



Explore Sisters: Strategic Plan

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Sisters

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This report represents original student work and recommendations prepared by students in the University of Oregon's Sustainable City Year Program for the City of Sisters. Text and images contained in this report may not be used without permission from the University of Oregon.

About SCI

The Sustainable Cities Institute (SCI) is an applied think tank focusing on sustainability and cities through applied research, teaching, and community partnerships. We work across disciplines that match the complexity of cities to address sustainability challenges, from regional planning to building design and from enhancing engagement of diverse communities to understanding the impacts on municipal budgets from disruptive technologies and many issues in between.

SCI focuses on sustainability-based research and teaching opportunities through two primary efforts:

1. Our Sustainable City Year Program (SCYP), a massively scaled university-community partnership program that matches the resources of the University with one Oregon community each year to help advance that community's sustainability goals; and

2. Our Urbanism Next Center, which focuses on how autonomous vehicles, e-commerce, and the sharing economy will impact the form and function of cities.

In all cases, we share our expertise and experiences with scholars, policymakers, community leaders, and project partners. We further extend our impact via an annual Expert-in-Residence Program, SCI China visiting scholars program, study abroad course on redesigning cities for people on bicycle, and through our co-leadership of the Educational Partnerships for Innovation in Communities Network (EPIC-N), which is transferring SCYP to universities and communities across the globe. Our work connects student passion, faculty experience, and community needs to produce innovative, tangible solutions for the creation of a sustainable society.

About SCYP

The Sustainable City Year Program (SCYP) is a year-long partnership between SCI and a partner in Oregon, in which students and faculty in courses from across the university collaborate with a public entity on sustainability and livability projects. SCYP faculty and students work in collaboration with staff from the partner agency through a variety of studio projects and service-

learning courses to provide students with real-world projects to investigate. Students bring energy, enthusiasm, and innovative approaches to difficult, persistent problems. SCYP's primary value derives from collaborations that result in on-the-ground impact and expanded conversations for a community ready to transition to a more sustainable and livable future.

About City of Sisters

Located at the foot of the Cascades mountains in central Oregon, the city of Sisters offers beautiful natural surroundings, a variety of year-round recreational opportunities, and a vibrant local economy.

Sisters was a place where Paiute, Warm Springs, and Wasco peoples stopped during movement across central Oregon. The name of Whychus Creek, a tributary that runs through town and joins the Deschutes River just beyond the city limits, comes from a Sahaptin phrase, "The Place We Cross the Water." Sisters became a way station and became accessible once roads were constructed through McKenzie Pass and Santiam Pass in the Cascade Mountain Range. In the early twentieth century, Sisters was a center for sheep and cattle ranching and later became a focus for the timber industry, with numerous mills surrounding Sisters and even a mill in town.

The townsite of Sisters was platted in 1901, although the town was not incorporated until 1946. The original townsite for the City was six blocks in size, circumscribed by Adams Street on the north, Larch Street on the east, Cascade Street on the south, and Elm Street on the west, which represents the downtown core of the City of Sisters north of Cascade Avenue today.

With Sisters' strategic location as the "Gateway to the Cascades," major industries have included sheepherding, cattle ranching, timber production, and provision of goods and services for travelers. Sisters has capitalized on accommodating visitors, initially

servicing the transient tradesmen that traveled through central Oregon.

Many people know Sisters for its Western frontier design theme that derives architectural inspiration from the town's beginnings in the 1880s. However, Sisters did not always look this way. When Brooks Resources developed Black Butte Ranch, a resort community eight miles west of Sisters, it envisioned a plan to help the Sisters downtown core reinvent itself. In coordination with the City Council, Brooks Resources offered loans, forgivable after 10 years, to businesses who built with a Western theme. From this idea, the City developed a strong identity that helped attract people to Sisters as a tourism destination. The economy strengthened, the population returned, and in 1992, the Sisters School District re-opened its high school after 25 years of sending students to Redmond High School.

The 2021 population in Sisters totaled 3,475 residents, a result of the population doubling every decade since the 1990s. Sisters continues to serve as a gateway to the central Oregon region while also being known for local attractions including Hoodoo Ski Area and prominent community events such as the Sisters Rodeo, the Sisters Outdoor Quilt Show, and the Sisters Folk Festival.

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2023



UNIVERSITY OF
OREGON

School of Planning, Public
Policy and Management



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Consulting Team

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This project was initiated by the partnership between the University of Oregon's School of Planning, Public Policy, and Management and the Sustainable City Year Program. The program partners communities in Oregon with the university students and faculty to assist in local plans and projects on a variety of project topics.

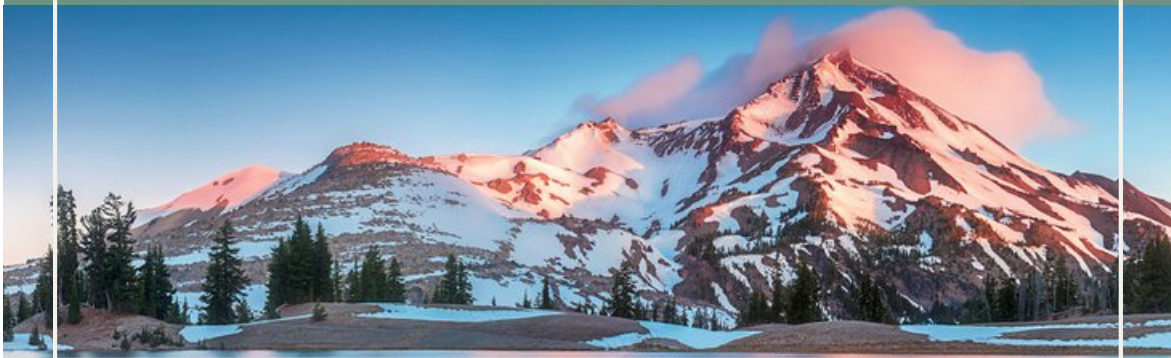
Plan Overview

This product is designed for Explore Sisters as a client of the University of Oregon's Nonprofit Management Consultancy capstone course in Spring of 2023 in partnership with the University of Oregon's Sustainable Cities Year Program. A team of four graduate students consulted for ten weeks by interviewing similar destination management organizations (DMO), facilitating a board visioning workshop, conducting literature reviews and analyzing relevant data to provide customized recommendations and resources to best develop and sustain the organization.

Explore Sisters was established in 2022 to promote local tourism and recreation opportunities in Sisters. With its recent inception, building a solid foundation to promote long-term sustainability will be key to the organization's success.

This document contains three strategic goals and subsequent action steps for Explore Sisters to consider when presenting their strategic plan to the city. Given its recent establishment, the steps provided are scaled to the capacity that Explore Sisters currently possesses.

"Building a solid foundation to promote long-term sustainability will be key to the organization's success"



Explore Sisters' Overview

Organization Purpose

Explore Sisters strives to increase community livability and economic vitality through the development of intelligent management and stewardship of the Sisters' local community, natural and cultural resources, tourism, and outdoor recreation.

Included in their Articles of Incorporation, Explore Sisters also strives to advance tourism, outdoor recreation, sustainability, and focus on a balanced four-season visitation and overnight stays while positively impacting the City of Sisters community. Therefore, integrating the community's needs while fostering the local tourism economy will be key to long-term success.

Organization Background

Explore Sisters is a DMO founded in June 2022 located in Sisters, Oregon. Sisters is a thirty-minute drive northwest of Bend, Oregon. Previously, tourism in Sisters was managed by the Sisters Chamber of Commerce, with a goal of balancing community needs with the local tourism economy. With a new Executive Director hired in December 2022, Explore Sisters is in the beginning phases of establishing itself as a 501(c)(6) nonprofit organization, currently focused on developing organizational branding, marketing, and strategic plans.

Explore Sisters board currently consists of five voting board members and one non-voting board member, appointed by the mayor, ranging in term lengths from one to three years. It consists of local business owners, Executive Directors of local nonprofits, and local government officials to provide a variety of perspectives and interests. There is currently one paid staff member, the Executive Director with experience in the tourism industry.

Following the City of Sisters' decision to transition tourism management from the Chamber of Commerce to an independent nonprofit organization, Explore Sisters was formed and allocated three years of funding through the 8.99% transient lodging tax (TLT) rate. The organization receives one-third of the total tourism tax revenue collected by the city but plans to pursue additional funding sources for specific programs and services. In their current state, Explore Sisters does not intend to generate revenue through merchandise or event sales. The main focus of the organization currently is building a six-month operating reserve.

As a new DMO, Explore Sisters is looking to develop a strategic plan to present to the City of Sisters to solidify future funding and establish itself as a necessity in leveraging tourism dollars into a reliable source of income for the city.

Project Methodology

After reviewing the possible project deliverables requested by Explore Sisters, the team determined that by collecting data on other DMOs that serve similar sized population or geography and facilitating a vision work session, the team would be able to provide resources and suggestions for long-term organizational stability.

After gathering information from various types of research methods, the team analyzed the data to determine trends, resources, and applicable recommendations for Explore Sisters to use when creating a strategic plan.

Informational Interviews

The initial interviews conducted by the team were to gain a better understanding of Explore Sisters' needs based off the project scope. The informational interviews were with the following individuals:

- Scott Humpert, Executive Director of Explore Sisters
- Kerry Prosser, Sisters City Liaison and Nonvoting Board Member of Explore Sisters
- Greg Willitts, Explore Sisters Board Member
- Kari Westlund, Executive Director of Eugene Cascades and Coast

DMO Interviews

The second set of interviews were conducted to gain specific guidance and resources for newly established DMOs to determine the expected steps that Explore Sisters should anticipate as they gain capacity. A copy of the interview notes is attached in Appendix A. The team interviewed Kitri McGuire, Vice President of Strategic Communications with Visit McMinnville and Tori Middelstadt, Executive Director at Visit Grants Pass. Their contact information can be found in Appendix B. The following summarizes information provided during the interviews.



