

FY24 DMO PLAN USER GUIDE IN WEBGRANTS

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Montana State Agencies**
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Welcome

Main Menu
Click Help above to view instructions. Go to "My Profile" to reset password.

- Grantee Instructions
- My Profile
- Funding Opportunities
- My Applications**
- My Grants
- My Inventory

Once the Marketing Plan has been created using Funding Opportunities, Click **'My Applications'** to access your marketing plan.

Click the **FY22 DMO Plan** (Project Title) to open the marketing plan for editing.

Current Applications					Archived Applications	
ID	Status	Stage	Project Title	Funding Opportunities	Program Area	Deadline
126572	Editing	Final Application	FY24 DMO Plan	125123 - FY24 DMO Plan	DOC Office of Tourism	05/02/2023

DMO PLAN APPLICATION FORMS

Application Forms		Application Details Submit Withdraw	
Form Name	Complete?	Last Edited	
General Information	✓	03/03/2023	
DMO Plan Narrative			
Objectives and Metrics			
DMO Budget			
Narrative Evaluation			
DMO Plan Attachments			
Reg/CVB Required Documents			

There are five forms that will be used to complete your marketing plan.

1. **DMO Plan Narrative** – answer the 4 questions asked in the Regulations.
2. **Objectives and Metrics** – add your 3-5 objectives with measurable metrics.
3. **DMO Budget** – post budgeted amounts for each of the 15 allowable methods used.
4. **Narrative Evaluation** – provide a narrative description of objectives and metrics.
Did you meet your goals? Used for FYE evaluation reporting.
5. **Reg/CVB Required documents** – attach the motion approving DMO plan by governing board, Certificate of Compliance and current bylaws. These must be included with your DMO plan.

The **General Information** form contains contact information and is marked complete because this information was provided when the marketing plan was created.

After saving information entered into text boxes a message may appear as a reminder to **Save** information. It's a courtesy message and can be disregarded if your information has been saved.

Leave site?

Changes you made may not be saved.

1. DMO PLAN NARRATIVE

Click 'DMO Plan Narrative'

Application Forms		Application Details Submit Withdraw	
Form Name	Complete?	Last Edited	
General Information			
DMO Plan Narrative	✓	03/03/2023	
Objectives and Metrics			
DMO Budget			
Narrative Evaluation			
DMO Plan Attachments			
Reg/CVB Required Documents			

Click 'Edit'

Menu Help Log Out	Back Print Add Delete Edit Save
Application	
Application: 126572 - FY24 DMO Plan	
Program Area: DOC Office of Tourism	
Funding Opportunities: 125123 - FY24 DMO Plan	
Application Deadline: 05/02/2023	

Complete each text box with information as required in Section 5.4 of the January 2022 Regulations & Procedures

5.4 DMO PLAN NARRATIVE

Use the online application to complete your DMO plan narrative, budget chart and evaluation information, addressing the following topics and questions.

Please refer to the DMO Handbook for guidance.

1. Describe your destination (who you are, who you wish to attract and why would they come) addressing your strengths, opportunities, and potential challenges.
2. Briefly describe how your destination aligns with the Montana brand.
3. What is the strategic role of your organization? (DMO strategy, select all that apply: Destination Marketing, Destination Management, Destination Stewardship, Destination Development).

Based on the strategic role you serve to your destination, provide the following information:

- a. Define your audience(s) (demographic, geographic and psychographic)
- b. What research supports your DMO strategy?
- c. What are your emerging markets?

4. Define and describe your overall goals. A goal is an idea of the future or desired result that a person or group of people envisions, plans and commits to achieve.
 - a. Describe proposed tactics and projects as related to overall goals and controlled by the organization in its financial statements.

Click **'Save'** when done. Information can be saved then edited at a later time.

