



Sturbridge Tourist Association

A Committee of the Town of Sturbridge

Amended Meeting Agenda (amended 8 July 2019 @ 4:00pm)

10 July 2019 – 6pm

Center Office Building – 2nd Floor Meeting Room

1. Call to Order
2. Approval of Previous Minutes – 12 June 2019
3. Treasurers Report
 - a. FY 2019 – Closeout
 - b. FY 2019 – Encumbrances
 - c. FY 2020 – Review
4. New Business
 - a. Funding Request – Old Sturbridge Village – First Review
 - b. Funding Request – Herbfest – First Review
 - c. Discover Central MA – STA FY2020 Marketing Campaign Discussion
 - d. Visitor Guides – Discussion
5. Old Business
 - a. RFP – Update
 - i. Funding Request – Allocate Funding for Legal Notices
6. EDTC Report
7. Correspondence
8. Next Meeting
9. Adjourn

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

Page
Break



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Sturbridge Tourist Association

A Committee of the Town of Sturbridge

Meeting Minutes

12 June 2019 – 6pm – Center Office Building

Members Present: Brian Amedy (BA); Tom Chamberland (TC); Jeff Ardis (JA)

Members Absent: Nick Salvador (NS)

Staff Present: Kevin Filchak (KF); Jeff Bridges (JB)

Guest Present: Alix McNitt (AM)

1. **Call to Order** – BA called the meeting to order at 6:05. A quorum was present.
2. **Review of Previous Minutes – 22 May 2019** – TC MOVED to approve the minutes as printed. BA seconded. APPROVED (3-0).
3. **Treasurers Report** – KF provided update and noted that there was an issue in the Community Support line item, a \$45 discrepancy that had been detailed in the reconciliation to the Town Accountant. TC asked if there were any concerns with overspending, KF said no as the Visitor guide came in under budget so the previous months concerns were mitigated. BA asked if KF had had the opportunity to follow up with the Town Planner regarding the Tourism Line Item; KF said he did not but that he would. This led to a brief discussion on the possible costs under the Tourism Line Item. AM asked about the new wayfinding signage and if the old street signs would be removed, KF said no as those were either state/safety signs. **TC MOVED to approve the financial report subject to the resolution of the \$45 difference. BA seconded. APPROVED (3-0).**
4. **New Business**
 - a. **Chamber of Commerce – Funding Applications – Second Review**
 - i. **GeoFest** – BA began by noting that the application is for an event that will take place in FY2020. AM started her presentation by addressing a point made at the previous STA meeting that the STA was not acknowledged in the Chamber's Annual Report, AM noted that they were in fact recognized. TC stated that his comment from the previous meeting related to the Chamber's financial report not general recognition. AM provided an overview of the event as well as its history. She explained that with the closure of a similar event in the Berkshires, Sturbridge was getting those patrons; stated that currently ~250 have expressed

an interest in coming to GeoFest. AM concluded by detailing the various partners that GeoFest works with. TC explained that the STA is asking more questions now of applicants, specifically data requests, and that it's the goal of the STA to help events become sustainable. AM noted that the reason that GeoFest does not collect data is resource related. General discussion amongst members and AM regarding how participants register and third party role of Geocaching website and the rules that it mandates geocaching events must follow. BA asked for a detailed breakdown of Chamber's request, AM detailed and explained the following: \$290 for Geocoins, \$900 for t-shirts, \$400 for website, \$400 for path tags, \$50 cache cards and \$1,600 for swag. BA asked if event is operating at a loss; AM responded that if labor is factored in yes, but that it was known by the Chamber that this event would not be a revenue generator. BA discussed the challenges with having this event between fiscal years and asked why some events are taking place outside of Sturbridge. AM explained event has always taken place in multiple communities and that the Chamber is trying to keep event fresh. BA explained that the STA goal is to support Sturbridge businesses and the event currently is not a large overnight tourism draw. BA stated that he'd like to wait to see how the 2019 event goes before supporting the 2020 event. The members had a lengthy discussion about soliciting information and data with hoteliers. AM detailed potential ways in which they could solicit data leading to a general discussion on solicitation of data and challenges therein. AM explained that the reason for the early request is to begin promotion for 2020 as early as possible. JB asked how many geocachers are expected to participation, AM said ~500, JB asked how many caches are in the vicinity of Sturbridge, AM said ~200. JB asked if it would be possible to solicit hoteliers now so that data could be collected for 2020. Lengthy discussion on how such a collection could occur, concluding with KF suggesting that he and AM coordinate on such an endeavor. JA asked if delaying approval would put event in jeopardy, AM noted there would be some exposure and that the Chamber would not promote the event until funding was approved. General discussion amongst members of whether the STA should fund event as benefactors or as start up funders. **TC MOVED to approve from FY2020 \$800 from marketing and \$500 from Community Support for the initial funding for the GeoFest in 2021.** TC noted that this would be initial seed money for the event. JA asked if this event would be used to gather information leading to general discussion. **BA seconded. APPROVED (3-0).**

- ii. **Harvest Festival** – JA asked AM if it could be agreed that the Harvest Festival brings fewer overnight stays. AM acknowledged that many will be from the initial area, but stated that some do stay overnight. AM explained that not every patron comes to the Chamber's booth at the event which would be the best way to collect data. General discussion on overnight stays. TC discussed vendor overnight stays, AM noted she has anecdotal evidence to that effect but can ask for more detailed information. TC asked about annual vendor counts, AM noted that it varies year to year for a variety of reasons. TC asked about marketing to

potential vendors, AM noted that vendors usually find the Chamber and explained how they select vendors. General discussion amongst members regarding the request. JA asked KF to provide breakdown of STA funds over previous years which KF provided. JA asked what the profit margin has been for the Chamber, AM explained that profits have been consistent and past costs. General conversation about the former "Tastes of Sturbridge" event and the institution of food trucks. JA asked if there was any difference in attendance with the food trucks and AM said there was not. BA noted that the advertising is on the local market and AM noted that the Chamber advertised in other markets when funding available. **TC MOVED to approve from FY2020 the amount of \$4460 from Community Support and \$3300 from Marketing for the Harvest Festival for 2019.** Brief discussion in which BA noted that he was comfortable with supporting Community Support allocation not Marketing. **TC WITHDREW his original motion and TC MOVED to allocate \$4460 from Community Support for the Harvest Festival in 2019. JA seconded. APPROVED (3-0).** BA explained that he believed as the Chamber is making a profit is should be responsible for marketing the event and because it's a community event. TC questioned the need to market in the immediate area, but was concerned about cutting funding entirely. **TC MOVED to allocate \$1,200 for marketing to support the event. No second was made, MOTION FAILED.** JA said that since there was a lengthy discussion for GeoFest and that the members had supported the idea of approving funding based on true need. General discussion on parliamentary orders. With no motion, discussion was closed by BA.

AM asked members about the RFP proposals that were before the board, KF provided overview of the RFPs. General discussion on proposals. AM asked if with the RFP the Chamber should be conducting promotional efforts for the town. KF explained that the STA was coordinating with Discover Central MA for a yearlong campaign, leading to a general discussion. TC encouraged AM to stay connected with KF to be up to date on the campaign. AM explained the capabilities of Mass Live. AM left meeting.

5. Old Business

- a. **RFP Discussion** – KF explained the current status of the RFP and explained the timeline. JA questioned the rapid timeline, leading to a lengthy general discussion on timeline. Members agreed to make the due date for the RFP 15 August to allow for more applicant responses during the summer.
 - b. **Business Recognition Program – Update** – KF had no update for the committee at this time.
6. **EDTC Update** – KF provided update. Regarding Route 15, TC asked about max building size, general discussion on that.

7. **Correspondence** – BA noted the email from Connie Pion at the Publick House regarding potential IAATO visit. Members did not support funding group, but BA noted CP should get credit for working to fund the event but no support at this time.
8. **Next Meeting** – 10 July next meeting. Brief discussion on that evening's approvals to Chamber of Commerce. Members discussed how to ween folks off of funding. TC said unlikely group would ever stop funding, but JA said that it difficult to imagine that they cannot find another sponsor. TC noted that the Publick House which runs the scarecrows has not sought funding previously. BA provided history of STA's funding Harvest Festival. Members discussed local Chambers Commerce.
9. **Adjourn** – BA MOVED and JA seconded to adjourn the meeting at 8:17pm.

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	\$11,800.00	\$47,824.88	\$47,300.24	\$524.64
Marketing and Advertising	24400 56551	\$109,332.60	-\$11,800.00	\$97,532.60	\$90,924.61	\$6,607.99
EDTC	24400 51130	\$36,863.52	\$0.00	\$36,863.52	\$32,762.55	\$4,100.97
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	\$179,182.40	\$23,178.60

EDTC Update

Date	Item	Cost
6/10/2019	Globe Sign Company	\$50.00
6/10/2019	Angelas Imprints	\$188.19
6/11/2019	American Trails	\$100.00
6/17/2019	GeoFest	\$387.00
6/17/2019	Leslie Wong	\$149.95
6/24/2019	S&S Worldwide	\$115.30
6/25/2019	Lisa Beaudin	\$144.00
6/25/2019	Gerald R. Briere	\$100.00
6/25/2019	Yalesville Fife and Drum Corp	\$400.00
6/26/2019	Globe Sign Company	\$135.00
6/3/2019	Pintastic	\$456.69
6/10/2019	GDP	\$2,490.00
6/10/2019	GDP	\$1,300.00
6/11/2019	GateHouse New England	\$500.00
6/17/2019	Sturbridge Herbfest	\$170.00
6/17/2019	Sturbridge Herbfest	\$142.96
6/17/2019	Sturbridge Herbfest	\$30.00
6/17/2019	Pagio, Inc.	\$375.00
6/17/2019	Chamber of Central MA	\$28.30
6/17/2019	GeoFest	\$400.00
6/17/2019	Pintastic	\$750.00
6/17/2019	Custom Business Products	\$654.00
6/24/2019	Pintastic	\$750.00
7/1/2019	Pintastic	\$782.85
7/1/2019	GateHouse New England	\$500.00
7/2/2019	Globe Sign Company	\$101.05
		\$11,200.29

Community Support Allocations	
Total Allocated	\$51,370.95
Spent	\$47,300.24
Remaining Allocated	\$4,070.71
Remaining Unallocated	-\$3,546.07
Un-Used Funding	\$4,070.71
Total Available Funds	\$524.64

Spent	99%
Allocated	107%
Un-Allocated	-7%

[illegible]

Marketing Allocations	
Total Allocated	\$102,477.44
Spent	\$90,924.61
Remaining Allocated	\$11,552.83
Remaining Unallocated	-\$4,944.84
Un-Used Funding	\$11,552.83
Total Available Funds	\$6,607.99

Spent	93%
Allocated	105%
Un-Allocated	-5%

[illegible]

Document Guide

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

Spending Totals / Comparisons

Community Support	FY2019	FY2018	FY2017	FY2016**
July	5%	13%	7%	
August	18%	15%	9%	
September	43%	15%	9%	
October	68%	15%	9%	
November	84%	27%	21%	
December	85%	28%	21%	
January	85%	28%	27%	
February	85%	60%	37%	
March	87%	79%	58%	
April	91%	80%	59%	
May	95%	86%	59%	
June	99%	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	72%	60%	32%	
February	72%	48%	34%	
March	78%	48%	35%	
April	81%	49%	37%	
May	84%	71%	45%	

June	93%	93%	88%	
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Remaining Totals / Comparisons

