

Montana Office of Tourism and Business Development

Regulations and Procedures for Regional/CVB Tourism Organizations Use of Lodging Facility Use Tax Revenue ([Rules & Regulations](#) | Marketing Method Evaluation Reporting eff. FY20)

Marketing Method Evaluation

General Reporting Requirements: **(Section 6.4)**

1. Did you meet your objective - was your strategy successful? Yes/No Explain (Refer to Appendix B).
2. An updated budget comparing estimated budget amounts versus actual expenditures for each marketing segment and method.
3. An update of the pie chart illustrating what percentage of your budget was used in each marketing segment.
4. Any additional requirements requested by the Council or Department in writing shall be met by the organization.

Some marketing methods used are for image and awareness building and are not measurable such as one time projects (P). If this is the case, what indicators were used to track success? Project completion may be the primary measure of success. **All other marketing methods should include evaluation techniques that are measurable and quantifiable. The evaluation should have a basis to continue, discontinue or modify the marketing method.** Method evaluation information shall be provided at the conclusion of the marketing method and/or the evaluation period. All method evaluation information for the corresponding fiscal year should be reported for each marketing segment and method no later than January 1 of the next fiscal year unless the organization requests an extension in writing from the Department. **Method evaluations shall fulfill the requirements specified in these regulations and other requirements specified at the time of approval. (Section 7.2)**

The following are commonly used segments and methods with specific reporting requirements. If using a method not listed below, refer to the requirements for the Segment **(Appendix B, pages 28-30)**.

Ad Agency Services | Contracted Services (P)

Provide detail of services provided. If agency is paid hourly provide detail of service provided for work period. If paid by retainer provide list of services provided during the billing period. (this information is also required as part of the evaluation process). **(Section 12.11)**

Administration

Did you meet your objective to not exceed 20% maximum allowed for administrative expenses? Yes/No Explain. Evaluation Requirements: 1. Describe types of expenses administrative funds were used for. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 7.5)**

Billboards/Out of Home Advertising | Wayfinding (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements: 1. Photo or layout of finished product (attach). 2. Include the most recent traffic counts if available. 3. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.8)**

Consumer Exhibiting Show (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements: 1. Number of attendees. 2. List of brochures and number of each brochure distributed, or inquiry cards collected. 3. Evaluation by staff concerning interest level of attendees, if repeat attendance is or is not recommended and why. 4. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.12)**

Convention Promotion / Event Subsidies (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements: 1. Convention or event size. 2. Number of room nights – anticipated versus actual. 3. Estimated economic impact. 4. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.22)**

Convention Promotion /Event Recruitment (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements: 1. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.21)**

Cooperative Marketing (P)

Did you meet your objective - was your strategy successful (the amount spent must be no more than 20% of their total annual budget) - Yes/No Explain. Evaluation Requirements: 1. If funds were spent, update all fields of marketing plan with specifics of the cooperative marketing activities. 2. Adhere to the specific marketing method requirements of the cooperative marketing activities. 3. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.1.2)**

Crisis Management (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements: 1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Cultural Tourism (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements: 1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

DMO Program Participation (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Digital Content Marketing Electronic/Digital Material (Digital Newsletters/Online Advertising) | For Sites Hosted by the State

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. A copy of the electronic newsletter that was sent as well as the number of people it was sent to. 2. All online digital advertising shall be evaluated by the means outlined in the marketing plan. 3. Online digital ads shall include print or digital copies of the digital advertisements, click-through rates and number of delivered impressions. 4. Description and examples of paid and organic search methods. 5. Number of active contacts in database. 6. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.2)**

Digital Content Marketing Electronic/Digital Material (Digital Newsletters/Online Advertising) | For Sites Not Hosted by State

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. A copy of the electronic newsletter that was sent as well as the number of people it was sent to. 2. All electronic advertising shall be evaluated by the means outlined in the marketing plan. 3. Banner ads shall include printed copies of the banner advertisements, click-through rates and number of impressions. Remove "Banner ads" replace with attach copy of ad(s) 4. Report click through rates and number of impressions 5. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.4)**

Digital Development (online, website, mobile)

Did you meet your objective – was your strategy successful – Yes/No Explain. Evaluation Requirements:
A short description of the site/page. 2. Marketing methods shall be evaluated by the means outlined in the marketing plan. 3. Provide a screenshot of your home page. 4. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.1)**

Equipment (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Film and TV Production (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. One copy on file at organization office. 2. Film location project description, production company, impact to local community, if known. 3. Number of attendees at trade show/film promotion event. 4. Qualification of contacts by level of interest in Montana, your region or community. Was this a joint venture with Montana Film Office? If so, give a brief summary. 5. Viewership and distribution of film

project – direct and indirect including earned ad value, if known. 6. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.10)**

Fulfillment/Telemarketing/Call Center

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Joint Ventures

Once a Joint Venture is identified, update all fields in the Marketing Plan; adhere to the specific marketing method requirements.