Kitri McGuire, Vice President of Strategic Communications of Visit McMinnville, has worked for the organization since a few months into its formation in 2015. Over the past seven years, Visit McMinnville has had the same Executive Director, Jeff Knapp, and has grown to a full staff of four. Board members are made up of elected officials and business owners in tourism-related industries, and the organization puts

together a new strategic plan based on the budget every year. Visit McMinnville also encouraged the formulation of a 20-year strategic plan for the City of McMinnville shortly after its creation to foster partnership with the Stable Table (Chamber of Commerce, Downtown Association, McMinnville Economic Development Partnership, Visit McMinnville). McMinnville has substantially grown over the years, and by increasing the revenue gained through the transient lodging tax and focusing the marketing needs for the City, Visit McMinnville is working to strengthen relationships with the Spanish-speaking populations nearby and the Grand Ronde Community. Other pertinent information that Visit McMinnville shared are listed below.



The interview with Visit Grants Pass provided strategies and approaches for new DMOs to position themselves well within their city governing structure and focus the organization's efforts on its nascent stages. Visit Grants Pass hired Tori Middelstadt as Executive Director in 2021, shortly after the 5-year contract with the city was signed and the IRS formation documents were filed.

Visit Grants Pass utilized various consultants to help get off the ground and initiate branding and marketing activities, while Tori focused on cultivating relationships with local elected officials and the Chamber of Commerce. The interview reinforced that DMOs have a specific roadmap for growth and sustainable development, and other DMOs are a willing resource to assist new organizations identify their strategic direction. Each DMO will be presented with specific challenges for their region, but each DMO needs to establish its mission and objectives, make use of consultants to do work outside of the capacity of a small staff, and maintain connections with elected officials and agencies that serve the DMO's region.

Sustainable Tourism Lab Interview



After speaking with Visit McMinnville and Visit Grants Pass, the team interviewed Oregon State University's (OSU) Sustainable Tourism Lab. The lab is currently working with up to 40 destinations across the globe to gain a deeper understanding of the impacts of tourism.

When the "M" in DMO stood for marketing, instead of the current management, tourism was viewed as a business seeking to maximize customers, or visitors. The lab is looking to build sustainable tourism by including other variables into mindful tourism, including resident opinions, environmental impacts, and the local workforce capacity. By balancing the costs and benefits to tourism, tourism can be managed responsibly and sustainably.

Board Mission, Vision, Values Workshop

Many, if not all, elements of the strategic plan are contingent on Explore Sisters' gaining consensus on and adopting an official mission and vision statement and establishing organizational values. To accomplish this, the team facilitated an Explore Sisters Board Mission, Vision, and Values workshop, see Appendix C, to understand and identify where there is alignment and disagreement on the focus and direction of the organization. Before the workshop, the board had been focused on laying the foundational groundwork of the organization and had not engaged in formal visioning work as a group. Having the consulting team facilitate this workshop allowed individual voices to be uninfluenced and recorded without bias.

The workshop was attended by four board members and Explore Sisters' Executive Director, Scott Humpert. The board members present included:

- Kerry Prosser, City of Sisters City Recorder
- Jesse Durham, Owner of Sisters Coffee Company
- Nancy Connolly, City of Sisters City Council President
- Michael Preedin, Mayor of Sisters

Participants were asked to respond to questions related to the work of Explore Sisters, who the work is done for, how it is done, and what the impact would be if Explore Sisters was successful in its goals. These questions were brainstormed in small groups and subsequently reported to the whole group with room for discussion.

Project Limitations

The team recognizes limitations in gathering the data that may affect the outcomes of this strategic plan. We attempted to contact Visit Bend to conduct an informational interview since Bend and Sisters share geographical qualities. Despite reaching out multiple times, no contact was made with anyone at Visit Bend.

The team also planned on partnering with the branding consultant to assist in the development and integration of Explore Sisters' mission, vision, and values with branding and marketing materials. Due to a delayed board vote, the team did not have the time to acquaint themselves with the project with such a brief project timeline. Despite these limitations, the team's strategic goals outlined in the strategic plan are thorough and supported by the other data gathering methods.



Strategic Plan Overview

To aid in creating a strategic plan for Explore Sisters, the team is recommending three strategic goals to integrate into the final strategic plan. These strategic goals have subsequent steps to guide the Board of Directors and Executive Director on successfully implementing the high-level goals, supported by the information gathered during the Mission, Vision, and Values workshop and DMO interviews. These goals are not an exhaustive list of what Explore Sisters should include in their strategic plan, but rather focus on building a solid organizational foundation. Below is an overview of the strategic plan that will go into detail in the following sections.



Strategic Goal 1: Strengthen Governance

Step 1: Utilize established mission, visions, and values to set organizational direction

Step 2: Deliberately build board to match vision

Step 3: Align Explore Sisters' work with mission, vision, and values



Strategic Goal 2: Stakeholder Engagement

Step 1: Engage with organizational partnerships

Step 2: Identify residents' interests through community engagement



Strategic Goal 3: Financial Opportunities

Step 1: Petition City Council to continue funding through the Transient Lodging Tax

Step 2: Identify grants that would provide additional funding for one-time expenses

Step 3: Considering hiring an AmeriCorps RARE member as an alternative to traditional staff

Strategic Goal 1: Strengthen Governance

Explore Sisters' Board of Directors is positioned advantageously to be a strong leadership body for the organization. Current members are passionate about Explore Sisters' work, and many have ample board experience. The close partnership with the City of Sisters and mandate in the bylaws to include city staff on the board helps Explore Sisters maintain crucial connections with city officials and remain up to date with city priorities. The following steps will help strengthen Explore Sisters' governance practices to maximize and perpetuate the organization's leadership to be successful in implementing the mission.

Step 1:

Utilize the established mission, visions, and values to set organizational direction

The Mission, Vision, and Values Workshop provided insight as to where Explore Sisters' board members are in alignment with the direction of the organization.

Our team observed that there is agreement in that the organization needs to be community focused and forward thinking, and that economic development activity should be dynamic and collaborative. The most prominent point of tension observed by the consultancy team during the workshop is the scope of the organization's responsibility. Some board members voiced that Explore Sisters work should strive to have the entire community excited for the future, while others cautioned that attempting to please everyone in the community puts the organization at risk of overextending to service territory that does not match the organization's mission.

The following proposed steps will help the Explore Sisters build on the board's consensus around organizational direction and root their work in this understanding so as to avoid pursuing work that does not serve the organization or the Sisters community.

Explore Sisters Mission, Vision, Values Workshop Outputs

Mission (sample)

Explore Sisters serves Sisters' residents and visitors through intentional stewardship of the unique character of the region to enhance the economic, social, environmental vitality of Sisters, Oregon.

Vision (sample)

Explore Sisters inspires visitation to Sisters and offers a heartfelt visitor experience by showcasing and enhancing the natural and cultural assets of the region. Residents of Sisters experience a greater quality of life, are engaged and trusting in the collaborative, dynamic work of Explore Sisters and its partners. Livability and community cohesion is enhanced through intentional and effective destination management.

Purpose

What we do: Inspire visitation to Sisters Oregon through thoughtful promotion of the unique qualities of the community and its surroundings.

For whom: The Sisters community, including visitors

How we do it: Collaboratively and responsibly steward the social, natural, and economic assets of Sisters.

Why it matters: Increase quality of life for Sisters' residents and preserve unique culture of Sisters despite growth.

Core Values

Stewardship, innovative, collaborative, inclusive, stable/professional/sustainable

Table 1: Recommended mission, vision, and purpose statements based on observations from the Mission, Vision, Values Workshop

Establish consensus on Explore Sisters' mission, vision, and values

Formally adopting an official mission and vision statement is integral to the work outlined in this report. Whether this board accepts the recommendations above or develops new statements, it is critical that Explore Sisters establishes their mission and vision before engaging in further organizational development. The mission and vision serve as the organization's north star as it moves through the nonprofit lifecycle and will protect it from straying from the intended purpose of the organization.

Incorporate stakeholder feedback into mission, vision, and values

Prior to formally adopting the finalized mission and vision statement, scrutinize the statements against stakeholder input to ensure the direction of the organization is in alignment with current and future partners and beneficiaries of the organization's work. Incorporating community needs and wishes into the organization's foundation is one step towards building community trust, which will serve as the backbone of Explore Sisters' work for the duration of the organization's existence.



Figure 1: Visit McMinnville's components of building community trust

Building community trust is a dynamic, long-term process that can be broken down into showing the organization's character and competence. Activities that Explore Sisters engages in should support one of the four areas that characterize character and competence, which are: intent, integrity, capability, and results. Participants in Explore Sisters' Mission, Vision, and Values Workshop identified transparency, honesty, and authenticity as key values of the organization. Incorporating stakeholder input in the mission and vision of the organization will uphold these values and highlight the nature of Explore Sisters' character. Kitri McGuire, Visit McMinnville's Vice President of Strategic Communications, shared the graphic to illustrate the additional components required for building community trust.

Determine what success looks like

Once the mission, vision, and values are finalized, Explore Sisters can identify success measures that support those driving components. Adopting metrics to measure progress in the identified direction is essential to growing the organization's capacity and achieving its mission. Developing systems to measure organizational progress strengthen governance by identifying where gaps exist in current performance versus expected performance. Highlighting these gaps allows the board to make more informed decisions regarding where to allocate resources and create strategies to improve deficiencies and further organizational progress.

The team recommends developing metrics in the following areas:



Finances are regularly evaluated, Y/N



Programs evaluation



Success of revenue-generating activities



Board's accomplishments at implementing the strategic plan

**Board Source recommends that boards conduct a formal self-assessment every two years, which may include an evaluation of each individual board member's performance or the performance of specific committees or roles.*

Step 2:

Deliberately build the Board to match vision

Explore Sisters has outlined a specific board makeup in their bylaws to ensure community interests are represented in the organization's leadership. As community members are recruited to fill the board seats, it is important that each member understand their fiduciary duties of care, loyalty, and obedience. As a new organization, Explore Sisters has the opportunity to implement best practices and procedures to ensure a standard of operation is maintained as board members come and go. Conducting board composition analyses, implementing a formal orientation and onboarding process, and developing committee intentionally will help the board function efficiently despite inevitable turnover.

Conduct a Board Composition Analysis

Achieving Explore Sisters' vision will require intentional board recruitment. Explore Sisters' bylaws indicate that the board has "a minimum of three tourism related industry representatives" and "no more than one director representing any given company, business, organization, or agency will be allowed to serve as a voting member at one time". It takes time for board members to prepare for and be ready to serve effectively. To ensure the composition of Explore Sisters' board remains as desired, board recruitment must be ongoing and intentional as the organization seeks new voices and leadership at the table.