Community Support	FY2019	FY2018	FY2017	FY2016**
July	95%	87%	93%	
August	82%	85%	91%	
September	57%	85%	91%	
October	32%	85%	91%	
November	16%	73%	79%	
December	15%	72%	79%	
January	15%	72%	73%	
February	15%	40%	63%	
March	13%	21%	42%	
April	9%	20%	41%	
May	5%	14%	41%	
June	1%	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	28%	40%	68%	
February	28%	52%	66%	
March	22%	52%	65%	
April	19%	51%	63%	
May	16%	29%	55%	
June	7%	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	\$47,824.88
Spent	\$47,300.24
Revised Total	\$524.64

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
11/14/2018	Chamber of Central MA	\$2,500.00	Harvest Fest
11/15/2018	JYL Transportation	\$1,000.00	Sturbridge Express Pilot Program
11/15/2018	JYL Transportation	\$1,000.00	Sturbridge Express Pilot Program
11/15/2018	JYL Transportation	\$1,000.00	Sturbridge Express Pilot Program
11/15/2018	JYL Transportation	\$1,000.00	Sturbridge Express Pilot Program
11/26/2018	JYL Transportation	\$500.00	Sturbridge Express Pilot Program
12/10/2018	Chamber of Central MA	\$790.00	Harvest Fest Rob Barns Portable Toilets
3/25/2019	Special Events Committee	\$600.00	Community Bonfire
4/4/2019	STR Report	\$1,650.00	Annual Renewal
4/11/2019	Leslie Wong	\$261.81	Farmers Market Shed
4/11/2019	Tom Chamberland	\$19.00	American Trails Webinar
5/9/2019	Special Events Committee	\$180.00	Slims Portable Toilets - Bonfire
5/20/2019	Chamber of Central MA	\$950.00	GeoFest
5/29/2019	Working Dog Show	\$1,000.00	Bleacher Rental
6/10/2019	Globe Sign Company	\$50.00	Special Events Committee - Farmers Market Chamber S
6/10/2019	Angelas Imprints	\$188.19	Farmers Market Tablecloth
6/11/2019	American Trails	\$100.00	Membership
6/17/2019	GeoFest	\$387.00	Pathtags Starter Kit
6/17/2019	Leslie Wong	\$149.95	Farmers Market Tent
6/24/2019	S&S Worldwide	\$115.30	Lawn Games for Special Events Committee
6/25/2019	Lisa Beaudin	\$144.00	Squarespace Reimbursement for Farmers Mkt.
6/25/2019	Gerald R. Briere	\$100.00	Minuteman Muster
6/25/2019	Yalesville Fife and Drum Corp	\$400.00	Minuteman Muster
6/26/2019	Globe Sign Company	\$135.00	Sturbridge Farmers Market - A-Frames
7/2/2019	Globe Sign Company	\$101.05	Sturbridge Farmers Market - Roadsigns

Marketing and Advertising - 56551	
Original Total	\$97,532.60
Spent	\$90,924.61
Revised Total	\$6,607.99

Date	Item	Expenditure	Details
7/25/2018	Worcester Magazine	\$750.00	Fall Campaign (print)
7/31/2018	Worcester Magazine	\$250.00	Fall Campaign (print)
8/6/2018	Worcester Magazine	\$250.00	Fall Campaign (print)
8/6/2018	Worcester Magazine	\$1,500.00	Fall Campaign (digital)
8/20/2018	Discover Central MA	\$3,000.00	Yankee Magazine campaign
8/22/2018	WeatherVane Enterprises	\$200.00	Sturbridge Express Marketing
8/27/2018	Rapscallion Brewery	\$1,770.00	Sturbridge Express Marketing
8/29/2018	The Republican	\$2,664.00	Summer/Fall Tourism
8/29/2018	Mass Live Media	\$669.00	Summer/Fall Tourism
8/29/2018	Your Hometown Shopper	\$75.00	GeoFest
9/12/2018	Worcester Magazine	\$1,250.00	Worcester Magazine Campaign (Print)
9/12/2018	Worcester Magazine	\$500.00	Worcester Magazine Campaign (Online)
9/14/2018	Retroactive Northeast	\$2,705.43	New England Shake Up
9/20/2018	The Republican	\$2,664.00	Summer/Fall Tourism
9/20/2018	Mass Live Media	\$669.00	Summer/Fall Tourism
9/20/2018	Times Union	\$6,333.33	Summer/Fall Tourism
9/20/2018	Chamber of Central MA	\$7.09	Postage et al.
10/3/2018	Center of Hope	\$46.00	Geofest 2019 Marketing
10/3/2018	CMS Chamber	\$8.83	Postage et al.
10/15/2018	Worcester Magazine	\$1,065.00	Fall Campaign (print)
10/15/2018	Worcester Magazine	\$2,375.00	Fall Campaign (digital)
11/5/2018	Discover Central MA	\$2,000.00	Yankee Magazine campaign
11/14/2018	Albany Times Union	\$6,333.34	Summer/Fall Tourism
11/14/2018	Brimfield Publication	\$300.00	Harvest Festival
11/14/2018	Your Hometown Shopper	\$195.00	Harvest Festival
11/14/2018	Strategen Advertising	\$398.00	Harvest Festival
11/14/2018	Chamber of Central MA	\$16.58	Tourism Line / Fulfillment
11/14/2018	The Republican	\$2,664.00	Summer/Fall Tourism
11/14/2018	Mass Live Media	\$669.00	Summer/Fall Tourism
11/14/2018	Times Union	\$6,333.33	Summer/Fall Tourism
11/15/2018	GateHouse New England	\$500.00	Worcester Magazine Campaign (Print)
11/15/2018	GateHouse New England	\$1,700.00	Worcester Magazine Campaign (Online)
12/10/2018	Chamber of Central MA	\$2,300.00	T&G Harvest Fest
12/17/2018	GateHouse New England	\$1,000.00	Worcester Magazine Campaign (Print)
12/17/2018	GateHouse New England	\$1,396.80	Worcester Magazine Campaign (Online)
12/27/2018	OSV	\$3,300.00	Christmas by Candlelight Ads
12/27/2018	OSV	\$9,900.00	Christmas by Candlelight Ads
12/31/2018	TLGV	\$530.00	Walktober Adverts
1/9/2019	GateHouse New England	\$1,355.20	Worcester Magazine Campaign (Online)
1/9/2019	GateHouse New England	\$1,000.00	Worcester Magazine Campaign (Print)
2/13/2019	GateHouse New England	\$48.00	Worcester Magazine Campaign (online)
3/18/2019	DCM	\$600.00	AAA Travel Show
3/18/2019	DCM	\$3,450.00	Yankee Magazine campaign
3/25/2019	Pagio, Inc.	\$1,080.00	DCM Advert
3/25/2019	Sturbridge Herbfest	\$525.00	Ad in Spirit of Change Magazine
4/1/2019	Sturbridge Herbfest	\$219.00	Wisdom Magazine
4/8/2019	Global Design & Publishing	\$950.00	Full pg. Ad in Area Guide
4/23/2019	WeatherVane Enterprises	\$1,000.00	Antiques Show
5/16/2019	GateHouse New England	\$500.00	Spring Campaign
5/20/2019	Pintastic	\$101.52	Pintastic Campaign
5/20/2019	Power Play Marketing	\$1,750.00	CCMS - Discretionary
5/20/2019	Chamber of Central MA	\$11.60	February Postage
5/20/2019	Chamber of Central MA	\$7.44	March/April Postage
5/29/2019	Herbfest	\$219.00	Herbfest
5/29/2019	Herbfest	\$400.00	Herbfest
5/30/2019	Tom Chamberland	\$90.32	VisitSturbridge.org Domain
6/3/2019	Pintastic	\$456.69	Facebook Adverts
6/10/2019	GDP	\$2,490.00	Area Guide Subsidies
6/10/2019	GDP	\$1,300.00	Area Guide Additional Publishing
6/11/2019	GateHouse New England	\$500.00	Spring Campaign
6/17/2019	Sturbridge Herbfest	\$170.00	For Rita M. Schiano ad work
6/17/2019	Sturbridge Herbfest	\$142.96	For Staples invoice
6/17/2019	Sturbridge Herbfest	\$30.00	For Rita M. Schiano ad work
6/17/2019	Pagio, Inc.	\$375.00	For MP Guide
6/17/2019	Chamber of Central MA	\$28.30	Postage et al.
6/17/2019	GeoFest	\$400.00	GeoFest Website
6/17/2019	Pintastic	\$750.00	Facebook Adverts
6/17/2019	Custom Business Products	\$654.00	GeoFest - T-Shirts
6/24/2019	Pintastic	\$750.00	Facebook Adverts
7/1/2019	Pintastic	\$782.85	Facebook Adverts
7/1/2019	GateHouse New England	\$500.00	Spring Campaign

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

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

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.

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

FY2019

YEAR END ENCUMBRANCE REQUEST

DEPARTMENT: Sturbridge Tourist Association

Please encumber the following: Invoices and/or Quotes are attached.

Vendor Name	Name and Number of Account to Be Encumbered	Amount
Campaigns That Win	Marketing – 24400 56551	\$5,285.00

STA Committee Members

Brian Amedy, Chair
Tom Chamberland, Vice-Chair
Jeff Ardis
Nick Salvador

Department Head

 Kevin Filchak, Economic Development & Tourism Coordinator

Hi Tom,

Please except our pricing in this email as our bid as per your specs.

At 1000 \$3.80/book – 1300 \$370/book – 1500 \$355/book

Thank you again and as always,

Mark

Mark Carron

CTW Ink LLC

508-951-6639

From: mark@campaignsthatwin.com <mark@campaignsthatwin.com>
Sent: Tuesday, May 7, 2019 4:36 PM
To: 'Thomas Chamberland' <tchamberland301@gmail.com>
Cc: 'don@donshortman.com' <don@donshortman.com>
Subject: RE: Sturbridge trail guide printing quote

Thank you Tom.

We're confident we can forward you pricing you will find favorable.

We have no trouble with the timelines.

