**VENTURE PORTLAND FALL/WINTER 2018-2019 BENCHMARK GRANT**

**DUE: OCTOBER 5, 2018 BY NOON (12PM)**

**GRANT APPLICATION CHECKLIST**

**Business District: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Completed Checklist**

**Cover Letter**

**Complete Grant Application**

* Section 1:
	+ Amount
	+ Benchmark
	+ Business District Information
	+ President’s Signature
	+ Treasurer’s Signature
* Section 2: Benchmark Achievement Forms (Bonuses, Optional)
* Section 3: Narrative
* Section 4: Budget

**Supporting Documents\* (if applicable)**

\*Business districts that provide an Annual Budget and current Balance Sheet are more competitive.

**\*\*INCOMPLETE OR LATE APPLICATIONS WILL NOT BE ACCEPTED.\*\***
Benchmark Achievement Forms, definitions and grant guidelines are available at [ventureportland.org/grants](http://www.ventureportland.org/grants)

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**You must complete all fields and all components of each question. Incomplete or late applications will not be accepted.**

**SECTION 1: AMOUNT, BENCHMARK, BUSINESS DISTRICT INFO AND SIGNATURES\***

#### Amount Requested\*\*:

#### Base Grant Request ($3,000 max) + Benchmark Achievement Bonus ($1,000 max) = Total Amount Requested ($4,000 max)

**Benchmark:**

#### Choose one from below (priority benchmarks in bold).

* **Strong Membership**
* **Web/Social Media Presence**
* **Self-sustaining Signature Event**
* District Identity/Place Making
* Collateral/Map/Newsletter
* Marketing/Media/PR Campaign

**Business District:**

**Mailing Address:**

**Grant Coordinator:**

**Attended Grants Certification Training?** **[ ]  Yes** **[ ]  No**

**Grant Coordinator Phone: Email:**

**Grant Writer:**

**Attended Grants Certification Training? [ ]  Yes [ ]  No / First Time Grant Writer? [ ]  Yes [ ]  No**

**Grant Writer Phone: Email:**

**President:**

**Attended Grants Certification Training? [ ]  Yes [ ]  No**

**President Signature\*:**

**President Phone: Email:**

**Treasurer:**

**Attended Grants Certification Training? [ ]  Yes [ ]  No**

**Treasurer Signature\*:**

**Treasurer Phone: Email:**

\*Venture Portland accepts the following ‘signatures’: A hand-delivered ‘wet’ signature, a scanned ‘wet’ signature sent via email or fax, a signature verified using a third party service (Docusign, etc) and a signature ‘written’ using design software (Adobe Acrobat, MS Paint, etc.). Venture Portland does not accept a typed name in an italics or cursive font as a ‘signature’.

\*\*Please note: the maximum amount that can be awarded each grant cycle varies based on Venture Portland’s available funding.

**SECTION 2 (OPTIONAL): BENCHMARK ACHIEVEMENT FORMS (BONUSES)**

**Detailed narrative responses may require additional pages. Please note some questions have multiple components that must be completed.**

To be eligible for up to three Benchmark Achievement bonuses applicants may choose to submit any of the following Benchmark Achievement forms to increase their total Benchmark grant request up to a maximum of $4,000:

* **$500: Benchmark Achievement Anticipated (current, maximum of one)** – Will your district achieve its chosen benchmark during the Fall/Winter 2018-2019 grant cycle? If yes, select ‘Benchmark Achievement Anticipated (current)’ and provide narrative detail about how your district anticipates reaching its chosen benchmark during the current grant cycle utilizing lessons learned from previous years of funding for this project.
* **$250: Benchmark Achieved (past, maximum of two)** – Has your district already achieved this Benchmark? If yes, select ‘Benchmark Achieved (past)’ and provide narrative detail about how your district reached this Benchmark. Note: only Benchmark Achievement Bonuses that have not yet been redeemed are eligible. To find out which Benchmark Achievement bonuses your district has already redeemed, check your district’s latest Benchmark Progress Report or contact Jacob (503.477.9648, jacob@ventureportland.org).

**Benchmark Achievement Anticipated (if applicable, $500)**

**+**

**Number of Benchmarks Achieved \_\_\_\_ x $250**

**=**

**Total Benchmark Achievement Bonus ($1,000 max)\*:**

\*Include Benchmark Achievement Bonus in Section 1, ‘Amount Requested’ and Section 4, ‘Requested Venture Portland Grant’.

*Optional Section*

Benchmark Achievement Form

STRONG MEMBERSHIP

Select one of the following:

Benchmark Achievement Anticipated (current) - $500

 Benchmark Achieved (past) - $250

 Benchmark In Progress **-** EstimatedAchievement Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Benchmark Revisited Due to Significant Changes in District (describe): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Not Working on Benchmark

Number of Current Paid Members:

Membership Goal:

Number of Businesses in District:

Membership Growth Over Previous Year (% and #):

Does your district have a formal annual membership campaign? [ ]  Yes [ ]  No

Who is in charge of managing membership information?

