

edelaney@iaato.org

Contact Person (name & title) \*

Erin Delaney- Operations Assistant

Contact Person Phone Number \*

401-841-9700

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 \*

International Association of Antarctica Tour Operators

Address

50 South County Commons Way, Unit E-5B South Kingstown, RI 02879

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

Website- <https://iaato.org/home>

Facebook: <https://www.facebook.com/antarcticatouroperators>

Instagram: [https://www.instagram.com/antarctic\\_ambassadors/?hl=en](https://www.instagram.com/antarctic_ambassadors/?hl=en)

---

## 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 \*

\$5,500

---

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

The International Association of Antarctic Tour Operators (IAATO) and the Arctic Expedition Cruise Operators (AECO) Polar Field Staff Conference will host field staff from all over the world who primarily work in the Arctic and Antarctic, and will congregate in Sturbridge to discuss the mission of safe and environmentally responsible tourism to both polar regions.

We are incredibly excited to be hosting our event in Sturbridge so we can share the classic New England charm and important history with members of the organizations.

With the help of funding from the Sturbridge Tourist Association, we will be able to create a memorable experience for our Field Staff which will help cover costs for logistical operations or events such as bringing in Old Sturbridge Village Speakers to teach participants about the rich history of Sturbridge.

Breakdown of Funding request:

Transportation: \$3,000

Event Reception: \$2,000

Old Sturbridge Village Speakers/Facilitators \$500

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

Our conference will host at least 100 guests over the span of 3 nights which will bring in 300 room nights to Sturbridge at the Publick House Historic Inn. IAATO's growing Secretariat (currently seven people) will be in Sturbridge an additional three days and some with extra family. We will be supporting local restaurants and businesses while we conduct our pre conference meetings. Additionally, as the fall colors settle on New England, many members will choose to stay after the event as first time visitors to the area bringing continued business to the local community.

We began to look into Sturbridge after a colleague had a successful conference at the Publick House with a previous employer. After experiencing Sturbridge's unique charm and history, we know IAATO and AECO members will spread the word about Sturbridge in their respective homes around the globe having attended the conference, this could generate future business for the area.

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

We are looking into different options, but currently have only applied to Sturbridge Tourist Association.

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

We will not make any revenue from this event.

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

Here is a little bit more about who IAATO is and what we do:

IAATO's is a non-profit trade association whose membership is truly international and comprised of more than 100 respected companies from around the world. Membership includes ship and land operators, ship agents, travel agents, tourism bureaus, government offices, travel companies that charter ships and airplanes from existing operators, conservation organizations and expedition management companies. Members are subscribed to the belief that the ultimate protection and conservation of Antarctica will largely depend upon sound policy to which all Antarctic Treaty nations adhere. To advocate and promote safe and environmentally responsible operations, members have worked diligently to establish extensive operational procedures and guidelines.

IAATO's focus on conservation, management and education promotes a greater worldwide understanding and protection of the Antarctic with the goal of leaving it as pristine and majestic for future generations as it is today. This effort is unique, and the challenge to maintain environmentally responsible tourism exists to this extent in no other region of the world. Many IAATO guidelines and operating procedures have since been adopted as regulations by the Antarctic Treaty nations.

The association and its members work closely with Antarctic Treaty Parties, the media and environmental organizations to not only represent the industry but to enhance public awareness and concern for the conservation of the Antarctic environment.

Member companies provide logistic and scientific support to national Antarctic programs and Antarctic organizations. With over 200 departures annually to Antarctica, tour vessels provide a cost-effective platform of opportunity for researchers and science programs. Each season Antarctic tour vessels transport 100 or more scientists, support and heritage conservation staff from many national Antarctic programs.

In addition, IAATO strives to achieve the goal of having visitors return home as ambassadors for Antarctica, serving as champions for conservation efforts to protect the White Continent.

---

## 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?

2019 Polar Field Staff Conference

Where will the event be held?

