



2024–2025

# Partnership Allocation Program Guidelines

## Introduction

Welcome to the program guidelines for Regional Tourism Organization 8's (RTO8) 2024-2025 Partnership Allocation Program. Included in this guide is information regarding our current program including the following: program rationale, partnership eligibility requirements, funding parameters and the 2024–2025 project initiatives. We have designed this guide to answer your questions about the Partnership Allocation Program; however, if you have further questions, you are encouraged to contact Brenda Wood, Executive Director at [brendawood@rto8.com](mailto:brendawood@rto8.com). Approval of Partnership Funds are dependent upon RTO8 receiving their 2024–2025 Transfer Payment Agreement from the Ministry of Tourism, Culture and Sport (MTCS).

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## Program Overview

RTO8's Partnership Allocation Program is designed to build on existing and introduce new tourism products that enhance the region's diversity of tourism attractions and competitive advantage by supporting the development of visitor experiences in the region. This program's estimated allocation is \$114,000.00 from the MTCS.

## The Ministry's and RTO8's objectives in providing this opportunity are to:

- Enhance tourism across the Province, especially overnight stays.
- Support the RTO as the leader in regional tourism.
- Maximize support for tourism at a regional level by encouraging strong partnerships, expanding the breadth and diversity of funding partners.
- Encourage RTOs to engage industry partners to broaden their financial base to extend reach.
- Support a coordinated approach that aligns planning, product development, investment attraction and workforce development in the region.
- Assure the transparency and accountability of funding through the transfer payment agreement.
- Increase the economic tourism value to the region.

The Partnership Allocation Program is **not a grant** program, it is a Partnership Program that requires a buy-in of 50% of eligible project costs from the applicant. The program is designed to have partners work with RTO8 to attain mutual benefits by delivering on partnership project objectives. RTO8 can only enter into partnerships when projects align with their mandate and goals, target audiences, segments and activities as outlined in RTO8's current Operational Plan. The intent of the Partnership Allocation Program is to assist tourism products or experiences, it is not intended to provide year over year funding to organizations. Projects are expected to have a sustainability plan in place for continued growth. Higher priority will be placed on initiatives that show potential to increase tourism receipts for the region.

Partners must be prepared to commit to and follow through on the collection of jointly determined data related to the project undertaken. The data collected from partners in the form of Project Reports may then be aggregated with other data in the longer term to provide a clearer picture of the state of tourism within the region.

## Program Objectives

The Partnership Allocation Program is an initiative designed with the intent to make the RTO8 region one of the leading travel destinations in Ontario for experiencing soft outdoor and rural adventures connecting Canadian waterway heritage. RTO8 will work with eligible partners that encourage tourism by:

- Building on pre-existing festivals and events with at least one year of operational data within the region that generate new or repeat visitation to Kawarthas Northumberland;
- Expanding Indigenous tourism product within the region and building relationships with Indigenous operators;
- Designing and installing clear business signage to assist visitors in wayfinding or self-guided tours;
- Consumer-facing website upgrades e.g. photography, videography, booking widget;
- Digital marketing outside of the RTO8 region (2 to 5 hour drive radius) targeting the GTA, Ottawa, Kingston, Quebec etc.

### Priority will be given to proposals that:

- Promote overnight visits, increase the length of stay
- Include two or more partners that are financially committed to the project, in addition to RTO8
- Have clearly defined and measurable goals  
\*See project categories for additional details

### Two intake periods:

- Intake period 1 - Those who have not received funding from this program within the past five years
- Intake period 2 - Open to those who have received funding in the past

## Partner Eligibility

2024–2025 Funding will only be provided to legal incorporated tourism businesses, tourism businesses with an active Canada Revenue Agency (CRA) Business Number (BN), or Indigenous operators who are 51%+ Indigenous owned and controlled. Examples include those that are established by or under legislation; are federally or provincially incorporated, or have a CRA Business Number (BN), are Indigenous tourism businesses that are incorporated or have a CRA Business Number (BN), or are able to provide a Certificate of Indian Status Registry number or Métis Registry number.

Eligible partners are for-profit or not-for-profit tourism businesses, as well as First Nations tourism businesses that operate within or are developing tourism products within the RTO8 geographic boundaries.

For all funding categories, the applicant must be prepared to have at least \$2 million General Commercial Liability insurance coverage and will add “Regional Tourism Organization 8” as an additional insuror for the full duration of the partnership project.

The project must be located within the region served by RTO8 (The City of Kawartha Lakes, Peterborough County, City of Peterborough, Northumberland County, Curve Lake First Nation, Hiawatha First Nation, and Alderville First Nation). Applicants should discuss their project with their local Destination Marketing/Management Organization (DMO) before applying and must submit a letter of support from them along with their application. DMOs are as follows:

- City of Kawartha Lakes - Laurie McCarthy (lmccarthy@kawarthalakes.ca)
- City of Peterborough / Peterborough County/ Curve Lake First Nation / Hiawatha First Nation – Joe Rees (jrees@investptbo.ca)
- Northumberland County / Alderville First Nation - Diane Murenbeeld (murenbeeld@northumberland.ca)

Applications require full disclosure of all other funding granted to the initiative. Partners are not able to use Ontario grants (Experience Ontario, ReConnect, Celebrate ON, Trillium etc.) to fund their portion of the Partnership Allocation Program but federally funded programs can be used.