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Marketing Display (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. Photo of the display. 2. Listing of uses during the first year. 3. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.13)**

Marketing Plan Development (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Marketing Support/Customer Service Training (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Multi Media Marketing

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Opportunity (P)

Once an Opportunity is identified, update all fields in the Marketing Plan

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. Adhere to the specific marketing method requirements of the opportunity. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Outreach (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Partner Support (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Photo/Video Library | Digital Asset Management (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Portable Media (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. One final product of the portable media shall be retained on file at the organization. 2. All portable media shall be evaluated by the means outlined in the marketing plan. 3. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

(Section 15.2.14)

Press Trips | Fam Trips

Did you meet your objective - was your strategy successful - Yes/No Explain Evaluation Requirements:
1. List of participants and affiliation. 2. Itinerary. 3. List of earned media generated by press trip. 4. One final product to be kept on file at Organization. When possible, include links to online stories, articles and social media posts. 5. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.18)**

Print Advertising

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. Copy of ad (attach). 2. All print ads shall be evaluated by the means outlined in the marketing plan. Include measured results/metrics. 3. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.6)**

Printed Material | Travel Guide | Promotional Items (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. One final product shall be retained on file at the organization and a .pdf version shall be submitted with Evaluation Report (attach). 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.15)**

Product Development (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Publicity | Press Promotions | Media Outreach

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. List of press releases, pitch sheets and/or samples. 2. List of earned media received. include links to online stories, articles and social media posts. 4. For reactive press trips provide list of media including the name of media and/or digital influencer, include the assignment if available. 5. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.
(Section 15.2.16)

Publicity Marketing Personnel | Group Marketing Personnel (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. Attach an annual publicity/marketing report which includes the days or date ranges and number of hours worked and duties performed during the pay period. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.17)**

Research (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. All research shall be evaluated by the means outlined in the marketing plan. 3. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Social Media

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. All social media shall be evaluated by the means outlined in the marketing plan. 2. How does using the social media channel/site extend your marketing reach? 3. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.9)**

Strategic Planning (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. What indicators were used to track success? Report metrics and measurements. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Survey/Data Collection (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements:
1. All research shall be evaluated by the means outlined in the marketing plan. 3. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

TAC/Governor's Conference & Meetings

Did you meet your objective to have executive director or representative attend all virtual and in-person TAC meetings and the annual Governor's Conference on Tourism and Recreation? Yes/No Explain

Evaluation Requirements: 1. Method shall be evaluated by the means outlined in the marketing plan. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why.

Trade Show Promotion

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements: 1. Number of attendees. 2. Method used to distribute leads locally. 3. Qualification of contacts by level of interest in Montana, your region or community. 4. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.11)**

TV/Radio Advertising

Did you meet your objective - was your strategy successful - Yes/No Explain Evaluation Requirements: 1. Affidavits of media purchased on file at the organization. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.7)**

Visitor Information Center - Funding Staffing Signage

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements: 1. Total number of visitors during the funding period. 2. Number of visitors from the top 10 states or points of origin. 3. Funding for VICs shall include a summary of total hours open and hours which are funded by lodging tax. 4. Postage reimbursements to unfunded chambers shall include post office receipts and breakdown of mailings -- bulk, first class, etc. This is to be used in response to travel inquiries, not other chamber business. 5. Additionally, the top five states requesting information should be documented. 6. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.19)**

VIC Staff/Customer Service Training - Professional Development (P)

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements: 1. The total number of sessions and number of attendees in the area or region should be included. 2. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.20)**

