



# Sturbridge Tourist Association

*A Committee of the Town of Sturbridge*

**REVISED – 08/08/2019 at 15:00hrs**

## Meeting Agenda

**14 August 2019 – 6pm**

*Center Office Building – 2<sup>nd</sup> Floor Meeting Room*

1. Call to Order
2. Approval of Previous Minutes – 10 July 2019
3. Selection of Chair / Vice Chair for FY2020
4. Treasurers Report
5. New Business
  - a. Funding Request – Old Sturbridge Village – Second Review
  - b. Funding Request – Gatehouse Media – First Review
  - c. Funding Request – The Big MOE – First Review
  - d. Request for Proposal – Opening of Technical Proposals
6. Old Business
7. EDTC Report
8. Correspondence
9. Next Meeting – 28 August 2019 at 6pm
10. Adjourn

**The items listed which may be discussed at the meeting are those reasonably anticipated by the Chair. Not all items listed may in fact be discussed and other items not listed may also be brought up for Meeting to the extent permitted by law.**

# Page Break



# Sturbridge Tourist Association

*A Committee of the Town of Sturbridge*

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# Page Break





# Sturbridge Tourist Association

*A Committee of the Town of Sturbridge*

## STA Meeting Minutes

*Regular Meeting – 07/10/2019 at 6pm*

*Center Office Building – 2<sup>nd</sup> Floor Meeting Room*

**Members:** Brian Amedy (BA), Jeff Ardis (JA), Nick Salvador (NS)

**Absent:** Tom Chamberland (TC)

**Staff:** Kevin Filchak (KF); Jeff Bridges (JB)

**Guests:** Sarah Greene (SG)

- 
1. Call to Order – BA called the meeting to order at 6:06pm. A quorum was present.
  2. Approval of Previous Minutes – 12 June 2019 – **BA MOVED to accept [minutes] as written, JA seconded (2-0-1).**
  3. Treasurers Report
    - a. FY 2019 – Closeout – KF provided overview of the FY 2019 and explained end of year budgets. BA asked about Herbfest, KF provided overview of Herbfest noting that it had over expended approved amount by \$336.96. SG explained her understanding of the approved funding was higher than the number found in the March meeting minutes (when it was originally approved). General discussion on the over expenditure and conversations regarding the original approval amount.
    - b. FY 2019 – Encumbrances – KF explained the encumbrance request for trail guides had been submitted to the town accountant.
    - c. FY 2020 – Review – KF explained the format of the FY2020 budget document. JA asked about GeoFest breakdown; KF provided explanation leading to general discussion on the event.

**BA MOVED To approve all financial reports as written, NS seconded. APPROVED (3-0).**
  4. New Business
    - a. Funding Request – Old Sturbridge Village – First Review (discussed after 4.b) – JA raised the question of the STA's scoring matrix and asked if that's being used. General discussion on use of the matrix and scoring going forward; members agreed to keep the matrix but not necessarily use the scoring at this time. BA provided overview of the OSV

request, noting that this is a new / old initiative from OSV. BA explained the request, saying that the Village is trying to recruit the bus tour groups to come to Sturbridge. He noted that this has not been done for many years and then explained the history of bus tours in Sturbridge. JA asked if the previous efforts were worthwhile and BA said yes. BA said there is not enough information now about how tour groups currently operate in the town. KF provided an overview of the cost breakdown of the request leading to general discussion on the proposal. JA noted that the bus tours have validity based on BA's comments, but BA noted that the results won't be seen for a while because these trips are planned well in advance. BA said that the person overseeing the tour implementation must know what they're doing. NS asked if all three goals must be accomplished or if they are done individually. General discussion on the Village's plans for the proposal. JA noted that he's pleased with how much work has gone into the application, and had some questions about getting other businesses to buy in. He further noted that there is value in this but perhaps not at the full amount, rather providing the seed funding for it. BA suggests seeing an example of their bid to operators, and how other local businesses used to support funding these initiatives. BA asked about Village funding and supporting this bid. General discussion on funding and how the STA could fund it in full and in part. General discussion on hotelier cooperation and how overflow and planning tour dates works. JA asked if the Village comes in and meets all of the Committee's criteria, what would be a reasonable funding amount. BA was in favor of \$12,000. NS noted that this would be an investment and wouldn't see the return until CY2022. BA asked if the Village has not budgeted it for this year, will it be included next year. KF provided history of funding the village. JA noted concerns about other large expenses in FY2020. General discussion on return on investment for this event. KF summarized the questions for OSV as follows: (1) If the proposal is not funded to the full amount would the project continue, would part of it be dropped? (2) What is the experience level of tour contact at OSV? (3) What is BTI's experience in this space and do they know Sturbridge? (4) What efforts will be made to make this messaging impactful and who is driving said message? (5) What progress has been made for seeking support from other potential partners (MOTT, individual destinations, etc.) and (6) Can a sample itinerary be provided? KF will invite OSV to the next meeting and ask the above questions.

- b. Funding Request – Herbfest – First Review (discussed before 4.a) – BA provided history of the approval for Herbfest. SG provided overview of the event for the members, discussing the various speakers, layout, caterer, etc. She noted that her issue is having people pre-register for the event; said that 20 vendors have signed up and pre-paid with space for up to 39 vendors. BA discussed the funds requested and SG explained what the initial funding approved by the STA was used for. BA noted two items: insurance, and police detail; he noted that these issues has been discussed as a group, and asked for feedback from JB. General discussion on how Betterment funds are used for police details at general events. JB suggested that it is up to the committee to make that determination of supporting the event. BA noted that without PD and Insurance the request is \$1238 in marketing and \$2375 for Community Support. General discussion on where equipment was being procured from, SG explained that nearly everything is local. NS noted that this is a larger expense for a non-overnight event. SG explained that the

hope is that some people will stay overnight, saying that the information going to the event patrons are encouraging people to stay overnight. BA asked if a question on the registration could ask if people are staying overnight and talked about the value of the information gathered. NS asked about pre-registration for the event and if there are numbers for attendees, SG said no not yet but they are hoping to gather that data soon. BA noted that he'd prefer seeing the event cover the Police and Insurance costs. **BA MOVED to approve \$1238 for advertising out of FY2020 budget, and \$2375 out of Community Support out of FY2020 budget for the 2019 Herbfest.** General discussion about the over-expenditure. JA asked about not including the Police and Insurance, BA confirmed those were not in the motion. NS asked if the shuttle was included, BA said yes and SG said that number likely will go down. General discussion on parking. **JA seconded motion. APPROVED (3-0).**

- c. Discover Central MA – STA FY2020 Marketing Campaign Discussion – KF provided overview of what DCM was looking for. General discussions about what to include in the September edition. It was agreed that the photographer should be invited to town in October for fall shots and fall events.
  - d. Visitor Guides – Discussion – BA went over the guide, and noted a few of the photos did not show Sturbridge pictures in the forefront. KF noted that he wanted to show the guide and remind the group that there are other vendors who've expressed interest in this.
5. Old Business
- a. RFP – Update
    - i. Funding Request – Allocate Funding for Legal Notices – KF provided status report on the RFP. **BA MOVED to approve \$72 to pay for the STA Legal Notices in the Telegram and Gazzette. NS seconded. APPROVED (3-0).**
6. EDTC Report – KF provided detailed update. BA noted that he was re-appointed to the committee.
7. Correspondence – None.
8. Next Meeting – Dates selected were August 14<sup>th</sup> and 28<sup>th</sup>. BA asked that the nomination for chair / vice chair be handled at those meetings.
9. Adjourn – **BA MOVED to adjourn the meeting at 7:45pm. JA seconded. APPROVED (3-0).**

**Respectfully Submitted:**

Kevin Filchak, M.P.A.  
Economic Development and Tourism Coordinator

# Page Break

# Budget Reconciliation

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Department	Sturbridge Tourist Association
Month	June 2019
Balance Agree	X*
Balance Does Not Agree	

Explanation of Variance: For 24400 56551, I have \$6,607.99 vs. \$6,608.00. There is a \$0.01 difference. For 24400 58618, I have \$3,562.69 vs. \$3,563.00, a \$0.31 difference.