Does your district have membership and/or board diversity goals? [ ]  Yes [ ]  No

Explain how your current membership mix reflects your district diversity goals:

Explain how your current board reflects your diversity goals:

Explain how your current membership benefits serve the diverse types of businesses in your district:

*Optional Section*

Benchmark Achievement Form

Web/Social Media Presence

Select one of the following:

Benchmark Achievement Anticipated (current) - $500

 Benchmark Achieved (past) - $250

 Benchmark In Progress **-** EstimatedAchievement Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Benchmark Revisited Due to Significant Changes in District (describe): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Not Working on Benchmark

Website and Social Media Address(es):

Most Recent Number of Website Page Views:

Most Recent Number of Unique Website Visitors:

Current Number of Facebook Followers:

Current Number of Other Social Media Followers (Twitter, Instagram, etc):

Is your website and social media consistent with your district’s brand/identity? [ ]  Yes [ ]  No

What services do you use to keep your website secure?

Who is in charge of regular website updates and maintenance?

Who is in charge of generating/posting new website content?

Who is in charge of generating/posting new social media content?

How does your district leverage its website and social media to market and promote district businesses?

What impact has your district’s website and social media had on district business revenue?

*Optional Section*

Benchmark Achievement Form

Self-Sustaining Signature Event

Select one of the following:

Benchmark Achievement Anticipated (current) - $500

 Benchmark Achieved (past) - $250

 Benchmark In Progress **-** EstimatedAchievement Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Benchmark Revisited Due to Significant Changes in District (describe): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Not Working on Benchmark

Name and Type of Event:

Number of Years Event Has Occurred:

Average/Most Recent Number of Attendees at Event:

Average/Most Recent Amount of Event Sponsorship Revenue:

Average/Most Recent Number of Vendors (if applicable):

Average/Most Recent Number of Participating Member Businesses:

How does the event relate to your district’s brand/identity?

How does the event benefit the diverse types of businesses in your district?

What impact has your signature event had on district business revenue?

When was the last time the event was assessed for fit with your district’s current built form and business mix?

*Optional Section*

Benchmark Achievement Form

District Identity/Placemaking

Select one of the following:

Benchmark Achievement Anticipated (current) - $500

 Benchmark Achieved (past) - $250

 Benchmark In Progress **-** EstimatedAchievement Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Benchmark Revisited Due to Significant Changes in District (describe): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Not Working on Benchmark

Does your district have its own brand? [ ]  Yes [ ]  No

Does your business association have its own brand? [ ]  Yes [ ]  No

If yes, please attach any related brand usage guidelines.

How does your district’s brand relate to your district’s identity?

How does your district use its brand consistently?

When was the last time your district’s brand was refreshed?

Does your district have semi-permanent Fixtures (Banners, Flower Baskets, etc)? [ ]  Yes [ ]  No

If yes, what type and how many?

How does your district maintain its semi-permanent fixtures?

Does your district have an event that helps define its identity? [ ]  Yes [ ]  No

What impact has your placemaking had on district business revenue?

*Optional Section*

Benchmark Achievement Form

Collateral/Map/Newsletter

Select one of the following:

Benchmark Achievement Anticipated (current) - $500

 Benchmark Achieved (past) - $250

 Benchmark In Progress **-** EstimatedAchievement Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Benchmark Revisited Due to Significant Changes in District (describe): \_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Not Working on Benchmark

Name/Type(s) of Collateral (Map/Newsletter/Other):

Is your district’s collateral consistent with its brand/identity? [ ]  Yes [ ]  No

Most Recent Number of Materials Printed/Distributed:

Most Recent Number of Ads/Sponsors:

How much revenue does the collateral generate for the association?

Most Recent Number of Participating Businesses (if applicable):

Most Recent Number of Newsletter Subscribers (if applicable):

Is your collateral valued by district businesses as a benefit? [ ]  Yes [ ]  No

What impact has the collateral had on your district (number of visitors, increased recognition, etc.)?

How does the collateral benefit the diverse types of businesses in your district?

What impact has the collateral had on district business revenue?

*Optional Section*

Benchmark Achievement Form

Marketing/Media/PR Campaign

Select one of the following:

Benchmark Achievement Anticipated (current) - $500

 Benchmark Achieved (past) - $250

 Benchmark In Progress **-** EstimatedAchievement Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Benchmark Revisited Due to Significant Changes in District (describe): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Not Working on Benchmark

Total Number of Earned Media Stories (in the past 12 months):

Please attach any media clips, press releases, media lists or collateral pieces to support this benchmark.

Increase of Website Visitors and/or Social Media followers in the past 12 months (% and #):

How do your marketing efforts utilize your district’s brand and collateral?

How do you market the district seasonally?

Has your district had to overcome a major disruption? [ ]  Yes [ ]  No

If yes, what was it and what resources/strategies did you use? If no, what resources/strategies would you use to overcome a major disruption?

