



**Request for Applications
Economic Development Grant
Fiscal Year 2023-2024**

**Applications will be accepted beginning July 1, 2023.
Applications will be accepted until funds have been exhausted.**

Submit applications to:
Polk County Board of Commissioners
Attention: Nicole Pineda
850 Main St
Dallas, OR 97338

SECTIONS:

- I. Purpose
- II. Grant Program Terms & Requirements
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I. Purpose

The Polk County Economic Development Grant Program may provide grants to eligible applicants to encourage investments in business retention or expansion, tourism related activities, strengthening workforce development, or other effective ways to further economic development as considered a priority by the Polk County Board of Commissioners under ORS 461.540.

Polk County's Economic Development Grant Program is made possible due to Oregon's video lottery revenues that are allocated to Polk County to promote economic development by creating jobs, strengthening workforce development, improving community livability and safety, and other effective ways to further economic development (ORS 461.540).

II. Grant Program Terms & Requirements

The Applicant must meet the minimum requirements as outlined below, though additional requirements may apply as deemed appropriate by the Board of Commissioners. Please read all requirements prior to submitting an application. Prospective applicants are suggested to hold a pre-application meeting with the County prior to submitting an application.

- 1. Funds Available:** Grant amounts range from \$500 to \$30,000; the maximum requested amount cannot exceed \$30,000 per project. These funds are available for eligible economic development projects in Polk County which meet the criteria outlined in this RFA, including but not limited to leveraging an investment match for grant funds.
 - a. Grant Match:** 50% matching funds are required for capital projects and equipment or technology acquisition. Costs incurred prior to the application may not be used toward the match requirement.

2. **Application Timeline:** For the 2023-2024 fiscal year, grant applications will be accepted beginning July 1, 2023.

Application Reviews will be conducted on a first come first served basis as applications are received and awarded pursuant to Board of Commissioners' decisions.

3. **Application Requirements:** Applications must be submitted using the following forms: Application Form, Project Narrative, Project Budget, Assurances, and W-9.

4. **Entity Eligibility Criteria:**

- a. **Eligible Entities:** Applicants must be a recognized legal entity in the State of Oregon, and show proof of revenue for two or more years. Applicants with less than two years of financial history may use a fiscal sponsor that can meet the minimum fiscal requirements.
- b. **Workforce:** Applicants should demonstrate that funding will enhance workforce development or employment opportunities.
- c. **Targeted sector industries:** All applications will be considered, however preference is given to businesses and projects in targeted sectors which include:
 - i. **Trade sector industries** are those that produce a product or service that is desired by buyers outside the local area, including but not limited to food and beverage processors, metal fabricators, secondary wood products, electronic and electrical commerce, and other manufacturing interests along with those industries that support them.
 - ii. **Natural resource-based industries** or related processes, especially in agriculture and forest products, that use land, water and people to make products of value.
 - iii. **Tourism** is travel for recreational, leisure, or business purposes. Tourism industries attract opportunity for economic return from resources outside the local area. This category includes but is not limited to non-profit tourism or economic development organizations, Chambers of Commerce, Visitors Centers, historical sites, agri-tourism venues and entertainment venues.

5. **Project Eligibility Criteria:**

- a. Project Categories:
 - Capital improvement projects including but not limited to building acquisition or improvements that are not considered routine maintenance (roofs, exterior, repairing sidewalks, ETC.)

- Process equipment and tooling
- Technology equipment and software
- Workforce development or education
- Tourism development and marketing

b. All trade sector or natural resource-based industry applications must have job creation metrics included in their outcomes.

6. **Project Period:** Funded projects may be multi-year and must be completed prior to consideration of a new application unless special circumstances have been negotiated with the County prior to contract signing and documented therein.

7. **Non-Eligible Projects:**

- Organizations that have received Polk County economic development funding in the current fiscal year, or have an incomplete current grant.
- Funding for individuals.
- Applicants with outstanding metrics reports from prior grants.
- Projects that do not meet criteria outlined above (i.e. routine maintenance)
- **Business start-ups.**

8. **Economic Development Grants Application Evaluation and Scoring Criteria:**

The Polk County Board of Commissioners will review all Economic Development Grant applications based on the extent to which the project meets the preferred target elements. The Polk County Board of Commissioners is interested in supporting a range of projects throughout the county. Therefore, preference will be given to businesses that have not received prior funding, achieve the greatest impact, and can demonstrate a high likeliness for achieving the intended outcomes. Applicants are encouraged to ensure that responses to the application questions clearly address the following target elements:

- Supports the targeted industries of trade sector, agriculture or tourism.
- Creates new jobs or retains existing jobs in Polk County.
- Expands business products, services, or market shares.
- Meets or exceeds the match as required for capital purchases.
- Budget clearly identifies how grant funds and non-grant funds will be spent.

III. Grant Information

1. **Application Process:** The application needs to explain the nature of the project, (goals and strategies) what results the project will achieve, (activities and outcomes) and how the proposed use of funds will help achieve those outcomes.
2. **Agreement Requirements:** Upon approval of the grant application by the Board of Commissioners, each successful applicant will be required to execute a Polk County Grant

Agreement (Agreement) prior to the distribution of funds. The timing and format of reports and invoices will be set forth within the Agreement. Measurements to evaluate the effectiveness of the grant will be set forth within in the Agreement. All entities awarded funding will be required to submit proof of expenditures and clearly defined measurable results that show the effectiveness of the project. All reports are considered public information.

Under Oregon Public Records laws (ORS Chapter 192), all applications and reports are considered public information. Those receiving funds will operate independently, and not operate as agents of the Oregon Lottery or its fiscal agents, the State of Oregon or Polk County.