The team recommends Explore Sisters define the tourism-related industry positions to represent the major tourism industries influencing Sisters' economy today, including events, outdoor excursion, food industry, artisans, and lodging. The bylaws currently limit the number of voting board members to nine individuals. Therefore, identifying the five most influential tourism related industries in Sisters and recruiting and maintaining membership of at least one individual from each industry will assist in achieving a well-rounded, and well-connected board.

The Board can utilize the Board Makeup Matrix in Appendix D to assist in identifying gaps in industry, skill, expertise, and demographic representation in the Board. By using this matrix, the Board can identify where efforts should be channeled while recruiting new members.

Implement a new board member orientation and mentorship program

Explore Sisters responsibly includes descriptions of board member fiduciary duties and role expectations in the bylaws. These descriptions help ensure each member is able to use their individual skills and expertise to best lead the organization. As Explore Sisters' board grows, it will be important to formalize the onboarding process by developing a board member orientation. An added best practice in board member orientations can include assigning current board members as mentors to new members to help new members understand the organization better and identify where their skills can be best applied.

New member orientation can include, but is not limited to:

1

Programs

Present new board member with the organizational calendar and description of organization's key programs and activities.

2

History

Provide brief written history or fact sheets, brochures, newsletters, articles of incorporation, etc. To ensure the board member is familiar with the organization's history.

3

Strategic direction

Share most recent strategic plan, current case statement, etc. To help board member understand the direction of the organization.

4

Roles and responsibilities

Describe the role of the whole board versus individual member responsibilities including expectation around fundraising, advocacy and other ways board members can forward the organization's mission.

5

Board operations

Review board handbook, attend meetings, join committees.

6

Financials

Provide board members with financial documents including 990 and annual reports and teach them how to read and understand them. Orient member on the budget.

7

Organizational structure

Have member review bylaws and organizational chart, introduce member to key staff, describe duties of board committees.

An effective board member orientation helps new members get up to speed with the purpose and history of the organization, the roles and responsibilities of a board member, and the organization's policies and programs. By implementing a board member mentorship program, new members feel welcomed, comfortable, and prepared to participate in board activities. Quickly building trusting relationships between board members complements and aids in the collaborative approach that Explore Sisters' strives to accomplish. For a more detailed process in board member orientation and mentorship, see Appendix E.

Create committees that align with strategic plan

To effectively achieve the strategic goals outlined in this document, Explore Sisters' board could create committees that complement the goals of the organization. Committees should be formed when there is a true, ongoing need, and can vary in numbers based on the task. Too many committees can create confusion around the role of the board, however, having committees encourages collaboration amongst board members and staff while accomplishing specific needs for the organization.

Based on Explore Sisters' organizational goals and its current needs, the team recommends the following committees be implemented:

Executive Committee	The Executive Committee works as a liaison between the Executive Director and the board. They conduct policy work on behalf of the board and make decisions between board meetings and in times of crisis.
Marketing and Branding Committee	The marketing and branding committee will work closely with branding and marketing consultants to help ensure Explore Sisters' external messaging is developed in line with the mission, vision and values of the organization. They provide oversight on the look and feel of marketing and branding materials, long-term planning, and strategic vision.
Finance Committee	The Finance Committee, which could be combined with the Executive Committee, ensures the board follows through on its responsibility to uphold the financial health of the organization. They provide recommendations to the full board regarding proper use of the board's assets and ensure responsible handling and accuracy of financial documents.
Nominating Committee	The Nominating Committee focuses on building an effective board by recruiting prospective members and onboarding new members. Duties can include providing ongoing education and training to the board and routinely assessing the board's performance.

Table 2: Committees that Explore Sisters could develop to further its strategic goals

Step 3:

Align Explore Sisters' work with mission, vision, and values

By setting organizational direction and building processes to account for board turnover, the Board can seamlessly guide the organization's work. The Executive Director's role is to manage the day-to-day operations and program of the organization. With clear mission, vision, and values, Explore Sisters' staff can effectively execute a marketing plan and programs into their daily work.

Integrate mission, vision, and values into marketing and branding

Explore Sisters made a positive step hiring a branding and marketing consultant to help the organization intentionally develop their community facing presence. With assistance from the consultant, Explore Sisters will incorporate the vision, mission, and values into its marketing and branding. Beyond working with the consultant, the continuous development of marketing strategy can support Explore Sisters' intended outcomes including, but not limited to:

1

Explore Sisters' is a recognizable brand in the community and residents and visitors are aware of your purpose.

2

Visitor behavior is influenced by and in alignment with the goals of Explore Sisters and its partners.

3

Through continuous building of community trust, Explore Sisters will embody the core values it has set out to uphold.

Integrate mission, vision, and values into marketing and branding

Programs and services that Explore Sisters can offer will be determined by robust stakeholder input, but the board plays an important role in deciding which activities are a priority for the organization. The nature of Explore Sisters' work is dynamic and can take many forms. To avoid mission drift, but increase opportunity for collaboration, Explore Sisters should align their programs with the economic development goals of the city that best compliment the mission, vision, and values of Explore Sisters.

Rooting program development in the mission, vision, and values of Explore Sisters ensures the organization will acquire funding that will further the organization's mission rather than detract from it. Explore Sisters' projected budget intends to raise \$90,000 in grants over the next three years to supplement the Transient Lodging Tax revenue. To reach this goal while also remaining true to Explore Sisters' mission and vision, the organization should be careful to seek funding that compliments existing or developing programs rather than developing programs to meet funder requirements.



Strategic Goal 2: Engage Stakeholders

By prioritizing the engagement of external stakeholders through partnerships and business opportunities, Explore Sisters can thrive as a destination management organization. Visit Grants Pass and Visit McMinnville shared that connecting with organizations and local residents was key to building the capacity in the first few years of its inception. By focusing on organizational partnerships and gaining local residents' opinions, Explore Sisters will be able to work collaboratively, utilize local resources, and strengthen the organization.

Step 1:

Engage with organizational partnerships



Figure 2: Three-legged stool of Economic Development

While Explore Sisters is defining itself as a separate entity from the city and the Chamber of Commerce, prioritizing the establishment, development, and maintenance of external partnerships will be critical to building its capacity for long-term sustainability. Visit McMinnville shared their local collaboration, named the Stable Table, which included the City Chamber of Commerce, Downtown Association, and McMinnville Economic Development Partnership. Similarly, Visit Grants Pass' Executive Director works closely with the Chamber of Commerce and the city government.

The analogy of a “3-legged stool”, seen in Figure 2, was mentioned during the Mission, Vision, and Values Workshop. The “legs” of the stool consist of Explore Sisters, City of Sisters, and Economic Development for Central Oregon (EDCO). Explore Sisters can simultaneously implement plans specific to central Oregon's economic needs by working as a collaborative team. Because Explore Sisters recently became an independent entity from the city, the two still work closely, attending public meetings and budget proposals. However, without EDCO, Explore Sisters and the city will need to compensate for EDCO's work engaging Central Oregon's business economy, affecting the quality and intentions of economic development.

Visit Grants Pass also utilized local consultants during the first few years of the DMO's launch. The consultants varied in the work such as creating and implementing a branding and advertising plan, facilitating Board education for new Board members, collecting digital marketing materials, and the cost-efficient alternative AmeriCorps RARE staff (see Strategic Goal 3, Step 3). With Explore Sisters' board recently approving a branding consultant, consider investing funds, or seek additional funding sources (see Strategic Goal 3, Step 2). This strategy will allow Explore Sisters to receive specific support while networking with and promoting local businesses. Explore Grants Pass also utilized local businesses to carry out community events and while they promoted them through their own network. By having Explore Sisters being the lead marketer to promote various events, the lift of executing the event can be on the well-established business while minimizing the need to increase resources for Explore Sisters.

Step 2:

Identify resident interest through intentional community engagement

Community engagement is critical to gaining local resident opinion. Visit McMinnville used open houses and community events to engage the local community. They also marketed events and attractions to share opportunities with locals. Based on the interviews, Explore Sisters would benefit by engaging with the Sustainable Tourism Lab at Oregon State University (OSU). Visit McMinnville used the lab to conduct a Resident Focused Survey to gather and analyze survey data about residents, while Visit Grants Pass were able to gain a greater understanding of local opinions around tourism through the Resident Sentiment Survey.

The Sustainable Tourism Lab is an excellent opportunity for Explore Sisters to build an organizational partnership with. The lab is a no-cost option to build, distribute, and analyze online and in-person surveys for Sisters' residents. The lab can also host focus groups on behalf of Explore Sisters to obtain specific information. The lab's current work aligns well with Explore Sisters due to the town's geographic local, aligned tourism goals, and the lab's accessibility. By partnering with the lab, Explore Sisters can build out their viability as a newer DMO by gaining the interests of Sisters' residents. Explore Sisters can use their contact form [here](#), or contact the directors via email to initiate the process to initiate the partnership to develop a local resident survey.



Strategic Goal 3: Build Financial Sustainability

Explore Sisters is currently funded through a portion of the Transient Lodging Tax (TLT) that the city manages. This is a relatively standard practice that also occurs with Visit McMinnville and Visit Grants Pass. However, destination management organizations (DMOs) can also secure funding through specific grants. Visit Grants Pass received funding through Oregon Heritage Fund to obtain relevant historical information about the local area and enhance the tourism experience. Visit Grants Pass secured funding through Travel Oregon for specific, terminal projects like the revitalization of the marketing for the historical downtown area. They also hosted an AmeriCorps Resource Assistance for Rural Environments (RARE) member for a year. By supplementing the TLT revenue with grant funding and using a cost-effective staff alternative, Explore Sisters can achieve financial sustainability.

Step 1:

Petition City Council to continue funding through the Transient Lodging Tax

The creation of Explore Sisters is part of a greater transition by cities across the country toward DMOs to coordinate tourist activities across multiple agencies and place an emphasis on preserving natural resources and local vitality while attracting year-round visitors who share Sisters' social and environmental values. This will not only require a great deal of work coordinating the efforts of Sisters' businesses and agencies, but also meticulous planning and setting clear and achievable goals and objectives. When it comes time to petition the City Council to continue funding Explore Sisters' work, it will be crucial for local leaders to have worked with and experienced the work of Explore Sisters. By emphasizing the Strategic Goals listed here, and how they support the long-term viability, Explore Sisters can position itself for a successful petition in the future.