Publick House Historic Inn

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

Please add the start date for the event.

MM DD YYYY

09 / 22 / 2019

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

MM DD YYYY

09 / 25 / 2019

Please add the start time for the event.

Time

12 : 00 AM ▼

Please add the end time for the event.

Time

12 : 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?

We are only sending out information to IAATO and AECO members.

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

The Polar Field Staff Conference will begin on the evening of Sunday September 22nd 2019 and will end mid-day Wednesday September 25th 2019. There will be separate meetings before the 22nd and after the 25th, so additional people will be arriving/staying for those.

The Polar Field Staff Conference is a bi-annual event and will be held again 2021.

## 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. \*

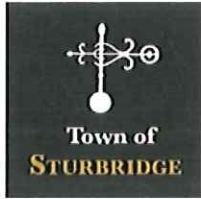


I have read and agree to adhere to all STA policies and requirements as stated above

This content is neither created nor endorsed by Google.

Google Forms

Page  
Break



# TOWN OF STURBRIDGE

ECONOMIC DEVELOPMENT & TOURISM COORDINATOR

KEVIN FILCHAK, M.P.A. 

Date: 20 May 2019

To: Sturbridge Tourist Association

Subject: RFP – Update

Attachment: Chapter 30B | Chapter 3. Supplies or Services Estimated to Cost \$10,000 But Not More Than \$50,000: Written Quotes

The STA's two Requests for Proposal (RFP's) for branding and marketing had originally been posted on the town's website on 16 April and then extended on 6 May following the receipt of only one bid for one of the projects. Following a conversation with the Office of the Inspector General (IG), who was contacted to provide guidance on RFP procedures, it became known that the STA RFP's that had been posted were not done in compliance with Chapter 30B. All procurement projects must adhere to Chapter 30B of the Massachusetts General Law, and for the STA's two projects, which had anticipated totals of under \$50,000, the requirement is to solicit three quotes and choose the lowest bid; the use of RFPs for projects under \$50,000 is not permitted. Furthermore there are specific posting requirements that must be followed. In discussions with fellow staff regarding these projects those requirements were not caught. Therefore the IG's office recommended that we remove the bids and begin the process again by soliciting quotes. On 14 May I removed the bids from the town's website as per the IG's recommendation.

With this information, I would like to ask for the STA's guidance on next steps for these two projects.

### CHAPTER 3. Supplies or Services Estimated to Cost \$10,000 But Not More Than \$50,000: Written Quotes

To procure supplies or services that are estimated to cost at least \$10,000 but not more than \$50,000<sup>40</sup> you must solicit written quotes from at least three vendors who customarily provide the item or service you need.<sup>41</sup> As described below, you must provide each vendor with a written description of the supply or service you need, and you must award the contract to the vendor offering the quality of the supply or service you need at the lowest price. The quote process in Chapter 30B is flexible, straightforward and well-suited to making smaller purchases rapidly.<sup>42</sup>

#### ***Step 1: Develop a written purchase description***

In order to describe to vendors the supply or service for which you are seeking a quote, you will need a written purchase description. In most cases, developing a written purchase description for small procurements is fairly simple. For example, you could seek quotes for copy paper based on the following purchase description: “Five hundred reams of 20 lb. weight, bright white, 8½ x 11 copy paper, delivered to Town Hall on January 2.” However, if you were to procure sophisticated equipment or professional services, a more detailed purchase description would be necessary.

**If your local government has a CPO, only your CPO or someone with delegated authority from the CPO may solicit bids.** (Chapter 2 has more information on CPOs and delegations.) If you have no CPO, you may solicit bids if:

- you are authorized by statute, charter or bylaw; or
- you have been duly delegated authority; or
- you are a member of a board, committee, commission or other body with procurement responsibilities.

If you have questions, check with your CPO (if you have one) or legal counsel.

