RFQ Strategic Planning References	
DMOProz	
Contact	**Response**
Hershey Harrisburg PA Regional VB - Mary Smith	No response - Bad email
Mansfield/Richland County OH CVB - Lee Tasseff	VERY Satisfied, suggest doing outside interviews with community businesses
Greater Raleigh NC CVB - Dennis Edwards	VERY Positive, open minded, good job with stakeholders, one on one meetings
Irving TX CVB - Maura Gast	VERY Positive experience - thoughful approach, good listeners
Visit Duluth - Anna Tanski	VERY Positive experience - Would not use anyone else in the future
Gulf Shores + Orange Beach AL Tourism Herb Malone	No Response, left message
Lake Havasu city AZ CVB - Doug Traub	No Response, left message
Analytica	
Contact	**Response**
City of DeLand FL - Michael Pleuss - City Manager	No response, left message with receptionist
City of Fort Walton Beach FL - Michael Beedie - City Manager	Positive, good at keeping Board on track
City of Round Rock TX - Jim Nuse - City Manager	No response, left message with receptionist
City of Pompano Beach FL - Brian Donovan - Assis. City Manager	Good Experience, Very flexable.
Hillsborough County - Eric Johnson - Director	Positive, more focus on economic development/infranstructure

SANTA ROSA COUNTY TOURISM

DESIGNING NEXT STEPS TO ENHANCE THE SANTA ROSA COUNTY VISITOR ECONOMY

18 DECEMBER, 2015

ZEITGEIST CONSULTING

DMO PRŌZ

801 Woodward Drive
Madison, WI 53704

608.819.6110

info@DMOproz.com

18 December, 2015

Shannon Ogletree
Santa Rosa County EDO
6491 Caroline Street / 4
Milton FL 32570-4592

Shannon,

Thank you for considering DMOproz to assist Santa Rosa County in developing a strategic vision for the future of the destination and the organization. We're honored and excited at the opportunity to be of service.

Over the past 20 years, we have worked with more than 180 Destinations around the country and helped more than two-thirds develop their Strategic Plans. This experience puts us in a unique position from which to assist your organization. We've seen best practices in action and helped create organizational culture shifts in this ever-evolving Industry.

As we understand your interest, you are searching for a trusted advisor to lead a participatory process to enhance and streamline the governance process for the Santa Rosa County TDC in order to advance the region's Visitor Economy. On the following pages, you'll find our initial thoughts on possible avenues we could travel to achieve that goal.

And, we look forward to the opportunity to be of service in the months ahead.

Sincerely,

Bill Geist
President & Chief Instigator

AGENCY HISTORY

ABOUT US

DMOproz (aka Zeitgeist Consulting, Inc.) is dedicated to increasing the effectiveness and impact of Destination Marketing Organizations (DMOs) across North America. For 20 years, our experience in political advocacy, destination development, community leadership and community marketing has allowed us to provide our clients with a reality-based view of the world...and has provided us the ability to suggest actionable steps to enhance DMO governance, management and marketing initiatives through Strategic Planning and Destination Development. From these assignments, destinations have moved successfully to pursue destination-defining projects as well as connect the dots on infrastructure upgrades, making their communities more attractive for residents and visitors alike.

Founded on the simple premise that Destination Marketing Organizations looking for a consultative hand should be able to turn to someone that has actually done time in the DMO trenches and understands the challenges of the political will at play in our communities, Bill Geist established Zeitgeist Consulting in 1995. But through the years, our offerings have expanded and, as we are working with more virtual partners, we have evolved beyond being just Zeitgeist.

We are still (legally) Zeitgeist Consulting, Inc., only now doing business as DMOproz. As noted in our footer, we are based in Madison WI at 801 Woodward Drive and can be reached via phone at 608-819-6110 or email at info@DMOproz.com. The Zeitgeist Consulting / DMOproz FEIN is #45-4216965.

WHO'LL BE WORKING WITH YOU

Not unlike the original *Mission: Impossible* television series, DMOproz has its core team…but selects various professionals when the assignment calls for added talent. In this endeavor, we are assigning the Founder of DMOproz,Bill Geist, and our VP of Client Services, Terri White.

Bill Geist • Chief Instigator

Bill Geist brings over 40 years of marketing experience and 30 years in the tourism industry together to lead the DMOproz Team. Since launching the firm in 1995, he has worked with over 180 CVBs, Regional Tourism Organizations and State Tourism Offices...more Destination Marketing Organizations than any firm of its kind in the country.

Formerly the CEO of the Greater Madison (WI) Convention & Visitors Bureau, Bill was at the epicenter of the public battle to build a downtown convention center designed by Frank Lloyd Wright. Prior to his stint in Madison, he directed the Kankakee County (IL) CVB and oversaw a number of top-draw tourism events including the Domino's Pizza Outboard Powerboat National Championships.

He holds an MBA from the University of Wisconsin and an undergraduate degree from Kenyon College. His first book, "*Destination Leadership for Boards*," is now in its third printing and he is a contributing author of the DMAI-sponsored "*Fundamentals in Destination Marketing*."

Terri White • VP of Client Services
Terri has overseen the DMOproz offices for more than 15 years and performs a wide range of support services including research implementation and assessments for select clients as well as heads the firm's research arm, ***DMOvizion***.

She coordinates all communications, logistics and the project flow in and out of our office. Before joining DMOproz, Terri was a Customer Sales and Service trainer for American Girl. She has also served as a Marketing Assistant and Client Advocate for other firms in Wisconsin.