  
Kevin Filchak, M.P.A.

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Department Head

  
17 July 2019

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Date

07/17/2019 12:19  
 1655cger

 TOWN OF STURBRIDGE  
 FY19 STA FUND BUDGET

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FOR 2019 12

ACCOUNTS FOR: 244	STURBRIDGE TOURIST ASSN	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
<hr/>								
24400	STURBRIDGE TOURIST ASSN							
<hr/>								
<a href="#">24400 51130</a>	<a href="#">SALARIES/WAGES</a>	36,864	0	36,864	36,240.15	.00	623.37	98.3%
<a href="#">24400 56551</a>	<a href="#">MARKETING/ADVERTISI</a>	109,333	-11,800	97,533	90,924.60	.00	6,608.00	93.2%
<a href="#">24400 56552</a>	<a href="#">COMMUNITY SUPPORT</a>	36,025	11,800	47,825	47,300.24	.00	524.64	98.9%
<a href="#">24400 58618</a>	<a href="#">TOURISM IMPROVEMENT</a>	0	20,140	20,140	16,577.31	.00	3,563.00	82.3%
TOTAL STURBRIDGE TOURIST ASSN		182,221	20,140	202,361	191,042.30	.00	11,319.01	94.4%
TOTAL STURBRIDGE TOURIST ASSN		182,221	20,140	202,361	191,042.30	.00	11,319.01	94.4%
TOTAL EXPENSES		182,221	20,140	202,361	191,042.30	.00	11,319.01	

07/17/2019 12:19  
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TOWN OF STURBRIDGE  
 FY19 STA FUND BUDGET

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FOR 2019 12

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
GRAND TOTAL	182,221	20,140	202,361	191,042.30	.00	11,319.01	94.4%

\*\* END OF REPORT - Generated by Christopher Geraghty \*\*

Account	Account #	Original Total	Revenue Adjustments	Revised Total	Expenditure	Current Total Balance
Community Support	24400 56552	\$40,359.00	\$0.00	\$40,359.00	\$16.50	\$40,342.50
Marketing and Advertising	24400 56551	\$109,974.00	\$0.00	\$109,974.00	\$519.00	\$109,455.00
Benefits	24400 51210	\$13,734.00	\$0.00	\$13,734.00	\$0.00	\$13,734.00
Salaries / Wages	24400 51130	\$19,223.00	\$0.00	\$19,223.00	\$0.00	\$19,223.00
Tourism	58618	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total		\$183,290.00	\$0.00	\$183,290.00	\$535.50	\$182,754.50

## EDTC Update

[illegible]



Spent	0%
Assigned	33%
Unassigned	67%

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Last Updated on 08/08/2019

Marketing Allocations	
Approved by STA	\$19,300.00
Spent by Recipients	\$519.00
Unspent Approved Funds	\$18,781.00
Unassigned Funds	\$90,674.00
Funds Returned to STA	\$0.00
<b>Total Available Funds</b>	<b>\$90,674.00</b>

[illegible]

## Document Guide

**Approved by STA** = Sum of all items listed in the "Allocated" column

**Spent by Recipients** = Sum of all items listed in the "Spent" column

**Unspent Approved Funds** = Sum of all items listed in the "Remaining" column

**Unassigned Funds** = "Current Total Balance" (found on cover page) - "Approved by STA"

**Funds Returned to STA** = Sum of "Remaining" column for those items that have closed

**Total Available Funds** = Sum of "Unassigned Funds" and "Funds Returned to STA"

**Item** = Project approved by the STA

**Allocated** = Amount approved by the STA

**Spent** - Amount spent by the recipient

**Remaining** = "Allocated" - "Spent"

**Date Approved** = The date the STA approved the project

Allocated Comparisons   FY 19 Budget				
Community Support	FY 2020	FY2019	FY2018	FY2017
July	33%	94%	33%	36%
August		96%	33%	36%
September		97%	33%	36%
October		97%	35%	41%
November		101%	36%	56%
December		101%	36%	56%
January		101%	73%	56%
February		101%	88%	73%
March		104%	97%	73%
April		107%	97%	73%
May		107%	98%	92%
June		107%	98%	98%
Marketing	FY 2020	FY2019	FY2018	FY2017
July	18%	81%	54%	30%
August		83%	55%	30%
September		83%	62%	43%
October		83%	72%	50%
November		87%	82%	53%
December		87%	82%	53%
January		89%	93%	62%
February		97%	99%	65%
March		104%	81%	95%
April		105%	93%	95%
May		105%	101%	101%
June		105%	101%	101%

Spending Totals / Comparisons
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Community Support	FY2020	FY2019	FY2018	FY2017
July	0%	5%	13%	7%
August		18%	15%	9%
September		43%	15%	9%
October		68%	15%	9%
November		84%	27%	21%
December		85%	28%	21%
January		85%	28%	27%
February		85%	60%	37%
March		87%	79%	58%
April		91%	80%	59%
May		95%	86%	59%
June		99%	96%	86%
Marketing	FY2020	FY2019	FY2018	FY2017
July	0%	1%	3%	0%
August		11%	6%	2%
September		19%	7%	5%
October		32%	45%	5%
November		49%	54%	25%
December		70%	54%	29%
January		72%	60%	32%
February		72%	48%	34%
March		78%	48%	35%
April		81%	49%	37%

May		84%	71%	45%
June		93%	93%	88%

### Remaining Totals / Comparisons

<b>Community Support</b>	<b>FY2020</b>	<b>FY2019</b>	<b>FY2018</b>	<b>FY2017</b>
July	100%	95%	87%	93%
August		82%	85%	91%
September		57%	85%	91%
October		32%	85%	91%
November		16%	73%	79%
December		15%	72%	79%
January		15%	72%	73%
February		15%	40%	63%
March		13%	21%	42%
April		9%	20%	41%
May		5%	14%	41%
June		1%	4%	14%
<b>Marketing</b>	<b>FY2020</b>	<b>FY2019</b>	<b>FY2018</b>	<b>FY2017</b>
July	100%	99%	97%	100%
August		89%	94%	98%
September		81%	93%	95%
October		68%	55%	95%
November		51%	46%	75%
December		30%	46%	71%
January		28%	40%	68%
February		28%	52%	66%
March		22%	52%	65%
April		19%	51%	63%
May		16%	29%	55%
June		7%	7%	12%

\*Anything approved before the fiscal year is accounted for in July.

\*\*FY 2016 only has data for end of the year at this time; in addition "Special Events" and "Community Support" are combined in this total as both accounts have since been combined.

% Spent = the amount spent at the end of that calendar month divided by the total allocated

% Remaining = the amount of funds remaining in the account at the end of that calendar month divided by the total allocated

% Allocated = the amount of fund allocated for certain events as was approved by the STA divided by the total allocated





EDTC Salary - 51130	
Original Total	\$19,223.00
Spent	\$0.00
Revised Total	\$19,223.00

Date	Item	Expenditure	Details

EDTC Benefits - 51210	
Original Total	\$13,734.00
Spent	\$0.00
Revised Total	\$13,734.00

Date	Item	Expenditure	Details



**Sturbridge Tourist Association  
Definitions**

**Community Support**

This line item shall be for the sponsorship of events, the procurement of goods and services for an event, payment or installation of equipment and/or any other purchase, unrelated to marketing, that supports tourism in the town of Sturbridge.

The purpose of this fund is to support the local tourism industry though, in certain circumstances, the STA may allocate these dollars to support community events if they believe there is an inherent benefit to tourism and/or tourist related businesses in town through the funding of said activity.

This line item shall also go toward the funding of reports and studies necessary for the advancement of tourism in the community. However this does not apply to reports that focus on marketing as those are funded by the Marketing line item.

**Marketing**

This line item shall support efforts to publish, promote and distribute media campaigns about Sturbridge for the purpose of attracting visitors to the community across all media platforms.

These campaigns can range from general adverts about the community to targeted ads highlighting a specific item and/or event.

