

SANTA ROSA TDC

BOARD STRATEGIC PLAN PROPOSAL

MARCH 12, 2016

ZEITGEIST CONSULTING

**DMO
PRÖZ**

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Madison, WI 53704

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Julie Morgan
Santa Rosa TDC
8543 Navarre Pkwy
Navarre, FL 32566

ZEITGEIST CONSULTING

**DMO
PRÖZ**

12 March, 2016

Julie,

Thanks for considering DMOproz to assist the Santa Rosa TDC as it envisions what the future holds for the Organization and the Destination. We're honored and excited at the opportunity to share our interest and qualifications.

We've worked with nearly 200 DMOs across the United States, from Fort Lauderdale, Florida to Juneau, Alaska and helped two thirds develop their Strategic Plans. This experience puts us in a unique position from which to assist your destination and organization. We know the language, the politics and the industry's expectations of DMOs. We've seen best practices in action and helped create culture shifts in previously inert organizations.

And, we (literally) wrote "the book" on DMO Board Leadership. Thus, you don't need to spend precious time bringing your consultant up to speed, allowing us all to move faster and more efficiently through the planning process.

We look forward to discussing this opportunity with you in the months ahead. Thanks again for considering us to be your partner in this endeavor.

Sincerely,



Bill Geist, President & Chief Instigator

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FIRM BACKGROUND & QUALIFICATIONS

DMOproz (aka Zeitgeist Consulting, Inc.) is dedicated to increasing the effectiveness and impact of Destination Marketing Organizations (DMOs) across North America. For over 20 years, our experience in political advocacy, destination development, community leadership and marketing has allowed us to provide our clients with a reality-based view of the world...and gives us the ability to suggest actionable steps to enhance DMO governance, management and marketing initiatives through Strategic Planning and Destination Development.

DMOproz has worked with over 200 Destination Marketing Organizations across North America, more than any other firm of its kind. We don't say that to brag...but to suggest that our knowledge of the myriad ways that DMOs are addressing today's Visitor Economy and long range destination sustainability is as deep as it is broad. We are your conduit to the rapidly evolving strategies at play in diversifying revenue streams, seeing a bigger picture than just "heads in beds" and next generation tactics in destination sales and marketing.

We have extensive experience in facilitating Tourism-related Focus Groups and Strategic Planning Workshops and have worked with several Florida TDCs, including Palm Beach County, Sarasota County, Leon County and Martin County.

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. Through the years, our offerings have expanded and, as we are working with more and more virtual partners, we have evolved beyond 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.

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, here are contacts of DMOs for which we have also performed similar work:

Hershey Harrisburg PA Regional VB: contact Mary Smith, mary@hersheyharrisburg.com
Mansfield/Richland County OH CVB: contact Lee Tasseff, ltasseff@mansfieldtourism.com
Greater Raleigh NC CVB: contact Dennis Edwards, dedwards@visitraleigh.com
Irving TX CVB: contact Maura Gast, mgast@irvingtexas.com
Visit Duluth MN: contact Anna Tanski, anna@visitduluth.com
Gulf Shores + Orange Beach AL Tourism: contact Herb Malone, hmalone@gulfshores.com
Lake Havasu City AZ CVB • contact Doug Traub, Doug@GoLakeHavasu.com

PROJECT TEAM



Bill Geist • DMOproz President & Chief Instigator

Bill Geist brings over 35 years of marketing experience and 30 years in the tourism industry together to lead the DMOproz Team. Since launching Zeitgeist in 1995, he has worked with over 190 CVBs, Regional Tourism Organizations and State Tourism Offices.

Formerly the CEO of the Greater Madison (WI) Convention & Visitors Bureau, he was at the epicenter of the public referendum 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 second printing and he is a contributing author of the DMAI-sponsored *"Fundamentals in Destination Marketing."*



Terri White • DMOproz High Priestess & VP of Services

Terri has overseen the DMOproz offices for more than 15 years and performs a wide range of support services including research implementation and assessment 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 Zeitgeist, 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 and was a Meeting Planner for the Upper Midwest CVB Association and the Wisconsin Association of CVB.

PROPOSED PROCESS

Based upon the specifications outlined in the RFP, DMOproz offers the following proposed program of work:

REVIEW BACKGROUND DOCUMENTATION

DMOproz will initiate work with a phone and/or video conference with Santa Rosa TDC Leadership in order to formalize the scope of the assignment, identify pertinent intel that may exist from previous Strategic Plans, and discuss the format for Stakeholder Focus Groups that will be staged as part of the process. During this meeting, we will discuss how the Santa Rosa TDC will identify those Stakeholders invited to "sit at the table" as well as those for which an online survey instrument and/or a phone interview will suffice.

PRELIMINARY SURVEY

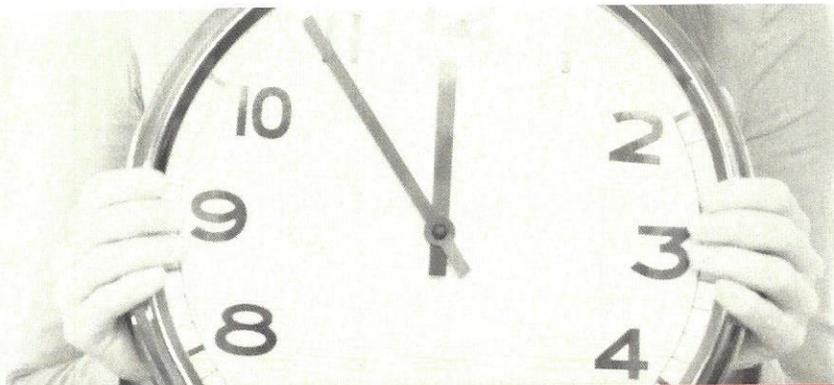
After situational discussions with TDC leadership, we will craft an online questionnaire for you to distribute to the TDC Board. This questionnaire will be designed to be completed in the weeks immediately prior to our Focus Groups and Planning Session. The questions will focus on Board members' feelings about the organization and destination...and visions for the future. The survey instrument serves several purposes. First, it alerts us to issues that may be addressed in the North/South Focus Groups. It also saves time in the upcoming face-to-face Board session that can be better utilized in active give-and-take discussion. And, it serves to jump start participants' thinking about the upcoming sessions.