Page Break

Sturbridge Tourist Association | Fiscal Year 2020 Budget

Account	Account #	Original Total	Revenue Adjustments	Revised Total	Expenditure	Current Total Balance
Community Support	24400 56552	\$40,359.00	\$0.00	\$40,359.00	\$0.00	\$40,359.00
Marketing and Advertising	24400 56551	\$109,974.00	\$0.00	\$109,974.00	\$0.00	\$109,974.00
Benefits	24400 51210	\$13,734.00	\$0.00	\$13,734.00	\$0.00	\$13,734.00
Salaries / Wages	24400 51130	\$19,223.00	\$0.00	\$19,223.00	\$0.00	\$19,223.00
Tourism	58618	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total		\$183,290.00	\$0.00	\$183,290.00	\$0.00	\$183,290.00

EDTC Update

[illegible]

Community Support Allocations	
Approved by STA	\$11,055.00
Spent by Recipients	\$0.00
Unspent Approved Funds	\$11,055.00
Unassigned Funds	\$29,304.00
Funds Returned to STA	\$0.00
Total Available Funds	\$29,304.00

Spent	0%
Assigned	27%
Unassigned	73%

[illegible]

Marketing Allocations	
Approved by STA	\$17,990.00
Spent by Recipients	\$0.00
Unspent Approved Funds	\$17,990.00
Unassigned Funds	\$91,984.00
Funds Returned to STA	\$0.00
Total Available Funds	\$91,984.00

Spent	0%
Assigned	16%
Unassigned	84%

[illegible]

Document Guide

Approved by STA = Sum of all items listed in the "Allocated" column

Spent by Recipients = Sum of all items listed in the "Spent" column

Unspent Approved Funds = Sum of all items listed in the "Remaining" column

Unassigned Funds = "Current Total Balance" (found on cover page) - "Approved by STA"

Funds Returned to STA = Sum of "Remaining" column for those items that have closed

Total Available Funds = Sum of "Unassigned Funds" and "Funds Returned to STA"

Item = Project approved by the STA

Allocated = Amount approved by the STA

Spent - Amount spent by the recipient

Remaining = "Allocated" - "Spent"

Date Approved = The date the STA approved the project

Allocated Comparisons FY 19 Budget				
Community Support	FY 2020	FY2019	FY2018	FY2017
July		94%	33%	36%
August		96%	33%	36%
September		97%	33%	36%
October		97%	35%	41%
November		101%	36%	56%
December		101%	36%	56%
January		101%	73%	56%
February		101%	88%	73%
March		104%	97%	73%
April		107%	97%	73%
May		107%	98%	92%
June		107%	98%	98%
Marketing	FY 2020	FY2019	FY2018	FY2017
July		81%	54%	30%
August		83%	55%	30%
September		83%	62%	43%
October		83%	72%	50%
November		87%	82%	53%
December		87%	82%	53%
January		89%	93%	62%
February		97%	99%	65%
March		104%	81%	95%
April		105%	93%	95%
May		105%	101%	101%
June		105%	101%	101%

Spending Totals / Comparisons

Community Support	FY2020	FY2019	FY2018	FY2017
July		5%	13%	7%
August		18%	15%	9%
September		43%	15%	9%
October		68%	15%	9%
November		84%	27%	21%
December		85%	28%	21%
January		85%	28%	27%
February		85%	60%	37%
March		87%	79%	58%
April		91%	80%	59%
May		95%	86%	59%
June		99%	96%	86%
Marketing	FY2020	FY2019	FY2018	FY2017
July		1%	3%	0%
August		11%	6%	2%
September		19%	7%	5%
October		32%	45%	5%
November		49%	54%	25%
December		70%	54%	29%
January		72%	60%	32%
February		72%	48%	34%
March		78%	48%	35%
April		81%	49%	37%

May		84%	71%	45%
June		93%	93%	88%

Remaining Totals / Comparisons

Community Support	FY2020	FY2019	FY2018	FY2017
July		95%	87%	93%
August		82%	85%	91%
September		57%	85%	91%
October		32%	85%	91%
November		16%	73%	79%
December		15%	72%	79%
January		15%	72%	73%
February		15%	40%	63%
March		13%	21%	42%
April		9%	20%	41%
May		5%	14%	41%
June		1%	4%	14%
Marketing	FY2020	FY2019	FY2018	FY2017
July		99%	97%	100%
August		89%	94%	98%
September		81%	93%	95%
October		68%	55%	95%
November		51%	46%	75%
December		30%	46%	71%
January		28%	40%	68%
February		28%	52%	66%
March		22%	52%	65%
April		19%	51%	63%
May		16%	29%	55%
June		7%	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	\$40,359.00
Spent	\$0.00
Revised Total	\$40,359.00

[illegible]

Marketing and Advertising - 56551	
Original Total	\$109,974.00
Spent	\$0.00
Revised Total	\$109,974.00

[illegible]

EDTC Salary - 51130	
Original Total	\$19,223.00
Spent	\$0.00
Revised Total	\$19,223.00

Date	Item	Expenditure	Details

EDTC Benefits - 51210	
Original Total	\$13,734.00
Spent	\$0.00
Revised Total	\$13,734.00

Date	Item	Expenditure	Details

Community Support

This line item shall be for the sponsorship of events, the procurement of goods and services for an event, payment or installation of equipment and/or any other purchase, unrelated to marketing, that supports tourism in the town of Sturbridge.

The purpose of this fund is to support the local tourism industry though, in certain circumstances, the STA may allocate these dollars to support community events if they believe there is an inherent benefit to tourism and/or tourist related businesses in town through the funding of said activity.

This line item shall also go toward the funding of reports and studies necessary for the advancement of tourism in the community. However this does not apply to reports that focus on marketing as those are funded by the Marketing line item.

Marketing

This line item shall support efforts to publish, promote and distribute media campaigns about Sturbridge for the purpose of attracting visitors to the community across all media platforms.

These campaigns can range from general adverts about the community to targeted ads highlighting a specific item and/or event.

This line item shall also provide funding for any/all marketing related studies the STA may undertake. If the scope is beyond that of marketing, the study shall be covered under Community Support.

Economic Development and Tourism Coordinator Salary

This line item shall cover the annual salary of the Economic Development and Tourism Coordinator (EDTC). The specific responsibilities and duties of the EDTC are detailed in their position description.

Note, the STA and the Town of Sturbridge evenly split the salary and benefits costs for the EDTC each fiscal year.



06/27/2019 13:50
1655cger

TOWN OF STURBRIDGE
NEXT YEAR BUDGET DETAIL REPORT

P 1
bgnyrpts

PROJECTION: 20202 STA FY2020 BUDGET

ACCOUNTS FOR:

STURBRIDGE TOURIST ASSN

	VENDOR	QUANTITY	UNIT COST	2020	FINAL
24400	STURBRIDGE TOURIST ASSN				
24400	51130 - SALARIES/WAGES				19,223.00
24400	51210 - EMPLOYEE BENEFITS				13,734.00
24400	56551 - MARKETING/ADVERTISING				109,974.00
24400	56552 - COMMUNITY SUPPORT				40,359.00
TOTAL STURBRIDGE TOURIST ASSN					183,290.00
TOTAL STURBRIDGE TOURIST ASSN					183,290.00
GRAND TOTAL					183,290.00

** END OF REPORT - Generated by Christopher Geraghty **

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
Application [Basic]	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.
Application [Content]	Applicant has prepared a thorough application, and has considered all applicable variables. ¹	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.
Communication	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.
Previous Interactions*	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.
Transparency	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.

¹ 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).

After Action Report (AAR)*	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.
Total Possible Points	18 / 12			
Total Points Awarded				

II. Budget

Criteria	3 Points	2 Points	1 Point	0 Points
Budget	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.
Previous Allocations*	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.
Return on Investment*	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.
Revenues Collected	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).
Returning Applicant Request*	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.	
Ability to Manage Program	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.
Total Possible Points	18 / 9			
Total Points Awarded				

III. Event*

Criteria	3 Points	2 Points	1 Point	0 Points
Number of Participants	> 500 participants	499 – 250 participants	249 – 50 participants	< 49 participants
Location of Event	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.
Cost to Participants	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.
Overnight Stays	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.
Total Possible Points	12			
Total Points Awarded				

IV. Marketing / Promotion

Criteria	3 Points	2 Points	1 Point	0 Points
Marketing	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.
Track Record*	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				

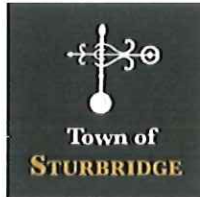
V. STA Mission

<i>Criteria</i>	<i>3 Points</i>	<i>2 Points</i>	<i>1 Point</i>	<i>0 Points</i>
Use of local businesses	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.
Supporting Mission of STA	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.
Community Event	Event is considered a major community event.	Event is a significant event in Sturbridge.	Event is in Sturbridge.	Neither a significant nor community event.
Other	Points awarded at the discretion of the Sturbridge Tourist Association Members.			
Total Possible Points	12			
Total Points Awarded				

VII. Summary

Overall Points Awarded		
Possible Points Awarded		
Project Approved for Interview?	Yes	No

Page
Break



Town of Sturbridge

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A. 

Date: 8 July 2019
To: Sturbridge Tourist Association
Subject: Funding Request – Old Sturbridge Village – First Review

Overview

Old Sturbridge Village has submitted a request for \$25,000 to support their efforts to get more tour groups to the Village and to Sturbridge as a whole. In short, their request is to lay the ground work to re-engage with tour operators and to bring those groups back to Sturbridge. They are currently working with a group called Break The Ice Media (BTI) who would be the recipient of the funding. The request would break down as such:

- 1) Sales and Marketing Lead Generation by BTI (cost: \$20,000): BTI would use its resources to engage with tour operators within a 10 hour radius of Sturbridge and would foster leads within those groups for potential tours.
- 2) Tour Implementation and Coordination led by OSV (cost: \$0): OSV will make an investment in hiring staff to foster these leads and to bring those groups to Sturbridge.
- 3) Attendance at ABA (American Bus Association) (cost: \$5,000): This would pay for OSV or BTI (unclear) staff to attend the ABA and have direct interactions with potential tour groups and work on lead generation.

This would constitute a *significant* portion of the marketing budget for FY2020 when considered with costs of the upcoming RFP and the campaign with DCM. That said it is an investment that could have beneficial spillover effects for the hotel, restaurant and merchant community in town. Therefore it is an application that should be considered carefully.

It is recommended that the STA invite OSV to its next meeting to discuss this further. There are a few questions I would encourage the STA ask that OSV be prepared to answer:

- 1) What does the \$5,000 cover with the ABA trip?
- 2) Given the amount in question, has OSV solicited quotes from other vendors that may offer similar services for lower rates?
- 3) As this initiative does have a potential for a lot of spillover benefits, has OSV outreached to other hotels, restaurants and/or merchants in the area to see if they want to help support this initiative as they realistically will profit from it?

- 4) What information/data will the STA get from this investment that will (A) show success, and (B) provide leads for initiatives of our own?
- 5) Is it possible to get a similar affect with a smaller quote?

Suggested Motion

If the STA concurs, the following motion would be in order:

MOVE to invite Old Sturbridge Village to the next meeting of the STA to discuss their proposed application.

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.

Email address *

ctieri@osv.org

Name

Christine Tieri

Organization

Old Sturbridge Village

Please identify what type of organization you represent

☐ For profit

☒ Nonprofit

☐ Government

☐ Private citizen / volunteers

☐ Other:

Phone Number

5083977312

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) and then click the box confirming you have read and agree to said policy. *

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

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. *

☒ 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.

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

Old Sturbridge Village – and Sturbridge itself – had once been a highly desired destination for bus tour groups. The travel trade has not been as prevalent in years past due to numerous reasons including the recession, lack of universal effort from Sturbridge businesses/destinations, and for Old Sturbridge Village in particular, we haven't had a designated position to promote groups in many years. We have learned that the travel trade has rebounded in recent years, but without dedicated promotion, we have fallen off the radar of the tour group operators.

Old Sturbridge Village would greatly benefit by bringing tour groups back to the forefront, and we believe the town would benefit as well. We have learned:

- 1) Tour group operators are looking for an attraction that is also a destination and offers a diverse set of experiences and amenities which meet the needs and desires of almost any traveler. Old Sturbridge Village offers the museum, can provide dining to large groups as well as lodging. Further, very large groups may need additional options for dining and lodging which Sturbridge has plenty of.
- 2) Sturbridge is positioned perfectly for easy access and proximity to major international gateway cities including NYC and Boston.
- 3) We are located within the popular New England region and Old Sturbridge Village is a great stop along a larger route offering a dining experience, a full day of exploration and historical education, or an overnight where additional sites and regional experiences can be found.
- 4) Earlier this year, Old Sturbridge Village conducted an attitudinal research study on our audience. We found that 1/4 of the people engaging with Old Sturbridge Village were "Guide Groupies" as we call them. They are highly motivated and prefer to take part in guided tours of any destination. This is a group who is defined by seeking out group tours for their leisure time, and would likely be the same audience that can be found through tour operators.