There are several key activities that Explore Sisters can utilize to ensure the relationship with the City Council is properly nurtured:

1

Stay in close contact with the City Council and provide a quarterly progress report will provide City Council the opportunity to provide feedback on Explore Sisters' work and see the impact of the work on Sisters' overall economic development.

2

Explore Sisters can work closely with the other legs of the Sisters' "3-legged stool," because it solidifies Explore Sisters as an agency providing core services to Sisters' residents and visitors.

3

Successfully procuring supplemental funding through grant opportunities to support special projects can show the City Council that Explore Sisters is dedicated to using city dollars on activities that best impact Sisters' residents, and that the organizations is not wholly reliant on the City Council to remain operational.

By maintaining the relationship with the City Council through transparency, working closely with local agencies and committees, and demonstrating a commitment to financial health, Explore Sisters can ensure that the benefits of a Destination Management Organization are apparent to the City Council. These efforts will make the argument for receiving a greater share of Sisters TLT dollars, or a share of a county TLT if created, more likely to be adopted by the City Council or Deschutes County.

Step 2:

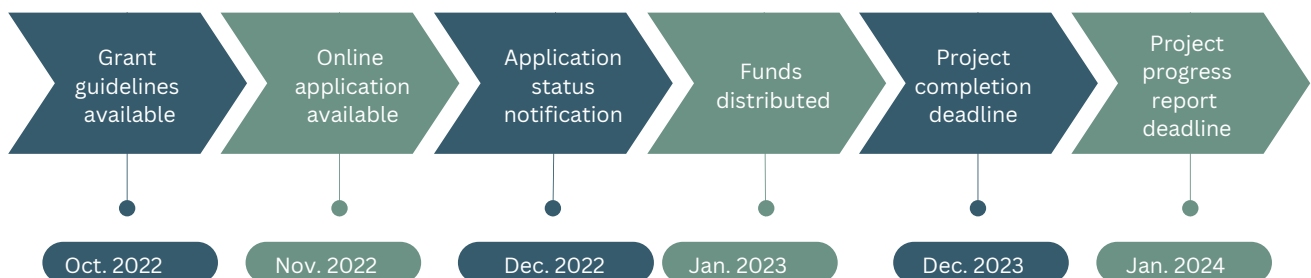
Pursue supplemental funding opportunities

Oregon DMOs are primarily funded by Transient Lodging Tax, but by applying and securing additional funding, such as grants, Explore Sisters will diversify its funds to grow assets and build organizational capacity. The team recommends that the Finance Committee enlist in this task. Three main grant funders were mentioned during the interviews with other DMOs that align with the work Explore Sisters is doing.



Travel Oregon manages the Capacity & Small Project Grants program to assist destination management organizations build organizational capacity. Distributed funds are to build and refine skills, procedures, structures, and tactics so that DMOs successfully fulfill their mission and create more significant outcomes. Funding can also be used for diversity, equity, and inclusion training and coaching to assist groups in advancing racial equity within their organizations and via the work.

The application process is relatively simple with Explore Sisters needing to provide its DMO-related purpose and prove its TLT funding from an Oregon government entity. Guidelines to apply for the grant can be found [here](#), or Appendix F. For reference, the most recent grant timeline is displayed below. For reference, the most recent grant timeline is displayed below.





The Ford Family Foundation has previously funded Visit Grants Pass to secure an external consultant. However, the Foundation offers three grants of varying amount and scope to organizations seeking funds to complete projects with community buy-in. The Ford Family Foundation offers a lot of flexibility in their grants depending on Explore Sisters' needs and capacity for a particular project.

One advantage of these grants is the exception of requiring 50% of funding to be committed prior to applying for the grant. Additionally, the grant can make up more than one-third of the total project costs, unlike other grants distributed by the foundation.

Large Good Neighbor Grant	Small Good Neighbor Grant	Technical Assistance Grant
<ul style="list-style-type: none">• Grants range from \$25,000-100,000+• Requires in-kind or cash contributions from local and regional sources to demonstrate community interest	<ul style="list-style-type: none">• Grants range from \$5,000-25,000• Requires a lesser degree of community engagement	<ul style="list-style-type: none">• Grant awards up to \$5,000• Aim to build internal capacity through professional development, facilitating a strategic planning process, hiring consultants, etc.

Per standard grant giving practices, a complete fundraising plan including how the grant factors in, is recommended when applying. The expected turnaround for larger grants, greater than \$100,000, is two to six months. However, smaller grants are typically decided upon in about four weeks.



The Oregon Heritage Grant is managed by the Oregon Heritage Commission under the Oregon Parks and Recreation Department to preserve, develop, or interpret Oregon’s cultural heritage.

Historically, grants have been awarded to preservation projects, public education events, public history interpretations, and organizational planning that supports heritage resources. Grants are awarded on a biennium timeline and range from \$3,000 to \$20,000 with a total of \$380,000 available to award. With their 2023 biennium cycle approaching, Explore Sisters can apply when the application opens in August 2023. More details are listed in Appendix G.

Step 3: Explore hiring an AmeriCorps RARE member

Explore Sisters’ proposed budget includes a line item for an additional part-time staff member. An alternative option is to hire an AmeriCorps member through the AmeriCorps Resource Assistance for Rural Environments (RARE) program, managed at the University of Oregon’s Institute for Policy Research and Engagement (IPRE). The program strives to increase capacity within rural communities to improve economic, social, and environmental conditions. Visit Grants Pass has also utilized their program to build the capacity that led their organization to hire a second full-time staff member in December 2022. The RARE program provides a trained graduate-level member for eleven months to live and work in the community. Members are utilized in supporting organizations at various stages of organizational development.

Some of the benefits to the RARE program include:

Full time professional capacity for 11 months with the option to extend for an additional 11 months and/or multiple years of RARE placement.

Low organizational investment of \$25,000 (2023-24 service year); below Explore Sisters' budgeted amount for a part-time staff member.

Connection to local, regional, and statewide networks of professional community and economic development institutions focused on sustainable growth in rural Oregonian communities.

Explore Sisters securing an AmeriCorps RARE member provides cost-efficient full-time staff support and builds organizational partnerships. It is to Explore Sisters' benefit to consider expanding the existing UO partnership and receive a local full-time staff while continuing to develop the organization's network. For more information on the application process and how to apply to host a RARE member, visit the website [here](#).

Conclusion

Explore Sisters is at a great point in its organizational development to establish a strong foundation. The student team is impressed with Explore Sisters' intentionality when promoting tourism in the City of Sisters. When developing a strategic plan to propose to City Council, by focusing on the three goals 1) strengthening governance, 2) engaging stakeholders, 3) building financial sustainability, Explore Sisters will have a solid start to building long-term organizational capacity. The steps following each goal are intended to be approved by the board to implement into Explore Sisters' annual business plan. By adopting the provided goals, and subsequent steps, Explore Sisters will have a foundation that the organization can use to build capacity to enhance Sister's economic health through stewardship of its local resources and residents.

Appendices

Appendix A: DMO Interview Questions

1. Tell us about yourself and your role at DMO X.
2. Tell us about DMO X.
 - a. How old
 - b. Why were you formed
 - c. Staff make up
 - d. Major activities and initiatives
3. Board
 - a. Makeup
 - b. What are the major roles of the board—advisory, working, etc.?
4. Can you tell us about your strategic planning process?
 - a. How many iterations so far?
 - b. Who is involved in the process?
5. How do you identify local stakeholders?
 - a. Any groups that are surprising partners?
 - b. Any organizations that you feel are in competition with? Whether you want to be or not.
6. What strategies have you used to engage your area residents?
 - a. What was successful/unsuccessful?
 - b. Are there populations that you find more difficult to get input from?
 - c. What information do you focus on when collecting community opinions on tourism that inform your work?
7. Does sustainability and livability of your area impact your strategies, and in what ways?
8. What are some major successes and challenges that DMO X has experienced since its inception?
 - a. Successes
 - b. Challenges
9. Can you share your financial resources with us? (i.e., grants, public funding, etc.)
10. Recommendations for the first six months?
11. Is there anything else you would like to share?

Appendix B: Partnering Organizations Contact Cards

Visit McMinnville

Kitri McGuire
*Vice President of Strategic
Communications*
kitri@visitmcminnville.com
503-857-0182

Visit Grants Pass

Tori Middelstadt
Executive Director
tori@visitgrantspass.com

Sustainable Tourism Lab

Todd Montgomery
Director
todd.montgomery@osucascades.edu
541-322-2086

Travel Oregon

Michelle Woodward
Grants Manager
michellew@traveloregon.com

Louisa Mariki
Grants Coordinator
louisam@traveloregon.com

Ford Family Foundation

Yvette Rhodes
Associate Program Officer
yrhodes@tfff.org

Oregon Heritage Fund

Kuri Gill
Grant Manager
kuri.gill@oregon.gov
503-986-0685

Appendix C: Questions from Mission, Vision, Values Workshop

Activity 1: Mission

Write down three examples of 1-2 words that can answer the following questions:

1. Who does Explore Sisters serve? (audience/beneficiaries)
2. How does Explore Sisters serve them? (action)
3. Why do you do this work? (result/benefits)

Activity 2: Vision

Write down three short phrases to answer the following questions:

1. What is the main purpose for Explore Sisters' existence?
2. How would your community be different if Explore Sisters were successful in all its goals?

Activity 3: Values

Write in the chat as many words you can think of that describe what Explore Sister offers, how Explore Sisters operates, and how Explore Sisters interacts with the world.

The following are general themes and observations made about the Board of Directors and where there was consensus and divergence in defining Explore Sisters' mission and vision.

Mission & Vision:

Areas of consensus:

- Explore Sisters serves the needs of the community first and centers community voice in its work.
- Emphasis on enhancing and promoting Sisters' unique qualities in a sustainable manner.
- Desire for a balanced community where businesses can thrive all year long, residents are not overwhelmed by growth, livability is enhanced, and there is not overcrowding in any one season.

Appendix C cont. : Questions from Mission, Vision, Values Workshop

Areas of divergence:

- Participants had slightly different views of the Vision for Explore Sisters. Some participants were focused primarily on economic development and sustainable growth, where others had a broader vision for the impact of the organization's work on the community.
- There was conversation regarding the role of the org. and the importance of not overextending past destination management into community development. Some members emphasized that it is not the job of the DMO to do everything that may be needed in the community. Some members envisioned ES could serve a larger purpose in bringing the community together, while others thought it was important to keep the vision narrower so as to protect the organization from mission drift.