The screenshot shows a web application interface. At the top, there is a navigation bar with icons for Menu, Help, Log Out, Back, Print, Add, Delete, Edit, and Save. The 'Save' button is circled in red. Below the navigation bar, the page title is 'Application'. The main content area displays application details: 'Application: 126572 - FY24 DMO Plan', 'Program Area: DOC Office of Tourism', 'Funding Opportunities: 125123 - FY24 DMO Plan', and 'Application Deadline: 05/02/2023'. Below this is a section for 'DMO Plan Narrative' with a sub-heading '1. Describe Your Destination' and a text area for entering the narrative. A rich text editor toolbar is visible above the text area. At the bottom left, it says 'Path: p' and at the bottom right, 'Words:0'.

'Mark as Complete' when all information is included in the Component.

This screenshot shows the same application form as above, but with the 'Mark as Complete' button circled in red. The button is located at the bottom right of the 'DMO Plan Narrative' section, next to a 'Go to Application Forms' link. The application details and narrative section are visible above.

All components must be 'Mark(ed) as Complete' before Plan can be submitted for review.

Application Forms		Application Details Submit Withdraw	
Form Name	Complete?	Last Edited	
General Information	✓	03/03/2023	
DMO Plan Narrative			
Objectives and Metrics			
DMO Budget			
Narrative Evaluation			
DMO Plan Attachments			
Reg/CVB Required Documents			

2. OBJECTIVES AND METRICS

Click **'Objectives and Metrics'** to input the required information. Include 3-5 objectives that are measurable and the metric for measurement.

Application Forms		Application Details Submit Withdraw	
Form Name	Complete?	Last Edited	
General Information	✓	03/03/2023	
DMO Plan Narrative			
Objectives and Metrics			
DMO Budget			
Narrative Evaluation			
DMO Plan Attachments			
Reg/CVB Required Documents			

Click the **'Add'** button for the addition of a new Objective and Metric.

Menu | Help | Log Out
Back | **Add** | Delete | Edit | Save

Application

Application: 126572 - FY24 DMO Plan

Program Area: DOC Office of Tourism

Funding Opportunities: 125123 - FY24 DMO Plan

Application Deadline: 05/02/2023

Requested Total: \$5,000.00

Instructions

Click "Add" to enter the Objective.

Objectives	Measurable Metrics for Success	Report the Metric Achieved	Evaluation of Measurable Metrics for Success
Add a short description of the objective.	Describe the metric used to measure success.	Leave this text box empty until method is completed.	Leave this text box empty until method is completed.

[Go to Application Forms](#)

Text is required in the 'Objectives' and 'Measurable Metrics for Success' fields. The 'Report the Metric Achieved' and 'Evaluation of Measurable Metrics for Success' text boxes will be completed when the objective is achieved or following FYE and prior to deadline.

Click **'Save'** when done. Information can be saved then edited at a later time.

'Mark as Complete' when finished.

3. DMO BUDGET

Application Forms		Application Details Submit Withdraw	
Form Name	Complete?	Last Edited	
General Information	✓	03/03/2023	
DMO Plan Narrative			
Objectives and Metrics			
DMO Budget			
Narrative Evaluation			
DMO Plan Attachments			
Reg/CVB Required Documents			

Click 'DMO Budget' to open the budget component. Click 'Add' to add an Allowable Method

Application: 126572 - FY24 DMO Plan
 Program Area: DOC Office of Tourism
 Funding Opportunities: 125123 - FY24 DMO Plan
 Application Deadline: 05/02/2023

DMO Budget [Mark as Complete](#) | [Go to Application Forms](#)

Allowable Methods	Amount Budgeted	% of Budget Allocated	Amount Expended	% of Budget Expended
	\$0.00	0.00	\$0.00	0.00

Last Edited By:

The Budget component has a dropdown list of 15 'Allowable Methods'. Use the methods that are applicable to your Goals/Objectives/Metrics.

Application: 126572 - FY24 DMO Plan
 Program Area: DOC Office of Tourism
 Funding Opportunities: 125123 - FY24 DMO Plan
 Application Deadline: 05/02/2023

DMO Budget

Allowable Methods*
 Administration
 Joint Venture
 Opportunity Marketing
 Cooperative Marketing
 Marketing Personnel
 Agency Services
 Marketing Resources
 Paid Media
 Earned Media/Tourism Sales
 Website Development (Online, Website, Mobile)
 Education/Outreach
 Travel/Trade Shows
 Research
 Product Development
 Visitor Services

Amount Budgeted*
 % of Budget Allocated*
 Amount Expended*
 % of Budget Expended*

Choose **'Allowable Method'** and provide the Amount Budgeted for each Method used. The **'Amount Expended'** and **'% of Budget Expended'** text boxes will be completed at FYE.