The goal of this project, which we are calling The Travel Trade Sales & Marketing Program, are as follows:

- Provide a focused and strategic approach to increasing group tours revenue
- Build and expand on existing relationships with group tours operators and receptive prospective operators
- Attract and increase both domestic and international group tours to Old Sturbridge Village
- Work in partnership with the STA as well as local state and tourism offices
- Align with other New England tourism destinations to attract groups as part of regional itinerary
- Identify opportunities to cross sell services (museum admission, food and beverage, lodging and shopping); as well as with other area businesses for additional revenue-generating

activities

Finally, our target market for this project would be:

- Tour Operators located within a 10 hour drive radius who travel in and around New England for day trips and multi day trips.
- Geographic locations: New York State; New Hampshire; Vermont; Connecticut; Rhode Island; Maine; Maryland; Ohio; Pennsylvania and Canada
- We will also be pitching operators who particularly cater to: History Buffs, Hands-on Explorers, and Family Focusers*

*Along with "Guide Groupies" our research identified three other strong attitudinal groups that are motivated to engage with Old Sturbridge Village, and we can pitch that messaging to tour group operators.

Funding amount requested *

\$25,000

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

This is a 3-part program that we will partner on with Break The Ice Media (BTI), who is the current marketing, media and PR agency for Old Sturbridge Village. BTI's sole focus is on destination marketing and they have a dedicated team specifically for the travel trade sector. They will provide a much-needed sales arm for lead generation, partnership development, tracking and reporting and closing sales.

- 1) Sales & Marketing Lead Generation (handled by BTI)
- 2) Tour Implementation and Coordination (handled by OSV)
- 3) Attendance at ABA (American Bus Association) Marketplace to secure one-on-one meetings with tour operators (handled by BTI)

PROGRAM DETAILS:

- 1) Sales & Marketing Lead Generation Strategy (handled by BTI)

This is a 9-month commitment ideally starting in September 2019-May2020

1a) Relationship Building: Compile a list of contacts who have visited Old Sturbridge Village in the past. Identify opportunities to reach out to this audience through direct mail, email newsletter or individual outreach. Invite them back to the museum for a site visit, touting new offerings and current opportunities.

1b) Identify Lead Generation Sources: This includes attendance at American Bus Associations Marketplace in January 2020 (see #3) , individual outreach and hosting of one off tour operator/group travel leader tours, and/or editorial opportunities in group focused publications (Group Travel Leader, Group Tour Magazine, etc.) This part o the program will also include pursuing:

>>Existing Lead Lists : Continue development and follow through of OSV's existing lead lists of group tour operators. Those lead lists will be targeted through direct mail, personal phone calls, e mail, in person meetings, and site visits.

>>Tourism Industry leads : Follow up on leads generated through the tourism industry including Discover New England, Brand USA and regional organizations

>>Site Visits: Host site visits for well qualified leads. (Goal to host minimum of 1-2 site visits with receptive operators in 2020)

>> Prospecting: Place a minimum of 25 individual cold/warm sales touches per month with potential group and travel trade prospects. A touch is a point of contact with a prospect. It could be an in person meeting, phone call, email or direct mailing. Also includes full account

service, benchmark and measurement, sales cycle follow through, monthly reporting.

1c) Develop Print/Online Collateral: Create collateral that supports OSV's group tour goals and speaks to the different types of groups that can visit the museum. Consider the differences between student groups and/or senior groups, for example, and what type of experiences each would be looking for. Have collateral available in print/PDF form and online via the OSV website.

Some of this information is on the OSV website currently but needs to be expanded in order to appeal to a wider range of groups. Types of collateral may include: eNewsletter, one-page sell sheet, trade show signage or materials. Collateral will also include information about the town of Sturbridge and its variety of assets (shopping, dining, trails, etc.) to promote the ability for the tour operator to book additional activities in the area.

2) Tour Implementation and Coordination (handled by OSV)

Old Sturbridge Village is prepared to employ an individual who will serve as our "boots on the ground." This position will collaborate with BTI during the sales nurturing process to provide appropriate packages and pricing for the various offerings at Old Sturbridge Village (museum admission, special programming, dining and/or lodging). Additionally, our implementation coordinator will provide on-site tours as needed. Once the sale is closed, BTI will hand the lead to our coordinator, who will handle finalizing contracts, details, and be the main contact to answer any questions the tour group operators may have before or during their visit.

3) Attendance at ABA (American Bus Association) Marketplace to secure one-on-one meetings with tour operators (handled by BTI)

ABA marketplace is the premiere trade show of the travel trade with a focus on networking, education and connecting business leads in order for organizations to secure business with tour group operators. Taking place each January, this trade show provides OSV the opportunity for one-on-one meetings with tour operators as well as additional contacts through general show networking and the ABA database. An average of 30 meetings are typically booked per organization/tour operator with up to 54 max. (The earlier you sign up, the more bookings you can secure). This is also the right place to sell the entire town - when our representative is sitting in front of the tour group operator and can have a conversation about the whole area.

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

#1) BTI fees - \$20,000; #2) OSV coordinator position \$0 (OSV will cover); #3) \$5,000 membership in ABA plus attendance fees and travel expenses to trade show

How will this proposal engage with the general public? *

By bringing bus tours back to the area, it will be another way to increase revenues, in turn, helping to sustain our own living history museum keeping it vibrant and relevant for the people of the area and our residents who get free admission to The Village.

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). *

Estimated based on securing 5 tour groups in 2020 (conservative): Costs per tour group (averages based on past history): Museum admission @ discounted = \$1000 revenue (no tax); Lodging/28 rooms = \$2800 revenue (\$168 tax – 6%); Dining/1 meal = \$1200 revenue (\$75 tax – 6.25%); Additional programming/demonstration per group (if chosen) = \$250 revenue (no tax); Shopping at Village and/or other local businesses (estimated) \$1500 revenue (\$93.75 tax); TOTAL REVENUE PER GROUP: \$6750 X 5 GROUPS = \$33,750; TOTAL TAX PER GROUP: \$336.75 X 5 GROUPS = \$1683.75

Are you expecting to make any revenues from this project? *

☒ Yes

☐ No

☐ Maybe

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

Museum Operations

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

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

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. *

Yes, this entire program is designed to target only "visitors."

If the project is drawing a majority of its patrons from less than 50 miles/patrons don't stay overnight (i.e. not a "visitor" by MOTT's definition), please explain how it supports Sturbridge. *

We are aiming to draw from beyond 50 miles, specific regions to include: • New York State; New Hampshire; Vermont; Connecticut; Rhode Island; Maine; Maryland; Ohio; Pennsylvania and Canada

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

Pursuing and closing tour group clients has a long lead time, as tour group operators make their plans months in advance. With that said, the longer we hold off putting into place a program like this one, the longer we postpone getting groups to come to town. Once a program like this is in place, it can build off itself. For instance, if a tour group operator has a good experience, they will likely do annual (or more!) trips to Sturbridge. Additionally, we will secure positive reviews and use that to promote the tours moving forward. This is an initial investment in the long-term plan of bringing back tour groups to the Sturbridge area.

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.

Within sixty (60) days of the conclusion of the project, the STA expects that the applicant shall submit a Post Event Evaluation to the Committee summarizing the outcome of said project.

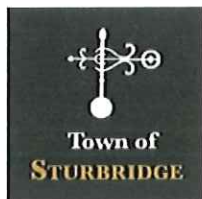
As grantee for the project as detailed in this application, I certify that these statements made herein are true and that the funds requested to be disbursed fulfill the purpose indicated in the approved application. [If your application was approved with a condition] I further certify that the conditions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

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

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Google Forms

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Town of Sturbridge

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A.

Date: 8 July 2019
To: Sturbridge Tourist Association
Subject: Funding Request – Herbfest – First Review

Overview

This is the second round of funding for the Sturbridge Herbfest first approved by the STA in March. For this request, the chairs of Herbfest are seeking funding for the following:

- ▶ Vinyl sign, \$100
- ▶ Two 20x20 tents at \$300 each
- ▶ Six tables at \$10 each
- ▶ 120 chairs at \$1 each
- ▶ Wisdom – 2 Ads at \$219 each
- ▶ Local Ads for \$400
- ▶ Two portable toilets and washing stations for \$270
- ▶ Trash dumpster at \$325
- ▶ Insurance for Senior Center at \$400
- ▶ Printing Costs (flyer and posters) at \$200
- ▶ Town Police at \$462.82
- ▶ Mailing Costs at \$100
- ▶ Shuttle Bus and Driver at \$1,000

It was recently noted that the Herbfest overspent their FY2019 allocation by \$336.96. A suggestion to the committee would be to reduce the current request by that same amount in acknowledgement that such an over expenditure did occur. Additionally, this committee has previously questioned the viability of paying for detail officers at events; that same reasoning could also be extended to covering insurance costs at a town building. These aforementioned points should be raised as questions both within in the committee and to the Herbfest organizers.

Suggested Motion

If the STA concurs the following motion would be in order:

MOVE to invite Sturbridge Herbfest to the next meeting of the STA to discuss their application.

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.

- **Required**

Email address * sargreene@gmail.com

Contact Person (name & title) * Sarah Greene

Contact Person Phone Number * 508-347-2111

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). 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 * Sturbridge Herbfest

Address

426 Main Street, Sturbridge, MA 01566

Website and Social Media pages (please include links)

www.alternatives-4health.com

Is this the first time you are seeking funding?

Yes

X No

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 *

4475.82

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

Cost breakout

Sarah Greene , Jo-Ann Grubert and Christine Haller continue to plan the first herbal conference to be held in Sturbridge at the Senior Center on October 5, 2019. We are looking for additional funds to promote and put on our event. We are hoping to make this an annual one day event.

We received \$2000 and used all but \$100 for advertising expenses. We are asking for funds to cover the following expenses:

Vinyl Sign	100
2 tents 20x20 @ \$300 each	600
6 tables @\$ 10 each	60
120 chairs @ \$1 each	120
Wisdom – 2 Ads @ 219 ea	438
Local Ads	400
2 Portable Toilets & washing station	270
Trash Dumpster	325
Insurance for Senior Center	400
Printing Costs (flyers & posters)	200
Town Police	462.82
Mailing Costs	100
Shuttle Bus & Driver	1000

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

We expect to attract between 300 to 400 people our first year. Herbal teachers from surrounding states will be offering herbal classes and intensives. These teachers are well known and will hopefully attract new people to our area. Some participants may opt to stay in local hotels. In our advertising we plan to include other events and places of interest to visit (ex. OSV herb garden, local nurseries). We plan on having 3 food vendors on our site, 1 of whom is a Sturbridge business owner. We will offer restaurant suggestions for an evening meal as our event ends at 4:30.

This is a required question

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

There will be an entrance fee of \$10 in advance and \$15 on the day of the event. The vendor fee is \$50 and we have room for 27 vendors.

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

We do expect to make some revenues and they will be used to support, expand and improve the 2nd annual Sturbridge Herbfest. They will also be used to pay for any unforeseen expenses.

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

The Sturbridge Senior Center will be alive with 3 food vendors, (25-30)artisan and craft tables, drum making, and weed walks. Inside the center and in two areas outside there will be over 16 - 50 minute workshops and 3 – 2 hour intensive classes with these subjects: winter health, children's health, stress reduction, lyme disease, first aid, herbal teas, medicine making with herbs, women's health, essential oils, food preservation, gardening. This type of event is for the sharing of information and meeting new people.

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?

Sturbridge Herbfest

Where will the event be held?

Sturbridge Senior Center, 480 Main Street, Sturbridge

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

www.alternatives-4health.com

Please add the start date for the event.

10/5/2019

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

Please add the start time for the event.