REFERENCES

We invite you to call upon any of our past clients as a testament to our commitment and professionalism. You can find a list on our website at: DMOproz.com > About Us > Our Clients. However, in the interest of time we can provide the following list of those that for which we have performed Strategic Plan facilitation in the past couple years:

Visit Sarasota County: contact Virginia Haley, vhaley@visitsarasota.org
Gulf Shore + Orange Beach Tourism: contact Herb Malone, hmalone@gulfshores.com
Visit Duluth MN: contact Anna Tanski, anna@visitduluth.com
Irving CVB: contact Maura Gast, mgast@irvingtexas.com
Surf City USA: contact Kelly Miller, kelly@surfcityusa.com

801 Woodward Dr | Madison WI 53704 | 608.819.6110 | info@DMOproz.com

PROPOSED PROCESS

As we discussed earlier this week, your primary interest in engaging an industry-experienced consultant is to work with the Board of the TDC to assist them in transitioning from their past role in setting direction and policy for the former DMO to a more advisory capacity. In our work with roughly a dozen Florida destinations, we have a deep understanding the the various TDC governance models in play in the Sunshine State. This background provides us a solid footing from which to advise how governance within this new model should look for Santa Rosa County.

We also believe that we can maximize your investment by including in our proposal the opportunity to facilitate the development of a Strategic Plan for the destination and the TDC. Especially given the Board's evolving role, doing both a review of governance models and future visioning would seem to be a natural combination.

BOARD GOVERNANCE WORKSHOP

Our Board Governance Workshops are designed to develop a strong culture of destination vision, organizational collaboration and cooperative advocacy. In the first of two-90 minute sessions, Bill Geist (author of *Destination Leadership for Boards*) will outline for the TDC Board how the best Boards are evolving in today's disruptive environment. Channelling equal parts John Carver (often called the "Godfather of Modern Governance") and the work of Harrison Coerver and Mary Byers (*Race for Relevance*), Bill will help Board Members see the bigger picture of the time they invest in the TDC and suggest ways that they can create a bigger impact on the destination and organization.

In the second session, Bill will lead a participatory discussion in which the tenets of Destination Leadership can be applied to the realities of Santa Rosa County. As part of our package, each member of the Board will receive a copy of *Destination Leadership for Boards.*

DMO PRōZ
801 Woodward Dr | Madison WI 53704 | 608.819.6110 | info@DMOproz.com

STRATEGIC PLANNING

Our Strategic Planning process involves a number of steps, some of which are optional (listed at the end of this section) and others that we believe are crucial to developing a plan that builds upon existing Strategic Plans from like interests and agencies and becomes an active roadmap for the TDC Board.

Online Surveys. After situational discussions with DMO leadership, we will craft an online questionnaire for the TDC to distribute to community and hospitality industry Stakeholders. This questionnaire will be designed to be completed roughly a month prior to our onsite planning sessions. The questions will focus on stakeholders' feelings about the organization and destination...and their visions for the future.

We also survey the TDC Board, allowing us to save time in the upcoming face-to-face Strategic Planning session that can be better utilized in active give-and-take discussion. It also serves to jump start participants' thinking so they will be ready for the upcoming session.

Strategic Planning Retreat. We'll then lead a full-day Retreat with the Board to examine the concepts unearthed in our preliminary surveys to lead the discussions of what lies ahead for the future of the Organization and the Destination. Our typical format is to spend the morning ideating as many issues as possible, getting everything out on the table for analysis and allowing for meaningful conversations about the current state of the hospitality industry, Board governance objectives, Board/Staff relations and other topics related to organizational development. Just prior to Noon, we'll walk the Board through an exercise adapted from one designed by Stanford professor BJ Fogg to prioritize opportunities based upon importance and difficulty. The afternoon will then be spent identifying how the top opportunities can and will be addressed.

Follow-Up Documentation. Following our exploratory research and time in destination, we'll prepare and deliver a Draft Strategic Plan that identifies the Goals, Objectives and suggested Tactics of the top ideas developed by the Board and Staff. These documents include a synopsis of discussions and concepts aired during our interaction with Stakeholders, Board and Professional Staff and a complete set of recommended steps to achieve the primary Goals of the TDC and the County. These documents tend to run in the 25± page range are are intended to guide the agenda of future TDC Meetings and Staff initiatives.

DMO PRōZ
801 Woodward Dr | Madison WI 53704 | 608.819.6110 | info@DMOproz.com

Stakeholder Interviews (Optional). While the majority of the TDC's Stakeholders will be satisfied with being a part of the Strategic Planning process through the online survey instrument, there may be those that would benefit from face-to-face interaction. And, we can go two different ways on this (or both). We can schedule up to 12 :30 minute one-on-one Stakeholder interviews prior to the Strategic Planning Workshop. Or, we could schedule two or three focus groups of Stakeholders from which we can glean intel for use in the Workshop. Or, we can mix-n-match with a half day of interviews and a Focus Group or two. Should it be determined that a single day of interviews/groups is insufficient, we would be glad to add additional days. This option is priced at $1,500/day + travel expenses.

Presentation of the Plan (Optional). We have also found that many of our clients benefit from a return visit to present the newly adopted plan to the Board and select industry partners. This discussion helps to solidify the relationships and participation of the community as a whole by ensuring that your key stakeholders voices are being heard and incorporated into the future direction of their DMO. Should you wish to add this component to the quote, please add $1500 + travel expenses.

Should a return visit not be required, we are happy to deliver the same presentation of the Strategic Plan virtually via GoToMeeting at no charge.

801 Woodward Dr | Madison WI 53704 | 608.819.6110 | info@DMOproz.com

PROPOSED INVESTMENT & TIMELINE

DMOproz agrees to provide the outlined **Strategic Planning** Services for the Santa Rosa TDC for the fee of $9,000 + travel expenses incurred in the successful execution of the proposed process. Airfare to PNS is presently running in the $425 range for the first quarter of next year.

The fee includes:

- Preliminary scoping discussions with Management
- Creation and analysis of online Stakeholder and Board surveys
- Facilitation of the Planning Retreat with the Board of Directors (which would include an abridged version of the Board Governance Workshop)
- Development of a Final Report with a complete set of Organizational and Destinational Recommendations and a complete 3-year Strategic Plan to guide Board and Staff Work
- A copy of ***Destination Leadership for Boards*** for each Board member.