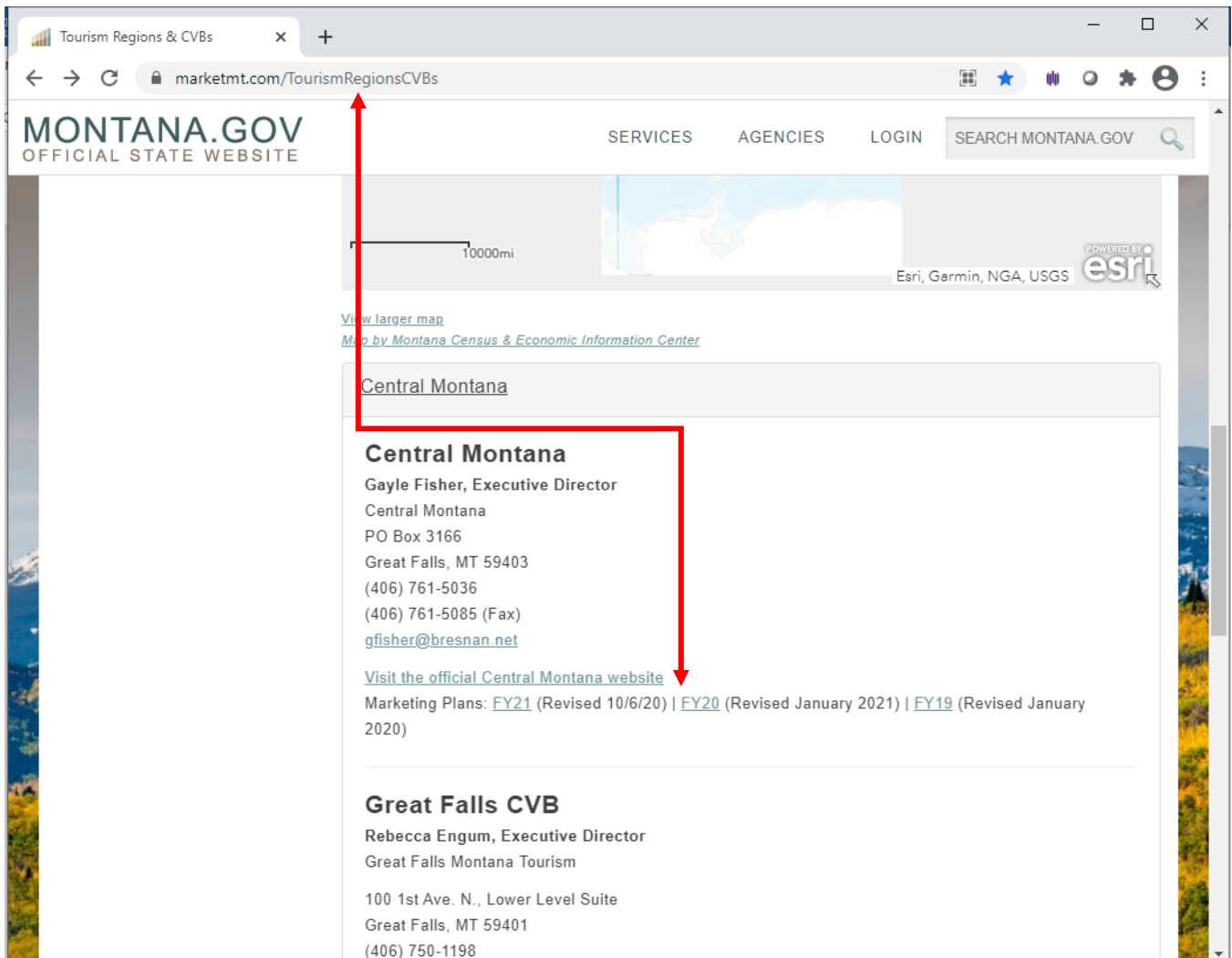
Website/Digital Development/Online/Mobile | SEO/SEM

Did you meet your objective - was your strategy successful - Yes/No Explain. Evaluation Requirements: 1. A short description of the site/page (app). 2. Marketing methods shall be evaluated by the means outlined in the marketing plan. 3. Provide a screenshot of your home page. 4. Assess the results of this method and explain whether you will or will not continue using this marketing method and why. **(Section 15.2.1)**

In addition, the Regions and CVBs throughout the state provide excellent examples of marketing methods and the components that make up a marketing plan (research, statistics, measurements, evaluation, budget, descriptions, etc.).

Refer to their respective annual marketing plans that are accessible online to view and download. Visit the Regions/CVB page (scroll to bottom) <https://marketmt.com/TourismRegionsCVBs>

Contact Barb Sanem (bsanem@mt.gov) for further assistance accessing annual Marketing Plans.



The screenshot shows a web browser window with the URL marketmt.com/TourismRegionsCVBs. The page header includes the Montana.gov logo and navigation links for SERVICES, AGENCIES, LOGIN, and a search bar. A map of Montana is displayed with a 10000mi scale bar and an Esri logo. Below the map, the page is titled "Central Montana" and lists contact information for Gayle Fisher, Executive Director of Central Montana. The contact details include: PO Box 3166, Great Falls, MT 59403, phone numbers (406) 761-5036 and (406) 761-5085 (Fax), and email gfisher@bresnan.net. A link to the official Central Montana website is provided. Below this, the page lists marketing plans for FY21, FY20, and FY19. The "Great Falls CVB" section lists contact information for Rebecca Engum, Executive Director of Great Falls Montana Tourism, including the address 100 1st Ave. N., Lower Level Suite, Great Falls, MT 59401, and phone number (406) 750-1198. Red arrows point from the map area to the "Central Montana" section header and from the "Visit the official Central Montana website" link to the contact information.

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Central Montana

Central Montana
Gayle Fisher, Executive Director
Central Montana
PO Box 3166
Great Falls, MT 59403
(406) 761-5036
(406) 761-5085 (Fax)
gfisher@bresnan.net
[Visit the official Central Montana website](#)
Marketing Plans: [FY21](#) (Revised 10/6/20) | [FY20](#) (Revised January 2021) | [FY19](#) (Revised January 2020)

Great Falls CVB
Rebecca Engum, Executive Director
Great Falls Montana Tourism
100 1st Ave. N., Lower Level Suite
Great Falls, MT 59401
(406) 750-1198