Time

9:30

Please add the end time for the event.

Time

4:30

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

Yes X

No

Is this an annual event?

Yes X

No

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

Advertisements in Health and Herbal Publications - Wisdom, Spirit of Change, local cable TV channels

Social media

Flyers at The International Herbal Symposium and the Northeast Women's Herbal Conference

Flyers & Posters

Informational article in Local Newspapers and Senior Newsletters

Presenters will have flyers and brochures to pass out

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

Page
Break



Town of Sturbridge

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

Date: 8 July 2019
To: Sturbridge Tourist Association
Subject: Discover Central MA – FY 2020 Campaign

The marketing campaign that the STA entered into with Discover Central MA (DCM) has begun. For a refresher on what the campaign entails please see the attached breakdown.

For the first quarter the turnaround time was short so DCM took the lead on the first article with Yankee Magazine. However they have asked that the STA plan out each quarter's articles going forward in advance so that we are ready to go to print once the time comes. Additionally, they are requesting that we provide them with some times and locations where season-neutral photos can be taken by their photographer.

I would ask that the STA discuss these questions and provide me with direction.

April 11, 2019



Sturbridge Tourism Association
308 Main Street
Sturbridge, MA 01566

MARKETING PROPOSAL: **(Effective July 1, 2019 - June 30, 2020)**

Website & Social Media Marketing:*

- (2) Features per quarter / 8 Total (Sponsored Content) on Discover Central MA homepage.
 - (2) Email blast per quarter promoting homepage article (distribution approximately 18,000).
 - Social Media campaign to audience defined by the STA (\$225 per month) on Instagram and Facebook.
- Price: \$9,240 (Valued at \$11,400)**

Participation in AAA Travel Show (March 2020)

- (1) Pop-Up Banner permitted as well as designated section on table for STA collateral.
 - (1) Representative from STA to promote Sturbridge at designated times throughout the trade show.
 - Access to all email addresses collected at the trade show for STA use.
- Price: \$600 (Booth \$4,200)**

Inclusion in Yankee Magazine Campaign:

- (1) Sponsored Content Article with Sturbridge Focus (Fall 2019).
 - Hosted on NewEngland.com and sent to Yankee distribution list
- (1) 1/2 Page Print ad in Yankee Magazine Fall Guide.
 - Designed by Discover Central MA with STA input.

Price: \$5,000 (Valued at \$6,200)

(2) Half Page Ads in DCM Visitor Guide:

- Distribution 40,000 to restaurants, colleges and attractions within region.
- Distribution via CTM Media to I-84, Boston-area, Southern NH, and Providence-area

Price: \$1,400 (Valued at \$2,070)

(2) Photo Shoots at Locations Designated by STA:

- Can be events or locations. Advance notice required. Discover Central MA will have full access to images for marketing purposes, as will the STA (with DCM credit).

Price: \$500 (Retainer with DCM)

Discover Central MA Membership + (2) Complimentary (non-lead receiving) memberships

Price: \$150 (Value not to exceed \$600)

TOTAL PRICE: \$16,890

VALUE: \$25,000

**Please note, sponsored content is to be provided by the Sturbridge Tourism Association on a monthly basis. All content must be provided 2 weeks prior to launch date. A freelance writer can be provided for an additional \$200 per article.*

Page Break



Town of Sturbridge

Economic Development & Tourism Coordinator
Kevin Filchak, M.P.A. *[Signature]*

Date: 8 July 2019
To: Sturbridge Tourist Association
Subject: Cover Memo - RFP

Overview

At this time the STA's RFP for a branding and marketing strategy have been legally posted (A) on the town's website, (B) on the State's website, and (C) shortly in the Telegram and Gazette (T&G). To view the RFP please see the attached pages. The proposals are due to my office no later than 14 August 2019. If there are no delays with the review, I would anticipate a contract start date somewhere around mid-September.

To complete the legal posting, the STA will need to post a legal notice in the paper. I have selected the T&G as it has a larger reach than any local publication in Sturbridge. To run the ad twice, this past Sunday and on the 28th, it will require \$72. The STA had allocated the funds last fiscal year but as this is a new year, it will require a re-allocation.

Suggested Motion

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

MOVE to approve \$72 from Marketing to pay for the STA's legal notices in the Telegram and Gazette.



Sturbridge Tourist Association

A Committee of the Town of Sturbridge

Proposal Submittal Deadline and Submittal Address (mailing or hand delivery):

14 August 2019, by 12:00 pm

Town of Sturbridge
Attn: Kevin Filchak, M.P.A.
301 Main Street
Sturbridge, MA 01566

Sturbridge Tourist Association – Initial Review of Technical Proposals

Week of 14 August 2019

Sturbridge Tourist Association – Ranking of Technical Proposals and Review of Price Proposals

Week of 28 August 2019

Sturbridge Tourist Association – Vote Selecting Proposal

Week of 28 August 2019

Anticipated Contract Start Date

16 September 2019

Contact Information

Kevin Filchak, M.P.A.
(508) 347-2500 ext. 1411
Kfilchak@town.sturbridge.ma.us (any and all questions shall be submitted in writing to this email address)

The Town of Sturbridge reserves the right to reject any or all proposals or portions thereof, to accept a proposal or portion thereof, and to waive any informality.

Contents

Overview	3
Background	3
Project	3
Scope of Service	4
Proposal Submission Procedures	5
Submission Requirements	5
Quality Requirements	6
Comparative Evaluation Criteria	7
Contract Award	8
Attachment 1: Certification of Non-Collusion	9
Attachment 2: Tax Compliance Certification	10
Attachment 3: Proposal Price Sheet	11

Overview

The Sturbridge Tourist Association (STA), represented by the Economic Development and Tourism Coordinator (EDTC), is seeking proposals for the development of a town brand and a three (3) year marketing strategy for the community. The STA will use these to promote Sturbridge to the public at large over the next few years.

Background

Sturbridge is a vibrant community with a diverse business base that benefits from its proximity to several major inter and intra state roadways. The town is home to fourteen hotels, almost fifty restaurants, three breweries and numerous merchants. However what the town is best known for is Old Sturbridge Village which, as the largest living history museum in New England, can and has drawn over 250,000 patrons a year to our community. Beyond the numerous eateries, hotels and the Village, the town is host to a number of burgeoning economic and entertainment sectors. Sturbridge is rapidly becoming a wedding destination with locations such as the Publick House and Hyland Orchard drawing hundreds of couples from across the country to wed in this idyllic New England community. For outdoor enthusiasts the town is building new outdoor trails every year; there are currently over thirty miles of available trails in town. Finally, the town is expanding its outreach efforts by creating local events that foster community spirit and encourage patronage of local businesses. All told Sturbridge hosts many wonderful things to see and experience.

It must be stated that Sturbridge greatly benefits from the revenues brought in by its tourists and visitors. Over the past ten years the town has seen yearly increases in the revenues that it collects from the hotel/motel room tax and the same is seen over the past eight years for our meals tax. In 2018 alone the town collected \$999,165 in hotel/motel tax revenues and \$464,678 in meals taxes. The revenues generated from local tourism are put towards one of three categories. First is the general fund to offset local operational costs. The second is the Betterment Committee which funds public safety, recreation and beautification efforts in town. The third and final way those dollars are spent is through the STA which uses its allocation to support tourist related events in, and marketing of, the community as well as funding the EDTC position.

Project

Over the past several years the town, through the funding the STA receives, has worked to promote itself and its businesses regionally and across the northeast. This has consisted of various multi-media campaigns done with different outlets, at different scales, and for different lengths of time. This leads to several challenges for Sturbridge as it is unclear how much of an impact, if any, these campaigns are having at attracting visitors to town. Furthermore Sturbridge does not have a clear message it is trying to convey beyond encouraging people to visit the community.

Therefore the STA is soliciting proposals to develop (A) a community brand that can be used both internally and by our local and regional partners (both public and private), and (B) a three (3) year marketing strategy that can be used to promote all that Sturbridge can offer its visitors.

The desired services to be provided by the applicant are described in the Scope of Services section of this RFP.

Any questions pertaining to the services required by the Town of Sturbridge or the technical aspects of this RFP should be directed, **in writing**, to Kevin Filchak, M.P.A., Economic Development and Tourism Coordinator at kfilchak@town.sturbridge.ma.us. Questions must be received no later than **7 August 2019 at 4:00pm**. Questions received after that time will not be answered.

The Town of Sturbridge reserves the right to accept or reject any or all proposals if it is deemed to be in the best interest of the Town to do so. The Town of Sturbridge may cancel this RFP in whole or in part, at any time whenever such an act is deemed to be in its best interest.

A **sealed** written proposal, **with separately sealed** technical and price proposals shall be submitted to:

Town of Sturbridge
Attn: Kevin Filchak, M.P.A.
301 Main Street
Sturbridge, MA 01566

Six (6) copies of the proposal must be received no later than 12:00pm on Wednesday, 14 August 2019. The final contract price and fee will be negotiated with the highest ranked proposal.

Scope of Service

The chosen consultant will be expected to develop a community brand and subsequent three (3) year marketing strategy for Sturbridge that will involve the following components:

- A written examination of Sturbridge's current brand and marketing strategy, identifying strengths, weaknesses, opportunities and threats;
 - Written report to be submitted to the STA via the EDTC;
- Develop a profile of the types of Sturbridge visitor (location traveled from, purpose of travel, interests, media preferences, etc.);
 - Written report to be submitted to the STA via the EDTC;
- Conduct research to see how Sturbridge residents and businesses view the community;
 - It must include two community meetings: one for the general public and the other for key stakeholders (businesses, local and regional partners, etc.);
 - Written summary of the meetings to be submitted to the STA via the EDTC;
- Develop a town brand and written brand guidelines and publically present to a joint meeting of the Sturbridge Tourist Association and the Board of Selectmen;
 - Develop a written strategy for how the Town can adopt said brand (may be included as a part of the marketing strategy);

- Develop a written three (3) year marketing strategy for the town to market itself to those visitors profiled;
 - Publically present written strategy to the Sturbridge Tourist Association;
- Provide technical assistance, support and guidance during the initial rollout of the brand and strategy (last two months of the bid contract, anticipated May and June 2020).

Proposal Submission Procedures

1. The submission and review of the proposal shall comply with the purposes and intent of Massachusetts General Law Chapter 30B and all other applicable laws of the Commonwealth.
2. Proposals must be received no later than 14 August 2019 at 12:00pm. An original and six (6) copies must be submitted together with a transmittal letter signed by an authorized official of the firm.
3. The price proposal shall be submitted on the form found at the end of this RFP, in a separate, sealed envelope clearly marked "**Price Proposal – Branding/Marketing.**" Price proposals that are submitted in the same envelopes as the technical (non-price) proposals shall be rejected without further consideration. The price proposal shall include adequate provision for all proposed services.
4. Proposals and/or quotes may be changed or withdrawn prior to but not subsequent to 14 August 2019. Changes or corrections may be made by submission of such changes, in writing and in sealed envelopes, which identifies the submitting party and indicates that it contains a change or correction to the proposal for "**Branding /Marketing.**"

Submission Requirements

The following shall be considered to be the minimum requirements for submission. Each proposal shall contain the following.

- 1) Transmittal letter, no longer than two (2) pages in which the applicant must:
 - a. State your firm's understanding of the services to be performed and the work products to be provided as defined in the Scope of Services section of this RFP.
 - b. Make a positive commitment to perform the work within the required timeframe.

The transmittal letter must be signed by the individual authorized to negotiate and contractually bind the firm.