Adding one day of Stakeholder Interviews and/or Focus Groups would increase the fee to $10,500 + travel. Two days, if deemed necessary, would bring the fee to $12,000 + travel.

The **Board Governance Workshop** alone, without the Strategic Planning component, would run $4,000 + travel.

On projects of this size, DMOproz respectfully requests a 20% down payment upon execution of the contract to hold dates…and bills for the remaining fee upon the successful completion of the project.

TIMELINE

We understand that we are merely in the exploratory phase of a potential relationship, but DMOproz dates in the first quarter of the year tend to go fast. If you believe there is support for moving forward, we suggest requesting a "hold" on potential dates to provide you right of first refusal if another client comes calling for your preferred timeframe.

We presently have the following dates in the first quarter of 2016 available to travel to Santa Rosa County:

February 22-24
March 2-4
March 8-11
March 15-18
March 29-31

Thanks again for considering us. We look forward to discussing these initial thoughts in the days ahead.

DMO PROZ
801 Woodward Dr | Madison WI 53704 | 608.819.6110 | info@DMOproz.com

RFQ- Facilitator Services

Santa Rosa County

Tourist Development

March 16, 2016

Submitted by:

Analytica

POB 998
Newberry, FL 32669
352 339 6090
www.analytica-group.com
www.analyticaconsulting.co

Table of Contents

Table of Contents	2
Transmittal Letter	3
Project Understanding	4
Proposal	4
Qualifications	4
Strategic Planning Experience	6
Marketing Organization/Visitor Business	11
References	12
Sample Agenda	12
Approach with time line	13
Fee	16

Appendices

A. Focus group protocol example	17
B: Controlling for bias in focus group research	18
C: The Structured Interview Process	22

Analytica

POB 998
Newberry, FL 32669
Herb@analytica-group.com
hmarlowe@aol.com

352 339 6090 Voice
888 287 3959 Fax
www.analytica-group.com
www.analyticaconsulting.co

March 16, 2016

Transmittal Letter

Proposal - **RFQ- Facilitator Services**

Santa Rosa County Procurement Department,
6495 Caroline Street Suite G,
Milton, Florida, 32570;

Due 10:00 a.m., March 22, 2016. A one (1) original, twelve (12) copies of the proposal, and one (1) CD/thumb-drive with the full proposal included, (each document must be in an individual PDF format file).

Dear Sirs:

I am pleased to submit Analytica's proposal to provide the requested facilitation services. Having developed over 50 strategic plans for public entities including Tourist Development Councils, I believe we are well qualified to provide such services. We are particularly experienced in work with County Governments at both elected and management levels, having worked in all areas of the state with rural and urban counties, large, medium and small counties.

Your format has been followed and all requested information provided. Please contact me if there is any additional information you need.

Cordially,

Herbert A. Marlowe, Jr., Ph.D.
Principal

Project Understanding.

The Santa Rosa County Tourist Development Council Board of Directors is seeking qualifications from qualified consultants to facilitate discussions and prepare a five year strategic plan for the organization. This plan will include goals and measurable objectives, as well as activities to accomplish the goals.

Proposal Elements

Consultant firm/individual background and experience

Analytica was established in 1991 as a sole proprietorship by Dr. Herbert Marlowe. It provides various organizational development services, including strategic planning, organizational design and program assessments and need studies, to primarily public sector clients. The firm has developed over 100 strategic plans for public, private and non-profit entities, primarily in Florida. Projects have been successfully completed in all regions of the state. Many of these projects address tourism and economic development strategy directly or as a sub-set of strategies addressing the full range of public policy topics that are impact tourism such as transportation, public safety, arts, culture and recreation infrastructure, and planning and development. Herb's resume is provided below. The firm's experience and project list are provided in the next section.

Herbert A. Marlowe, Jr.

POB 998, Newberry, FL 32669
352 339 6090
HMarlowe@aol.com; herb@analytica-group.com

Professional Experience

- Principal, Analytica, 1991 to present
- Assistant Research Scholar, Institute for Higher Education, College of Education, University of Florida, 1987-1990.
- Continuing Education Coordinator, Center for Training in the Environmental Occupations, University of Florida, 1984-1987.
- Director of Continuing Education, Adult Programs, Florida Mental Health Institute, Tampa, Florida. 1978-1984.
- Instructor, Adult Programs, Florida Mental Health Institute, Tampa, Florida. 1974-1978.
- Organizational Development Consultant, U.S. Navy. Newport, R.I. 1971-72.

- Yeoman, Mobile Construction Battalion 62, Gulfport MS and DaNang, Republic of Vietnam, 1969-1970.

Education

- Ph.D. College of Education, University of Florida, 1984. Dissertation: The structure of social intelligence.
- Ed.S. College of Education, University of Florida, 1974.
- M.E., College of Education, University of Florida, 1974.
- B.A.E. (High Honors), College of Education, University of Florida, 1968.

Professional Experience: With over thirty years of consulting experience, Herb has worked on a broad range of issues in a wide number of fields including: water supply and wastewater treatment, agriculture, health, mental health, human services, transportation, community redevelopment, economic development, downtown redevelopment, criminal justice, organizational re-structuring, human resource issues, recreation and culture, public utilities, tourism, race and cultural relations, science and engineering, marketing and development, and environmental. In each of these areas he has applied his particular skills to assist groups to analyze the issue, develop alternatives, and prioritize an action plan to move forward toward some shared goal.

Within this broad experience, Herb has developed particular expertise in the field of strategic planning. He has developed over 100 strategic plans in the areas of economic development, general government operations, health and human services, transportation, and environmental and water related issues.

