

The City of Oregon City
Oregon City Tourism Strategic Plan - Scope of Work

May 30, 2017
Submitted by Coraggio Group
503.493.1452 | coraggiogroup.com



coraggiogroup

Scope of Work

Coraggio proposes a straightforward, three-phase framework to Get Clear, Get Focused, and Get Moving on your Tourism Strategic Plan. Below, we have identified the general components of our approach including deliverables for each stage. We would expect to scope our work with you in greater detail once we begin the engagement and have the opportunity to fully understand your needs.



Phase One: Get Clear



The Get Clear phase represents the foundation for the project. It sets the stage for early wins and ongoing success from start to finish. We will work with you to create and maintain the conditions necessary for an engaging, transparent, and innovative strategic planning process—one that serves as a galvanizing mechanism for further unifying Oregon City’s broad range of stakeholders, and consistently reflects the city’s values.

This will also be the time when we work with you to form your Planning Team. In our experience, it is best if this team is comprised of 6-10 people representing a broad range of perspectives. For Oregon City, this probably looks like a mix of city employees and partners who can bring important external perspective to the effort.

Much of the Get Clear work will be supported through a combination of research and stakeholder outreach to gain a better understanding about what is important for the continued long-term success of Oregon City’s tourism, and to gather insights for use by the planning team. In designing this research/outreach, we will work with you to determine the forms of insight gathering that will bring the most value, and how other participants—such as Oregon City staff—might support these efforts, if desired.



Scope of Work

The Get Clear work includes the following:

Immersion Work

We propose an initial half-day Immersion Work Session as a way for us to fully understand the range of strategic challenges and opportunities you're seeing for the destination that need to be vetted as part of the planning process. As part of this work session, we will agree on the key elements the strategic plan must address, as well as finalize everyone's thinking on key dates and deliverables. Participants should include representatives of the Economic Development Department and perhaps some key community stakeholders.

With the insight we gain from the Immersion Work Session, we will then develop a final project plan for your review. The project plan will include timelines, key reporting milestones and deliverables and will serve as a tool for managing expectations from project start to finish.

Stakeholder Visioning Retreat

As a way to create an open and inclusive experience for key community stakeholders—thus establishing early buy-in for the strategic plan once it is complete—we propose facilitating a half-day stakeholder visioning retreat. This retreat would be organized as an engaging high-level strategic guidance discussion that will help bring even sharper focus to the planning work once it begins.

Stakeholder Survey

No organization operates in a vacuum, so taking the temperature with key external stakeholders will be very important in highlighting community issues and trends that will impact your decision-making process. Therefore, we will use what we learn in the Immersion Session to design an organized approach with targeted questions that draw out the needed information while demonstrating to participants that this process is being accomplished *with* them, it is not something that will be done *to* them. Our questions for stakeholders will be both strategic and tactical—we will want to understand how they envision the future of Oregon City tourism.

Public Meetings (4)

We will hold a series of four public meetings to outline the planning process and answer any questions. These meetings will be spread throughout the project and will serve as key check-ins with external partners and community stakeholders. We may choose to share some interim deliverables during these sessions to build support for the plan, and explain how decisions were made and why.

Tourism Economic Impact Analysis

With our economic development research partner, Dean Runyan Associates, we will prepare estimates of the travel impacts for Oregon City, consisting of travel spending and the associated payroll, employment and tax receipts, for the period 2012 through 2016. These figures can be used as a baseline for projections of the economic potential of additional travel-related development in the City. Comparable figures for Clackamas County, the three-county metro area and the state of Oregon will also be provided, including the pertinent comparisons. In addition, we will prepare an estimate of overnight travel volume for Oregon City for 2016.

Insight Report

We will create a comprehensive report that summarizes the various themes and insights from our outreach effort. The report will also include strategic implications that we can use to frame strategic decisions that will be made during the planning process. In other words, we will have a way to ask the question, "How does this decision support or align with the insights we gathered in our outreach activities?"



