



Marion County
OREGON

Economic Development Grant Application

Please return completed Application to:
Economic Development Lottery Grant Program, attn: Dan Estes
Board of Commissioners, 555 Court St., NE Salem, OR 97301

Completed application must be received by 4:00 PM on third Thursday of the month to qualify for consideration in the following month. Applications may be returned to the applicant for more information and subsequently held over until information is complete. Applicants are encouraged to attend the Economic Development Advisory Board meeting to answer questions about their pending application. EDAB meetings are held on the second Wednesday of the month at 3:30 PM in the HR Training Room, Fourth Floor, Courthouse Square.

Questions? Please call Dan Estes at 503-589-3264

For Office Use Only:

Submitted By: _____

Received By: _____

Received:

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Marion County Economic Development Video Lottery Grant Application

PURPOSE

To leverage Marion County Video Lottery funds to enhance and diversify the economic base of Marion County

GOALS

- 1. To create and maintain traded sector jobs**
- 2. To expand industrial land base**

CATEGORIES

Category 1. Direct job creation or retention

- a. Traded sector
- b. \$5000 per new job/\$2500 per retained job
- c. Specific training or machinery purchase proposal

Category 2. Indirect job creation or expansion

- a. Traded sector
- b. \$5000 per new job/\$2500 per retained job
- c. Specific proposal to expand market share or move into a niche market

Category 3. Assistance to traded sector - recruitment, retention and job training

- a. Direct relationship to job creation or retention
- b. Comprehensive program and proven record
- c. \$5000 per new job/\$2500 per retained job

Category 4. Ancillary services to traded sector

- a. Direct link to traded sector
- b. Comprehensive program and proven record
- c. \$10,000 per project per organization

Category 5. Tourism

- a. Direct relationship to job creation or retention
- b. Comprehensive program and proven record
- c. \$10,000 per project per organization

Category 6. Feasibility studies

- a. Direct relationship to traded sector
- b. Documented job creation or retention potential
- c. Limited to infrastructure and economic development related studies
- d. 50% match required
- e. \$10,000 per project per organization

ELGIBILITY

- Established businesses
- Business Associations
- Local Governments
- Educational entities

MANDATORY REQUIREMENTS

- Grant must be used to create or maintain jobs in Marion County
- Project to reflect the development goals and objectives of Marion County
- Project must have clearly defined measurable results
- Matching funds must be identified and available
- Activities for all categories must be completed within one year of contract award

INELGIBLE ACTIVITIES

- Purchase of land, buildings or rolling stock
- Illegal activities
- Duplicates a project funded from other sources

CRITERIA FOR AWARDING FUNDS

All Grant Applications will be judged on the following criteria, listed in order of importance:

1. Creation or retention of traded sector jobs
2. Advance technological capabilities or productivity
3. Expand market share or into a niche market
4. Enhance global competitiveness
5. Improve infrastructure to industrial zoned properties

CONTRACT OBLIGATIONS

Upon approval of the Grant application by the Board of Commissioners each successful applicant will be required to execute a contract substantially in the form attached as Exhibit A, prior to the distribution of funds. Unless other payment arrangements are approved in the application, funds will be released upon submission of proof of expenditures and progress reports. The timing and format of reports and invoices will be set forth within the contract. All Applications and reports are considered public information.

Costs incurred prior to the approval of the grant award by the Marion County Economic Development Advisory Committee cannot be reimbursed.

It is understood that Grant recipients are independent entities and are not agents of the Oregon Lottery, its fiscal agents, the State of Oregon or Marion County.

TRADED SECTOR AND ANCILLARY SERVICES

For the purposes of this Application process the “Traded Sector” is defined as manufacturers and fabricators of products including the growing and production of food and garden products, electronic commerce. “Ancillary Services” is limited to those entities providing direct services to the Traded Sector such as health care services.

PROJECT BUDGET

Project budgets must be detailed showing specifically the items using Grant funds and the sources of other funds to complete and maintain the project.

TARGETED SECTORS (priority areas, preference given):

- Traded Sector: including, but not limited to food processors, metal fabricators, secondary wood products, electronics and electrical commerce, and other manufacturing companies, along with those industries that support them.
- Resource-based industries: including but not limited to nurseries, forest products producers, etc.
- Health Care Services: including but not limited to health care providers, hospitals, assisted living centers, etc.

CRITERIA FOR AWARDING FUNDS: Selected applicants *must be able to complete their projects within one year* of the award date. Priority will be given to applicants who meet two or more of the criteria below. Applicants must complete the attached application demonstrating how they meet the following criteria:

- Video Lottery Grant will:
 - Advance technological capabilities or productivity;
 - Create or retain jobs;
 - Improve infrastructure and capacity building to support local economic Development and workers
 - Serving multiple businesses through a consortia or association.
 - Help a business expand market share or expand into a niche market

BUDGET: Each application must include a project budget detailing project costs and matching funds using the format provided in this application. Budgets will be evaluated using the following criteria:

- Expenses are reasonable, customary and necessary and reflect the current cost trends to complete the proposed scope of work.
- Expenditures and/or match are clearly described and reflect all project activities.