Relevant publications or presentations:

- Kelton, R., Wingo, O., and Marlowe, H. 2006. Integrating strategic and business planning. Innovations in Local Government Conference. Dayton, OH.
- Marlowe, H.A., Arrington, L., Henry, T. and Watts, A. 2003. *Post disaster redevelopment plan.* Marathon, FL: Monroe County Government
- Nyhan, R. C and H. A. Marlowe, Jr., 1995. Performance measurement and Total Quality Management (TQM) in the public sector: Opportunities and challenges. Public Productivity and Management Review 18, (4) 333-347.
- Marlowe, H. A., R. C. Nyhan, L. Arrington and W. Pammer 1994. The re-ing of local government: Understanding and shaping governmental change. Public Productivity and Management Review, 17, 299-311.
  - Re-printed in: Watson, D. and Hasselt, W. (Eds) 2003. Local Government Management. New York. M.E. Sharpe. (A selection of the 30 best articles on local government management published in the American Society of Public Administration journals over the past 60 years).
- Marlowe, H. A. and Ashburn R. Management and Supervision Skills. Atlanta, GA: Southern Regional Education Board. 1985.
- Marlowe, H. A. and Ashburn, R. Interpersonal Relationship Skills. Atlanta, GA: Southern Regional Education Board. 1985.
- Marlowe, H.A. and Beaudet, B. Creating a high performance utility: The link between culture and organizational health. American Water Works Association Conference, 1992.
- Marlowe, H.A. and Beaudet, B. Creating self-renewing capabilities in a Water Utility: Lessons learned fro analysis and action in creating a learning organization. American Water Works Annual Conference. 1991.
- Marlowe, H.A. The learning organization: Implications for trainers. American Society for Training and Development Technical Conference. 1990
- Marlowe, H.A. and Beaudet, B. Workplace literacy in the Water industry. American Water Works Journal. 1992.

Experience with strategic planning and board facilitation, especially government affiliation

Analytica has developed over 50 strategic plans for public sector entities such as Tourist Development Councils (Palm Beach and Lee), county governments (Hillsborough, Pinellas, Lee among others), municipalities (DeLand, Pompano Beach, Fort Walton Beach, Doral among others), special taxing districts (The Children's Trust of Miami-Dade, The Children's Board of Hillsborough County for example) and multi-jurisdictional projects (such as water supply in Southwest Florida and Tampa Bay, tourism around Lake Okeechobee, health care delivery in the Florida Heartland counties).

Most of the strategic plans for coastal municipalities and counties have strong tourism development and economic development components which are developed as an integral component of overall strategy. In this work tourism and/or economic development strategy is developed in concert with strategies for transportation, water and sewer infrastructure, public safety, park and recreation facilities, arts and culture resources, workforce housing, and workforce development.

In addition to this broader context for tourism and economic development, Analytica has developed specific tourism and economic development plans. Examples of the firm's work here include a strategic plan for Environmental, Cultural and Heritage tourism for Volusia County; a beachfront and downtown revitalization strategy for Daytona Beach; an award-winning economic development strategy for the Glades region of Palm Beach County that included better visitor access to Lake Okeechobee and the development of trails around the lake; an economic development oriented transportation plan for Hillsborough County, management of economic development for Lawrenceville, Ga; strategic plans for rural counties (Baker, Gadsden, and Madison), a community perceptions study for the S. Walton TDC and facilitation of various economic summits (Palm Beach County, Round Rock, Tx).

The following chart provides a comprehensive summary of the firm's experience.

Strategy Development Projects	Project Description	Client*
Vision Plans		
	Vision Plan for Municipalities with extensive community engagement	Naples, Longboat Key, Palm Coast, Naples, Leesburg, DeLand, Fort Walton Beach, Panacea, Tallahassee, Canal Point, Ponce Inlet, Pembroke Pines, St. Augustine
	County/Regional Vision Plans	Palm Beach County, Alachua County, Leon County, Lake County, Osceola County
Strategic Plans	Municipalities	Deland, Round Rock, Tx; Fort Walton Beach, Palm Coast, Oviedo, Orlando, Loxahatchee Groves, Ocoee, Pompano Beach, Deerfield Beach, Doral
	Counties	Pinellas, Brevard, Collier, Hillsborough, Lee, Polk, Charlotte, Palm Beach Fire/Rescue
	Special districts	Miami-Dade Children's Trust, Juvenile Welfare Board of Pinellas County, Children's Board of Hillsborough County
	Regional/Inter-governmental bodies	Brushy Creek Regional Utility Authority, Round Rock, Tx; Volusia Water Authority, Peace River Water Authority, Florida Heartland, Kissimmee Chain of Lakes, Health and Human Services Council, Pinellas, Charleston SC Education Alliance, Florida Children Services Council, Tampa Bay Water, CapMetro, Austin, Tx.
	Non-profit entities	Children's Home of Tampa, YMCA of Tampa, House Next Door, Deland, Family Resources, St. Petersburg, Spring of Tampa Bay, Family Counseling Services of Miami, Glades Initiative of Belle Glade, The Literacy Coalition of Palm Beach County, Hillsborough Kids Inc of Tampa, ARC of Palm Beach County, Non-profit Resource Center of Palm Beach, School Readiness Coalition of Palm Beach, WestCare of Las Vegas, Mental Health Cares, Tampa, Tampa Bay 211, Clearwater
Strategic Business Plans	Business plans to implement strategic plans	Palm Coast, Round Rock, Tx; DeLand, Orlando, Children's Trust of Miami-Dade, Children's Board of Hillsborough County, Pompano Beach, Lee County, Polk County