---

<sup>40</sup> Section 4(d) of Chapter 30B allows you to award contracts of less than \$35,000 to purchase agricultural products from Massachusetts farming operations.

<sup>41</sup> Section 6 of Chapter 218 of the Acts of 2016; M. G.L. c. 30B, § 4(a).

<sup>42</sup> Section 4(a) of Chapter 30B provides that a governmental body may require that such contracts be subject to the competitive sealed bidding provisions of M.G.L. c. 30B, § 5.

There is an explicit requirement in Chapter 30B that you write a purchase description to ensure that you adequately describe what you need to each vendor you contact for a quote.<sup>43</sup> You must provide the purchase description to at least three vendors in person or by telephone, fax, email or standard mail. You must ensure that each vendor's quote is based on the same written description.

**You can use current catalog and sale brochure prices as quotes as long as the product in the brochure or catalog meets your written purchase description.** This approach can save time when you are purchasing supplies. You must keep a copy of this information in your procurement file.

**Step 2: Establish a rule for award**

When you solicit quotes under Chapter 30B, you are required to award the contract to the responsible vendor offering the needed quality of supply or service at the lowest price.<sup>44</sup> Chapter 30B requires you to establish a rule for award when the contract term will exceed one year.<sup>45</sup> Although there is no explicit requirement that you write a rule for award when the contract term will be one year or less, we recommend that you do so to provide for a fair, open and transparent procurement process. Based on the previous purchase description for copy paper, the following is an example of a rule for award using quotes:

*The contract will be awarded to the responsible vendor offering 500 reams of 20 lb. weight, bright white, 8½ x 11 copy paper, delivered to Town Hall on January 2, at the lowest price.*

**Step 3: Seek three written quotes**

Seek prices from at least three vendors based on the written purchase description you provide them. As stated above, all vendors' quotes must be based on the same written purchase description. You must seek quotes from vendors who customarily provide the supply or service you need. If you have reason to believe that a vendor is not

<sup>43</sup> Section 6 of Chapter 218 of the Acts of 2016; M.G.L. c. 30B, § 4(a).

<sup>44</sup> M.G.L. c. 30B, § 4(b).

<sup>45</sup> M.G.L. c. 30B, § 12(c)(5).

responsible – that is, that the vendor lacks the capability, integrity and reliability for good-faith performance of the contract – do not solicit a written quote from that vendor. If a vendor requests not to be contacted for quotes, document the request and do not attempt to solicit written quotes from that vendor again. It also makes sense not to solicit written quotes from vendors who have not responded to your previous solicitations.

Chapter 30B requires that you record the following information and maintain it in your procurement file:

- the names and addresses of all persons you contacted for written quotes;
- the written purchase description used for the procurement;
- the names of all persons who submitted written quotes; and
- the date and amount of each written quote.

Note that Chapter 30B requires you to *seek* at least three written quotes. It does not require you to *obtain* three written quotes. If, after making a reasonable effort, you cannot obtain three written quotes for the supply or service you need, you may award the contract on the basis of one or two written quotes. However, you should also consider broadening your search and contacting a few more vendors to ensure that you are getting a competitive price for the supply or service.

**You may award a sole-source contract of not more than \$50,000 if a reasonable investigation indicates that there is only one practicable source for the supply or service you are procuring.** In this case, you need not seek competitive quotes, but you must record and retain in a file:

- the contractor's name;
- the contract amount and type;
- the supplies or services procured; and
- the basis for your determination that only one practicable source exists.

See Chapter 6 for more information on sole-source procurements.

***Step 4: Determine the best-priced quote from a responsible vendor and award the contract***

After obtaining written quotes, identify the best-priced offer from a responsible vendor offering the quality of supply or service you need. A responsible vendor has the capability to perform fully the contract requirements, as well as the integrity and

reliability to assure good-faith performance.<sup>46</sup> Award the contract to the responsible vendor offering the lowest-priced written quote. When a contract requires a vendor to pay your local jurisdiction, the best price is the highest price.