The screenshot shows a web application interface for a DMO Budget. At the top, there are navigation links: Menu, Help, Log Out, Back, Print, Add, Delete, Edit, and Save (circled in red). The main content area is titled 'Application' and includes a dropdown menu for 'Allowable Methods' with the following options: Administration, Joint Venture, Opportunity Marketing, Cooperative Marketing, Marketing Personnel, Agency Services, Marketing Resources, Paid Media, Earned Media/Tourism Sales, Website Development (Online, Website, Mobile), Education/Outreach, Travel/Trade Shows, Research, Product Development, and Visitor Services. Below the dropdown, there are input fields for 'Amount Budgeted*', '% of Budget Allocated*', 'Amount Expended*', and '% of Budget Expended*'. The 'Amount Budgeted' and 'Amount Expended' fields currently show '\$0.00'.

Click **'Save'**.

Follow the steps above for each Allowable Method being used in the DMO Plan.

Allowable Methods that have been added can be edited by clicking the blue colored Allowable Method name.

DMO Budget					Mark as Complete	Go to Application Forms
Allowable Methods	Amount Budgeted	% of Budget Allocated	Amount Expended	% of Budget Expended		
Administration	\$1,000.00	20.0	\$0.00	0		
Joint Venture	\$500.00	10.0	\$0.00	0		
Research	\$2,500.00	50.0	\$0.00	0		
Website Development (Online, Website, Mobile)	\$1,000.00	20.0	\$0.00	0		
	\$5,000.00	100.00	\$0.00	0.00		

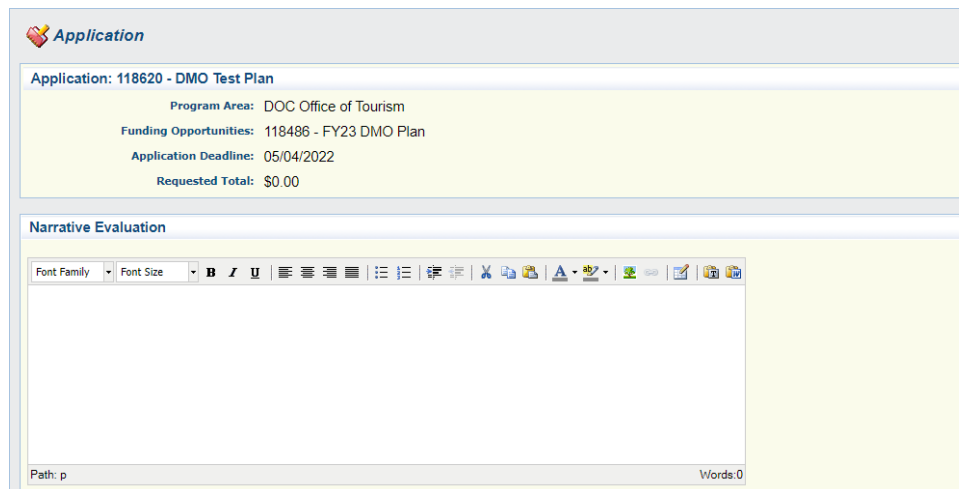
Last Edited By: DMO DMO, 03/06/2023

Once all Allowable Methods and budget amounts are completed, click **'Mark as Complete'**.

4. **NARRATIVE EVALUATION** - this component will be completed at fiscal-year-end.