Strategy Development Projects	Project Description	Client*
Strategic Goal Setting - One or two year plans that address key issues	Public sector entities	Temple Terrace, Belleair Beach, West Park, Broward County, Volusia County, City of Sarasota, Lakeland, Winter Haven, Lake Wales, Osceola County, Winter Park, Brevard County, Martin County, Davie, Palm Beach School Board, Riviera Beach, Belle Glade, Polk County, Hollywood (FL), Casselberry, Callaway, Coral Springs Community Development District, Lauderdale Lakes, N. Ft Lauderdale, Ocala, Port St. Lucie Service District, Sarasota County, Southwest Florida Water Management District, Cooper City
Strategic Plans	Non-profit entities	Chamber of Commerce of DeLand, Florida After-School Network, Duvall House of Volusia County, Grace Lutheran of Winter Haven, MHC of Tampa Children's Home of Tampa, YMCA of Tampa, House Next Door, Deland, Family Resources, St. Petersburg, Spring of Tampa Bay, Family Counseling Services of Miami, Glades Initiative of Belle Glade, The Literacy Coalition of Palm Beach County, Hillsborough Kids Inc. of Tampa, ARC of Palm Beach County, Non-profit Resource Center of Palm Beach, School Readiness Coalition of Palm Beach, WestCare of Las Vegas, Mental Health Cares, Tampa Bay 211, Georgia Developmental Disabilities Council.
Economic Development	Economic strategic plan	City of Daytona Beach, Economic Council of Sarasota County, Glades region of Palm Beach County, Madison County; Gadsden County; Hamilton County; Suwannee County, Lee County
	Economic Development Organizational study	Volusia County
	Economic development summits	Round Rock, Tx; Palm Beach County, Lee County, Charlotte County, Jacksonville
Tourism Development	Strategic Plan	Greater Lake Okeechobee Tourism Alliance, Volusia ECHO Tourism Alliance; Element in Daytona Beach ED Plan
	Annual strategic goals	Tourist Development Council, Lee County; Tourism Development Council, Palm Beach County
	Community Perceptions Survey	S. Walton Tourist Development Council

Strategy Development Projects	Project Description	Client*
Downtown Redevelopment	Downtown Redevelopment Plan	City of Cape Coral; Fort Walton Beach, Margate; City of Cocoa
	Downtown Redevelopment Strategic Plan	City of Tallahassee
	Downtown Redevelopment Plan	City of St. Petersburg
	Strategic Plan	Florida Redevelopment Association
Community Development	Strategic Plan	Polk County Opportunity Council
	Strategic Plan	Glades Initiative
Public Safety & Criminal Justice	Evaluation of Criminal Justice Commission	Palm Beach Criminal Justice Commission
	Police Department Operational Issues Analysis	City of Belle Glade
	Strategic Plan, Law Enforcement	City of DeLand, City of Round Rock, TX
	Strategic Plan, Fire and EMS	Palm Beach County, Polk County
	Criminal Justice, Mental Health and Substance Abuse Strategic Plan	Palm Beach County, FL; Citrus County, FL
	Community Violence Prevention Strategic Plan	Hillsborough County
	Strategic Plan	Palm Beach Criminal Justice Commission
Health and Human Services	Organizational design and strategic plan	Health and Human Services Planning Council, Pinellas County
	Homeless strategic plan	Pinellas County
	Development of community health indicators	Martin County, St. Johns County
	Analysis of strategic focus areas	Florida Developmental Disabilities Council
Education	Alternative governance structures for a school district	Charleston Education Alliance
	Education Vision Plan	Palm Beach Directions 94
	Annual Goal Setting	Palm Beach County School Board
	Strategic plan	Stetson University School of Business, Palm Beach Community College Institute of Government, Florida After-School Network
	Community literacy	United Way of Polk County
	Pre-K Policy	School Readiness Partnership of Florida

Strategy Development Projects	Project Description	Client*
Transportation and Public Utilities	Transportation Summit	Palm Beach County
	Organizational development	Palm Beach County Water Utilities
	Strategic Plan	Florida Stormwater Utilities Association, Governmental Utilities Group, Cap Metro, Austin, TX, Polk County
	Transportation for Economic Development	Hillsborough County
Charter Reviews	Facilitation of charter review commissions	Brevard County, Polk County, Volusia County
Environmental Issues	Sustainable water supply via regional solutions	Tampa Bay Water Coordinating Council, Volusia Water Alliance, Southwest Florida Water Alliance, Brushy Creek Water Authority,
	Land use	Sarasota Vision 2050; South Florida Water Management District
	Compatible economic development	Key Largo
	Stormwater	Southeast Stormwater Association
	Conservation Lands policy	Lee County
Analytics	**Nature of the Project**	**Client***
	Assessment of health and human services	St. Johns County
	Analysis of social service alternative structures	Polk County
	Assessment of youth programs	St. Petersburg
	Analysis of senior needs	N. Miami, Cutler Bay
	Development of a cost-sharing and reimbursement model for City and County fire services	Alachua County, City of Gainesville
	Assessment of small business satisfaction	South FL Water Management District
	An assessment of homeless issues and services	Pinellas County
	An analysis of the economic impacts of investment in early childhood services	Collier County

Analytics	Nature of the Project	Client*
	An analysis of the system impacts of mental health and substance abuse on criminal justice services	Citrus County, Palm Beach County
	An analysis of housing issues for persons with HIV/AIDS	Treasure Coast Health Planning Council
	An examination of mental health services in Dade County	Florida Department of Health and Rehabilitative Services
	A health services needs assessment	Palm Beach County, St. Johns County
		• *Florida unless noted otherwise

Experience with destination marketing organizations or visitor industry related business

Analytica's experience with destination marketing organizations or visitor industry related business has occurred primarily through Tourist Development Councils or Local Governments which have such entities under contract for services. From this perspective they have provided information and perspectives about trends which have been valuable in the strategic planning process.

Other business interests of Analytica's principal, Herb Marlowe, are directly engaged in a visitor industry related business as a former owner of short-term rentals for equestrian and sports event visitors in Alachua and Marion counties. This experience of developing collaborative marketing strategies as well as managing visitor rentals provides an on-the-ground perspective of some of the challenges involved in the visitor industry.