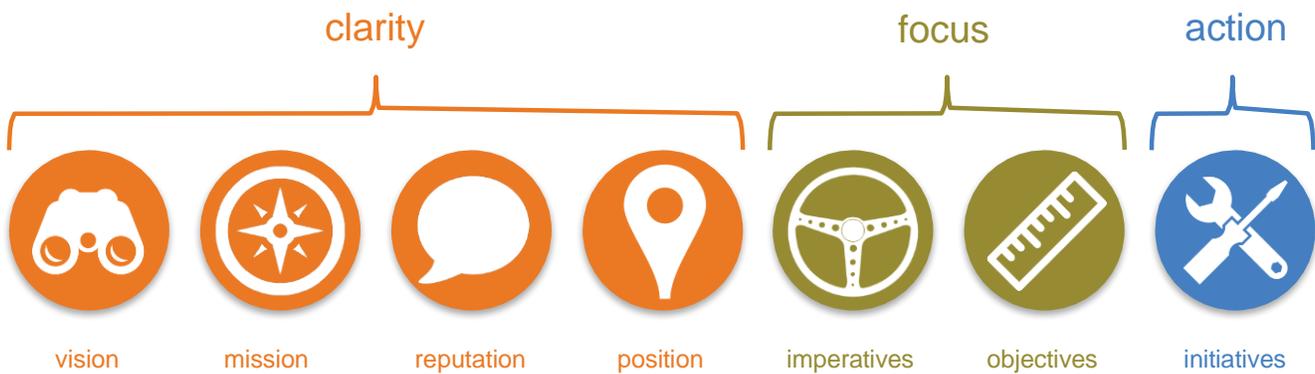
Scope of Work

Phase Two: Get Focused



The Get Focused phase is where we will roll up our sleeves and get to the work at hand: building the next Tourism Strategic Plan for Oregon City. This work will be grounded in the reality of what we learned from all stakeholders in the Get Clear phase, but will also be an opportunity to think strategically and dream about what the Oregon City of the future might be. As much as possible, we will build on the existing Tourism Strategic Plan and will strive to develop a plan with implementation in mind.

The Get Focused phase will utilize our Strategic Clarity Framework, and we will work with you to customize the selection of elements that are necessary for Oregon City to create the plan it needs. This may mean adding, removing, or modifying elements of our framework below:



The Get Focused phases will include the following steps:

Strategic Clarity Workshops (2)

The Strategic Clarity portion of the Tourism Strategic Plan is comprised of the following elements:

- **Vision:** What is the ideal future state we will strive to create? What are we committed to making happen?
- **Mission:** What is most important to us as we strive to realize our Vision? What is the focus of our work?
- **Reputation:** What is the experience we want Oregon City’s tourism efforts to be known for?
- **Position:** What unique and sustainable value will Oregon City’s tourism efforts deliver?

In these 2-3 hour workshops, we will work with your Planning Team to develop statements for each of these elements of the Strategic Plan through engaging and thought-provoking exercises. Defining these parts of your Strategic Plan is a critical first step that defines your future, and lays the groundwork for beginning to think about the strategic activities you will undertake.



Scope of Work

Strategic Planning Workshops (2)

We will now begin the work of identifying what—specifically—we hope to accomplish, how we will measure that accomplishment, and what general steps we will need to take. This will begin with identifying our Strategic Imperatives—the general categories of action Oregon City will need to take in the coming years.

For each Strategic Imperative we identify, we will articulate specific measurable Objectives and Initiatives. As facilitators for this process, we will strive to bring a balanced perspective that will enable real, perhaps even tough, conversations to take place—conversations that will give Oregon City direction not only on what to do, but equally important on what not to do.

These 2-3 hour Strategic Planning Workshops will assist us in developing the following elements of your Strategic Plan:

- **Imperatives:** In broad categories, what must be accomplished during the planning horizon?
- **Initiatives:** What significant projects will enable us to best deliver on the promise of our Strategic Imperatives?

Measurable Objectives Workshop (1)

We believe that setting clear measures of success in a planning process is key to making the plan “real” and builds accountability into the plan. However, we also recognize how challenging it can be to define measures of success. We will use this workshop to determine how we will measure success, defining realistic measures that are easily quantified. Though more work outside this workshop may be needed to arrive at precise thresholds, we will be able to determine what will be measured—and get the details finalized before the planning process is complete.

- **Objectives:** How will we measure success? How will we know that our efforts are having an impact?

As we develop Objectives, we will focus on identifying metrics that are both outcome-based and within Oregon City’s control. Outcome-based metrics measure the impact of activities. The other end of the spectrum is output-based metrics, which measure the completion of an activity. That activity may, or may not, change the outcome. We want outcome-based metrics because we need to know if our activities are moving the needle towards our desired outcome. We may be very busy with activities and on target with execution, but what if the activity isn’t changing the outcome?