Values:

Themes:

- Stewardship
- Innovative
- Collaborative
- Inclusive
- Stable/professional/sustainable

Points of tension:

- Professional v. heartfelt care/compassion: Need to define what compassionate professionalism looks like and how it influences the services/programs that ES offers.
- Stable v. innovative & dynamic: Not necessarily at odds but need to be careful not to sacrifice one for the other.

Appendix E: Board Orientation and Mentorship Resources

Source: BoardSource Board Development and Orientation Checklist

Lois J. Zachary, president, Leadership Development Services, LLC

MENTOR YOUR WAY TO BOARD DEVELOPMENT



Are you looking for a way to develop your board members' leadership abilities? A board mentoring program can have powerful results.

Savvy nonprofit boards are following the lead of their private sector cousins and utilizing mentoring as a means for orienting new members, promoting individual and organizational learning, and preparing for leadership succession. I can attest to the power of board mentoring professionally (as a mentoring subject matter expert) and personally (as a volunteer board leader). Mentoring has made me a better board contributor, increased my commitment to the organization, and been extremely gratifying.

ORIENTING NEW BOARD MEMBERS

I sit on the board of a national educational agency. Over the past five years, we have streamlined all of our board processes, structures, and board member expectations. Every new board member is now assigned two mentors from day one — a veteran board mentor *and* a staff mentor — to hasten their integration and involvement. The board development committee does the matching.

Mentoring partners meet virtually and/or in person prior to and after every board meeting during the first year of board service. The board mentors welcome the new board members into the “organizational family” by introducing them to the people, issues, and work of the organization and serving as go-to people and sounding boards. The staff mentors' job is to translate organization alphabet soup and familiarize new board members with the organization's current and long-term programmatic and financial operations. As both mentors get to know the new board member, they confer about how to best utilize the mentee's time and talent and enhance their board experience.

After one year of service, one board member commented to me, “I've served on many boards and never before felt so welcomed; as a result, I am more willing to give my time. I feel connected to the people, the work, and the mission of the organization. Because of that, I am able to better represent its mission to our stakeholders.”

PROMOTING ONGOING INDIVIDUAL AND ORGANIZATIONAL LEARNING

A long-term health care organization hired me to develop a peer mentoring program for its board members. The goal was to continuously educate board members about complex health care issues and trends. At the first meeting of the year, they receive a twelve-month board education agenda and are invited to share their expertise and/or experience in critical areas and to mentor fellow board members.

MENTOR YOUR WAY TO BOARD DEVELOPMENT

One board member, an attorney with years of experience in the health care field, agreed to share his knowledge of the changing health care environment and critical issues facing providers. After listening to his presentation, several board members realized how complex the issues were and how difficult it was to fully understand them. The attorney then agreed to mentor these members and bring them up to speed in time for a major board decision.

Peer mentoring is a powerful tool for board education because it engages people and harnesses the individual and collective power of the board. It has the added advantage of facilitating more trusting and meaningful board member relationships, building board cohesion, and ultimately contributing to the level of shared understanding that promotes more informed decision making.

PREPARING FOR LEADERSHIP SUCCESSION

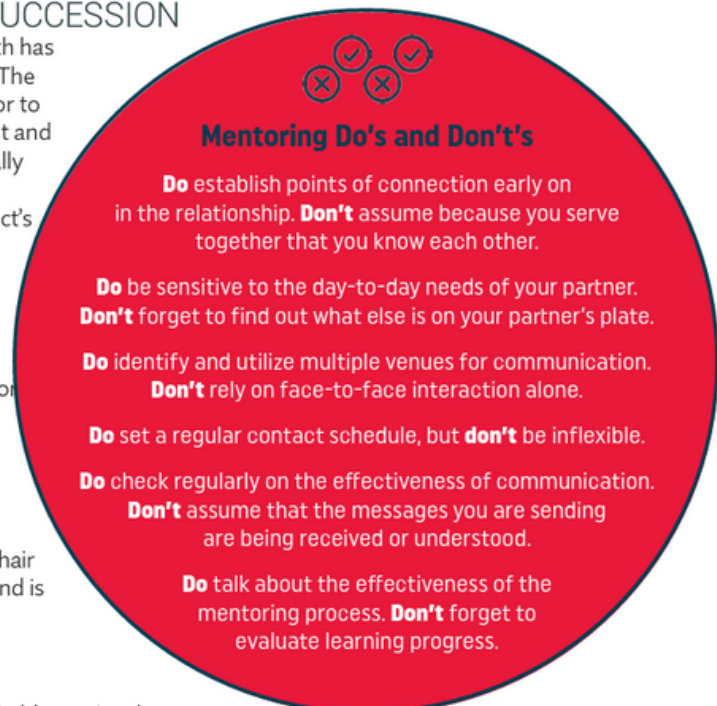
A high-profile community organization I work with has embedded mentoring in its succession planning. The leadership succession plan kicks in two years prior to the chair-elect assuming responsibilities. The past and current chairs meet with the chair-elect individually and then together to formulate a development strategy that incrementally increases the chair-elect's responsibilities, introduces them to key stakeholders, gives them more visibility, and involves them intimately in working on strategic issues. The chair-elect identifies the competencies that they need to develop and with the help of mentors puts milestones and timelines in place to help them progress. The result is that when the chair-elect becomes the chair, they are well grounded and fully prepared to lead and serve the organization. A chair who has been through the two-year process attributes their success as chair to their mentors' ongoing support and guidance and is eager to "pay it forward" to the next chair-elect.

THE POWER OF MENTORING

In talking with new board members, I hear remarkable stories that speak to the power of mentoring. They can't imagine not having a go-to person to answer questions, bounce ideas off of, and help sort out organizational puzzles. They tell me they feel more comfortable more quickly because they have established meaningful relationships. And because they are able to grasp the big picture faster, they are able to make meaningful contributions to their boards sooner.

To build, grow, and support a viable board mentoring culture, you should do the following.

- Establish concrete learning objectives and long-term goals that you can measure and celebrate.
- Secure visible support, involvement, and commitment from the highest levels of the board and staff. Involve the governance committee in developing, implementing, and evaluating the program.
- Determine how you will pair mentors and mentees (this will depend on your goals and learning objectives).



BOARD MEMBER ORIENTATION CHECKLIST

This checklist is a general outline to guide the orientation of new board members. Your organization should modify it as you see fit to ensure that all new board members are provided with the information necessary to fulfill their responsibilities.

PROGRAM

- ✓ Tour facilities
- ✓ Presentation by chief executive, key staff, video, or other electronic media.
Materials to share with board members:
 - Organization's web site address
 - Annual calendar
 - Publications and programs list

HISTORY

- ✓ Ensure that new board members understand the history of the organization.
When was it founded? Why? How has it grown and developed over time?
Materials to share with board members:
 - Brief written history or fact sheet on the organization
 - Brochures
 - Newsletters
 - Articles of incorporation
 - Note whether Directors and Officers insurance has been used in the past

GENERAL EXPECTATIONS OF BOARD MEMBERS

- i Know the organization's mission, goals, policies, programs, services, strengths, and needs, as well as the larger ecosystem and its collective purpose.

STRATEGIC DIRECTION

- ✓ Review strategic plan
Materials to share with board members:
 - Most recent strategic plan
 - Current case statement
 - Recent press clippings

GENERAL EXPECTATIONS OF BOARD MEMBERS

- i Follow trends in the organization's field of interest and keep informed.

BOARD MEMBER ORIENTATION CHECKLIST

BOARD ROLES & INDIVIDUAL BOARD MEMBER RESPONSIBILITIES

- ✓ Discussion with board chair or whole board about the role of the full board versus the responsibilities of individual board members
For a brief overview, [download our infographic on board member responsibilities](#).
- ✓ Include fundraising responsibilities of individual board members, role that advocacy plays in mission achievement, and how board members can stand for their missions
Materials to share with board members:
 - Board member letter of agreement
 - Conflict of Interest policy
 - Board roster
 - Board member position description
 - Document describing board roles v. individual board member roles
 - Recent board meeting minutes

GENERAL EXPECTATIONS OF BOARD MEMBERS

- i Prepare for and conscientiously participate in board and committee meetings, including appropriate organizational activities when possible.
Understand and embrace fiduciary responsibilities.
Act as an ambassador for the organization when in public, speak only with one voice outside of board room.
Volunteer outside of board role when appropriate.
Suggest to the appropriate committee possible nominees for board membership who would make significant contributions to the board and organization.

BOARD OPERATIONS

- ✓ Review board manual
- ✓ Accept committee or task force assignment
Materials to share with board members:
 - Schedule of board meetings
 - Schedules of committee meetings
 - Full board roster and committee rosters
- ✓ Meet with board chair
- ✓ Attend board meetings

GENERAL EXPECTATIONS OF BOARD MEMBERS

- i Serve in leadership positions and undertake special assignments willingly and enthusiastically.
Attend all board meetings and come prepared to participate.

BOARD MEMBER ORIENTATION CHECKLIST

FINANCES

- ✓ Presentation by chief executive, chief financial officer or treasurer.
- ✓ Review recent financials and teach board members how to read and understand organizational financial statements.
- ✓ Provide an overview of the budget practices board members will need to know, including what to know to approve organizational budgets, what the Form 990 is, and how to read a financial statement.

Materials to share with board members:

- Annual reports
- Last three Form 990s (this information should also be shared during recruitment, even if documents are public).

GENERAL EXPECTATIONS OF BOARD MEMBERS

- i Faithfully read and understand the organization's financial statements and otherwise help the board fulfill its fiduciary responsibility.

ORGANIZATIONAL STRUCTURE

- ✓ Review bylaws
- ✓ Review organizational chart
- ✓ Introduce key staff members
- ✓ Make sure board members not only understand how the organization is structured, but also how the board interacts with specific departments and staff members.

Materials to share with board members:

- Committee job descriptions
- List of staff positions
- Bylaws

GENERAL EXPECTATIONS OF BOARD MEMBERS

- i Avoid prejudiced judgments on the basis of information received from individuals; urge staff members with grievances to follow established policies and procedures through their supervisors. All significant matters coming to you should be called to the attention of the chief executive and/or the board's elected leader as appropriate.