Reference list of previous similar projects

City of DeLand FL Strategic Plan. Michael Pleuss, City Manager, 386 626 7109
City of Fort Walton Beach Strategic Plan. Michael Beedie, City Manager, 850 833 9504
City of Round Rock, TX Strategic Plan, Jim Nuse, City Manager, 512 748 7590
City of Pompano Beach FL Strategic Plan, Brian Donovan, Assistant City Manager, 954 786 4601
Hillsborough County Strategic Plan, Eric Johnson, Director of Strategic Planning, 813 774 2476

Sample agenda/proposed format

Focus group example

Introductions

Purpose of the Focus Group; how this information and discussion will impact the strategic plan

Potential Questions (facilitation process will ensure each participant responds and no one person dominates)

- What is the most frequent comment you hear from visitors?
- From the visitor's perspective, is there a feature they view as missing? Is there something they want that they can't get in the county? What are the weaknesses that should be addressed?
- Are there features of the county which could draw visitors but are overlooked or underemphasized?
- Who does Santa Rosa compete with for tourists? What competitive advantage does Santa Rosa have? What are the assets that could be built upon?
- How is the business changing and what opportunities will emerge?

Retreat example

Introductions

Purpose

Discussion of scenarios

- What is your preferred scenario? (This may be a combination of the presented scenarios) *Note: In strategic planning terminology, this exercise articulates the vision.*

Areas to develop or strengthen

- To continue or strengthen progress on our preferred scenario, where should we focus our time and resources?
  Note: In strategic planning terminology, this exercise articulates the goals.

For each area we have identified that we need to develop or strengthen

- The specific accomplishment(s) we should pursue are....?
  Note: In strategic planning terminology, this exercise articulates the strategies and objectives

For each accomplishment,

- How can we judge progress?
  Note: In strategic planning terminology, this exercise articulates the measurable element.

Outline of work proposed, including a timeline of preparation, execution and final report

---

The RFP delineated the following scope of work which we have reformatted as a set of tasks. For each task we have described our approach, the time frame and the deliverable.

- **Task 1.0. Facilitate two focus group sessions** to serve as a forum for stakeholders, board members and key staff participants to engage in meaningful conversations about current state of the hospitality industry, board governance objectives, board/staff relations and other topics related to organizational development. One session for North End Committee and one session for South End Committee.
  - Task 1.1. Development of Structured Interview Protocol in collaboration with the TDC Director. The Structured Interview Protocol is designed to ensure a comprehensive and in-depth discussion that generates a complete set of perspectives while controlling for various forms of potential bias that could lead to inaccurate or erroneous conclusions. Appendix A provides an example of a focus group protocol. Appendix B describes the approach Analytica has developed to mitigate bias. Appendix C describes the Structured Interview Protocol in some detail.
  - Task 1.2. Selection of focus group participants. For the focus group to be most effective the diversity of perspectives that are present in the stakeholder community

should be present. Hoteliers, Visitor rental providers, campsite operators, tourism attractions (public and private), related service industries (visitor-oriented restaurants, retail, health care), public work services, and residents who are impacted by tourism along should be considered along with any other specific groups. This would include selection of substitutes in case of last minute events.

- Task 1.3. Logistical preparation. This includes site selection, time selection, notification and verification processes.
- Task 1.4. Focus group facilitation.
- Task 1.5. Summary of discussion

Time Frame: Month 1 of project

Deliverable: Summary report delineating the perspectives of the focus group participants on the questions which were posed. Example questions will be found in Appendix as well as in the agenda sample provided below.

- **Task 2.0. Facilitate a board workshop/planning session** with Santa Rosa County Tourist Development Council Board of Directors and Tourist Development Office Staff
    - Task 2.1. Preparation of Strategic Choices Report. This report will include the information derived from the focus groups, data about tourism trends relevant to Santa Rosa County, two or more scenarios which depict various directions tourism could take in the county, and a set of key decisions which will set that direction. These decisions may be framed as a set of goals to be chosen or not and to be prioritized.
    - Task 2.2. Review of the Strategic Choices Report with the TDC Executive Director and other key persons. This review will identify any gaps, points that may need clarification or expansion and any other changes that will make it a more usable document for the workshop.
    - Task 2.3. Distribution to workshop participants prior to the session for review.
    - Task 2.4. Workshop facilitation. Please refer to the agenda section for an example of the topics the session could address.
    - Task 2.5. Summary report and draft plan. Based on the workshop direction, a draft plan will be developed.

Time Frame: Months 2 & 3

Deliverable: Draft Strategic Plan

- **Task 3.0. Conduct any necessary follow-up meetings** with these groups
    - Task 3.1. If follow-up meetings are needed they will be scheduled.

Time Frame: Months 2 & 3

Deliverable: Draft Strategic Plan Revisions

- **Task 4.0. Meet with Chairman and Tourist Development Director** to review plan and progress
    - Task 4.1. The draft plan will be provided to the Chairman and Tourist Development Director
    - Task 4.2. Meeting to review and finalize plan.
        - 4.2.1. One component of this meeting will be a discussion about what indicators will tell the Chair and Director that progress is being made toward the goals of the strategic plan.

Time Frame: Month 3

Deliverable: Draft Strategic Plan Revisions

- **Task 5.0. Develop quantitative objectives** necessary to measuring performance against the goals of the plan.
    - Task 5.1. Drawing upon the 4.2.1 discussion, a set of quantitative objectives will be developed.
    - Task 5.2. Review draft quantitative objectives with TDC Director.
    - Task 5.3. Finalize quantitative objectives.

Time Frame: Month 3

Deliverable: Draft Strategic Plan Quantitative Objectives

- **Task 6.0. Provide a final report and presentation** to the Santa Rosa County Tourist Development Council, Santa Rosa County Board of County Commissioners and Tourist Development Office
    - Task 6.1. Develop draft presentation and review with TDC Director
    - Task 6.2. Make presentation.