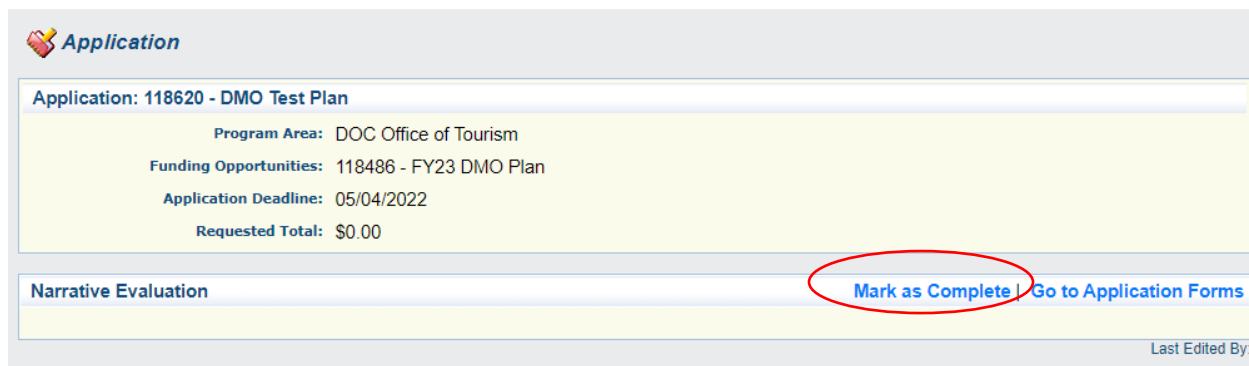
*Leave these text boxes empty while developing your plan for approval.
The component must be marked as complete in order to Submit the Plan.*

Provide a narrative evaluating the goals/objectives/metrics in the plan.



The screenshot shows a web application interface. At the top, there is a header with a logo and the word 'Application'. Below this, a yellow box contains the following information: 'Application: 118620 - DMO Test Plan', 'Program Area: DOC Office of Tourism', 'Funding Opportunities: 118486 - FY23 DMO Plan', 'Application Deadline: 05/04/2022', and 'Requested Total: \$0.00'. Below the yellow box is a section titled 'Narrative Evaluation' which contains a rich text editor with a toolbar and a large empty text area. At the bottom of the text area, it says 'Path: p' and 'Words:0'.

‘Mark as Complete’ so plan can be submitted.



This screenshot is similar to the previous one, showing the 'Application' form. The yellow box contains the same application details. In the 'Narrative Evaluation' section, the text 'Mark as Complete | Go to Application Forms' is visible. The 'Mark as Complete' text is circled in red. At the bottom right of the form, there is a label 'Last Edited By:'.

5. **REG/CVB REQUIRED DOCUMENTS**

This link is where the documents that are required to be submitted with the annual DMO Plan are uploaded. They include the motion approving the DMO Plan by the governing body, Certificate of Compliance, and copy of current bylaws.

Application: 118620 - DMO Test Plan

Program Area: DOC Office of Tourism
 Funding Opportunities: 118486 - FY23 DMO Plan
 Application Deadline: 05/04/2022
 Requested Total: \$0.00

Instructions
 Download and Complete the Required Documents to be submitted with your Marketing Plan.
[Click here to start download.](#)
 Click "Add" to attach your completed documents.

Reg/CVB Required Documents			Mark as Complete	Go to Application Forms
Description	File Name	File Size	Date Uploaded	Delete?
Last Edited By:				

Click 'Add' to attach each document. Click 'Save' 'Mark as Complete' when finished.

Attach File
 Download and Complete the Required Documents to be submitted with your Marketing Plan.
[Click here to start download.](#)
 Click "Add" to attach your completed documents.

Upload File: No file chosen

Description:*

SUBMIT MARKETING PLAN FOR REVIEW & APPROVAL

All Application Forms must be **marked as complete** (including the ones not used until FYE) before the DMO plan can be submitted for review and approval by the council.

Once all forms are marked as complete, submit your DMO plan by clicking the 'Submit' button on the Applications Forms page.

Application Forms		Application Details	Submit	Withdraw
Form Name	Complete?	Last Edited		
General Information	✓	03/03/2023		
DMO Plan Narrative				
Objectives and Metrics				
DMO Budget				
Narrative Evaluation				
DMO Plan Attachments				
Reg/CVB Required Documents				

Thanks for your hard work and using this guide.