Appendix F: Travel Oregon Capacity & Small Project Grants 2022 Guidelines

I. PROGRAM INTENT

TRAVEL OREGON'S MISSION AND GRANTS PROGRAM OUTLINE

The mission of Travel Oregon is to inspire travel that uplifts Oregon communities. Collaborating with stakeholders and partners to align as stewards of Oregon, we work to optimize economic opportunity, advance equity and respect the ecosystems, cultures and places that make Oregon...Oregon. Travel Oregon's Competitive Grants are intended to develop and improve the economies of communities throughout Oregon by means of the enhancement, expansion and promotion of the visitor industry.

As Travel Oregon returns to a more consistent cadence in project-based grant funding beginning in spring of 2023, there is a desire to strengthen local communities by supporting destination marketing/management organizations and federally-recognized tribes through capacity building efforts.

Funds are intended to develop and refine skills, systems, structures and strategies so the organization can successfully fulfill its mission and achieve outcomes that are more impactful. Funds also support diversity, equity and inclusion training and coaching to support these entities as they advance racial equity within their organizations and through their work.

If an entity finds that capacity building is not a priority for their community, then a Small Project grant of up to \$20,000 may be requested.

Eligible entities must choose between two project categories: 1) Capacity Building or 2) Small Projects. Only one option may be requested. Capacity Building is preferred as Travel Oregon believes capacity building funds provide an opportunity for awardees to set the organizational foundation to successfully move future projects forward. Capacity Building awards are intended to be one-time investments. Awardees are encouraged to find ways through other funding streams to extend or build upon a capacity award when the grant timeline is completed.

As part of its [10-year strategic vision](#), Travel Oregon has developed a destination stewardship approach. This three-pronged approach seeks to balance and meet the economic, environmental, and social/cultural needs of a destination, while working in close partnership with the destination's tourism industry and residents. To implement this approach, Travel Oregon will employ three lenses to guide future decisions, programming, and actions: Prosperity Lens, Racial Equity Lens and Regenerative Tourism Lens. Applicants are encouraged to begin thinking about how these same lenses may impact their own organization and to take steps now to prepare or enhance ideas of destination stewardship.¹

Total funding available for the Capacity & Small Project Grant program is \$1.5 million. Maximum requests for capacity building will be based upon a percentage of the applicant's current board-approved budget (2022) and further detailed in section III. Small Project requests may be up to \$20,000. No cash match is required. Projects must be complete, and funds spent by Dec. 31, 2023.

II. ELIGIBILITY

ENTITY ELIGIBILITY

Eligible applicants include those listed below that are *doing business* in Oregon and can demonstrate direct work in support of improving the economic impacts of Oregon's travel and tourism industry:

¹ [Read Travel Oregon's 10-year strategic vision – details of destination stewardship and three lenses may be found on page 13](#)

- Oregon Destination Marketing/Management Organizations that receive transient lodging tax from an Oregon city, county, region or state entity as the authorized contact for destination marketing and/or management.²
- OR
- Federally-recognized tribes

PROJECT ELIGIBILITY

Applicant must choose one of the two eligible project categories: 1) Capacity building or 2) Small project.

Capacity Building: Depending on the type of Capacity Building, funds may be used to expand responsibilities of an existing staff member, add new staff or for consultant fees. Capacity Building requests may include any of the following:

1) PROFESSIONAL DEVELOPMENT

Projects that provide the staff and board with tools and knowledge needed to achieve the organization's mission to enhance and expand economic impact through travel and tourism.

Eligible projects include:

- Professional development or staff training
- Executive coaching
- Board development

2) TECHNICAL SKILLS

Projects that help an organization develop specific skills needed to improve organizational effectiveness to enhance and expand economic impact through travel and tourism.

Eligible projects include:

- Financial analysis/management assistance
- Information technology or human resources assistance
- Marketing or development plan assistance
- Outreach/advocacy skill development or assistance
- Communications/PR assistance
- Convening/facilitating assistance
- Grant writing/fundraising assistance
- Membership development assistance

3) LEARNING/ADAPTATION

Projects that help an organization assess, respond to, and create change for continuous improvement to enhance and expand the travel and tourism economy.

Eligible projects include:

- Organization assessments
- Strategic planning
- Research

4) NEW MARKET/PRODUCT DEVELOPMENT

Projects that help an organization enhance or expand its travel and tourism economic impact opportunities.

Eligible projects include:

- Core destination product/experience & retail/sales ready product development assistance

² If you are an authorized DMO as recognized by a local government where transient lodging tax is not collected, see how to proceed in section IX under "Eligible Entity Verification".

- Itinerary development (must be done in coordination with a tour operator so product is bookable and ready for retail or wholesale)
- Shoulder season marketing
- New market development (overseas or domestic)
- Air service development
- Workforce training/development
- Sports tourism

5) DIVERSITY/EQUITY/INCLUSION

Projects that help an organization prioritize and learn how to incorporate the voices and perspectives of others, particularly Black, Indigenous and People of Color and anyone being directly impacted by the organization’s work.

Eligible projects include:

- Racial equity training/coaching
- Unconscious bias training/coaching
- Training/coaching on asset-based approaches
- Training/coaching on participant informed approaches

Small Projects must show readiness to be completed in the timeframe of the grant and fulfill an immediate need recognized by the community. Preference will be given to projects that demonstrate they ensure accessibility and inclusion of all visitors, including under-represented communities as well as projects that are undertaken as part of the rebuilding efforts of communities that have been impacted by wildfire. **PROJECTS MUST BE NEW.** No reprints of brochures or other materials unless losses are due to wildfire. If producing collateral, a distribution plan must be outlined, including budgeted costs.

INELIGIBLE PROJECTS AND ACTIVITIES

The following activities are **not** eligible for grants:

- Mobile app development
- Deferred, regular or ongoing maintenance and upkeep
- Cannabis or tobacco tourism-related projects

III. FUNDING

REQUESTS FOR FUNDING

No match is required for any funding request.

Requests for funding differs depending on project category:

Capacity Building: Requests for funding are based on applicant’s current (2022) board-approved budget.

- Applicants with an annual budget of \$250,000 or less may request up to 10% of their total budget and no more than \$25,000.
- Applicants with an annual budget greater than \$250,000 may request up to 8% of their total budget but no more than \$50,000.

Small projects: Requests for funding may be up to \$20,000.

IV. DEVELOPING A STRONG APPLICATION

Applicant must outline a detailed timeline to ensure there is ample time and dedication available to successfully complete the project by Dec. 31, 2023.

Applicant must engage with its board and/or other stakeholders to gain buy-in prior submitting the final application. Set a meeting or start conversations well in advance of the Nov. 28 application deadline.

Applicant is encouraged to share their project idea with their Regional Destination Management Organization (RDMO)³ to keep them informed.

Applicant must be able to show how this project will make impacts over the next three years. Look at the big picture – how will the work today set the foundation for the future.

Check the [Frequently Asked Questions](#) page to see shared applicant questions.

V. REVIEW OF APPLICATIONS; DECISION TO AWARD

The application process is open from 8 a.m. PDT on Nov. 2 until 5 p.m. PST on Nov. 28. No applications or materials will be accepted after the 5 p.m. PST deadline. Award decisions will be announced by Dec. 21 via email. Initial disbursement of awarded funds will occur after Jan. 1, 2023. Applications will be reviewed and decisions to award will be made based on the following:

Capacity Building will be given preference for funding and will be reviewed prior to the review of Small Project applications.

- Demonstrate the ability to complete the project in the required timeline (by Dec. 31, 2023).
- Demonstrate that applicant and project meet the eligibility requirements of Section II and Section III and that the application is complete and contains all information required by these grant guidelines.
- Demonstrate that their board and/or impacted stakeholders are in support of the application.
- Outline how this one-time funding will be able to impact the organization over the next 3+ years.

If funding remains after the Capacity Building review, then Small Project applications will be reviewed and decision to award will be made based on the following:

- Demonstrates an immediate need for the project that is recognized by the community/stakeholders.
- Demonstrates the ability to complete the project in the required timeline (by Dec. 31, 2023).
- Demonstrates that applicant and project meet the eligibility requirements of Section II and Section III and that the application is complete and contains all information required by these grant guidelines.
- Preference given to projects that demonstrate they ensure accessibility and inclusion of all visitors, including under-represented communities.
- Preference given to projects that are undertaken as part of the rebuilding efforts of communities that have been impacted by wildfire.
- Preference given to entities with required permitting (if needed) secured.

Travel Oregon reserves the right to award grants in amounts totaling less than all funds that are available under the Capacity & Small Project Grant Program, to award a different amount than is requested in a grant application, to make changes to the Grant Guidelines or to cancel the Capacity & Small Project Grant Program in its entirety.

³ For more information about RDMOs, visit Industry.TravelOregon.com/RDMO

VI. GRANT CONTRACTS

Applicants who are awarded a grant will enter into a contract with Travel Oregon, which includes agreements to comply with all guideline requirements and to complete the project as approved.

FUNDING USE/BUDGET AND TIMELINES

Grant recipients shall maintain accurate records of how dollars are spent and must agree to provide Travel Oregon with access to these records in a timely manner, when requested. Grant recipients are required to spend awarded funds by Dec. 31, 2023. Any unspent funds will be returned to Travel Oregon.

GRANT REPORTS

Required reports will be submitted through Travel Oregon's online grant management system.

Project Status Report

Recipients are required to provide a final project budget, receipts to show proof of usage of funds, a written account of how the grant funds were used and the impact of the grant dollars. The Project Status Report is due by Jan. 15, 2024.

GRANT FUNDS DISBURSEMENT

Any grant funds not used as approved shall be returned to Travel Oregon pursuant to the grant contract. Projects must be completed within the approved grant timeline. Following approval and execution of contract, an initial disbursement of 90% of the grant award will be sent to the recipient. Final disbursement of funds will be sent once the project is complete, the Project Status Report has been submitted and the final budget and proof of spending documentation is reviewed and approved by Travel Oregon.

VII. QUESTIONS

View the Capacity & Small Project Grants Program [Frequently Asked Questions](#) page for commonly asked questions. Submit additional questions via email to grants@traveloregon.com. Please be aware that email response time may be delayed, but questions will be answered as quickly as possible.