As this program is oversubscribed each year, approved partners will have 30 days from project approval to submit the required documentation, if this time frame is not adhered to, RTO8 reserves the right to reallocate funding at its discretion.



## Project Categories

Projects noted within the 2024-25 Business Plan include the following:

**Translation** – support the translation of consumer-facing digital information into French (e.g. current website, digital brochures, wayfinding signage). Printed materials are not eligible with the exception of on-site wayfinding signage.

**Out of Region Digital Marketing** – digital ads/campaigns focused on attracting consumers from outside of the Kawartha Northumberland region (ideally a 2-to-5-hour drive radius of the region) e.g. GTA, Ottawa, Kingston, Oakville etc. This would help to increase overnight stays.

**Digital Capacity** – this includes assisting with the implementation of a website booking widget to enable consumers to book directly with the tourism operator from their website and not via a third-party booking engine like Airbnb or Vrbo. The development of consumer-facing digital brochures/ marketing materials, consumer facing website upgrades etc.

**Experience Development/ Enhancement** – support the creation of market-ready new consumer experiences and/or the enhancement of existing consumer experiences through educational courses (e.g., Gros Morne Institute for Sustainable Tourism courses), consultant fees for qualified experience development, and eligible expenses for piloting a newly developed or enhanced consumer experience to ensure market readiness.

**Photography / Videography** – updated visual assets play a vital role in enticing visitors. We support new photography and or videography to assist in consumer marketing (website, promotional materials etc). This includes photographer / videographer fees, model fees etc. Note: All visual assets must be provided to RTO8 for their use.

**Wayfinding Signage** – support for the development of new or upgrading of existing consumer facing wayfinding signage. This includes graphic design fees and sign creation fees for on property signage, trail signage, directional signage to assist consumers in locating a specific property. Note: Installation fees and fees associated with land permits, licensing etc. are not eligible.

**Festivals & Events** – to be eligible for this program, the festival or event must have at least one year of operation – first time festivals & events are not eligible. The festival or event must be marketed/ promoted outside of a 75KM radius of its location to attract visitors from farther distances. Preference will be given to those who utilize sustainable practices (e.g. reduce waste, recycle, engage in ethical sourcing, opt for sustainable packaging, go paperless etc.) Eligible items include but are not limited to equipment rentals (tents, tables, chairs, portable washrooms, portable AV equipment, venue rentals) photographers etc.

## Traveler Preference Research Shows Interest in:

- Food & beverage experiences including farm visits, winery & micro-brewery tours and tastings, cooking classes, educational experiences farm to fork)
- Soft outdoor adventure including fishing, paddling, hiking, cycling
- Cultural tourism experiences that engage and educate visitors
- Visiting quaint towns and villages to experience shopping, dining, attractions, festivals & events, galleries
- Wellness experiences (e.g. guided nature walks, forest bathing etc.)



## Funding Criteria

### Intake period 1 (March 1-May 31, 2024)

Open to tourism business owners/operators/organizations operating within the Kawarthas Northumberland region that are applying for the **first time** to this program or those who have not received funding in the past five years.

### Intake period 2 (June 1-Oct.31, 2024)

Open to tourism business owners/operators/organizations operating within the Kawarthas Northumberland region who have received funding from this program in the past.

RTO8 is bound to the funding guidelines as set forth by the MTCS. First and foremost, the funds are only available to partners that are able to provide matching funds. The Ministry uses the following definition of Partner:

*In the context of the funding model, 'partnership' is defined as the agreement of the RTO to work with one or more entities on a specific project in support of the RTO's business plan. The RTO is the project lead and the partner contributions 'flow into' the RTO – they do not 'flow through' to the partner(s).*

Partnership Fund projects may receive up to 50% for their eligible project, with a minimum matching contribution of \$1,500.00 and a maximum matching contribution of \$14,000.00. **Costs are exclusive of HST.**

Some exceptions to the above matching funds will apply.

All projects must be completed by February 17, 2025.

## Ineligible Costs

The following are deemed ineligible by the Ministry:

- Grants and flow-through to other organizations
- Charitable fundraising
- Advocacy
- Donations to political parties or lobby groups
- Capital costs related to permanent structures or acquisitions (except for wayfinding signage)
- Competition prizes, prize money and monies paid to competition participants
- Previously incurred expenses
- Refundable portion of the HST or other refundable expenses
- Expenses that do not directly relate to the application/delivery of the Partnership Allocations Program project
- In-kind donations
- Funds for operational funding, such as salaries and wages
- Alcohol is not a reimbursable expense

## Project Expenses/Payments

The Ministry requires that RTO8 be responsible/accountable for the administration of project funds, meaning that **RTO8 cannot pay or reimburse the partner directly**. The partner will be invoiced by RTO8 for their portion of the project. Supplier invoices must be addressed to RTO8 but sent to the partner for approval before payment by RTO8.