3. **Notice:** Polk County will disclose limited company information (not proprietary information) on the type and amount of financial subsidies granted by Polk County, the benefits companies have committed to create, and the outcome of fulfilling those commitments. The disclosure of information on the amounts of subsidies and their effectiveness helps public officials and citizens evaluate the use of lottery funds for economic development grant subsidies.
4. **Funding Availability:** Eligible entities with eligible projects are encouraged to submit applications to the Polk County Economic Development Grant Program. Projects will be considered for funding as long as resources are available. Unfortunately, some deserving projects may not receive funding. **Costs incurred prior to the award of grant, or in anticipation of grant cannot be reimbursed or used for the match requirement.**

Note: Grant awards may be taxable; contact your financial advisor for specific information.

Recipients of grant awards must expend grant funds within one year of award unless applied for as a multi-year grant. If not, the award must be reviewed and re-approved by the Polk County Board of Commissioners, or the funds will be required to be returned. Polk County, and its agents, retains the right to ask additional questions of the grant recipients as deemed necessary.

IV. Application Instructions

1. **Application Format and Submission:** All requests for funding must be submitted using the Economic Development Grant Application. Complete applications will include:
 - (1) Application and Project Narrative,
 - (2) Attachment A – Project Budget,
 - (3) Attachment B – Assurances, and
 - (4) Attachment C – W-9.

The application with its attachments should clearly outline how the applicant meets the eligibility requirements, and give a clear description of the project and how it addresses

the target elements.

Applications can be submitted by:

Hand Delivery/Mail: Economic Development Grant Program
c/o Polk County Board of Commissioners
850 Main St.
Dallas, OR 97338

Fax: Economic Development Grant Program
Attn: Nicole Pineda
(503) 623-0896

Email: pineda.nicole@co.polk.or.us

- 2. Budget:** Applications shall include the Project Budget (Attachment A) to be considered for funding. Responses to the budget questions in the application should be as detailed and concise as possible while providing details on secured and pending revenue sources, project expenses and their importance or relevance to the project, as well as show the source of other funds to complete and maintain the project. The project budget shall detail the revenues and expenses for the total cost of the proposed project, including both requested grant funds and other revenue sources (non-grant funds). Expenses shall be itemized so that the use of grant funds is clearly demonstrated. Information provided in the application narrative should match the items listed in the budget worksheet.

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

V. Application Review

- 1. Competitive Process:** All successful applications and the subsequent Agreements are reviewed and approved by the Board of Commissioners, pursuant to the Oregon Public Meetings Law on a first come, first served basis. Applicants may be invited to meet with the Board to discuss their pending application. Applicants who are denied may reapply in future grant cycles.
- 2. Criteria for Reviewing and Awarding Funds:** Applications will be screened by staff for Board approval and/or interview for further consideration of approval.

VI. Questions and Contact Information

For questions or support with completing the Economic Development Grant Program application contact:

Nicole Pineda, Executive Assistant
Phone: 503-623-8173
Email: pineda.nicole@co.polk.or.us

VII. Other Resources

Applicants may also want to consider applying to the **Revolving Loan Fund of the Mid-Willamette Valley Council of Government** at <http://www.mwvcog.org:8080/2/departments/ced/small-business-finance>

VIII. General RFA Conditions

1. **Execution of the Application:** If the application is made by a partnership, it shall be executed in the name of the partnership followed by the signature of an authorized partner. If the application is made by a corporation, it shall be executed in the name of the corporation followed by the signature of the officer authorized to sign for the corporation and the printed or typewritten designation of the office that the officer holds in the corporation. If the application is made by a joint venture, it shall be executed by each participant of the joint venture. The address of the applicant shall be typed or printed on the application.
2. **Applications Submitted:** Applications, which are incomplete, conditioned in any way, or which contain erasures, alterations or irregularities of any kind may be rejected if in the best interest of Polk County.
3. **Grant Agreement:** A sample grant agreement is attached to this application as Exhibit A. If an agreement is awarded, it is anticipated that agreement will closely resemble this document including "supporting documents." The supporting documents will include, but are not limited to the application document, the applicant's written application, any required certificates, and all other documents incorporated by reference therein.
4. **Withdrawal of Application:** At any time an applicant may withdraw their application. Withdrawal will not preclude the submission of another application.
5. **Incurring Costs:** Neither the County, nor its agents, is liable for any cost incurred by applicants prior to issuance of a contract agreement.
6. **Equal Opportunity Action Policy:** The applicant agrees to comply with the Civil Rights Act of 1964, and 1991, Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973, and Title VI as implemented by 45 CFR 80 and 84 which states in part, No qualified person shall on the basis of disability, race, color, or national origin be

excluded from participation in, be denied the benefits of, or otherwise be subjected to discrimination under any program or activity which received or benefits from federal financial assistance.

7. **Polk County Reserves The Right To:**

- Reject any and all applications
- Amend the RFA
- Waive any irregularities or informalities in any applications
- Not award an agreement for the requested projects
- Accept the application deemed to be the most beneficial to the public and Polk County

IX. ATTACHMENTS AND EXHIBITS

1. **Application Mandatory Submission Forms:** Applicant shall complete, sign and return Attachments A-C with the grant Application. Failure to do so may result in the Application being deemed to be non-responsive and not considered for award.

Attachment A – Project Budget

Attachment B – Assurances

Attachment C – W-9

Attachments A-C are attached hereto and incorporated herein by reference.

2. **Exhibits:** By submitting an application to this RFA, applicant shall accept all terms and conditions of the Agreement as shown in Exhibit A (Sample Grant Agreement), and Exhibit B (Grant Report Template). Exhibits A and B are attached hereto and incorporated herein by reference.