VIII. GRANT TIMELINE

Oct. 25, 2022 – Grant Guidelines available online

Nov. 2, 2022 (8 a.m. PDT) – Online application opens

Nov. 28, 2022 (5 p.m. PST) – Online application closes

Dec. 21, 2022 – Capacity & Small Project Grants application status notification (funds to be distributed after Jan. 1, 2023)

Dec. 31, 2023 – Project completion deadline (grant funds spent)

Jan. 15, 2024 – Project Status Report due (final budget, proof of spending, written account of how grant funds were used and the impact of the grant dollars)

IX. GRANT APPLICATION CHECK LIST

ELIGIBLE ENTITY VERIFICATION

Travel Oregon defines a Destination Marketing/Management Organizations (DMO) as an agency responsible for coordinating the processes where almost all aspects of a destination are managed, including promotional efforts, local resources, accommodation, activities, events, environmental concerns, tourist attractions and transportation.

To be eligible for funding, a DMO must receive transient lodging tax from an Oregon city, county, region or state entity as the authorized contact for destination marketing and/or management.

If you are a contracted or recognized DMO by a local government where transient lodging tax is NOT collected, you may still submit an application. In place of the local government or regional agreement/letter confirming receipt of TLT, please upload official documentation attesting that you are the recognized DMO (ex: letter of attestation from an official of your destination's city/county government). Travel Oregon staff will confirm whether any additional information is needed for eligibility verification.

REQUIRED MATERIALS

Before beginning the online application, we encourage applicants to gather all information and/or documents required to submit the application:

- ✓ [Travel Oregon Substitute Federal W-9 Form](#) – form must be complete, signed and dated.
- ✓ Project budget ([must be completed on required form](#)).
- ✓ Current board approved budget (2022).
- ✓ Destination Marketing/Management Organizations Only: Copy of local government or regional agreement or letter confirming you receive TLT and are an authorized contact of the organization⁴ or for DMOs recognized by a local government where TLT is not collected, documentation such as a letter of attestation from an official of your destination's city/government.
- ✓ Small Project Grants Only: Distribution plan, including budgeted costs, if producing collateral.

[View the application questions before you begin.](#)

Refer to the Capacity & Small Grants Program [Frequently Asked Questions page](#) for troubleshooting.

ONLINE APPLICATION

The Capacity & Small Project Grants application will be available for completion and submission beginning at 8 a.m. PDT on Nov. 2. All applications must be completed and submitted online by 5 p.m. PST on Nov. 28.

Access the online application (beginning Nov. 2) here: <https://www.grantinterface.com/Home/Logon?urlkey=otc>

Applicants who have previously applied for Travel Oregon Competitive Grants or the COVID-19 Emergency Response Grant may use their existing password to log on. Once logged into your applicant dashboard, you can access the application by selecting "Apply" in the top navigation. All other applicants will need to select "Create New Account" to begin.

All submissions are final. Be sure to triple-check your work prior to submitting the application.

⁴ In compliance with ORS 284.131, 20% of the state lodging tax revenue appropriated to Travel Oregon is used for a regional cooperative tourism program. The seven commission-designated Regional Destination Management Organizations (RDMOs) do not need to submit an agreement or letter.

Appendix G: Oregon Heritage Grant

More information available on their website:

<https://www.oregon.gov/oprd/oh/pages/grants.aspx>

OREGON HERITAGE GRANT 2021-2023 BIENNIUM

OREGON HERITAGE COMMISSION, OREGON HERITAGE

Oregon Heritage Grant funds are to be used for:

Support of projects that preserve, develop, or interpret of Oregon's cultural heritage. Priority will be given to projects that preserve, develop, or interpret threatened heritage resources and/or heritage resources of statewide significance.

The grant may fund a broad variety of projects including, but not limited to collections preservation and access, exhibits, oral history projects, public education events, organizational archives projects, films theatrical performances, teaching traditional practices, public history interpretation, organizational planning that supports heritage resources, and more. Due to the availability of other state funding for the preservation of historic structures, the Commission will not give priority for funding preservation of historic structures.

Grants must be submitted through the [Oregon Parks and Recreation Department Grants Online](#) system. There will be one grant cycle in the 2021-2023 biennium.

Definitions:

- Heritage is the array of significant things, thoughts, and activities associated with the human experience in Oregon.
- Oregon's heritage resources include artifacts and other manifestations of material culture, documents, publications, photographs and films, prehistoric and historic sites, historic buildings and other structures, cultural landscapes, heritage celebrations, festivals and fairs, and songs, stories, and recordings associated with the human experience in Oregon.

GRANT TIMELINE:

Deadline – October 20, 2021 (11:59pm)

Notification – December 1, 2021

Project Start – December 15, 2021, agreements fully executed, and workplan approved.

Project completion and reporting deadline – Apr. 30, 2023

AWARD AMOUNT: Generally, awards are \$3000-\$20,000. \$380,000 is available to award.

MATCH: Grants will be made for no more than 50 percent of total project costs. Up to 50 percent of the participant's share of project costs may consist of approved donated services and materials. Volunteer rate is Oregon minimum wage. Volunteers using professional skills, may use professional rates. Other funds from the Oregon Heritage Commission or Oregon Parks and Recreation Department may not be used to match an Oregon Heritage Grant.

BUDGET INFORMATION: Bids and estimates strengthen the grant request when applicable.



Oregon Heritage, OPRD

www.oregonheritage.org

PROFESSIONAL REQUIREMENTS: The application must convey that all work will be completed following appropriate museum, archival, preservation, research or library practices and ethics. Please specify in the application which standards will be followed for the project.

GRANT REPORTING AND PAYMENT: Awarded projects will be the subject of binding agreements between the State and the applicants. Typically, grant funds are dispersed on a reimbursable basis. Details of payment arrangements and grant reporting are included in the grant guidelines.

ELIGIBILITY, CRITERIA AND PRIORITIES:

ORGANIZATIONS:

- A non-profit organization incorporated in the State of Oregon with a 501(c)(3) determination from the United States Internal Revenue Service and a legally-constituted board of trustees or directors;
- A tribal government of a Native American group recognized by the State of Oregon and the federal government and located in the State of Oregon;
- A university or college located in the State of Oregon; or
- A local government within the State of Oregon.

ORGANIZATIONS NOT ELIGIBLE:

- Individuals;
- Religious organizations;
- For-profit organizations such as partnerships, companies, and corporations;
- State agencies, except for state supported colleges and universities;
- School districts; and
- Federal agencies.

CRITERIA: The review committee will consider the following in ranking the grant applications:

- The capability of the applicant to carry out the proposed project.
- The effectiveness of the proposed project for conserving or developing heritage resources.
- Level of the threat to the heritage resource and/or statewide significance.
- How well the work plan meets professional standards.

PRIORITIES:

- Projects that preserve or develop heritage resources that are threatened and/or are of statewide significance
- Projects with a well-prioritized, clearly explained work plan with an appropriate level of detail and realistic cost estimates.
- Projects that document, preserve, or interpret the history of voices previously marginalized or excluded. For example, this may include ethnicities, races, genders, classes, etc.
- Geographic diversity.
- Project readiness, including matching dollar share in-hand.

ASSISTANCE:

- Grant, access, and OPRD: Grants Online questions: Kuri Gill, kuri.gill@oregon.gov, 503-986-0685.



References:

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- Oregon Heritage Grant: <https://www.oregon.gov/oprd/oh/pages/grants.aspx>
- Sisters Country Vision: 2022-21 Annual Progress Report https://sisterscommunity.org/wp-content/uploads/2022/02/2020-21-Annual-Update_Sisters-Country-Vision_FINAL.pdf
- Sustainable Tourism Lab: <https://osucascades.edu/sustainable-tourism-lab>
- Travel Oregon: Capacity & Small Project Grants: <https://industry.traveloregon.com/opportunities/grants/capacity-small-project-grants/>
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Explore Sisters Destination Management Organization Strategic Plan

Presented by Eleana Chase, Ryan Pernell,
Hiba Shocair and Austin Bosworth



Agenda

- Project Overview
- Scope & Methodology
- Findings Summary
- Strategic Plan
- Conclusion & Discussion



Project Overview

- Founded in June 2022, Explore Sisters is poised to implement a new vision for the management and marketing of the City's tourism and natural attractions focusing on livability and all-seasons visitation.
- The project scope provided various opportunities to support Explore Sisters' implementation and development by informing a 2-3 year strategic Plan.
- 3 Strategic Goals supported by sub-steps to accomplish said goals.



Scope & Methodology

- Informational Interviews
- Like-Sized DMO Data Gathering
- Board Vision Workshop
- OSU Sustainable Tourism Lab



Sustainable
Tourism
Lab
OSUSustainableTourismLab.com

Community | Economic | Environmental

Findings Summary

DMO Interviews

- Visit McMinnville focused on strategic planning, revenue growth, and forming partnerships to drive tourism in the region.
- Visit Grants Pass emphasized developing a roadmap for growth and building strong relationships with local officials and the Chamber of Commerce.

OSU Sustainable Tourism Lab Interview

- Their focus is on gaining a deeper understanding of the impacts of tourism by considering various factors.
- The lab's approach involves incorporating resident input, environmental impacts, and the local workforce capacity into their analysis.