Time Frame: Month 3 or 4

Deliverable: Strategic Plan presentation

Fee structure

Task #	Sub-task	Task	Fee	Out of Pocket Estimate	On-site days
1		Focus Groups			
	1.1	Protocol development	500	0	0
	1.2	Participant selection	0	0	0
	1.3	Logistical preparation	0	0	0
	1.4	Focus group facilitation	3000	500	2
	1.5	Summary	500	0	0
2		Planning Workshop			
	2.1	Strategic Choices Report	2000	0	0
	2.2	Review with TDC Director	0	0	0
	2.3	Distribution & feedback	0	0	0
	2.4	Workshop facilitation	3000	500	2
	2.5	Summary & Draft Plan	1000	0	0
3		Follow up meetings			
	3.1	Follow up meetings	0	0	0
		Given that the need for this task is unknown, it is not budgeted. If you wish to budget for it we can assume two days on site at a fee of $1,500 per day and travel			
4		Chair and Director Meeting			
	4.1	Chair and Director Meeting	1500	400	1
5		Quantitative Objectives			
	5.1	Development of quantitative objectives	1000	0	0
	5.2	Review	0	0	0
	5.3	Finalize	0	0	0
6		Presentation & Report			
	6.1	Presentation(s)	3000	500	2
			15500	1900	7

Appendix A: Example Focus Group Protocol

Preferred Size: 8 to 12 persons

Staffing:

Facilitator

Recorder

Facility:

- Table configuration where participants can speak to each other as well as to facilitator.
- Screen for projection of questions, materials and live notes.

Amenities:

- Refreshments appropriate to the time of day.

Process:

1. Overview of process and purpose
2. Introduction of people in the room and their role
3. Posing of question 1
   a. Facilitated discussion ensuring each participant expresses their view
   b. Obtaining preference data if appropriate once all perspectives have been aired or
   c. Obtaining prioritization preferences; or
   d. Obtaining system analysis or gap data if that is the purpose
4. Questions 2 .... N
5. Review of major themes
6. Feedback from participants on any other topics they thought relevant
7. Review of how the information will be used.

Appendix B: Identifying and Controlling for Sources of Bias & Error in Focus Group Assessment Research

Herbert A. Marlowe, Jr
Working Paper: Not for Distribution

June 15, 2000

Introduction

Focus group assessment, as with any other form of scientific research, is concerned with the control of error or bias. Error or bias introduces non-controlled forms of variation which may skew results. While in a perfect world, all error could be eliminated, in the real world of focus group assessments that will never occur. There are too many sources of variation, and too few ways to eliminate it. What we can do is to identify those sources and seek to minimize their impact both through design and analysis. This paper provides a brief overview of the forms of bias and then presents methods for controlling and/or minimizing bias.

Sources or Bias or Error

- *Selection Error.* Selection error occurs when people are selected for the focus groups on some variable other than the ones identified before-hand as variables to test. When that occurs, we cannot determine if the results were due to pre-identified variables or due to the "hidden" or "unknown" variable that influenced selection.

- *Method Error.* Method error occurs when there is a significant variation in focus group method. If focus groups are conducted one way one time, and another way another time, then the question may be legitimately asked, "are the differences between groups due to the actual thoughts of the group, or due to the different method used to obtain the data. Method error confounds results by making it unclear what impact differing methods had on the results.

- *Moderator Personality/Style Bias.* Moderator's obviously differ in style and personality. When these differ significantly, they introduce a confounding variable into the assessment.

- *Expectancy Bias.* Participants may have varying expectations of the purpose or task of the focus group. This can lead to response variance due to expectancy gaps that is not truly reflective of the participant's view or opinion of the test materials. The focus group designer must also be careful not to create expectations that inadvertently shape responses.

- *Item order effect.* If the focus group is testing reactions to different items, then the order of item presentation can influence response if not controlled for in some way.

- *Respondent Order Effect.* In response bias, error is introduced by respondents self-selecting a response "pecking order" in which certain participants "go first" and others "go last"

- *Dominance bias.* In a focus group setting an extremely verbal or dominant personality can influence group responses if not controlled for in some way.

- *Shyness bias.* The opposite of dominance bias, shyness bias refers to the behavior of some persons to be very quiet in group settings and to not initiate participation in discussions.

- *Acquaintance bias.* Is it possible that individuals who know each other may influence each other's responses. If this occur, acquaintance bias would occur.

- *Stranger bias.* While acquaintance bias can occur, in actuality stranger bias can also occur. While not as obvious, this may occur in the form of some participants being reluctant to speak in the presence of strangers or some participants making stronger statements than they actually hold simply because there is no one in the group who "knows" them.

- *Idiosyncratic error.* This source of error is a result of transient individual participant experiences which may color their responses. Someone having a "bad" day for example may give exaggerated responses simply as a mechanism for venting frustration or anger at a totally separate event.

Methods of Control

Selection Error.

- Selection error is best controlled by random selection of participants. Random selection prevents the inadvertent introduction of error through a skewed selection.

Method Error

To minimize method bias a number of options are available. In order of descending strength they are:

- Develop structured and detailed protocols in which all moderators are trained. This prevents significant variation in method.
- Have trained moderators, all of whom share a common training background.
- Have a general protocol which covers desired results and key points.

Moderator/Personality Style Bias

This form of bias will never be eliminated. However, the mechanisms which can be used to minimize this form of bias include:

- Where feasible, use the same moderator for all focus groups. This solution at least ensures that the moderator impact is approximately the same for all groups.
- Where multiple moderators are used, provide a detailed protocol and structure so that individual personality differences do not result in different methods.
- Attempt a post-facto analysis to determine if there seem to be any patterns of response that are particularly associated with a particular moderator.

Expectancy Bias.

Expectancy bias can be controlled or minimized through the following steps:

- Standardization of any advertising or recruitment material;
- Use of a standard letter of acknowledgement of participation which creates a common expectation among participants
- Use of a standard opening statement by the moderator which clarifies process, role or item [as appropriate – if you are testing for initial reactions you do not want to create expectations or shape responses]

Item order effect.