Budgets may not include costs incurred prior to the award of funding or costs for the development of the application.

REPORTING REQUIREMENTS: All those awarded funding will be required to submit proof of expenditures and progress reports. The timing and format of reports and invoices will be negotiated at the time of contracting. All reports are considered public information.

CONTRACT REQUIREMENTS: Those receiving funds will operate independently, and not as agents of the Oregon Lottery or its fiscal agents, the State of Oregon or Marion County.

FUNDING AVAILABILITY: Eligible applicants are encouraged to submit proposals for Video Lottery Grants. Projects will be considered for funding as long as resources are available. This is an annual fund. All contracts will be awarded on a cost reimbursement basis; awardees will be required to submit receipts and adequate documentation of progress periodically in order to be reimbursed. **Costs incurred prior to the award of grant, or in anticipation of grant cannot be reimbursed.**

MATCHING FUNDS: Matching funds are not a requirement. However, because the grant application is a competitive process, matching funds may be considered as an indicator of strong community support and potential success. This may be taken into consideration by both the Economic Development Advisory Board and the Marion County Board of Commissioners when making a final award recommendation and a decision between qualified applicants.

TIME LINES: Applicants can expect a three month delay from the date of application to the issuance of the first grant check for their project. All successful applications and the subsequent contracts are reviewed and approved by the Board of Commissioners, pursuant to the Oregon Public Meetings Law.

Note: Applications approved are requested to expend the funds within one year of approval. If not, the application must be reviewed and re-approved by the Marion County Board of Commissioners. Marion County and its agents retain the right to ask additional questions of the Video Lottery Grant applicants as deemed necessary.

Application

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Board of Commissioners, 555 Court St., NE Salem, OR 97301
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qualify for consideration in the following month. Applications may be returned to the
applicant for more information and subsequently held over until information is complete.

Questions? Please call Dan Estes at 503-589-3264

Applicant: _____

Employer Identification Number: _____

Project Contact (person responsible for the project):

Name: _____

Organization (s): _____

Address: _____

City/State/Zipcode: _____

Phone: _____ **FAX:** _____ **E-Mail** _____

Applicant Category (check one)

- _____ Local Government located within Marion County
- _____ Educational Entity located within Marion County
- _____ Private Corporation located within Marion County
- _____ Business, industry or worker association located within Marion County

Sector:

- _____ Traded Sector (manufacturing)
- _____ Resource-based Sector
- _____ Service Sector
- _____ Other (please describe) _____

Total Funds Requested \$ _____ **Total Matching Funds** \$ _____

Description of Entity Requesting Funds

- Years in business: _____
- Number of current employees: _____ Projected in 3 years: _____
- Is retention an issue for your company? Yes No
- If yes, what are some potential reasons for difficulties with employee retention?

- Number of employees who will be hired through this project: _____
- Number of employees who will be retained through this project: _____

Project Description - Please provide a brief description of your proposed project and answer the following questions:

- Describe your business and provide a good description of your products, market, and financial situation.
- Describe your specific project.
- Why is the funding needed?
- What is the plan for implementing this project? For example, what is the start date, what are project components (or phases); what is the anticipated completion date?
- When will the grant funds be needed?
- Would your project remain viable if funding was awarded in a subsequent month?
- How will the project sustain itself once grant funds have been expended?

Who will be involved with the project?

- List the Partners or Businesses involved with your project proposal.
- Specifically what will be the responsibility and involvement of each of the project partners? (Businesses? Training providers?)
- Are all involved partners and businesses willing to comply with the guidelines of this grant?
- Specifically, who will be responsible for the reporting requirements?
- Describe your organization’s capacity to manage grant funds/

Project Budget: Please attach a complete description of all costs and match requirements to carry out this project. Please clarify which costs will come from the grant and which will be cash or in-kind match from the applicant(s). Match may consist of costs covered by the applicant that are not funded with local, state, or federal governmental resources. Please identify the source and amounts of other funds, contributions, donations, and the methods of estimation.

My signature below indicates that I understand that if my organization is awarded funds under this application I must:

- Track all expenditures related to this project separately from other organizational funds, and provide detailed invoices, including copies of receipts for related expenses and progress reports at regular intervals agreed upon during contract negotiation.
- Complete a final report at the end of the project providing both anecdotal information and data on the project’s outcomes. Final payment will not be made until a final report is accepted and reviewed by the Marion County Economic Development Advisory Board.
- Have sufficient resources on hand to cover project costs in between invoices. Invoices may be submitted no more often than once each month, or as negotiated.
- Have the authority to sign this application on behalf of my organization.
- Sign a contract before funds are delivered and comply with the terms and conditions therein for the duration of the project.

Signature

Typed name and title