Strategic Plan Overview



Strategic Goal 1:
Strengthen
Governance



Strategic Goal 2:
Stakeholder
Engagement



Strategic Goal 3:
Financial
Opportunities



Explore Sisters Mission, Vision, Values Workshop Output

Areas of agreement	<ul style="list-style-type: none">• Explore Sisters is community focused and forward thinking• Economic development activity in Sisters needs to be balanced, dynamic, and collaborative
Points of Tension	Scope of work: potential v. what is appropriate for a DMO
Core Values	Stewardship, innovative, collaborative, inclusive, stable/professional/sustainable



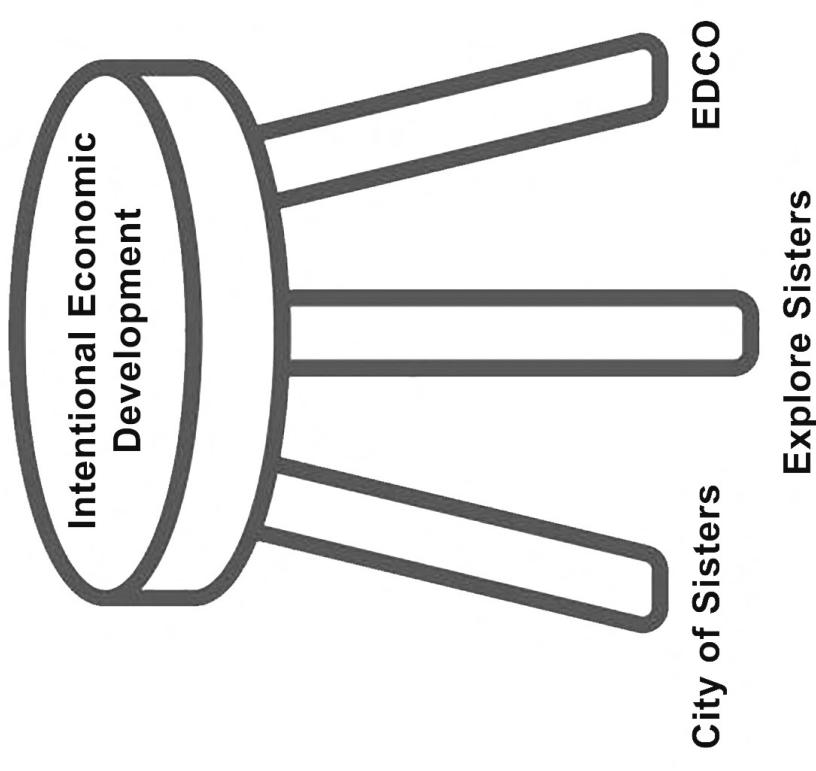
Strategic Goal 1: Strengthen Governance

- Step 1: Utilize the established mission, visions, and values to set organizational direction
 - Adopt official mission, vision, values w/ stakeholder input
 - Determine success metrics
- Step 2: Deliberately build the Board to match vision
 - Board composition analysis
 - Orientation & mentorship program
 - Committee development
- Step 3: Align Explore Sisters' work with mission, vision, and values
 - Align marketing materials with organizational values
 - Develop programs to achieve mission

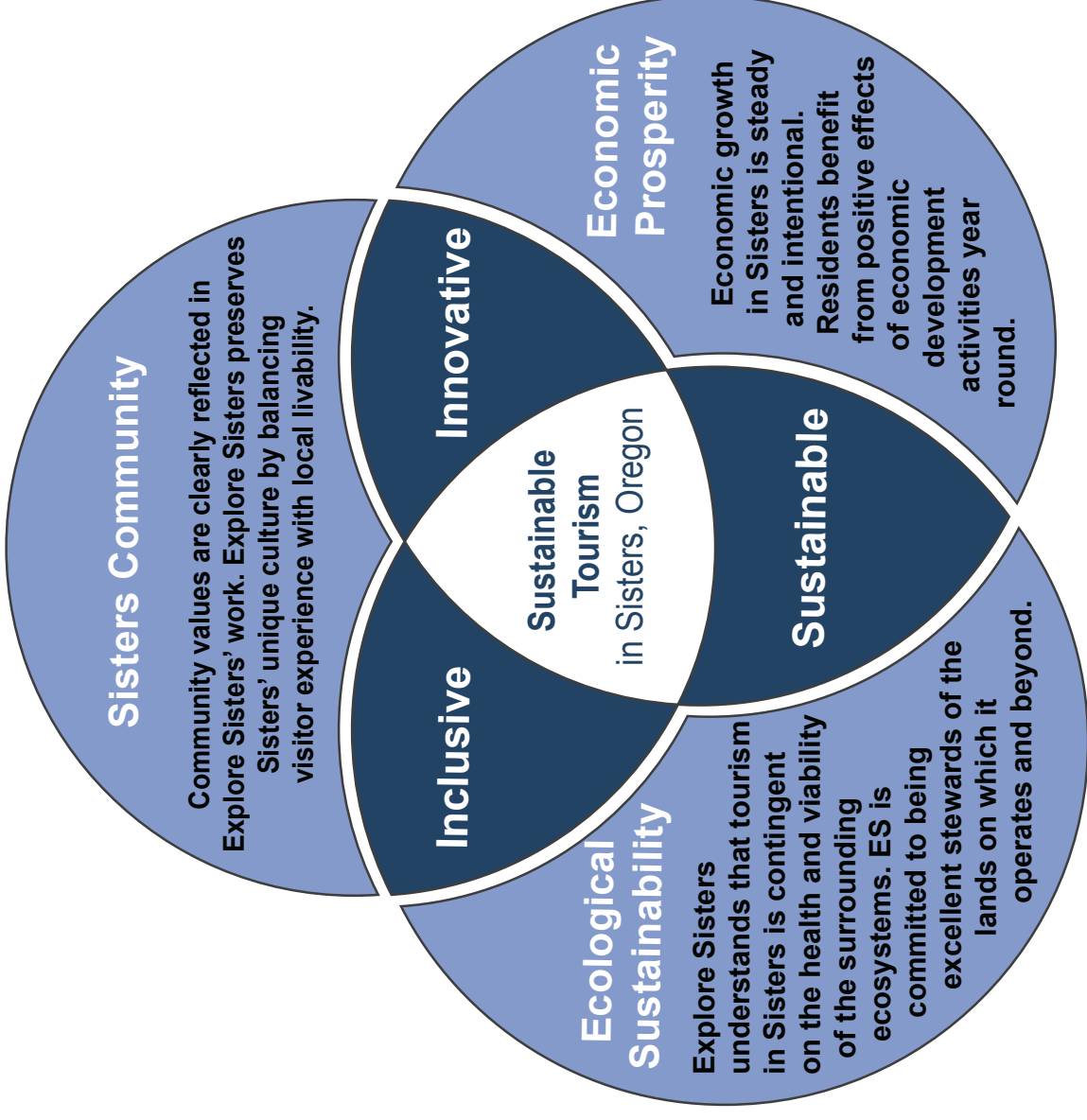


Strategic Goal 2: Stakeholder Engagement

- Step 1: Engage with organizational partnerships
- Step 2: Identify residents' interests through community engagement.



Strategic Goal 2: Stakeholder Engagement (cont.)



Strategic Goal 3: Financial Opportunities

- Step 1: Petition City Council to continue funding through the Transient Lodging Tax.
- Step 2: Identify grants that would provide additional funding for one-time expenses.



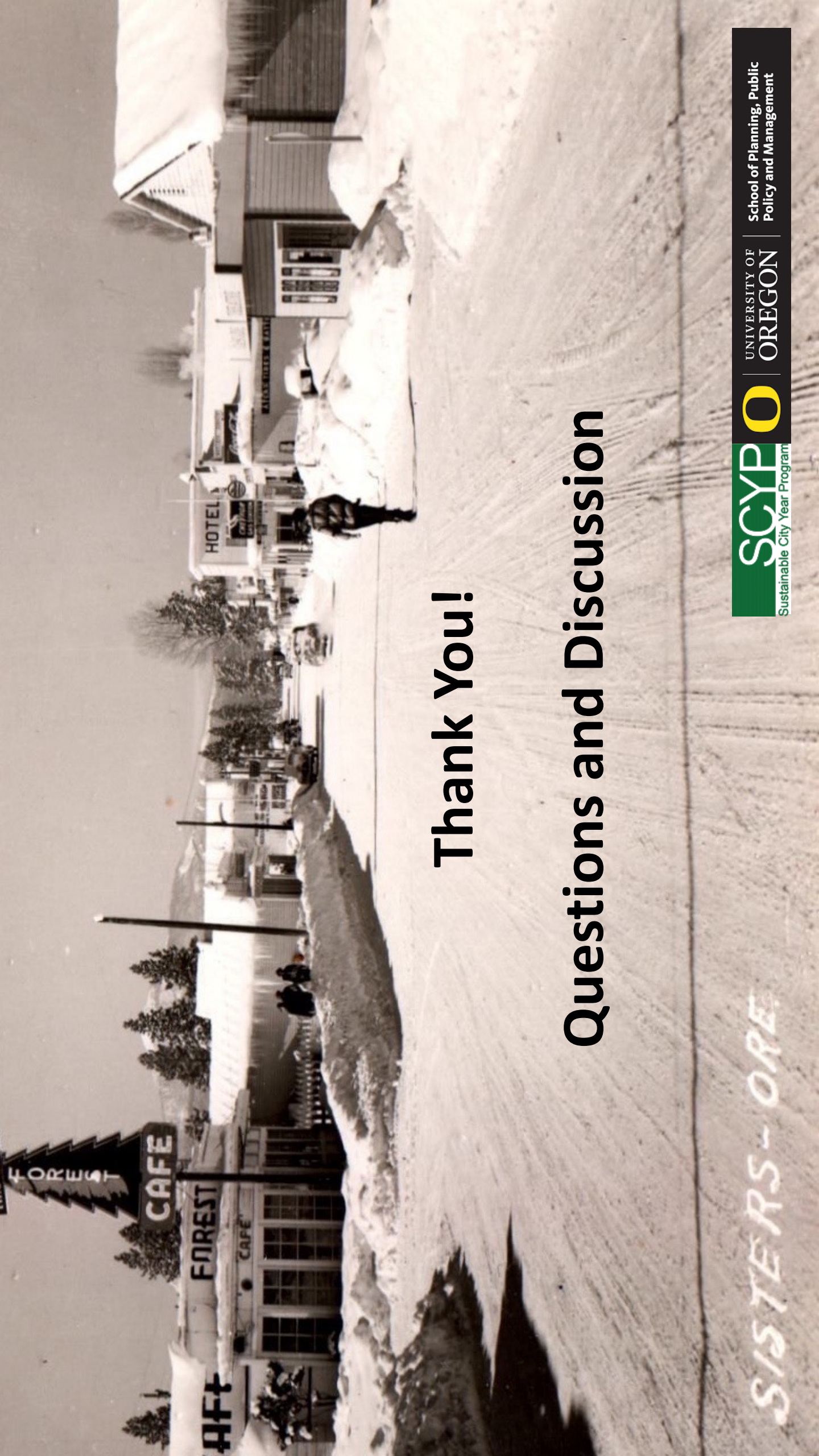
- Step 3: Explore hiring an AmeriCorps RARE member as an alternative to full-time staff



Conclusion

- All of the elements of a Strategic Plan are present, what's needed now is assembling them and ensuring the Board is aligned around the long-term strategy
- By adopting the provided goals, and subsequent steps, Explore Sisters will have a foundation that the organization can use to build capacity to enhance Sister's economic health through stewardship of its local resources and residents.





Thank You!

Questions and Discussion

SISTERS - ORE