This line item shall also provide funding for any/all marketing related studies the STA may undertake. If the scope is beyond that of marketing, the study shall be covered under Community Support.

**Economic Development and Tourism Coordinator Salary**

This line item shall cover the annual salary of the Economic Development and Tourism Coordinator (EDTC). The specific responsibilities and duties of the EDTC are detailed in their position description.

Note, the STA and the Town of Sturbridge evenly split the salary and benefits costs for the EDTC each fiscal year.

# Page Break



# STA Evaluation Worksheet

For Use on All Applications Received by the Sturbridge Tourist Association

Last Updated: 13 September 2018

Note: Any item listed with a \* should not be counted against an applicant if it does not apply to them.

## I. General

Criteria	3 Points	2 Points	1 Point	0 Points
<b>Application [Basic]</b>	Applicant has completed online application and provided all appropriate documentation.	Applicant has completed online application and has, upon request, provided additional clarifying documentation.	Applicant has completed online application and has not, after request(s), provided additional documentation.	Applicant has submitted a partially completed application.
<b>Application [Content]</b>	Applicant has prepared a thorough application, and has considered all applicable variables. <sup>1</sup>	Applicant has prepared a thorough application, and has considered most variables, excluding minor variables.	Applicant has prepared an application, and has failed to consider some important variables.	Applicant has prepared an incomplete application and has not considered important variables.
<b>Communication</b>	Applicant is responsive and forthcoming with information.	Applicant is relatively responsive and is generally forthcoming with information.	Applicant is slow to respond and requires reminders.	Applicant is not responsive or communicative.
<b>Previous Interactions*</b>	Applicant provided all documents in a timely manner and adhered to all STA policies throughout the process.	Applicant provided all documents, and mostly adhered to all STA policies throughout the process.	Applicant provided all documents but required EDTC to request them, and had difficulties in adhering to the STA policies.	Applicant did not provide all documents required by the STA and proved difficult to work with.
<b>Transparency</b>	The applicant's finances, organization, et al. are clearly defined and all relevant information, including historical data, is shared with the STA.	The applicants finances, organization, et al. are clearly defined and most relevant information is shared with the STA.	The applicants finances, organization, et al. are mostly defined and some relevant information is shared with the STA.	The applicant's finances, organization, et al. are not defined and relevant information is not shared with the STA.

<sup>1</sup> Variables are defined as considering all potential costs, having a marketing plan, having a venue identified, etc. A minor variable could be considered awaiting final quote for service, notifying committee that there may be small fluctuations in budget due to unforeseen circumstances, etc. A major variable could be considered lacking a budget, defined marketing plan, or not having a venue (if applicable).

<b>After Action Report (AAR)*</b>	Applicant has provided a complete AAR with no omissions in detail.	Applicant has provided a nearly complete AAR with only minimal information omitted.	Applicant has provided a partially completed AAR with major omissions	Applicant has not provided an AAR.
<b>Total Possible Points</b>	18 / 12			
<b>Total Points Awarded</b>				

## II. Budget

<b>Criteria</b>	<b>3 Points</b>	<b>2 Points</b>	<b>1 Point</b>	<b>0 Points</b>
<b>Budget</b>	Applicant has provided a completed and accurate budget with clearly identified costs and revenues.	Applicant has provided a complete budget, but the committee has questions regarding formatting.	Applicant has provided a budget but there are questions regarding totals or general arithmetic.	Applicant has provided an incomplete or inaccurate budget.
<b>Previous Allocations*</b>	Applicant used their entire previous allocation and stayed within their spending cap.	Applicants used most of their allocated amount and stayed within their spending cap.	Applicant used some of their allocated amount and stayed within their spending cap.	Applicants either did not use their allocated funds OR spent over their allocated amount.
<b>Return on Investment*</b>	The applicant has proven with quantitative data that this activity brings revenues to Sturbridge, specifically to the hotel community.	The applicant has proven with quantitative data that this activity brings revenues to Sturbridge.	The applicant has indicated that this activity has brought revenue to Sturbridge but cannot produce evidence.	The applicant is unable to demonstrate that the activity has brought revenues to Sturbridge.
<b>Revenues Collected</b>	Applicant does not intent to make revenue from event and/or if they do it is reinvested in future events.	Applicant anticipates making some revenue from the event and intends to put most towards future events with the remaining going to the Applicants general fund (or equivalent).	Applicant anticipates making revenue from the event and will put some towards future events with the remaining going to the Applicants general fund (or equivalent).	Applicant anticipates making revenue from the event and it is unclear where said revenue will go and/or it will go towards the Applicants general fund (or equivalent).
<b>Returning Applicant Request*</b>	Applicant has reduced their request from the previous amount requested as the activity becomes more self-sufficient.	Applicant has maintained their request from the previous year.	Applicant has maintained their request from the previous year or has increased it to match with increasing cost of services due to economic factors, but has not added services from the	Applicant has increased their request from the previous year to include new services.

			previous year.	
<b>Ability to Manage Program</b>	Event would not be possible without STA support.	Major aspects of the program would not be possible without STA support.	Some aspects of the event would not be possible without STA support.	If the STA does not participate, it will not adversely affect the event.
<b>Total Possible Points</b>	18 / 9			
<b>Total Points Awarded</b>				

### III. Event\*

<b>Criteria</b>	<b>3 Points</b>	<b>2 Points</b>	<b>1 Point</b>	<b>0 Points</b>
<b>Number of Participants</b>	> 500 participants	499 – 250 participants	249 – 50 participants	< 49 participants
<b>Location of Event</b>	Event takes place entirely in Sturbridge.	Event takes place almost entirely in Sturbridge.	Event takes place in multiple communities, of which Sturbridge is one of them.	Event does not take place in Sturbridge.
<b>Cost to Participants</b>	This event is free and open to the public.	This event is open to the public but requires a minimal per person fee (< \$50) for entry.	The event is open to the public, but requires a sizeable per person fee (> \$50) for entry.	This event is not open to the general public.
<b>Overnight Stays</b>	Applicant has confirmed guests will stay multiple nights in local hotel(s), and confirmed others will visit just for the day.	Applicant has confirmed that guests will stay overnight in local hotel(s), and confirmed others will visit just for the day.	Applicant anticipates guests will stay overnight in local hotel(s), and confirmed others will visit just for the day.	Applicant does not anticipate guests will stay overnight and confirms that others will visit just for the day.
<b>Total Possible Points</b>	12			
<b>Total Points Awarded</b>				

### IV. Marketing / Promotion

<b>Criteria</b>	<b>3 Points</b>	<b>2 Points</b>	<b>1 Point</b>	<b>0 Points</b>
<b>Marketing</b>	Applicant is promoting Sturbridge as a whole and gives equal opportunity to promote all businesses in Town.	Applicant is promoting Sturbridge as a whole but gives preferences to a select group of businesses.	Applicant is promoting Sturbridge in part and also gives preferences to a select group of businesses.	Applicant is not promoting Sturbridge.
<b>Track Record*</b>	Marketing campaign has been proven with quantitative data that it brought visitors to Sturbridge who visited businesses or stayed in local hotels.	Marketing campaign has been proven with quantitative data reach a large audience but is unclear who may be coming to Sturbridge	Marketing campaign has been supported with colloquial data that it reaches a large audience but is unclear who may be coming to Sturbridge	It is unclear what the marketing campaign has accomplished.

		because of advert.	because of advert.	
Total Possible Points	6			
Total Points Awarded				

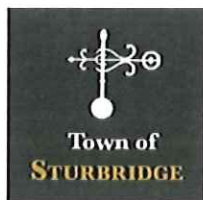
## V. STA Mission

<i>Criteria</i>	<i>3 Points</i>	<i>2 Points</i>	<i>1 Point</i>	<i>0 Points</i>
<b>Use of local businesses</b>	Applicant is only using Sturbridge businesses / vendors to support this activity.	Applicant is mainly using Sturbridge businesses / vendors to support this activity.	Applicant is using some Sturbridge businesses / vendors to support this activity.	Applicant is not using Sturbridge vendors to support this activity.
<b>Supporting Mission of STA</b>	This activity supports the mission of the Sturbridge Tourist Association	This activity mostly supports the mission of the Sturbridge Tourist Association	This activity in part supports the mission of the Sturbridge Tourist Association.	This activity does not support the mission of the Sturbridge Tourist Association.
<b>Community Event</b>	Event is considered a major community event.	Event is a significant event in Sturbridge.	Event is in Sturbridge.	Neither a significant nor community event.
<b>Other</b>	Points awarded at the discretion of the Sturbridge Tourist Association Members.			
Total Possible Points	12			
Total Points Awarded				

## VII. Summary

<b>Overall Points Awarded</b>		
<b>Possible Points Awarded</b>		
<b>Project Approved for Interview?</b>	Yes	No

# Page Break



# Town of Sturbridge

Economic Development & Tourism Coordinator  
Kevin Filchak, M.P.A.