Upon receipt of the 50% partnership invoice from RTO8, partners must submit a cheque or electronic payment to RTO8 within 30 days. Projects cannot commence until payment has been received from the partner and proper supporting documentation (contract, disclosure and release statement, and Insurance etc.) has been signed and received by RTO8.

**Please note** that all paid work must be completed by third parties, and that suppliers must be a legal business with an active CRA business number (BN). Suppliers charging HST must have their HST number noted on their invoice. Partners can contribute in-kind contributions to the project, but cannot be reimbursed for project expenditures and they must provide a cheque or electronic transfer for their portion of the project budget.

**All partnership fund vendor invoices must be made out to RTO8 as follows and emailed to [brendawood@rto8.com](mailto:brendawood@rto8.com):**

**RTO8**  
Re: (Partnership Fund/Event Name)  
P.O. Box 40  
Hastings, ON K0L 1Y0

Invoices not addressed to RTO8 cannot be paid. Invoices must be sent to the partner for approval first and then forwarded by the partner to [brendawood@rto8.com](mailto:brendawood@rto8.com). Invoices received directly from partner vendors to RTO8 will be rerouted back to the partner for approval. RTO8 will only process payment for invoices for items agreed to and specified in the approved project budget. Changes to project deliverables or budget must be pre-approved by RTO8 prior to changes being made.

## Acknowledgements

In entering into partnership with RTO8, all recipients are required to acknowledge the support received by RTO8 and the Ministry with the use of:

- The Ontario Yours to Discover logo (and the Kawarthas Northumberland logo provided with contract) on all consumer related materials.
- The Ontario Trillium logo and the RTO8 logo (provided with contract), on all industry related materials.
- RTO8 reserves the right to approve all logo placements prior to public release or production.
- Any public announcements/media releases require pre-approval of RTO8.

## Documentation Requirements

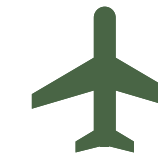
- Signed contract and supporting payment are required within 30 days after receipt of contract.
- Invoice payments to suppliers will not be processed until the supporting payment, signed contract and supporting documents are received.
- Notify RTO8 within 14 days after your project closes if all the funding will/will not be used.
- Only ask for the amount of funding you require.
- All vendors must be noted on the application with cost (less HST).

Agritourism is an industry ripe for growth, offering Ontario farmers diversified income.

## Procurement Policy

RTO's are expected to meet MTCS procurement guidelines as follows:

- Good value for money spent is a priority for RTO8.
- The Transfer Payment Agreements with the Ministry requires that RTO8 must undertake a competitive process for purchases of any value.
- The intent of a good tendering process is to ensure:
  - Value for money;
  - The receipt of appropriate services; and,
  - The use of a transparent competitive process to identify the best person/organization to deliver the services/supplies required.
- In carrying out a competitive process RTO8 will:
  - Develop a clear description of the product/service sought which includes sufficient information up front; and,
  - Apply consistent and objective evaluation criteria to all quotes.
  - Consider best value criteria including bid/project cost, experience, quality, services, etc. The lowest price does not always mean the best value.
- All processes around any procurement will be documented.
  - Under \$5,000 requires a note to file indicating a 'search' for best value for dollar was completed – i.e.: phone, web, committee review, etc.
  - Where the purchase price exceeds \$5,000, RTO8 must obtain a minimum of three written quotes.



Request for Proposals (RFP's) should be posted and distributed as widely as possible to ensure multiple submissions by qualified vendors are received by the closing date. RFP closing deadline dates should allow for as much time as possible to encourage qualified vendors to make a submission. RTO8 considers the RFP period should be no less than 10–14 days and preferably longer.

The partner will permit RTO8, if required, to verify/audit information submitted (at the discretion of the Province) to ensure that it is complete and accurate and that funds were used for the purpose intended.

## Project Evaluation Criteria

Mandatory for all projects:

- Partner agrees to compliance with RTO8 procurement policy.
- Partner agrees to incorporate the required logos into their project where applicable.
- Compliance with acknowledgements.
- Proposal is consistent with RTO8's Operational Plan.
- Compliance with the program accounting, submittal of invoices for payment, documentation and reporting procedures.
- Maximum of one application per intake period per tourism business/operator/organization.

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## Project Reports

The mid-year and final report (where applicable) will follow the guidelines/templates provided by RTO8. The reports will include but are not limited to:

- Partner submitting their report by the date indicated by RTO8.
- Description of the activities linked to the project description as outline in the application.
- Digital copies of the marketing materials and links to social media marketing /mentions.
- Proof of acknowledgement of RTO8 / MTCS funding support.
- Explanation of any variance between the application and the report.
- Final report for the project is due 30 days after the project/s is completed; final invoicing payments will be withheld until the Final Report is received from the partner.
- Budget forecasting by December 1, 2024 for the remaining expenses of the project until February 17, 2025. RTO8 reserves the right to re-allocate remaining funds to other projects.





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