Metrics in Oregon City’s control are ones where your actions alone impact the outcome. The work of tourism agencies is typically collaborative with a myriad of stakeholders; therefore, outcomes are a result of Oregon City’s influence amongst many others. It is unlikely that many of your efforts will be able to be categorized as under your sole control, but that will be part of our consideration when determining which metrics you will select and hold yourselves accountable to.

Target Market Identification

Every successful marketing strategy identifies a target market. Without one, you are creating undifferentiated content and hoping something sticks. To maximize Oregon City’s destination marketing effort, Coraggio will identify key target market(s) through five different steps:

- **Step 1:** Coraggio will use secondary research sources, stakeholder insights from the Get Clear phase, industry knowledge, and any existing information provided by Oregon City, to identify current visitation opportunities and trends.



Scope of Work

- **Step 2:** In cooperation with Oregon City, Coraggio will identify and aggregate Oregon City's key tourism assets (e.g. restaurants, parks, recreational opportunities, hotels, historic way-points etc) to create a product offerings portfolio.
- **Step 3:** Coraggio will then work to identify existing state efforts that provide incremental opportunity for Oregon City to create statewide efficiencies in their marketing efforts to capture existing value.
- **Step 4:** Using the outputs from steps 1-3, Coraggio will create an Oregon City Tourism Profile, summarizing all trends, assets and opportunities.
- **Step 5:** Finally, during a 90-minute session, Coraggio will work with Oregon City staff to identify its target market(s). We will leverage the tourism profile and existing institutional knowledge to narrow target market options. This process will inform Oregon City staff in target market identification processes and embed city knowledge into the output.

Brand Strategy Workshop

The Brand of Oregon City, for our purposes, is the durable perception of the place that is held by visitors and residents alike. In a three-hour session, the planning team will gather to discuss the business issues at stake (the "head" of the brand) as well as the emotions of the brand (the "heart" of the brand.) The group will engage in a series of right-brain exercises to generate the fodder for what makes the Oregon City brand unique and compelling. This information is critical for creating a brand vision that residents, visitors, business owners, community leaders, and other stakeholders will embrace whole-heartedly and stand behind for years to come.

We will also discuss the implementation of the brand: how it will be leveraged, who will own the supporting work, and when that work will be done. While we likely won't come to final answers during this meeting, we will have a draft set of strategies that we can continue to refine in parallel to the development of the brand materials by the marketing partner. These strategies will undoubtedly be related to how the brand will help to attract visitors, how the brand promise will be communicated, and how the ongoing measurement of the brand's success will be handled.

This Brand Brief will be "mostly" correct at this stage, and will be one important ingredient in the selection process for the marketing firm, as well as the basis for their work once they have begun.

Strategic Plan Revision Workshop

This workshop will give us the opportunity to revisit the whole of the Strategic Plan, review all the comments received, and make plan adjustments accordingly. Because the messages we send about the Strategic Plan must be consistent, we will also spend a portion of this session focusing on ensuring that leadership and other stakeholder representatives are prepared to deliver that consistent message.

Documentation of Final Strategic Plan

The final Strategic Plan document has to speak to many audiences for many years to come. For this reason, it is important that care goes into the production of the document. The language must be clear and direct, and tie the Plan to the day-to-day operations of the city. As with the Insight Report, we will work to develop a document that is visually appealing and communicates the plan in a clear, concise way.

Strategic Plan Presentation

Along with the planning team we will present the final plan to keys stakeholders. During this session, we will discuss the process for developing the plan, the implications of implementing the plan and answer any questions that may come up. One key element of discussion at this meeting will be an explanation of what trade-offs were made and why. It will be impossible to please everybody with the decisions made



Scope of Work

for the Strategic Plan, but what we can do is instill a sense of respect for the difficulty of decision-making involved, the good faith effort of those tasked with the responsibility, and the clarity of the results.

Phase Three: Get Moving



Marketing Strategy Workshops (2)

We will hold a pair of three-hour workshops to help us define a straightforward marketing strategy that supports the target markets and brand direction that we have agreed upon. These sessions are not designed to determine the marketing content, but rather to provide a framework within which the marketing firm can work once selected.