Date: 8 August 2019  
To: Sturbridge Tourist Association  
Subject: Cover Memo - Old Sturbridge Village

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## Overview

Old Sturbridge Village (OSV) has submitted an application and supplementary information for their proposed program to bring bus tours back to Sturbridge. OSV has provided answers to the STA's questions from last month's meeting (see attached). They have also provided sample itineraries from another of Break the Ice (BTI)'s clients: Ithaca New York.

While the Village provided the STA with a lot of information, there are still a number of questions that remain unanswered, specifically alternative sources of funding and partnerships. There also remains a question with regard to staffing this new position at the Village.

It is recommended that the STA carefully review the answers provided and consider the best manner in which to support this event given the financial restrictions this fiscal year.

## Suggested Motion

If the STA concurs, the following motion would be in order:

*MOVE to allocate from the Marketing Line item \$25,000 for Old Sturbridge Village's program to bring bus tours to Sturbridge.*



1. In the event the STA could not fund the full \$25,000 request, would OSV still move forward with this project in part or in full? If only in part what would be dropped?

This program has many components and in order to achieve the most success for the entire community, we do not recommend implementing a partial program. We are proposing a robust program that will boost the entire community. We strive to be a strong community player and an anchor for area business. We are happy to take the lead and do everything we can to implement this program. We have thought of various scenarios with other funding sources, but none are ideal for reasons stated below:

- We are looking into splitting off the ABA show funding portion (\$5,000) and asking another tourism source, such as DCM, to fund that portion. However, if this is the case, it would likely involve a broader regional approach at the show as they would be promoting the entire Central Mass region, not just Sturbridge.
- Alternatively, if we looked for support from an OSV donor to underwrite a portion of the funding, they would likely want to ensure their money would be going to support The Village only and not necessarily all the other destinations in town.
- The last option would be to approach other community partners to ask to make an investment in the program. This would take a tremendous amount of effort to sell, explain, and work out financing so that it would be fair to each of the participants. As you can imagine, some may opt in while others may not, yet still benefit from the program, which isn't exactly fair and may sour the approach for those who invested. For example, the Publick House might put in some money, while the Host may not. One brewery may put in a little money while another may not. Additionally, they could argue their taxes are paying for some tourism promotion already, so why is this an additional cost?

For all of these reasons, we maintain our position of asking the STA for full funding.

2. The STA spent some time talking about the importance of having an experienced staffer who would coordinate with the tour companies. Could you provide some indication (a sample job description) that would indicate the level of experience that this new OSV staffer would be expected to have in their duties of coordinating with tour companies?

First, we think it's important to outline the sales process so that the STA can see the breakdown of workflow and responsibilities between BTI and the Village employee. BTI will be responsible for:

- Relationship Building: Compile a list of contacts who have visited Sturbridge and Old Sturbridge Village in the past. Identify opportunities to reach out to this audience through direct mail, email newsletter or individual outreach. Invite them back to the museum for a site visit, touting new offerings and current opportunities.
- Identify Lead Generation Sources: This includes attendance at American Bus Associations Marketplace in January 2020, individual outreach and hosting of one-off tour operator/group travel leader tours, and/or editorial opportunities in group focused publications (Group Travel Leader, Group Tour Magazine, etc.)
- Develop Print/Online Collateral: Create collateral that supports the Town of Sturbridge as well as OSV's group tour goals and speaks to the different types of groups that can visit the town and the museum. Consider the differences between student groups and/or senior groups, for example, and what type of experiences each would be looking for. Have collateral available in print/PDF form and online via the Town of Sturbridge and

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OSV websites. Some of this information is on the OSV website currently but needs to be expanded in order to appeal to a wider range of groups.

- Prospecting and Measurement: Place a minimum of 25 individual cold/warm sales touches per month with potential group and travel trade prospects. A touch is a point of contact with a prospect. It could be an in person meeting, phone call, email or direct mailing; Additionally, host a minimum of 12 site visits with group tour operators and/or receptive operators in 2020; Continuously follow up on leads (cold/warm/hot), benchmark against sales plan, provide monthly reporting including; lead summaries, pipeline business, sold business.
- Nurture leads and close sales: BTI will continue to nurture leads through the sales cycle and work with OSV liaison and other Sturbridge businesses to put together custom packages as requested by Tour Group Operators. As soon as a package is accepted, the contracts will be signed by participating Sturbridge businesses, the Tour Group Operator will be turned over to the OSV employee as the lead point of contact for the program.

Our proposed position at the Village will be filled by someone with extensive knowledge of the amenities and attractions of both the Village and the entire town, and will be extremely skilled at coordinating schedules and facilitating guests' experiences. Here is a working job description that we are formalizing.

We are seeking a self-starter who is organized, proactive and good with people. The individual needs to fully understand all of Old Sturbridge Village offerings, as well as those of the Town of Sturbridge and work with agency to develop and create packages to sell, and be able to quickly put packages together on the fly if needed. They will be conscientious of meeting sales and revenue goals, and work with agency to measure results of sales efforts along the way.

Responsibilities may include:

- Provide proposals and quotes to agency for tour operators interested in bringing groups to OSV and the town
- Work with other community partners and town businesses to help put together exciting experiences
- Create and execute travel trade contracts for OSV; provide guidance for other town businesses if needed
- Be on-site during OSV portion of tour or responsible for designation of an on-site representative during the tour
- Determine logistics during the tour and work with the travel trade professional to ensure a clear understanding of same (i.e., where the bus parks, where guests are dropped off, how is luggage handled, is there handicapped accessible needs, guided tours or self-guided tours, specific hands on activities, how will meals be handled (group menus, pay on own)
- Secure deposits and/or full payment prior to tour
- Work with other community partners and town businesses for logistics of the tour
- Determine contact person at other partner locations during the tour and communicate with them directly as needed
- Host Travel Trade site visits (tour operators, receptive operators)
- Works closely with marketing and visitor center for better presence with town, regional and state tourism offices as well as other local destinations
- Identifies and pursues opportunities for re-booking and cross-selling existing events

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3. What is BTI's level of experience in this space? There was some discussion asking about BTI's knowledge of Sturbridge as they would be that first point of contact; how much does BTI know about our community?

Break The Ice Media (BTI) is a destination marketing and PR agency solely focused on the tourism and travel industry. OSV is currently a client of BTI. BTI provides Public Relations and Digital Marketing services on a regular and on-going basis. BTI's process is to become fully immersed with any new client or client initiative – to accomplish this they would spend time at OSV and within the Sturbridge community, learning the landscape, understanding the partners, experiencing restaurants, attractions, accommodations, meeting key local tourism personnel and stakeholders.