**Negotiating a lower price.** You may negotiate a lower price with the responsible vendor that offered you the lowest-priced written quote. You may not condition such negotiation on any change to the quantity or quality of the supply or service or to the scope of services. Negotiation of price alone is not prejudicial to fair competition.

**Handling tied quotes.** Occasionally you may receive tied price quotes from two responsible vendors. We strongly recommend that all local governments adopt a tie-breaker policy approved by their governing bodies. When you have an approved policy in place, you should use it whenever you receive tied written quotes. If your governing body has not adopted a tie-breaker policy, we recommend that you use a coin toss or some other simple, fair and objective process to break the tie. When you break a tied quote through a coin toss, you should invite the affected vendors to your office and flip the coin in their presence. As an alternative, you may allow for a “second heat” between the tied vendors. This entails contacting the tied vendors, explaining that the written price quotes were tied, and inviting each vendor to submit a second written quote for the same contract by a specific date and time. You may then award the contract to the responsible vendor offering the lowest-priced quote.

**Canceling a quote process.** Under Section 9 of Chapter 30B, you may cancel a solicitation for written quotes when you determine that such cancellation is in the best interests of your local jurisdiction. It may be in your local jurisdiction’s best interest to cancel a solicitation when, for example, there are material changes to the purchase description. (Of course, it is never appropriate to cancel a quote process because a favored vendor did not submit the best price.) You must prepare a written statement of the reasons for cancellation. This written statement is a public record and must be kept with the procurement file. You should also inform the vendors who have submitted written quotes that the process has been canceled.

---

<sup>46</sup> M.G.L. c. 30B, § 2.

**Step 5: Retain records**

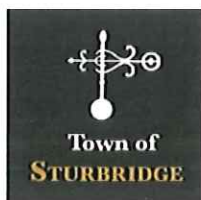
Remember that all contracts of \$10,000 or more must be in writing. All written documents required under Chapter 30B must be maintained in a file for six years from the date of the final payment under the contract. For instance, if you sign a one-year contract for cell phone service and make the final contract payment on December 31, 2014, you must retain the written records until January 1, 2020. These records include the following for a supply or service costing \$10,000 to \$50,000:

- the names and addresses of all vendors from which quotes were sought;
- the written purchase description used for the procurement;
- the names and dates of all persons from whom quotes were sought;
- the date and amount of each written quote received; and
- the executed contract and any contract amendments

We recommend that your local jurisdiction develop a standard form for requesting written quotes that memorializes the names and address of all persons from whom quotations were sought, the names of persons submitting quotations, and the date and amount of each quotation. A sample record and evaluation of quotations form is provided in Appendix B.



# Page Break



# TOWN OF STURBRIDGE

ECONOMIC DEVELOPMENT & TOURISM COORDINATOR

KEVIN FILCHAK, M.P.A. 

Date: 20 May 2019  
To: Sturbridge Tourist Association  
CC: Jeff Bridges, Town Administrator  
Subject: Business Recognition Program

---

An economic development goal for this calendar year is to develop a business recognition program in Sturbridge. This program would highlight those businesses that are positively impacting the local community and supporting the growth of the Sturbridge economy. As the STA's mandate to support tourism has led the group to undertake new initiatives in recent years, I propose that the STA consider the creation of a business recognition program as their next initiative. This would recognize and reward businesses for their hard work and effort in Sturbridge and serve as a way to help further promote the town to new audiences.

For the committee's consideration, I have prepared a general outline for how the program could be formatted. It is recommended that the topic be discussed further over the next few months.