Item order bias can be controlled by systematically varying the presentation order so that no item is always presented at a certain point.

Respondent Order Effect

Response bias can be systematically controlled by systematically varying the order in which participants speak in a structured interview. In a non-structured interview, it is very difficult to control for response bias. A post-facto analysis can be conducted to determine if the participants tended to respond in a particular order. If they did not, one can argue that response bias did not occur. If they did respond in a particular order, the researcher has to acknowledge that a confounding variable has been introduced.

Dominance bias.

Dominance bias is controlled via a structured interview process in which each respondent is allocated a fixed amount of time to respond in a clear sequence. This controls both time of speech [one form of dominance] and speaking sequence [another form of dominance is speaking frequently, out of turn, or interrupting another speaker]

Shyness bias.

The opposite of dominance bias is shyness bias where a member does not speak in any regular or systematic manner. Again, the structured interview process minimizes shyness bias by providing each participant a time slot in which to speak so that they do not have to compete for the floor or attempt to gain the attention of the moderator.

Acquaintance bias.

Acquaintance bias can be controlled through a variety of tools.

- One, given sufficient time and participant pool, a screening criteria can be that the participant know no one else in the group. While theoretically sound, this is difficult to achieve in practice either because it is difficult to monitor or because in smaller or rural communities it may be a practical impossibility.
- Two, use of a structured interview protocol minimizes the impact of acquaintance by forcing each individual to respond to the moderator and not to one another [unless that is part of the research design].
- Third, post-facto analysis can determine the impact of acquaintance if there is a concern that acquaintance bias may have occurred. The first step in post-facto analysis is to remove either the acquainted individuals or the entire focus group from the quantitative analysis. If the data patterns remain the same after their removal, then acquaintance had no impact on overall results. If the quantitative patterns do vary, then the next step would be to remove either the acquainted persons from the analysis or the entire focus group. If upon removal, the same general data patterns remain as were found when they were included, then one can safely conclude that acquaintance bias did not impact the results in any significant manner. If a different data pattern is found, then the data can be segregated and separate analyses conducted.

Stranger bias.

Control of stranger bias is more difficult because it is more difficult to detect. Initial detection can be done by either the moderator or the transcript reviewer but it is much easier to the moderator to see it in action. Stranger bias is indicated whenever one person consistently responds in the same form to another, i.e. they always agree, they always disagree, etc.

Idiosyncratic bias.

This cannot be controlled for ahead of time. It can be minimized by use of structured interview protocols which do not allow the person to "get off track" and into a discussion of their particular issue.

Appendix C: Focus Group Methodology: The Structured Interview Process

Herbert A. Marlowe, Jr.
Working Paper: Not for distribution
June 15, 2000

Focus group moderators utilize a variety of specific methods to obtain their data. Each method has its own strengths and weaknesses and is appropriate in certain settings, inappropriate in others. This paper introduces one method, the Structured Interview Process. The method is described and its strengths and weaknesses listed.

Description of the Method

The Structured Interview Process conducts a focus group using highly defined protocols. These protocols include:

1. Delineation of framework setting via standardized introductory comments. This creates a common set of expectations for participants, thereby reducing expectancy error.
2. Specification of questions, including specific phaseology. This ensures each participant is asked the same question. This reduces method error, moderator bias, acquaintanceship bias and stranger bias.
3. Delineation of item presentation sequence. This ensures that both order effect and moderator bias is minimized.
4. Delineation of participant response sequence. This ensures respondent and moderator bias is minimized as well as dominance bias.
5. Possible use of quantitative questions. This promotes data triangulation and serves as a test of internal reliability of the data. It also serves to minimize moderator bias.
6. Delineation of time frames for item and respondent. This minimizes dominance bias as well as moderator bias.

Advantages

The advantages of the Structured Interview Process include:

Advantage:	**Discussion:**
Strong control of various forms of bias	Structured interviews control or minimize expectancy error, method error, moderator bias, acquaintanceship bias, stranger bias, order effect, respondent order effect.
Data Triangulation	The strongest forms of data triangulation involves three different data types. Use of structured interviews facilitates quantitative data collection and systematic moderator data which adds two different data types to qualitative participant data

Ease of multiple site, multiple group administration	This process is easier to administer across multiple sites or groups. It ensures moderators are following similar steps.
Data Analysis is facilitated.	A structured interview facilitates data analysis by pre-designing the data set.

Disadvantages

The disadvantages of the Structured Interview Process include:

Disadvantage:	**Discussion**
Potential creativity limitations	If the purpose of the focus group is to facilitate group creative thinking on a topic, and then later draw ideas from that discussion, a structured interview will probably inhibit the needed free flow of ideas. If the goal is creativity or random ideas, other group processes such as brainstorming or various thinking exercises are more appropriate.
Participant Reaction	Some participants may not like structured formats. Those persons who want to express themselves as "they feel like it" will probably feel constrained. If the group is pre-identified as consisting of those types of persons, a more semi-structured interview protocol may be appropriate.
Off-target questions can be generated and asked if pre-design work is not done properly.	The Structured Interview Process requires careful pre-design, particularly in its questions. If the wrong questions are asked, the desired data will not be generated.

Alternatives to the Structured Interview Process

There are a variety of alternatives to the Structured Interview Process. These include:

- Semi-Structured Interviews. Semi-structured interviews provide an overall framework but allow the moderator greater flexibility to respond to group dynamics.
- Creative Thinking Groups. The purpose of these groups is to generate creative thinking on a topic. They use a variety of techniques such as brainstorming, poster notes, visualization, etc.
- Electronic. Electronic focus groups use interactive software technology to either generate ideas or evaluate materials. They advantage is they can eliminate dominance, acquaintanceship or stranger bias.
- Free form Interviews. In this form the moderator follows the flow of the group as they respond to items.
- Quantitative based. These forms are highly similar to Structured Interviews in that respondents complete and then elaborate upon their responses to a series of quantitative items.