- 2) Timeline
 - a. Applicant shall provide a clear timeline from start of contract (assume start date of 16 September) through 30 June 2020.

- i. Timeline shall highlight key goals and milestones the applicant plans to achieve during the contract period.

3) Professional experience

- a. Identify staff who will be assigned to this project. Provide resumes (which may be included as appendices) showing relevant past experience, education, training, etc.

4) References:

- a. Applicant must submit a complete list of all jobs performed in the past three (3) years that are similar in size and scope to this project with contact names and telephone numbers. For each municipal contract the applicant was awarded in the last three (3) years, the following shall be provided:
 - i. Client contact name
 - ii. Contact telephone number
 - iii. Contact mailing address
 - iv. Summary of project scope
 - v. Amount of initial contract award
 - vi. Final total project cost
 - vii. Explanation for any difference between initial and final project costs
- b. Town reserves the right to contact the reference provided, and use the information gained from the references as part of the factors used in determination of the contract award.

5) Non Collusion and Tax Compliance Forms contain in this RFP.

Quality Requirements

The following shall be considered minimum standards necessary to perform the scope of work. Acceptable evidence or certification must be provided to demonstrate the minimum standards are being met. Failure to meet the minimum standards as described below shall result in a rejection of the proposal.

- The Applicants' understanding of the Town's needs, the objectives and goals to be achieved and the work involved, and the nature and intent of the proposed public process;
- The quality and depth of the experience and expertise of the individuals who will do the work, and their track record in providing similar successful assistance in other tasks of this nature;
- Appropriateness of the project organization and individual team members; the identity, qualifications, and competence of the individuals (including and sub-consultants) who would actually do and/or be responsible for conducting the project, and the role of each in its completion;

- Quality of the Applicant's technical approach with emphasis on capacity to participate in a productive manner in staff and public meetings, taking into account comments and ideas from members of the public, town officials and staff;
- Appropriateness of the Applicant's Price Proposal, overall cost and the ability to perform the assigned tasks with a time frame and budget acceptable to the Town;
- Overall quality and responsiveness of the proposal;
- Other relevant criteria to be applied uniformly to all respondents.

Comparative Evaluation Criteria

Each Applicant must indicate if and how they meet the following Comparative Evaluation Criteria. Responses to each of these criteria will be judged in three (3) rating categories: Highly Advantageous, Advantageous and Not Advantageous.

A composite rating for each proposal will be based on the rating of each of the following Comparative Evaluation Criteria.

1) Proposed Methodology

- a. Highly Advantageous – The plan of services proposes a detailed, logical, and highly efficient scheme for producing a complete report that addresses all of the project objectives stated in the RFP.
- b. Advantageous – The plan of services proposes a credible scheme for producing a complete report that addresses most of the required issues.
- c. Not Advantageous – The plan of services is not sufficiently detailed to fully evaluate, or the plan does not contain all the components necessary to produce a complete report that addresses all of the required issues.

2) Social Media

- a. Highly Advantageous: Applicant has greater than five years of experience developing marketing strategies that include social media components.
- b. Advantageous: Applicant has between five and three years of experience developing marketing strategies that include social media components.
- c. Not Advantageous: Applicant has less than two years of experience developing marketing strategies that include social media components.

3) Research Capabilities

- a. Highly Advantageous: Applicant has the capability to research and develop understandings of the Sturbridge tourist population using data sources that will identify groups nationally.
- b. Advantageous: Applicant has the capability to research and develop understandings of the Sturbridge tourist population using data sources that will identify groups in at least the New York and New England regions.
- c. Not Advantageous: Applicant has the capability to research and develop understandings of the Sturbridge tourist population using data sources that will identify groups in the Tri-State area only.

Contract Award

The Town of Sturbridge will review the proposals and then make an overall evaluation, rating each proposal as either highly advantageous, advantageous or not advantageous. Those proposals failing to meet the Quality Requirements shall be deemed as non-responsive and shall be rejected.

The Town will determine the most advantageous proposal from a responsible and responsive proposer, taking into consideration the applicant's experience, staff capacity, references, proposed plan of services, or any other evaluation criteria set forth in the RFP as well as the proposal price.

As previously noted, the Town reserves the right to reject any proposal that, in its sole judgment, fails to meet the minimum requirements of this RFP; that is incomplete, conditional, or obscure; that contains additions or irregularities; in which errors occur, or if it is deemed to be in the best interests of the Town to do so.

The Town reserves the right to waive minor discrepancies or permit a proposer to clarify such discrepancies and so conduct discussions with all qualified proposers in any manner necessary to serve the best interest of the Town.

This contract is intended to be awarded to the selected applicant the week of 28 August 2019 and the scope of services detailed in this RFP shall be completed by 30 June 2020.

Proposals must be received prior to 12pm on Wednesday, 14 August 2019. **Faxed or electronic copies shall not be considered.**

Proposal should be mailed or delivered too:

Town of Sturbridge
Attn: Kevin Filchak, M.P.A.
301 Main Street
Sturbridge, MA 01566

Questions concerning this RFP shall be made, in writing, to the EDTC at kfilchak@town.sturbridge.ma.us.

Attachment 1: Certification of Non-Collusion

The undersigned certified under penalties of perjury that this proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word 'person' shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity or group of individuals.

Signature of Individual Submitting Proposal

Name of Business

Date

Attachment 2: Tax Compliance Certification

Pursuant to M.G.L. c.62C, §49A, I certify under the penalties of perjury that to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Signature of Individual or Corporate Name

Social Security Number or Federal Identification
Number

By
Corporate Officer (if applicable)

Date

Attachment 3: Proposal Price Sheet

Name of Business			
Service/Item/Etc.	Estimated Staff Hours	Rate	Total
Total			

Page _____ of _____.

If more rows are needed please add a duplicate page and

Order Confirmation

<u>Ad Order Number</u> 0000406266	<u>Customer</u> STURBRIDGE TOWN ADMINISTRATION	<u>Payor Customer</u> STURBRIDGE TOWN ADMINI	<u>PO Number</u>
<u>Sales Rep.</u> rlorditch	<u>Customer Account</u> 10009017	<u>Payor Account</u> 10009017	<u>Ordered By</u> Kevin Filchak
<u>Order Taker</u> rlorditch	<u>Customer Address</u> 308 MAIN ST, , STURBRIDGE MA 01566 USA	<u>Payor Address</u> 308 MAIN ST, , STURBRIDGE MA 01566 USA	<u>Customer Fax</u>
<u>Order Source</u> Rep	<u>Customer Phone</u> 508-347-2500 508-347-2500	<u>Payor Phone</u> 508-347-2500 508-347-2500	<u>Customer EMail</u>
			<u>Special Pricing</u> None

<u>Invoice Text</u>	<u>Ad Order Notes</u>	<u>Materials</u>	<u>Promo Type</u>	<u>Blind Box</u>
<u>Tear Sheets</u> 0	<u>Net Amount</u> \$72.00	<u>Tax Amount</u> \$0.00	<u>Total Amount</u> \$72.00	<u>Payment Method</u>
				<u>Payment Amount</u> \$0.00
				<u>Amount Due</u> \$72.00

<u>Ad Number</u> 0000406266-01	<u>Ad Type</u> 1Legal	<u>Ad Size</u> : 1.0 X 1.5000"	<u>Color</u> <NONE>	<u>Production Method</u> AdBooker	<u>Production Notes</u>
<u>External Ad Number</u>	<u>Ad Attributes</u>	<u>Ad Released</u> No	<u>Pick Up</u>	<u>Affidavits</u> 0	<u>Proofs</u> 0

<u>Product Information</u>	<u>Placement/Classification</u>	<u>Run Dates</u>	<u># Inserts</u>	<u>Cost</u>
<u>Run Schedule Invoice Text</u>	<u>Sort Text</u>			
1WTG::Full Run	1Legal Notices - CLS	7/7/2019, 7/28/2019	2	\$72.00
Proposals to develop community brand for Stur	PROPOSALS TO DEVELOP COMMUNITY BR			
1Legals P2W::Full Run	1Legal Notices - CLS	7/7/2019, 7/8/2019, 7/9/2019, 7/10/2019, 7/11/2019, 7/12/2019, 7/13/2019, 7/14/2019, 7/15/2019, 7/16/2019, 7/17/2019, 7/18/2019, 7/19/2019, 7/20/2019, 7/21/2019, 7/22/2019, 7/23/2019, 7/24/2019, 7/25/2019, 7/26/2019, 7/27/2019, 7/28/2019, 7/29/2019, 7/30/	30	\$0.00
Proposals to develop community brand for Stur	PROPOSALS TO DEVELOP COMMUNITY BR			

The Sturbridge Tourist Association is soliciting proposals from qualified vendors to develop a community brand for Sturbridge and a three (3) year marketing strategy. All details regarding scope of service, qualifications and the review process are included in the RFP which can be accessed at: <https://www.town.sturbridge.ma.us/bids>. It can also be access on the State's Central Register and at www.commbuys.com. All proposals are to be submitted in sealed envelopes to the Economic Development and Tourism Coordinator at 301 Main Street, no later than 12:00pm on Wednesday, 14 August 2019. Questions related to the proposals shall be submitted, in writing, to kfilchak@town.sturbridge.ma.us no later than 7 August 2019 at 4:00pm.

Page Break



Town of Sturbridge

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A. 

Date: 2 July 2019
To: Jeff Bridges, Town Administrator
CC: Sturbridge Tourist Association; Jean Bubon, Town Planner
Subject: EDTC Monthly Update – June 2019

Below is the summary of my work during June 2019. If you have questions on any of the items listed below please feel free to contact me.

Annual Town Meeting

On 3 June I attended the Annual Town Meeting at Tantasqua Regional High School. Apart from the STA's budget, I had no other business before the town that evening.

CMMPO Advisory Committee

On 26 June I attended the monthly meeting of the Advisory Committee. At that meeting it was voted to endorse the Long Range Transportation Plan (LRTP) as presented. The group also review CMRPC staff goals, regional transportation modeling and the Worcester Region Transportation Authority (WRTA). Finally it was noted that the latest round of Mass Works grant funding is now open for applications.

Commonwealth Community Compact (CCC)

Attachment: CCC Cover Letter & Contract

The town has been awarded \$24,850 for the purpose of an economic development self-assessment. This will also provide for the development of an economic development strategy. I've drafted a cover memo for the Board of Selectmen to allow for the adoption of the contract. Assuming the Board of Selectmen sign the contract, I shall then begin to solicit quotes and identify a vendor to being the project.

Discover Central MA

Attachment: DCM Campaign Overview

Starting with the new fiscal year, the STA will begin a yearlong marketing campaign with Discover Central MA (DCM). This partnership was entered into as the STA will primarily be focused on its brand and marketing development over the next year (see RFP below). Therefore by having DCM take control of its marketing for FY20, the STA can (A) save money and (B) confidently shift its focus towards marketing and brand development.

I have attached a copy of DCM's campaign for your reference.

Farmers Market

The Sturbridge Farmers Market has been in operation every Sunday since 9 June. To my knowledge there have been few issues with the exception of some vendors dropping out of the market. Even with the

vendors who have left, the market still has approximately 40 vendors participating, with more applying to participate, which for a market in its second year is impressive.

At this time I am working to reduce my commitment to the Farmers Market and the group is now meeting without me. I feel that (A) they are a stable group and able to handle most issues that arise without staff involvement, and (B) that my focus should return to economic development especially given some of the projects that are forthcoming. I will be submitting a formal recommendation for how the Farmers Market could continue with further reductions in staff involvement in the coming weeks.