DISCUSSIONS WITH LEADERSHIP

Once in market, we'll start by meeting with the TDA Chairman and Director to discuss the preliminary Survey findings along with the current state of the Hospitality Industry in Santa Rosa as compared to the National scene. We'll discuss the next day's Focus Groups and the upcoming TDC Workshop to identify ways to elicit the highest level of intel from each group.

FOCUS GROUPS

We will facilitate two 3-hour Focus Groups of key stakeholders to engage in meaningful conversations about current state of the hospitality industry, board governance objectives and other topics related to the enhancement of the Visitor Economy in Santa Rosa County. One session will be staged in the North end of the County, the other in the South. From these discussions, we'll generate intel from your Key Stakeholders for integration into the TDC Board Planning Session the next day.



PLANNING SESSION

We'll facilitate the discussions with the TDC Board and Staff to examine the concepts unearthed in our preliminary Survey and Focus Groups on what the next steps are for the future of the Organization and the Destination. This Session is rooted in our knowledge and expertise of the current state of the hospitality industry and how the TDC can affect and potentially lead those efforts as identified by your Board Members and Community Leaders thru the Survey and Focus Groups.

Our typical format is to spend the morning ideating as many issues as possible, getting everything out on the table for analysis. 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 that will power the Goals, Objectives and Tactics for the next 3-5 years. While we are always open to customization, our typical agenda follows:

STRATEGIC PLANNING SESSION TENTATIVE SCHEDULE OF TOPICS

8:00	Session begins with formal introductions, overview & ground rules
8:15	The Evolving State of Destination Marketing
8:35	Board Governance Review (based on <i>Destination Leadership for Boards</i>)
8:50	Pre-Session Survey Results Discussion
9:30	Identification & Clarification of Mission
10:00	Break
10:15	Identification of Key Stakeholders and Expectations
10:45	SWOT Analysis of the Destination & Organization
11:40	Fogg Exercise
12:00	Lunch
1:00	Develop / Prioritize a List of Opportunities for the Board to pursue
1:30	Begin Brainstorming Objectives and Strategies for Opportunities
2:30	Break
2:45	Continue Brainstorming Objectives and Strategies
4:30	Conclusion

FOLLOW-UP DOCUMENTATION

Following the Planning Session, we'll prepare a Draft Strategic Plan that identifies the Goals, Objectives and suggested Tactics of the top ideas developed by the Board. These documents tend to run in the 20± page range and include a synopsis of discussions and concepts aired during the retreat. The draft report is usually available in about two-three weeks for review and edit. Updates can be made with 48 hours. Upon completion, we offer a virtual "presentation" of the Plan via GoToMeeting so that all participants can ask questions and approve the final documentation.

PRESENTATION OF THE PLAN

We will return to present the newly adopted plan to the Santa Rosa Tourism Development Council, Santa Rosa County Board of County Commissioners, the Tourist Development Office and select industry partners if so desired. 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.

PROPOSED TIMELINE

We believe the suite of services in the preceding program of work can be completed within 12 weeks of project initiation. We would envision the following timeline:

WEEK ONE • REVIEW BACKGROUND DOCUMENTATION

WEEK TWO • PREPARE AND LAUNCH ONLINE SURVEY INSTRUMENTS

**WEEK FOUR • DISCUSSION WITH LEADERSHIP
FOCUS GROUPS
BOARD STRATEGIC PLANNING WORKSHOP**

WEEK FIVE THRU EIGHT • DEVELOPMENT OF STRATEGIC PLAN DOCUMENTATION

WEEK NINE • DELIVERY OF DRAFT DOCUMENT FOR REVIEW

**WEEK TEN • COMPLETED STRATEGIC PLAN DELIVERED
VIRTUAL PRESENTATION OF THE PLAN**

AS SCHEDULED • IN-PERSON PRESENTATION

ONGOING • PHONE CONSULTATION TO MONITOR PROGRESS & SUGGEST ADDITIONAL TACTICS

INVESTMENT

DMOproz agrees to provide the outlined Strategic Planning Services for Santa Rosa TDC for \$13,500 plus travel expenses. This fee includes the reviewing previous documentation, preliminary discussions with leadership, creation and analysis of the online surveys, onsite meeting with Leadership, 2 Focus Groups, Facilitation of the TDC Planning Session, a copy of our book, *Destination Leadership for Boards* for each Board member, the post session Plan in pdf format, the final presentation and a the subsequent follow up calls and progress against Goals.

Estimated Travel Expenses for 2 trips to Santa Rosa:	\$2500
Roundtrip Airfare from MSN \$600 x2	
Ground transportation \$75/day x6 days plus fuel	
Lodging \$150/nt x5	

DMOproz respectfully requests a down payment of 25% upon signing of an agreement to hold dates...and bills for the remaining fee plus expenses upon the successful completion of the project.

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