---

## CATEGORIES FOR RECOGNITION

In order to help this program succeed, it is recommended that the STA allow *all* Sturbridge businesses to be eligible for the award. The reason that this award should not be restricted to only tourism businesses is twofold. First, defining a tourism business is challenging because while we normally associate tourism with merchants, restaurants and hotels, other types of businesses bring in clients who stay in our hotels, eat in our restaurants and shop in our stores. It would be wrong to ignore this indirect business tourism. Secondly, their success in Sturbridge only adds to our local economy and improves our overall standing. Successful (and diverse) businesses and a good quality of life can draw businesses to our area thus growing our local economy. For these reasons it is important to consider all businesses.

Businesses should be considered in one of two categories: those with fewer than 25 employees and those with greater than 25 employees.<sup>1</sup> In this way smaller businesses are not being unfairly compared to larger ones or vice-a-versa. To be considered for this recognition, a general application should be developed to highlight each business's contribution to our community. The STA could also nominate businesses on their own in the event there are not enough applications. The following could be areas of consideration when discussing nominees:

---

<sup>1</sup> This number could be greater or smaller, but for the initial discussion I chose this as a starting point.

- Business supports and encourages visitorship to Sturbridge
- Business promotes Sturbridge as a destination
- Business has launched a successful new initiative
- Business hosts events that draw large and diverse crowds
- Business has added new jobs or has expanded their operation
- Business has been a community partner by supporting local groups, organizations, etc.
- Business receives regional, statewide or national recognition for their work

As businesses in Sturbridge are vastly different, the STA should take a holistic look at each nominee and judge them based on the sum of their application.

---

## AWARDS / RECOGNITION

In total it is recommended that there be eight quarterly awards and two annual awards issued every year. This is done to (A) keep awareness of the awards and their value, and (B) highlight all that Sturbridge has to offer potential visitors and residents.

---

### QUARTERLY AWARDS

It is recommended that the quarterly award recipients receive the following:

- Formal recognition from the STA and the Board of Selectmen and the presentation of a certificate
- Recognition in the town's newsletters
- A \$250 grant for marketing their business

---

### ANNUAL AWARD

It is recommended that the annual award recipient receive the following:

- Formal recognition from the STA and the Board of Selectmen and the presentation of a plaque
- Recognition in the town's newsletters
- A \$1,000 grant for marketing their business
- A complementary one year membership to DCM (only if not already a member)

---

## COSTS

Based on the numbers above, the cost for this program would be approximately \$4,150. Broken down, for each quarter the cost would be \$500 with a total annual cost of the quarterly awards being \$2,000. For the two annual award recipients, that would add an additional \$2,000 to the budget. I would estimate that for the cost of the annual plaques that could also add an additional \$100 - \$150.

If this amount is too high, an option may be to reduce the award amounts to \$100 per business per quarter and a \$500 annual prize. This would reduce the total annual costs to approximately \$1,950.






In either case, these amount allocated should be viewed as another marketing campaign for the town in the upcoming fiscal year.

---

#### SUMMARY

The STA should consider instituting a business recognition program in FY2020 as the implementation of such a program could lead to increased marketing and awareness of Sturbridge's many diverse businesses. It is therefore recommended that the STA consider this program over the next few months so that it could be rolled out beginning in quarter three of this year with the first annual award issued in January 2020. This program could have many benefits to the community and therefore is worth the STA exploring and examining this upcoming fiscal year.

# Page Break

From:  donotreply@domainsbyproxy.com Wednesday, May 01, 2019 10:13:28 AM   
Subject: FWD: Your domain(s) is set to renew soon. [VISITSTURBRIDGE.ORG@domainsby...  
To:  sturbridgetourism@gmail.com  
Bcc:  **Kevin Filchak**  
Attachments:  Attach0.html / Uploaded File 10K

[Domains Priced Right](#)

24/7 Support: **(480) 624-2500**

# Renewal Notice

The domain(s) listed below is set to automatically renew soon. You don't need to do anything.