Mass Development

I am currently planning to meet with officials from MassDevelopment the first week of July to (A) better educate myself on the services they provide and (B) to learn how their organization may be able to help some upcoming local projects. I will provide a follow up report in July.

Newsletters

I have prepared both the business and events newsletters for July. To view please follow the links below:

www.town.sturbridge.ma.us/businesses/news/business-newsletter-july-2019

www.town.sturbridge.ma.us/visitors/news/event-newsletter-july-2019

Request for Proposal

Attachment: RFP – Branding and Marketing

At this time the RFP for the town's branding and marketing strategy has been developed. I will be speaking with Butch Jackson¹ in the coming days to ensure the RFP is posted without incident and in compliance with Chapter 30B. I shall also put and advert in the Telegram and Gazette as per Chapter 30B.

Sign Inventory

Since my last report, I have completed my inventory of commercial and industrial signs in Sturbridge. Now I shall coordinate with the Planning Department to begin checking business signs against their approvals to ensure compliance. It will be my recommendation to the Design Review Committee that in the event a sign is not in compliance that the town works with that business to bring the sign into compliance. I do feel that going directly to enforcement or cease and desist orders would be met with far more resistance and opposition than is necessary.

Special Events Committee

On 12 June the SEC met and discussed the Farmers Market, a proposed road race and a pre-concert event. Staff emphasized to the group the logistical challenges for the road race and pre-concert events and both were postponed until such a time as proper planning could be implemented.

Sturbridge Tourist Association

Attachment: STA Draft Minutes – 06/12/2019

The Sturbridge Tourist Association met on 12 June at which time they reviewed applications from the Chamber of Commerce for their annual GeoFest and Harvest Fest events. In both cases, the STA

¹ As I understand it, Mr. Jackson is the only procurement certified employee in the town and therefore I am coordinating with him to ensure compliance.

reduced their usual allotment to the Chamber, citing lack of data and questioning the overall 'tourism' impact.

As the STA wraps up its fiscal year, the STA budget was nearly all spent with only \$625.69 remaining in Community Support and \$795.83 in marketing, out of original totals of \$36,024 and \$109,332 respectively. It was a positive year for the STA and the nearly depleted budgets reflect that positive impact they were able to bring.

TIF – Applicant Meeting

On 12 June we met with members of the Massachusetts Office of Business Development (MOBD) and Sturbridge Metallurgical Services (SMS) to discuss their proposed expansion. Following that discussion I put SMS in direct contact with officials at MassDevelopment for further conversations about their proposed expansion and to see if there are opportunities for partnership there.

As referenced above I shall meet with MassDevelopment in July; any information I learn about a potential partnership between them and SMS I shall put in my next report.

TIF – Policy and Application Development

Attachment: TIF Policy – Proposed Revisions, TIF Application

With several potential TIF projects forthcoming, I have been working to update the town's TIF policy and develop a local TIF application. Attached you can find the drafts for both that have been developed over the past month.

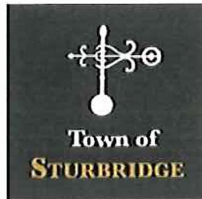
Please provide any feedback / proposed revisions for these documents at your earliest convenience.

Visitor Guides

On 19 June the STA's annual visitor guides were delivered. At this time the printer has distributed copies across south-central Massachusetts and northeastern Connecticut. There are six and a half boxes in the Center Office Building. There is also a digital version available online which can be accessed by following the link below:

www.town.sturbridge.ma.us/sites/sturbridgema/files/uploads/sturbridge_area_guide_2019_web.pdf

Page Break



Town of Sturbridge

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A. 

Date: 07/01/2019
To: Board of Selectmen; Jeff Bridges, Town Administrator
Subject: Commonwealth Community Compact – Contract Award

Overview

The Town of Sturbridge has been awarded a \$24,850 grant under the Commonwealth Community Compact (CCC) to conduct an economic development self-assessment and to develop an economic development strategy for the town. The final report that is produced will then be used by staff as the baseline for revising the economic development chapter of the town's 2011 Master Plan. The scope of this grant will have the chosen vendor identify the strengths, weaknesses and areas of opportunity of the Sturbridge economy by:

- Hosting community meetings
- Speaking with relevant stakeholders¹
- Conducting surveys
- Conducting a SWOT assessment of the current standing of the town's economy
- Analyzing the competitiveness of Sturbridge against five (5) like communities
- Developing and reporting on above findings along with an economic development strategy

This grant provides an excellent opportunity for Sturbridge to conduct a thorough assessment of our local economy, our business health and most importantly our relationship between the public and private sectors. This report will be invaluable as the town continues its efforts to support the business community and foster new and exciting growth in Sturbridge.

Next Steps

Once the contract is signed, the Economic Development and Tourism Coordinator shall re-solicit quotes² for the project and will select the vendor with the best price proposal (as per MGL Chapter 30B). Following the selection of the vendor, work shall begin at the earliest possible date and shall conclude no later than 30 June 2020.

Suggested Motion

If the members of the Board are in agreement, the following motion would be in order:

MOVE to authorize the Chair of the Board of Selectmen to sign the contract for the Commonwealth Community Compact for the Economic Development Self-Assessment of Sturbridge.

¹ May be combined with community meetings or surveys.

² Originally the SWOT analysis and economic development strategy were requested under two separate CCC grants, however the Commonwealth combined the grant requests hence the need to resolicit quotes.

Page
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Tax Increment Financing Application

Sturbridge's Local Application for Local Credits under the Commonwealth's
Economic Development Incentives Program

Overview

The Town of Sturbridge supports the growth and development of new and established businesses in our community. The Town has several tools to encourage economic development, but one of its most powerful is the tax incentive. This is an authority that is granted through Massachusetts General Law (M.G.L.) Chapter 40, §59 and allows the Town to provide tax abatements for projects that meet certain criteria. The town has also adopted its own specific policy regarding tax incentives and encourages potential applicants to view the policy by going to:

www.town.sturbridge.ma.us/businesses/pages/tax-incentives.

Under Chapter 40 the town can provide this type of incentive in one of two forms: (1) a Special Tax Assessment or STA, or (2) a Tax Increment Financing or TIF. Of the two, Sturbridge's preference is to offer only TIF incentives unless there are unique circumstances.¹ In brief, a TIF provides businesses with a tax abatement on their local property tax for a given parcel; **the abatement is only for the difference in valuation between the pre-investment and the post-investment valuation**. The business is expected to pay the full amount of the pre-investment property tax valuation. The abatement can range in percentage from as little as five (5) percent up to one-hundred (100) percent of the valuation and can last for no less than five (5) years and no more than twenty (20) years. Over the course of the TIF, the percentage of the tax abatement decreases from its highest amount and the applicant will be required to pay more of the full valuation. At the termination of the TIF, the business is responsible for the full amount of the valuation.

In order for the Town of Sturbridge to accept and review a TIF request, the Applicant must first complete a letter of intent and submit that to the Town Administrator, the Economic Development and Tourism Coordinator, the Board of Selectmen and the Regional Director of the Massachusetts Office of Business Development (MOBD). After submission of the letter the applicant must then submit this application form to the Sturbridge TIF Review Committee (TRC) for review and comment via the Economic Development and Tourism Coordinator (EDTC). It is strongly recommended that the Applicant speak with the town's EDTC prior to submitting the application. Any questions can be directed to the EDTC using the information below (it is also found on the footer of each page):

Kevin Filchak, M.P.A.
Economic Development and Tourism Coordinator
508.347.2500 ext. 1411
kfilchak@town.sturbridge.ma.us

We thank you for your interests in Sturbridge. It is our goal to help you along in this process, please feel free to contact us with any questions or comments.

¹ For a more detailed description of the town's tax incentive preferences, please consult its Tax Incentive Policies.

Sturbridge – Tax Increment Financing Application

Please answer each question (found in grey boxes) completely and with as much detail as possible (answer in white boxes). Applications without sufficient detail will be returned to the Applicant for revisions.

Part 1: Contact Information

Name of Business

Business Address

Mailing Address

Business Website

Business Phone Number

Business Owner(s)

General Manager(s) (if different)

Primary Contact and Job Title

Primary Contact Phone Number

Primary Contact Email

Is the business classified by the MA Department of Revenue as a Manufacturer?

Please provide a brief description and history of the company

Have you spoken with the Economic Development and Tourism Coordinator and/or the Massachusetts Office of Business Development about your proposed project? If so when?

Part Two: Parcel Information

Project Location (either address or parcel ID)

Do you own the property in question? Are you planning to lease / rent it? (please indicate if you are currently in negotiations and /or have agreements to purchase the property)

If leasing / renting, identify the developer / landlord and state who will be the taxpayer of record for the purpose of paying local real estate taxes

Current Valuation of the Property (please provide only the monetary amount)

\$

Proposed Monetary Investment in Property (please provide only the monetary amount)

\$

Estimated Valuation of Property after Investment (please provide only the monetary amount)

\$

Current Number of Jobs (if applicable)

Full Time:

Part Time:

Seasonal:

Anticipated Number of Jobs Created; NOTE: construction jobs related to the project DO NOT COUNT

Full Time:

Part Time:

Seasonal:

For any full time permanent jobs that would be created, please fill in the chart below

Category of Job	# of Jobs	Average Annual Salary	Healthcare Benefits? (Y/N)	Pension, IRA and/or 401K? (Y/N)
Management				
Professional				

Skilled Labor				
Unskilled Labor				
Other				

Please provide any other details regarding the jobs created through the investment you feel are important for the town to know.

Part 3: Project Information

In detail please describe your proposed investment in the property.

In detail, please describe why your business is requesting a TIF from Sturbridge. Be sure to explain the specific needs of your business and provide all available documentation and/or data to support your request.

In detail, please describe how this investment supports the goals of Sturbridge with respect to economic development.

Do you plan to use Sturbridge based contractors and suppliers for this project? If not will you use contractors based in southern-Worcester county? Please list names and locations of contractors/suppliers already identified.

What is the current state of your project? (i.e. conceptual, design, permitting, construction, etc.) If you have presented to local Boards or Committees, which ones and what were their determinations and/or recommendations?

Have you contacted the Massachusetts Office of Business Development (MOBD) concerning your request? Will you be requesting state tax credits as well?

Have you contacted MassDevelopment for support through any of their programs that may support this project? If so when and what was the outcome of those discussions?

Please describe for the TIF Review Committee what your preferred TIF agreement would look like. Please indicate (1) the preferred duration of the agreement (between five and twenty years), and (2) the proposed exemption amount for each year (i.e. Year 1 – 75%, Year 2 – 50%, Year 3 – 25%...)

In the event the town does not choose to provide your project with a TIF, will you still move forward with the project in Sturbridge?

If there is anything else that you feel is important for the town to be aware of as it reviews your application, please detail that here.

Thank you for completing this application. **Please save this application as a PDF and submit via email** to the Economic Development and Tourism Coordinator at kfilchak@town.sturbridge.ma.us at your earliest convenience. Our review will begin shortly after the application is received.



Tax Increment Financing Policy

Sturbridge Policy for Tax Increment Financing (TIF) Projects under the Commonwealth's Economic Development Incentives Program (EDIP)

Comment [KF1]: Title changed to show preference towards TIF projects.

The Town of Sturbridge supports the growth and development of new and established businesses in our community. The Town has several tools to encourage economic development, but one of its most powerful is Tax Increment Financing or TIF. This is an authority that is granted through Massachusetts General Law (M.G.L.) Chapter 40, Section 59 and allows the Town to provide tax incentives through property tax abatements for projects that meet certain criteria.

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Below are the policies adopted by the Sturbridge Board of Selectmen regarding TIF projects on **INSERT DATE**.