In addition,

- BTI works exclusively with tourism clients, and are experts in reaching visitor audiences and driving sales. BTI clients benefit from this deep understanding of the tourism industry. By working to drive visitation to clients every single day, the BTI team stays up-to-date on current trends, understands the companies that make up the Travel Trade (domestic and international) and knows what they are looking for and how to work them. This experience and knowledge will be applied while working with Old Sturbridge Village and all Sturbridge stakeholders.
- BTI is the association management company for [Travel Alliance Partners](#), a North American company consisting of 28 tour operators. This provides BTI with a 360 degree view of the travel trade market understanding the tour operator side of the business and what they need from the destinations and attractions they work with.
- BTI CEO, Nicole Mahoney hosts the weekly podcast, [Destination on the Left](#), interviewing tourism professionals from all over the world about creativity and collaboration in the industry.
- BTI team members contribute to the company blog every week. These blogs covering topics related to Group Tours may be of interest: [Travel Trade Shows](#); [10 Ways to Become Group Ready](#); [4 Types of Group Tours](#); [Creating Sample Travel Itineraries](#); [International Tourism Trends in the U.S.](#); [Tourism Marketing Collaborative Approach](#); [How to Market a Tourism Destination](#); [4 Components of the Sales Funnel](#)
- Please see the attached documents for full BTI Proposal including About Us section.

4. What efforts are being made to make this messaging to the tour groups impactful and who is driving it?

BTI will lead this effort. BTI will create, in collaboration with OSV:

- Profile sheet highlighting OSV and the Sturbridge community
- Sample itineraries
- Customized itineraries – at the request of tour operators
- eNewsletters to keep the travel trade up to date on new offers from Sturbridge and keep the destination top of mind
- When the program kicks off, a group tour workshop will be hosted at OSV to engage the stakeholders from the community that are interested in learning about and working with the group travel market. The workshop will serve as a foundation for starting to create and solidify itineraries and partnerships that can be marketed to the travel trade.

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In addition, BTI has a 4-level lead generation strategy (see proposal for full Sales Plan):

- Existing Lead Lists: Continue development and follow through of OSV's existing lead lists of group tour operators. Those lead lists will be targeted through direct mail, personal phone calls, e-mail, in-person meetings, and site visits.
- Tourism Industry leads: Follow up on leads generated through the tourism industry including Discover New England, Brand USA and regional organizations.
- Attend Travel Trade Shows: Attending American Bus Associations annual Marketplace will provide OSV the opportunity for one on one meetings with tour operators as well as additional contacts through general show networking and the ABA database.
- Site Visits: Host site visits for well-qualified leads.

**5. What progress has been made for seeking support from other potential partners with this project (MOTT, individual destinations, other Sturbridge businesses, etc.)?**

OSV is always exploring relationships with other entities, however, none is as dedicated to the success of the businesses in Sturbridge than the STA.

We have an extremely close relationship with Discover Central Mass (DCM) and work with Stephanie Ramey throughout the year on various promotions. We have shared this program with her, and while she was open to the idea of partnering on the ABA show in January, DCM has not received their funding commitment from MOTT yet, and it is unclear if they would have funds to participate. Further, whenever we do partner with DCM, it is often for the benefit of the whole region, not just Sturbridge.

We believe we have an extremely desirable area with a rich selection of attractions, activities, entertainment, and more, and therefore we believe Sturbridge deserves its own concerted effort in this area.

Please see question #1 for our exploration of other funding.

Regarding partners within the Sturbridge business community, we would want to engage them to participate, but don't feel we would get the investment needed to run the proper program. Perhaps once we have some success behind the program, we could follow up with the community partners to ask for investment for future touring efforts.

To facilitate participation, we would plan to host a Tour 101 Workshop with all the interested town businesses and organizations. The workshop would include experts from BTI as well as Travel Agency contacts to discuss some of the best practices and current trends in the tourism industry. This would provide knowledge and training for local businesses as well as create an avenue to foster relationships vital to developing area tours. It is a great opportunity for the town tourism trade to pull together and Old Sturbridge Village is happy to facilitate this effort.

**6. Could you provide a sample itinerary that might be shown to tour groups to encourage them to make Sturbridge a stop?**

**Answer:**

**1 Old Sturbridge Village Road, Sturbridge, MA 01566**

While it is too early in the process to provide an actual ready for market itinerary, we have developed several example themed itineraries.

- Here are several ideas:
  - Foodie
  - Craft Beverages
  - Antique Tours
  - Mystery Tours
- In addition, please see the attached documents BTI has developed in other regions.
  - Cayuga Ithaca Itinerary,
  - Mystery Itinerary
  - Taste of Finger Lakes Sweet Treat Trail Itinerary
  - Ultimate Finger Lakes Wine Dine Tour



## FROLICKING IN THE FINGER LAKES

**Spend a few days frolicking in the heart of the Finger Lakes Region of New York State. Discover locavore inspired restaurants and historic and cultural sites that are second to none. Explore hidden waterfalls, unique views and unexpected beauty. Many treasures await your arrival in Cayuga County and Ithaca.**

### DAY 1- Auburn

Start your adventure with u-pick strawberries at **Strawberry Fields Hydroponic Farm**. Strawberries grow from May through October in special containers up off the ground, making them easy to pick. Browse their market for homemade jams, salad dressings and their own 'Strawberry Blossom Delight' honey.



Head over to **Lake House Gifts** and discover the perfect piece to bring the beauty of the Finger Lakes into your home. From finely crafted furniture and artwork, to local honey and unique gifts, there's something for everyone.

Savor lunch and drinks at **Highland Park Golf Course Restaurant**. Located on one of the highest elevations in Cayuga County, Highland Park Golf Course has a full-service restaurant and bar that offers a large variety of great American fare and where Finger Lakes wines and beers are always on the menu. Enjoy the magnificent scenery from inside or while sitting on the outdoor wrap-around deck.

Enjoy a treat and a tour of **The Apple Station**. This family owned and operated winery includes an apple orchard, store and winery. Apples can be picked or purchased in the store along with ciders, donuts, NYS cheeses, and other local fares. The winery features apple, fruit blends and several grape wines. Visitors enjoy the feeling of stepping back in time to an old country store and filling station.

Before dinner, stroll the **Auburn Public Art Trail, Mosaics, Murals, and more**. This walking tour winds through downtown Auburn showcasing over a dozen public art pieces, which include signature mosaics, murals, and sculptures. This highly visible and fully accessible trail highlights the talents of local artists and tells the stories behind the work and the artists who created them. A print map, as well as a GPS-enabled online map will guide visitors through this impressive visual journey. The trail puts local artists and their work "on the map" and is a group experience that should not be missed.

In the evening, dine at **Curley's Restaurant**. A classic neighborhood kitchen plying American & Italian standards to their many signature dishes. Good friends have been getting together at Curley's Restaurant since 1934 to share great times and relax over delicious food.





# FROLICKING IN THE FINGER LAKES

## DAY 2- Auburn

Start your morning at **New Hope Mills**. The quality of New Hope Mills products has made their pancake mixes the #1 pancake flour in Central NY! Visit the store and café which feature local products such as maple syrup, honey, jams, jellies, preserves, spreads, baked goods and the famous pancake mix they are known for. With that hometown feel, locals and visitors alike enjoy the tasty goodness of the treats available in the café, as well as a shopping experience that will bring you back in time.

Next stop is the **Willard Memorial Chapel**. Experience the beauty of the only complete and unaltered Tiffany chapel known to exist. Enjoy this extremely rare example of the work of Louis C. Tiffany and Tiffany Glass and Decoration Co. and enjoy a private organ concert.

For over 50 years, the **Seward House Museum** was the home of William Henry Seward (1801-1872), Governor of New York, United States Senator, Secretary of State to Presidents Lincoln and Johnson, and instrumental in the purchase of Alaska. Walking through the home, visitors will be immersed into the lives of the Seward family. Their art collection, clothing, books, music and technology are all on display. Museum-goers often comment that the house feels like the Seward's went out for a bit and may return at any moment. Enjoy a guided tour through 17 rooms at this registered National Historic Landmark.

Stop for a relaxing lunch at **Prison City Pub & Brewery**. Relish in the abundant selection of award winning, handcrafted beers brewed on premise by their Brewmaster. Enjoy their elevated pub food spotlighting farm-to-table cuisine. Come in and encounter this laid back, high quality, rustic establishment where their historic charm is part of the experience.