ICANN, the organization that regulates domain sales online, requires us to inform the account holder and registrant contact (that's you, in this case) of expirations and renewals. If you want to follow up with your account holder, please contact them directly.

visitsturbridge.org  
Renews: **5/31/2019**

If you do not renew your domain(s) during the 12-day Renewal Grace Period, you will incur a fee of \$80.00 in addition to the domain renewal fee. During this time, the domain name(s) will be moved to parked nameservers and any website or email services associated with the domain name(s) will stop working.

**Be aware that most domains, including .com, .biz and .net, can only be recovered within a maximum of 30 days after your cancel date.** For further information about Domain Renewals or Canceled Domains, review the [Domain Registration Agreement](#).

Copyright © 2019 Domains Priced Right. All rights reserved.

2500703940

# Page Break



# Sturbridge Tourist Association - Funding Application

This is the funding application for the Sturbridge Tourist Association. Please answer each section completely and with as much detail as possible.

Questions can be directed to the Economic Development and Tourism Coordinator at (508) 347-2500 ext. 1411.

**\* Required**

**1. Email address \***

---

**2. Name**

---

**3. Organization**

---

**4. Please identify what type of organization you represent**

*Mark only one oval.*

☐

For profit

☐

Nonprofit

☐

Government

☐

Private citizen / volunteers

☐

Other: 

---

**5. Phone Number**

---

**6. Before continuing please read and review the STA's Funding Request Policy (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)) and then click the box confirming you have read and agree to said policy. \***

*Check all that apply.*

☐

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

**7. The STA receives funding requests from numerous applicants and has limited funding. As such your request may or may not be allocated in full or in part. The STA will make that determination based on their funding policies (see above) and available funding. Please check below indicating that you understand that this is a possibility and that funding may or may not be allocated for your application. \***

*Check all that apply.*

☐

I acknowledge and understand the above statement.



## Funding Information

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

**8. Please provide a detailed explanation of why you are seeking funding from the STA?**

---

---

---

---

---

**9. Funding amount requested \***

---

**10. Provide a detailed explanation of what your funding will be spent on. Be specific. Generalizations like "marketing" or "entertainment" are not acceptable. \***

---

---

---

---

---

**11. Provide a COMPLETE budget for your application amount. Be specific and ensure that your totals add up correctly. \***

---

**12. How will this proposal support the local Sturbridge economy? \***

---

---

---

---

---

**13. What is the estimated economic impact to Sturbridge? The STA is particularly interested in the numbers of hotel rooms sold, the tax revenue collected from those room sales, the number of local businesses utilized and the guaranteed revenues they received based on agreed upon contracts (Example 1: 100 room nights at \$100/room \* 6% sales tax = ~\$9,400 for hotel and ~\$600 for Sturbridge; Example 2: \$2,000 contract with Sturbridge restaurant for catering an event). \***

---

**14. Are you expecting to make any revenues from this project? \****Mark only one oval.*

- ☐ Yes
- ☐ No
- ☐ Maybe

**15. If "Yes" or "Maybe," where will/might those revenues go? \***

---

**16. If this is for an event, please provide the date/times for the event, as well as its location(s).**

---

**17. If this is for an event, how are you marketing said event? Be specific.**

---

---

---

---

---

**18. Will this project draw visitors to Sturbridge? If so how can you be sure? Please note, a "visitor" is defined by the Massachusetts Office of Travel and Tourism (MOTT) as someone who (A) travels over 50 miles and/or (B) stays overnight. \***

---

---

---

---

---

**19. If the project is drawing a majority of its patrons from less than 50 miles (i.e. not a "visitor" by MOTT's definition), please explain how it supports economic development and tourism in Sturbridge. \***

---

---

---

---

---

20. Is there anything else that you feel is important for the STA to consider for your application?

---

---

---

---

---

## 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.

21. **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. \***

*Check all that apply.*

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

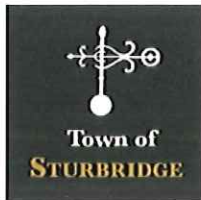
A copy of your responses will be emailed to the address you provided

---

Powered by



# Page Break



# TOWN OF STURBRIDGE

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

Date: 20 May 2019  
To: Sturbridge Tourist Association  
Subject: EDTC Update – 22 May 2019

---

Below is my brief update for the month of May. If you have questions please feel free to contact me.