- The first session will focus on the target visitor that we will market to: which geographies we need to market to, the demographics of individuals in those geographies, and the lifestyle profiles of our preferred visitors.
- The second session will focus on documenting the strategies we will employ across a set of marketing channels, including but not limited to: print, social media, PR, and community engagement.

The final Marketing Strategy document will include our target market information, our brand brief, our target visitor profiles, and our channel strategies into a single document that we can use as a touchstone for the development of the RFP for your marketing firm.

Financial Strategy Development

Every strategic plan comes with its own fair share of implications. Financial implications are no exception. To ensure that Oregon City has the capacity to deliver on its identified plan, it will be extremely important to look at the plan through a financial lens. Beginning in the immersion session, Coraggio will work with Oregon City staff to define the current tourism baseline budget. This budget, in combination with the economic impact report, will then be checked against the Initiatives as they are developed to ensure that each initiative is sound and actionable from a budget standpoint. This step will be incorporated into all strategic workshops when necessary to ensure a holistic financial strategy.

Successful initiatives will drive growth across Oregon City's tourism industry, in turn increasing the pool of available funds. Coraggio will use the outputs of the Get Focused phase, the baseline budget and the economic impact report to identify any growth in funds that could be allocated back into the tourism industry, resulting in a 5-year pro-forma that helps illustrate the financial obligations to the strategic plan and its overall success, as well as the likely return on that investment. If possible, we recommend including Oregon City financial staff in these conversations for their perspective and insights.

Marketing Agency Selection

We will work with you to turn our Marketing Strategy into a Request for Proposals (RFP) that will be issued to marketing agencies. In selecting a marketing agency, one focus will be an alignment of skills and approach to the Marketing Strategy we have identified. Coraggio will review proposers, form a shortlist of candidate agencies, and will participate in interviews to assist Oregon City in making the final selection of a marketing agency.



Scope of Work

Marketing Plan Implementation Assistance

Recognizing that Oregon City doesn't have a tourism marketing department, Coraggio will temporarily serve in this role, acting as a main point of contact for the marketing agency, offering background and supporting information for the agency, setting expectations through measurable objectives, providing guidance related to the Marketing Strategy, and communicating progress back to the Economic Development Department at Oregon City.

This work will include a kickoff meeting with the Agency, and periodic scheduled check-ins. One key goal of this work will be to help Oregon City develop capacity for the oversight of the marketing agency once Coraggio's contract has ended.

Strategic Priority Implementation Assistance/Oversight

A key output of strategic planning is a set of Initiatives associated with the Strategic Imperatives of the organization. The first step in operational planning is to prioritize initiatives and assign owners. We will work with the Planning Team to identify appropriate teams and leads to own each Initiative. These teams will be the drivers of each Initiative and will be responsible for ensuring appropriate progress is made. We'll help the Planning Team identify the right sequencing and timing of the identified Initiatives to ensure that Oregon City is not taking on too much at one time, and identify any interdependencies between the Initiatives that need to be considered.

As the Initiative teams begin to meet and develop their first action steps, they will inevitably struggle and need support. During this critical time, we will be available to meet with and coach the teams to help develop appropriate, results-oriented action steps. The goal of this support is to help the teams develop and execute short-term actions while maintaining a long-term focus.



Scope of Work

Proposed Schedule

The chart below reflects Coraggio’s anticipated delivery schedule for Oregon City’s Tourism Strategic Planning Project.

Phase of Work	Tasks/Deliverables	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Get Clear	Immersion Work Session	■						
	Stakeholder Visioning Retreat		■					
	Stakeholder Survey							
	Public Meetings (4)		■	■		■		■
	Tourism Economic Impact Analysis		■					
	Insight Report							
Get Focused	Strategic Clarity Workshops (2)			■				
	Strategic Planning Workshops (2)			■				
	Measurable Objectives Workshop			■				
	Target Market Identification			■				
	Brand Strategy Workshop			■				
	Strategic Plan Revision Workshop				■			
	Documentation of Final Strategic Plan				■			
	Strategic Plan Presentation				■			
Get Moving	Marketing Strategy Workshops (2)			■				
	Financial Strategy Development					■		
	Marketing Agency Selection				■			
	Marketing Plan Implementation Assistance/ Oversight					■	■	■
	Strategic Priority Implementation Assistance/ Oversight						■	■

Administrative Fees

We have included a small administrative budget to cover administrative assistance, print production, and other expenses.

Terms

All activities are invoiced on a monthly basis and are due net 30.