What impact has your marketing had on district business revenue?

**SECTION 3: NARRATIVE**

**Detailed narrative responses may require additional pages. Please note each question has multiple components that must be completed.**

1. **Project Overview**
	1. Project Title
	2. Activities
	3. Current district programs and assets that leverage the project
	4. Target Audience
	5. District Demographics\* (Number of district businesses, cultural diversity, business mix and

Does your membership reflect your district’s business mix?)

* 1. Member Demographics (Number of current dues-paying members/financial supporters)
	2. Does the project meet Venture Portland’s Strategic Objectives? (select all that apply)

 [ ]  Builds District Capacity [ ]  Markets/Promotes District

1. **Benchmark Progress**
	1. How will you know if the project is successful (include quantifiable outcomes you will use to evaluate success)? *Provide specific numbers*.
	2. If this is a **first-time project**, how will it identify a baseline and define a timeline to achieve benchmark status including benchmark achievement date?

**OR**

If this is **not a first-time project**, how will it use prior year experience to guide current goals for success and define a timeline to achieve benchmark status including benchmark achievement date? How will you demonstrate gains and/or progress over prior years?

1. **Timeline**
	1. Provide a detailed timeline of the project including planning, implementation, final accounting and evaluation.
2. **Community Engagement**
	1. How many volunteers will work on the project (number of volunteers, hours contributed and type of work)?
	2. How will you leverage additional community resources and/or collaborate with partners?
3. **District Capacity**
	1. How will the project succeed in the event of the loss of the grant coordinator or change in district leadership?
	2. Describe the business district’s track record of success to demonstrate ability to effectively implement this project and reach long term goals (benchmark achievements, experience, ability, lessons learned and success).
4. **Sponsor Recognition**

Venture Portland’s sponsorship and/or logo will be included on (check all that apply)\*\*

[ ]  Banner [ ]  Newsletter [ ]  Press release [ ]  Verbal

[ ]  Flyer/Postcard [ ]  Paid Advertisement [ ]  Social Media [ ]  Website

[ ]  Map ­­­ [ ]  Poster [ ]  T-shirt [ ]  Other (describe):

\*Business District Data can be accessed using the new Tableau District Data tool available at <http://tinyurl.com/BusinessDistrictData>

\*\*Applicantmust recognize Venture Portland’s grant in all public relations and marketing materials produced in support of the project. Use of Venture Portland’s logo must be approved by Venture Portland prior to production and upon approval included in all materials as defined in the submitted application. Failure to do so will impact future grant eligibility and result in having to return funds to Venture Portland.

**SECTION 4: BUDGET AND NARRATIVE QUESTIONS (2 & 3)**

1. Provide a detailed budget using the worksheet below. Please edit and/or add additional income and expense line items if needed and double-check math.
2. If the budget shows a profit, please explain how it will be used to benefit the business district.
3. Explain how grant funds will be matched and spent. Provide narrative detail on in-kind contributions/expenses (what, from whom and for what) and cash sources/expenses (how much, from whom and for what). In general, project budgets with confirmed cash or in-kind contributions in place at the time of application are more competitive.

|  |  |  |  |
| --- | --- | --- | --- |
| **INCOME** | **Venture Portland Grant** | **Business District Match\*** **Revenue – In-kind** | **Business District Match\*** **Revenue – Cash** |
| **Requested Venture Portland Grant**Include Benchmark Achievement Bonus  |  | **N/A** | **N/A** |
| **In-kind: Goods and Services** | **N/A** |  | **N/A** |
| **Cash: Project Revenue (Sponsors, Members, Vendors, Ads, etc.)** | **N/A** | **N/A** |  |
| **Cash: Business District** | **N/A** | **N/A** |  |
| **Subtotals:** |  |  |  |
| **Total Income: (add Grant, In-kind, and Cash Subtotal columns)** |  | **N/A** |
|  |
| **EXPENSE** | **Venture Portland Grant** | **Business District MatchExpenses – In-kind** | **Business District Match Expenses – Cash** |
| **Personnel: Staff (ongoing)** | **N/A** |  |  |
| **Personnel: Consultants** |  |  |  |
| **Equipment/Supplies** |  |  |  |
| **Materials** |  |  |  |
| **Printing** |  |  |  |
| **Fees/Permits** |  |  |  |
| **Insurance** |  |  |  |
| **Advertising** |  |  |  |
| **Other** |  |  |  |
| **Subtotals:** |  |  |  |
| **Total Expense\*\*: (add Grant, In-kind, and Cash Subtotal columns)** |  | **N/A** |
| **Projected Profit (subtract Total Expense from Total Income):** |  |

**\*Total Business District Match (Cash/In-kind Expenses) MUST equal or exceed requested Venture Portland Grant. \*\*Total Expense cannot exceed Total Income. Total Income may exceed Total Expense if you intend for this project to earn a profit; however, you must show how the Projected Profit will be used to benefit the business district in Narrative Question 2.**