At the **Harriet Tubman National Historical Park**, get a glimpse of the Underground Railroad and Harriet Tubman, "The Moses of Her People." She settled in Auburn after the Civil War and operated this home for aged and indigent blacks. As a conductor on the Underground Railroad a network of abolitionists that helped slaves escape to freedom she made a dozen trips south over a period of 11 years. Tubman died in 1913 at her South Street property, and is buried at Fort Hill Cemetery in Auburn.

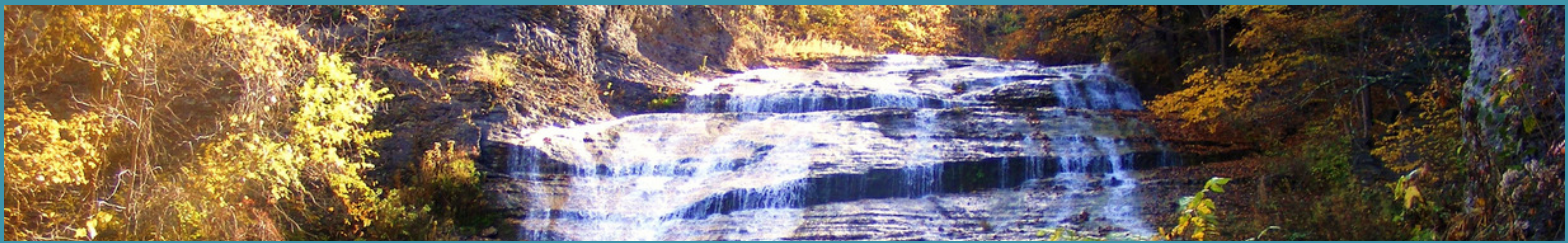


This evening, modern gastropub **Oak & Vine at Springside**, offers dinner with a view. Sip a drink on the terrace and try an array of American cuisine featuring locally sourced products.

After dinner, experience Broadway style musical theater at the **Merry-Go-Round Playhouse** located in Emerson Park on the shores of Owasco Lake.







# FROLICKING IN THE FINGER LAKES

## DAY 3- Aurora/ Ithaca

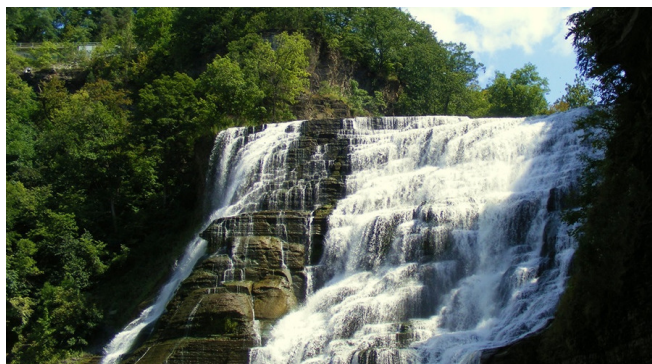
Start the day on a quest for the perfect piece at **MacKenzie-Childs**. Known for whimsical hand decorated ceramic tableware and home furnishings, tour the restored Victorian Farmhouse overlooking Cayuga Lake, watch a video of the production process at the Visitor Center, browse through the retail shop and enjoy the country gardens.



Next stop is **Treleaven by King Ferry Winery**, a small farm winery known for award winning Treleaven wines, including Riesling, Gewurztraminer, Pinot Noir, and Meritage aged in French and Bavarian oak barrels.



Head into Ithaca for lunch. Enjoy some time on your own for a unique dining and shopping experience on the **Downtown Ithaca Commons**, one of the few surviving pedestrian malls left in the U.S. Experience the centerpiece of a Nationally Registered Historic District as you browse the area's most diverse shopping and eclectic dining, from upscale bistros to casual cafes.



Next, head over to **Six Mile Creek Vineyard**, Ithaca's very own winery. The property boasts a hilltop tasting room overlooking a picturesque pond and vineyards. After sampling their array of wines, be sure to sip some of their spirits made exclusively from wine grapes.

The sound of the roaring waters of **Buttermilk Falls** will captivate you as it descends in a series of plunging cascades and rapids that converge into a beautiful basin.

End your day at one of Ithaca's fabulous restaurants. Groups can enjoy the scenic lakeside setting while dining at the casual **Boatyard Grill** or enjoy the private room at **Joe's**, the casual kitchen dishing up classic Italian fare since the '30s.





## FROLICKING IN THE FINGER LAKES

### DAY 4- Ithaca

In the morning, take in a sight that's uniquely and classically Ithaca- a 150 ft. waterfall in the heart of downtown. **Ithaca Falls** is one of the region's mightiest falls, and a perfect stop for a photo.

Tour the extensive gardens and arboretum of the **Cornell Botanic Gardens**. Experience 35-acres, featuring 12 specialty gardens with living displays of botanical diversity on your own or with a guide. Be sure to save time for the gift shop at the Nevins Welcome Center, full of nature inspired treasures.

Next, visit the **Herbert F. Johnson Museum of Art**. Located on the Cornell University campus, the museum's 5th floor showcases a breath-taking panoramic view of Ithaca and Cayuga Lake and offers a collection spanning six millennia and encompassing most world cultures.

Driving along the west shore of Cayuga Lake, the **Cayuga Lake Wine Trail** is the nation's first organized wine trail. For a delicious lunch featuring local ingredients from area farms, dine at **Knapp Winery Restaurant** which overlooks the trellis of grapevines on the estate vineyard. Follow up the meal with a wine tasting in their barrel-lined tasting room.

Meet the "kids" at **Lively Run Dairy**, one of the longest operating commercial goat dairies in the country. Meet the curious goats and see where they live, learn how high-quality goat cheese is made, and then have a tasting from their cozy gift shop.

Visit the expansive tasting room of **Finger Lakes Cider House**, the hub of the hard cider renaissance, located on a sprawling organic farm. Enjoy the artisan ciders of five local producers, each dedicated to creating distinct, complex ciders from farm-based orchards.

Enjoy a scenic ride through the countryside with a stop at one of the most outstanding views in the region. At 215 ft., the cascading **Taughannock Falls** is three stories taller than Niagara Falls. Take time for pictures at the Taughannock Falls Overlook, check out the new Visitors Center and gift shop and marvel at how the steep-walled gorge formation was carved by ice, thousands of years ago.

Enjoy dinner at **ZaZa's Cucina**. Elegantly designed with a modern flair, ZaZa's offers groups contemporary Italian cuisine.

Leave room for dessert! Serving ample portions of original recipe, small batch ice cream, grab a scoop at local favorite, **Purity Ice Cream**. Ithaca is the birthplace of the ice cream sundae- dating all the way back to 1892.





For questions and bookings please contact:



Rhonda Vaccaro  
Meetings & Group Sales  
[groups@tourcayuga.com](mailto:groups@tourcayuga.com)  
585-287-8838



Sarah Imes  
Group Tourism Manager  
[sarah@visitithaca.com](mailto:sarah@visitithaca.com)  
607-272-1313







# MYSTERY TOUR



**Set in the heart of the Finger Lakes, Cayuga County is home to a bounty of great food, wine, and history. Spend a few days exploring the food and wine scene, and you'll see why "History's Hometown" is a favorite destination for all.**

## DAY 1

Start your walk through American History at the **Willard Memorial Chapel**. Experience the beauty of the only complete and unaltered Tiffany chapel known to exist. Enjoy this extremely rare example of the work of Louis C. Tiffany and Tiffany Glass and Decoration Co. and enjoy a private organ concert.

For over 50 years, the **Seward House Museum** was the home of William Henry Seward (1801-1872), Governor of New York, United States Senator, Secretary of State to Presidents Lincoln and Johnson, and instrumental in the purchase of Alaska. Enjoy a guided tour through 17 rooms at this registered National Historic Landmark.

Enjoy lunch at **Highland Park Golf Course Restaurant**. Located on one of the highest elevations in Cayuga County, Highland Park Golf Course has a full-service restaurant and bar that offers a large variety of great American fare and, of course, Finger Lakes wines and beers are always on the menu.