---

## CHARRETTE – ROUTE 15

On 29 April Jean Bubon and I hosted a charrette to discuss potential uses for the Route 15 corridor. There were over fifty-five persons in attendance (we believe several more did not sign in but were present) and those in attendance were very active in the discussion.

On the whole, the meeting helped to do two things: (1) demonstrate to the residents the limitations of the corridor with regard to available developable space, and (2) show the staff the differing views of residents between those who wanted development of the corridor and those who wish to maintain it as a green corridor.

With these findings in mind, the Planner and I will work on tightening the zoning for the corridor without making major changes at this time.

---

## CENTRAL MASSACHUSETTS METROPOLITAN PLANNING ORGANIZATION (CMMPO) – ADVISORY COMMITTEE

On 24 April I attended and chaired a meeting of the CMMPO Advisory Committee.

---

## DCM BOARD MEETING

On 15 May I attended a meeting of the Board of Directors for DCM. At the meeting I volunteered to serve on their Membership and newly formed Event Award Committee.

---

## DCM CAMPAIGN

I have attached the ¼ ad that will be posted in the DCM Event Planner Guide as per the discussion at the STA's April meeting.

---

## FARMERS MARKET

The farmers market is preparing to open on 9 June and is currently working on a number of new items. First, this year will feature a known calendar of vendors that will be provided before the market season (this is due to the fact that there are no longer rolling admissions). Second, the farmers market is currently developing a website that it can use to help promote their mission. Third, in partnership with the Library the market has installed a shed behind the library where equipment for the market will be stored.

---

## FUN AT FIVE – 5/7/2019

On 7 May I attended a Fun at Five hosted by OSV.

---

## NEWSLETTERS

Below are the links to the May business and event newsletters:

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

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

---

## REGIONAL ECONOMIC DEVELOPMENT COMMISSION

On 14 May I attended a Regional Economic Development Commission meeting hosted by CMRPC in Berlin with the new Town Administrator and a member of the Board of Selectmen. At the meeting we heard from the management of the Berlin Cabela's about their merger with Bass Pro Shop. We also heard from the Deputy Undersecretary with the Executive Office of Housing and Economic Development (EOHED), Tim McGourthy. Undersecretary McGourthy spoke at length about the various programs offered through the EOHED.

---

## RFPs

On 6 May I extended the RFPs by two weeks having only heard from one applicant. During that time I contacted the Office of the Inspector General (IG) who provides a hotline for procurement law. Upon speaking with the IG's office, it became clear that the RFP's had two major issues. First they were not posted in all of the proper locations that they would need to be. Secondly, for projects under \$50,000 Chapter 30B requires the acquisition of three quotes, not an RFP. It was advised that we remove the RFPs and start the process over again. The RFPs were removed from the website immediately following the conversation with the IG's office.

---

## SIGN INVENTORY

Over the past few weeks I have been going through the Commercial Tourist District and Route 131 to take pictures of all commercial industrial signs in the corridor. I will continue this until all signs have been photographed.

---

#### SPECIAL EVENTS COMMITTEE – BONFIRE

On 25 April the SEC hosted a bonfire on the Town Common. The event proved to be immensely successful with several hundred estimated to have attended. The general feedback from the event was overall positive. One item of note was the need to better promote the event to those who are not on social media et al.

---

#### STR REPORT

A version of the STR report is attached for your reference. (NOTE: the online version is redacted as the information is proprietary; a hard copy will be provided to STA members).



# STURBRIDGE

shop. eat. stay. play.



**TOWN.STURBRIDGE.MA.US/FOR-VISITORS**

Page 88 of 88  
@VISITSTURBRIDGE  
Last Edited: 05/21/2019