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Definitions

EACC – Economic Assistance Coordinating Council: A State organization made up of members from the public and private sectors who review all EDIP applications for the Commonwealth.

EDIP – Economic Development Incentive Program: The State's tax incentive program that includes TIFs.

Deleted: local only incentives

EDTC – Economic Development and Tourism Coordinator: The EDTC oversees economic development and tourism related initiatives in Sturbridge. The EDTC is the lead local staff contact for Sturbridge regarding State/local incentive projects.

MOBD – Massachusetts Office of Business Development: The office at the State level tasked with overseeing the Economic Development Incentive Program. They are part of the Office of Housing and Economic Development. Any applicant will work with the Regional Director of MOBD based out of Worcester.

Deleted: Director of the Regional MOBD Office

TRC – TIF Review Committee: This committee reviews all TIF applications in Sturbridge and provides recommendations to the Board of Selectmen. If the project is supported by the Board the TRC will negotiate with the applicant, on behalf of the Board of Selectmen, to develop a payment schedule for the consideration of the Board and the voters at Town Meeting. It is made up of the Town Administrator, Town Planner, Town Assessor, Economic Development and Tourism Coordinator and one member of the Board of Selectmen appointed on a case by case basis from among its membership.

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Tax Credit Programs – State Issued

The Commonwealth of Massachusetts has developed a tax incentive program through the Massachusetts Office of Business Development (MOBD). According to their website, "[t]he Economic Development Incentive Program (EDIP) is a tax incentive program designed to foster job creation and stimulate business growth throughout the Commonwealth. Participating companies may receive State and local tax incentives in exchange for job creation, manufacturing job retention and provide investment commitments." The EDIP is offered for five (5) types of projects:

1. Expansion Projects (EP)
2. Enhanced Expansion Projects (EEP)
3. Manufacturing Retention & Job Growth Projects (MRP)
4. Job Creation Projects (JCP)
5. Local Only Incentive Projects (see next section)

The first four credits are issued for taxes that a business would pay to the Commonwealth. Therefore the review for those credits is done by MOBD and the EACC. For more information on the EDIP and for information on eligibility please contact either the MOBD Regional Director or the EDTC in Sturbridge.

Tax Incentive Programs – Local Options

The fifth credit option offered through the EDIP is designed for the municipality to manage and oversee. Under M.G.L., Chapter 40, Section 59 municipalities are allowed to enter into tax agreements, known as Local Only Incentive Projects, with existing or prospective businesses making a significant investment in the community. Please note that a business can seek both state and local credits concurrently, however this does not change the local process or local considerations on the matter. The issuance of these local incentives lies at the discretion of the municipality, though the EACC holds final approval over any incentive issued by a municipality. A local only incentive applies *only* to the property taxes paid to the municipality. These agreements come in two forms: 1) Special Tax Assessment or STA, and (2) Tax Increment Financing or TIF.

Special Tax Assessments:

An STA exempts a percentage of the total property tax assessment on the real property value of the parcel. The agreement is made for a period of no less than five (5) years. There is a strict formula for how the assessment must be issued during those first five (5) years.

Year of Agreement	Tax Assessment
Year 1	100% tax abatement on the real property of the parcel
Year 2	75-100% tax abatement on the real property of the parcel
Year 3	50-100% tax abatement on the real property of the parcel
Year 4	20-100% tax abatement on the real property of the parcel
Year 5 – onward (as negotiated)	0-100% tax abatement on the real property of the parcel

The abatement percentage is negotiated between the Town and the applicant. The total yearly totals for taxes owed by the applicant will be determined by the Town Assessor based on the percentages negotiated.

Tax Increment Financing:

A TIF provides a business with a tax abatement on the property tax for a given parcel. The abatement is *only for the difference in valuation between the pre-investment and the post-investment in valuation*. The business is expected to pay the full amount of the pre-investment property tax valuation as that amount is not covered under the TIF agreement. The abatement can range in percentage from as little as five (5) percent up to one-hundred (100) percent of the valuation, and can last for no less than five (5) years and no more than twenty (20) years. Over the course of the TIF, the percentage of the tax abatement decreases from its highest amount and the applicant will be required to pay more of the full valuation. At the termination of the TIF, the business is responsible for the full amount of the valuation.

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Deleted: The Town of Sturbridge does play a role in the application process by certifying the project and is involved in the discussions as well, especially if the project is also seeking local credits (see local tax credits below below).

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Comment [KF2]: This is the one section that may change. Awaiting response from MOBD with updated information.

Regardless, its addition/deletion has limited impact on the rest of the policy. Once available I shall add/delete as appropriate.

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To determine a given year's tax obligation for an organization receiving a TIF, the Sturbridge Assessor will calculate the TIF exemption based on a number of factors.¹ The Assessor will first establish the assessed value of the property in the year prior to the enactment of the TIF exemption. Following this, there is an exact formula that the Assessor will use to determine the proper amount to tax in a given year. The formula for determining the exemption amount in a given year is as follows:

$$\text{Market Value} - (\text{Base Value} * \text{Inflation Rate}) * \text{Exemption \%} = \text{Exemption Amount}$$

This provides the amount that is exempted by the TIF. That amount is then subtracted from that year's valuation. The base valuation is the amount that the parcel in question was valued at *before* the tax exemptions are enacted. The exemption percentage is based upon the negotiated rate between the Town and the business operator. The inflation rate is a combination of a number of factors seen in the fractional formula below:

$$\frac{(\text{Current fiscal year total assessed value of all commercial/industrial properties at their full and fair cash value, minus other TIF parcels}) - (\text{Current year's Proposition 2 1/2 Tax base growth adjustment attributed to commercial/industrial real estate})}{\text{Prior fiscal years assessed value of parcels listed in numerator}}$$

Prior fiscal years assessed value of parcels listed in numerator

Furthermore, each year's inflation rates are multiplied together each year the TIF is active. For example, year three's inflation rate is the product of years one, two and three's inflation rates.

Only the Town's Assessor can determine a given year's tax figures for parcels that are covered by a TIF.

Regardless of which approach is chosen, the business will be required to provide yearly reports on their project to the Town and the State. The information to be provided in those annual reports shall be detailed in any negotiated agreement with the town.

Sturbridge Incentive Preference

Of the two types of local incentives, the Town of Sturbridge chooses to offer only Tax Increment Financing incentives rather than Special Tax Assessment incentives, unless there is a unique circumstance and if it is in the best interests of Sturbridge to do so.

Criteria for Projects Seeking Local Tax Incentives

For all TIF projects, the Town follows all rules and regulations set forth under the Commonwealth's incentive program. In addition to those, the Town has decided to develop additional criteria for consideration in its review of all potential Tax incentive projects. The Town's will favor TIF applications that meet the following criteria. Note: these are listed below in no particular order:

¹ The formula used by the Sturbridge Assessor comes from the Commonwealth of Massachusetts, Department of Revenue, Division of Local Services, Property Tax Bureau." Informational Guideline Release No. 94-201." Published February, 1994. The information detailed above comes from this document.

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- The project supports the creation of permanent or part-time employment opportunities that are new to the community. [Please note that the Town does not count construction jobs related to the project build in the total as those jobs are temporary.]
- The project is, at the time of the application's submission, not currently attempting to obtain a building permit.²
- The project has the potential to increase the revenues collected through the Town's Hotel and Motel Tax and/or Meals Tax.
- The project is located on one of the Town's priority development sites.
- Applicant highlights their demonstrated need for the local aid associated with the project.
- The project would occupy a previously vacant building or parcel that had been over seventy-five (75) percent vacant for at least two (2) years.
- The project encourages the types of business growth that are detailed in the Town's most recent iteration of its Master Plan.
- The proposed investment/reinvestment has the potential to increase the number of visitors to Sturbridge.
- The proposed project provides other demonstrated benefits to the Town not listed above.

The Town does understand that each project is unique and must be examined on its own merits. Furthermore the Town recognizes that not every project will be able to meet all of the above criteria based on the nature of the business. As such the Board of Selectmen shall use their judgement in the review of a TIF application against the above criteria as they deem appropriate.

Approval Process

The approval of Tax incentive project requires the review and approval of both local and State officials. Below is a general timeline for the approval of a TIF project. Please note that each application is unique and therefore may deviate from what is listed below.

- Applicant meets with the EDTC to discuss the project and associated requirements. If state credits are being sought, the applicant should also speak with the MOBD Regional Director as well.
- Applicant submits to the MOBD Regional Director, the EDTC, the Town Administrator and the Board of Selectmen a Letter of Intent stating their interest to apply for State and Local credits under the Economic Development Incentive Program (EDIP).
- Applicant completes the Sturbridge Tax Increment Financing Application and submits to the TIF Review Committee.

² Please see the next section "Approval Process" for more details regarding this criterion.

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Comment [KF3]: Needs to be developed.

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- The TRC reviews the application and drafts a recommendation to the Board of Selectmen concerning the project. In order for the TRC to rule either in the affirmative or negative, a *majority of its membership* must concur on the opinion. The TRC will report to the Board their recommended course of action and the reasoning for their decision.
- The applicant presents their project to the Board of Selectmen and answers questions related to the project. Selectmen will vote to support or reject the project. *If rejected there is no appeal.* The BoS then authorizes the TRC to negotiate a draft agreement with the applicant for consideration on the next available Town Meeting Warrant Article.
- Applicant submits the state's EDIP Application to the MOBD Regional Director (mailed or emailed directly) and to the Town, care of the EDTC. They may also apply for state credits at this time.
- Applicant negotiates with TRC for the local incentive abatement percentages and duration.
- The project and the negotiated agreement goes before the Board of Selectmen and Finance Committee for review. Said committees will then vote to support or oppose the project on the Town Meeting Warrant Article.
- Project is placed on next available Town Meeting Warrant Article.
- Project goes before Sturbridge voters at Town Meeting who vote to support or reject the project. *If rejected there is no appeal.*
- Applicant and Town attend the quarterly EACC meeting. EACC reviews and votes to support or reject the project. *If rejected there is no appeal.*
- Applicant provides yearly updates to EACC and Town regarding the project for the duration of the TIF.

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In general, the application should take approximately four (4) to six (6) months from the initial application to approval by the EACC. However it is strongly recommended that any TIF be timed to include a Town Meeting as local voter approval is required to receive approval from the EACC.³

Finally the application should be submitted at the beginning of the permitting process. The Town will not review projects that have or are attempting to receive a building permit.⁴ It is imperative that business owners who are interested in receiving a TIF speak with the EDTC as soon as possible in order to begin the process in a timely manner.

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³ Please note that the only guaranteed Town Meeting is held in the first Monday in June. Historically others do occur throughout the year (commonly in fall), however there is nothing stating that a Special Town Meeting will occur.

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⁴ A building permit can only be received after all other Town permitting has been approved. Therefore if an application is at any stage prior to building permit, they may apply for a TIF.

Unique Cases

The Board of Selectmen recognizes and encourages the uniqueness of businesses. In that vein it recognizes that not all TIF applications are identical and therefore may exercise its judgement in their use and application of the above policy as they deem appropriate. In those specific cases the Board of Selectmen shall still follow the spirit of this policy.

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Project Support and Guidance

The town of Sturbridge is here to assist new and existing businesses navigate state and local financing options. For general assistance on these projects, please consult with the town's Economic Development and Tourism Coordinator. They can provide information and answer specific questions related to your application. It is *strongly* encouraged that prior to submitting a Letter of Intent, an applicant has a meeting with the EDTC and the Regional Director for MOBD to discuss the project.

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