After lunch, make a stop at the **Harriet Tubman National Historical Park**, for a glimpse of the Underground Railroad. Harriet Tubman was known as "The Moses Of Her People." She settled in Auburn after the Civil War and operated this home for aged and indigent blacks. As a conductor on the Underground Railroad, a network of abolitionists that helped slaves escape to freedom, she made a dozen trips south over a period of 11 years. Tubman died in 1913 at her South Street property, and is buried at Fort Hill Cemetery.



For a unique spin on wine, stop by **The Apple Station**. Known for many years as a great place to pick and buy apples, The Apple Station now produces and features apple, grape and blended fruit wines.

For dinner, head off to **Oak & Vine at Springside Inn**, a modern gastropub for dinner with a view. Sip a drink on the terrace and try an array of American cuisine featuring locally sourced products.



After dinner, experience Broadway style musical theater at the **Merry-Go-Round Playhouse** located in Emerson Park on the shores of Owasco Lake.



# MYSTERY TOUR



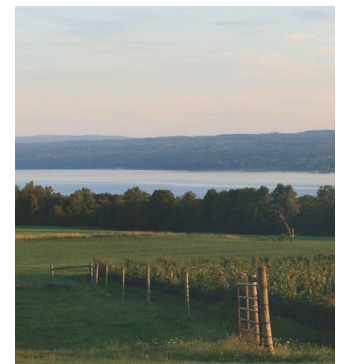
## DAY 2

Start the day at **New Hope Mills**. The quality of New Hope Mills products has made their pancake mixes the #1 pancake flour in central NY! Visit the store and café which features local products such as maple syrup, honey, baked goods and the famous pancake mix that they are known for. A shopping experience that will bring you back in time.

Embark on a quest for the perfect wine glasses at **MacKenzie-Childs**. Tour the restored Victorian Farmhouse overlooking Cayuga Lake, and see the beautiful hand decorated ceramic tableware and home furnishings. Watch a video of the production process at the Visitor Center, browse through the retail shop and enjoy the country gardens.

Next visit the quaint Village of Aurora for shopping in its unique stores. Be sure to stop into **Bet the Farm Winery & Gourmet Market**, a charming, specialty shop featuring their own wines, plus a quality selection of other Finger Lakes wines and gourmet foods from the region. Take advantage of lunch on your own and explore the dining options of this nostalgically attractive small town.

Head over to **Long Point Winery**. Overlooking the lake, the awe-inspiring views take a back stage only to the medium to full-bodied wines you experience in the tasting room. Long Point is also home to Amelia's Deli. If you chose not to have lunch in the Village of Aurora, you can enjoy homemade boxed lunches at this location, which can be made ahead of time or during tastings. Lunch and the picturesque landscape can be savored at the many picnic tables outside, or down the road at Long Point State Park.



After lunch, stop at **Treleaven by King Ferry Winery**, a small farm winery known for award winning Treleaven wines, including Riesling, Gewurztraminer, Pinot Noir, and Meritage aged in French and Bavarian oak barrels.

Next stop is **Montezuma Winery**. Offering a wide selection of award winning wines, with choices ranging from dry to sweet, each wine, a unique medley of fruit, grape, and honey has something to delight every palate.

Next stop is **Izzo's White Barn Winery**; set on 14 acres of old farmland blessed with its own pond fondly named 'Lake Lorraine' after the co-owner Lorraine Izzo. Enjoy their signature 'White Barn' wines as well as traditional Pinot Noir and Cabernet Franc.

End the day with dinner at **Prison City Pub & Brewery**. Relish in the abundant selection of award winning, handcrafted beers brewed on premise by their Brewmaster. Enjoy their elevated pub food which focuses on farm-to-table cuisine. Come in and encounter this laid back, high quality, rustic establishment where their historic charm is part of the experience.





## TASTE OF THE FINGER LAKES SWEET TREAT TRAIL

Cayuga County's culinary selections are many and varied, thanks to the County's rich, agricultural resources. From roadside farm stands to working farms to traditional locavore inspired restaurants, you'll find a full array of foodie options.

### DAY 1

Begin your adventure at **New Hope Mills**. The quality of New Hope Mills products has made their pancake mixes the #1 pancake flour in central NY! Visit the store and café which features local products such as maple syrup, honey, jams, jellies, preserves, spreads, baked goods and the famous pancake mix they are known for. With that hometown feel, locals and visitors alike enjoy the tasty goodness of the treats available in the café, as well as a shopping experience that will bring you back in time.



Next, stop at **Izzo's White Barn Winery**; set on 14 acres of farmland blessed with its own pond fondly named 'Lake Lorraine' after the co-owner Lorraine Izzo. Enjoy their signature 'White Barn' wines as well as traditional Pinot Noir and Cabernet Franc.

Have lunch at the **Refinery**. This recently renovated restaurant offers locally sourced produce and meats that are transformed into refined, modern fare. Sip on one of their carefully crafted cocktails, locally sourced wine and craft beer or enjoy a classic favorite. Their menu items have been inspired by using classic ingredients and recipes with a twist to make them unique and unlike anything you may have had before.

After lunch, pick strawberries at **Strawberry Fields Hydroponic Farm**. Strawberries grow from May through October in special containers up off the ground, making them easy to pick. When you're finished, browse their market for homemade jams, salad dressings and their own 'Strawberry Blossom Delight' honey.

Head over to **Lake House Gifts** to discover the perfect piece to bring the beauty of the Finger Lakes into your home. From finely crafted furniture and artwork, to local honey and unique gifts, there's something for everyone.



Stop for dinner at the **Springside Inn**. Their restaurant, Oak & Vine, is a modern Gastropub offering an array of American cuisine featuring locally grown products. Enjoy their seasonal menu with family style dining.



## TASTE OF THE FINGER LAKES SWEET TREAT TRAIL

### DAY 2

Start the day at **The Apple Station**, a family owned business that specializes in growing apples and blueberries. NYS produced jams, jellies, honey, maple syrup, maple candy, and maple cream are all available in addition to their own sweet cider, baked apple cider donuts and fruit wines.

Halfway down Cayuga Lake, stop in **Aurora**, one of the most charming villages in the Finger Lakes. This walkable village offers waterfront appeal and a laid-back grace of yesteryear. Small boutiques, shops, fine restaurants, and historic sites line its Main Street including **Bet the Farm Winery & Gourmet Market**, a delightful specialty shop featuring their own wines, plus a quality selection of other Finger Lakes wines and gourmet foods from the region.

Head over to **Long Point Winery**. Overlooking the lake, the awe-inspiring views take a back stage only to the medium to full-bodied vinifera wines you experience in the tasting room. Long Point is also home to Amelia's Deli. Enjoy homemade boxed lunches, which can be made ahead of time or during tastings. Lunch and the picturesque landscape can be savored at the many picnic tables outside, or down the road at Long Point State Park.



Next stop is **Owen Orchards**, a down-home, old-fashioned farm. With 15 U-Pick apple varieties to choose from, you can wander the orchard at your own pace and pick apples at your leisure. The Owen Orchards store is reminiscent of a classic farmer's market! You'll find fresh apples, homemade pies, fresh pressed apple cider, apple cider donuts, and an assortment of locally grown and produced vegetables, condiments, cheeses, and preserves.

Finish your day by relaxing at the **Prison City Pub & Brewery**. Relish in the abundant selection of award winning, handcrafted beers brewed on premise by their Brewmaster. Compliment your selected beverage by pairing it with their elevated pub food which focuses on farm-to-table cuisine. They also offer an extensive beer, wine, and cocktail list in addition to their house made beers. Come in and enjoy a laid back, high quality, industrial, rustic establishment where everything is being made before your eyes.







# ULTIMATE FINGER LAKES WINE & DINE TOUR

**Set in the heart of the Finger Lakes, Cayuga County is no exception to the presence of wine and great culinary bounty. Enjoy a day of experiencing quality wines made by quality people, who you're sure to meet along the way.**

## DAY 1

Start the day on a quest for the perfect wine glasses at **MacKenzie-Childs**. Tour the restored Victorian Farmhouse overlooking Cayuga Lake, and see the beautiful hand decorated ceramic tableware and home furnishings. Watch a video of the production process at the Visitor Center, browse through the retail shop and enjoy the country gardens.

Next visit the quaint Village of Aurora for shopping in its unique stores. Be sure to stop into **Bet the Farm Winery & Gourmet Market**, a charming, specialty shop featuring their own wines, plus a quality selection of other Finger Lakes wines and gourmet foods from the region. Take advantage of lunch on your own and explore the dining options of this nostalgically attractive small town.

Head over to **Long Point Winery**. Overlooking the lake, the awe-inspiring views take a back stage only to the medium to full-bodied wines you experience in the tasting room. Long Point is also home to Amelia's Deli. If you chose not to have lunch in the Village of Aurora, you can enjoy homemade boxed lunches at this location, which can be made ahead of time or during tastings. Lunch and the picturesque landscape can be savored at the many picnic tables outside, or down the road at Long Point State Park.



After lunch, head over to **Treleaven by King Ferry Winery**, a small farm winery known for award winning Treleaven wines, including Riesling, Gewurztraminer, Pinot Noir, and Meritage aged in French and Bavarian oak barrels.

Before dinner enjoy some drinks and good times while taking in historic downtown Auburn, at **Prison City Pub & Brewery**. Then head off to Oak & Vine at Springside, a modern gastropub for dinner with a view. Sip a drink on the terrace and try an array of American cuisine featuring locally sourced products.

After dinner, experience Broadway style musical theater at the **Merry-Go-Round Playhouse** located in Emerson Park on the shores of Owasco Lake.





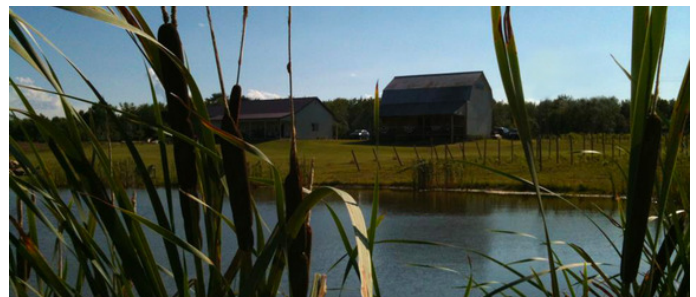
# ULTIMATE FINGER LAKES WINE & DINE TOUR



## DAY 2

Start the day at **Montezuma Winery**. Offering a wide selection of award winning wines, with choices ranging from dry to sweet, each wine, a unique medley of fruit, grape, and honey has something to delight every palate. Be sure to browse the gift shop featuring an array of wine accessories, locally made gourmet foods, home décor, clothing, gift baskets and homemade fudge, you are sure to find the perfect gift or souvenir.

Next stop is **Izzo's White Barn Winery**; set on 14 acres of old farmland blessed with its own pond fondly named 'Lake Lorraine' after the co-owner Lorraine Izzo. Enjoy their signature 'White Barn' wines as well as traditional Pinot Noir and Cabernet Franc.



Enjoy lunch at the **Refinery**. This recently renovated restaurant offers locally sourced produce and meats that are transformed into refined, modern fare. Sip on one of their carefully crafted cocktails, locally sourced wine and craft beer or enjoy a classic favorite. Their menu items have been inspired by using standard ingredients and recipes with a twist to make them unique and unlike anything you may have had before.



For a unique spin on wine, stop at **The Apple Station**. Known for many years as a great place to pick and buy apples, The Apple Station now produces and features apple, grape and blended fruit wines.

Finish your tour with dinner and drinks at **Highland Park Golf Course Restaurant**. Located on one of the highest elevations in Cayuga County, Highland Park Golf Course has a full-service restaurant and bar that offers a large variety of great American fare and, of course, Finger Lakes wines and beers are always on the menu. Enjoy the magnificent scenery either inside or outside, while sitting on the wrap-around deck.







# Town of Sturbridge

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A. 

Date: 8 July 2019  
To: Sturbridge Tourist Association  
Subject: Funding Request – Old Sturbridge Village – First Review

---

## Overview

Old Sturbridge Village has submitted a request for \$25,000 to support their efforts to get more tour groups to the Village and to Sturbridge as a whole. In short, their request is to lay the ground work to re-engage with tour operators and to bring those groups back to Sturbridge. They are currently working with a group called Break The Ice Media (BTI) who would be the recipient of the funding. The request would break down as such:

- 1) Sales and Marketing Lead Generation by BTI (cost: \$20,000): BTI would use its resources to engage with tour operators within a 10 hour radius of Sturbridge and would foster leads within those groups for potential tours.
- 2) Tour Implementation and Coordination led by OSV (cost: \$0): OSV will make an investment in hiring staff to foster these leads and to bring those groups to Sturbridge.
- 3) Attendance at ABA (American Bus Association) (cost: \$5,000): This would pay for OSV or BTI (unclear) staff to attend the ABA and have direct interactions with potential tour groups and work on lead generation.

This would constitute a *significant* portion of the marketing budget for FY2020 when considered with costs of the upcoming RFP and the campaign with DCM. That said it is an investment that could have beneficial spillover effects for the hotel, restaurant and merchant community in town. Therefore it is an application that should be considered carefully.

It is recommended that the STA invite OSV to its next meeting to discuss this further. There are a few questions I would encourage the STA ask that OSV be prepared to answer:

- 1) What does the \$5,000 cover with the ABA trip?
- 2) Given the amount in question, has OSV solicited quotes from other vendors that may offer similar services for lower rates?
- 3) As this initiative does have a potential for a lot of spillover benefits, has OSV outreached to other hotels, restaurants and/or merchants in the area to see if they want to help support this initiative as they realistically will profit from it?

- 4) What information/data will the STA get from this investment that will (A) show success, and (B) provide leads for initiatives of our own?
- 5) Is it possible to get a similar affect with a smaller quote?

### Suggested Motion

If the STA concurs, the following motion would be in order:

*MOVE to invite Old Sturbridge Village to the next meeting of the STA to discuss their proposed application.*

# Sturbridge Tourist Association - Funding Application

This is the funding application for the Sturbridge Tourist Association. Please answer each section completely and with as much detail as possible.

Questions can be directed to the Economic Development and Tourism Coordinator at (508) 347-2500 ext. 1411.

Email address \*

ctieri@osv.org

Name

Christine Tieri

Organization

Old Sturbridge Village

Please identify what type of organization you represent

☐ For profit

☒ Nonprofit

☐ Government

☐ Private citizen / volunteers

☐ Other: .....

## Phone Number

5083977312

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Before continuing please read and review the STA's Funding Request Policy (found here:

[https://www.town.sturbridge.ma.us/sites/sturbridgema/files/uploads/sta\\_funding\\_policy-09132018.pdf](https://www.town.sturbridge.ma.us/sites/sturbridgema/files/uploads/sta_funding_policy-09132018.pdf)) and then click the box confirming you have read and agree to said policy. \*

☒ I have read and agree to follow the STA funding request policy.

The STA receives funding requests from numerous applicants and has limited funding. As such your request may or may not be allocated in full or in part. The STA will make that determination based on their funding policies (see above) and available funding. Please check below indicating that you understand that this is a possibility and that funding may or may not be allocated for your application. \*

☒ I acknowledge and understand the above statement.

---

## Funding Information

In this section you will detail your monetary request from the STA and explain how your project will support tourism in Sturbridge.

## Please provide a detailed explanation of why you are seeking funding from the STA?

Old Sturbridge Village – and Sturbridge itself – had once been a highly desired destination for bus tour groups. The travel trade has not been as prevalent in years past due to numerous reasons including the recession, lack of universal effort from Sturbridge businesses/destinations, and for Old Sturbridge Village in particular, we haven't had a designated position to promote groups in many years. We have learned that the travel trade has rebounded in recent years, but without dedicated promotion, we have fallen off the radar of the tour group operators.

Old Sturbridge Village would greatly benefit by bringing tour groups back to the forefront, and we believe the town would benefit as well. We have learned:

- 1) Tour group operators are looking for an attraction that is also a destination and offers a diverse set of experiences and amenities which meet the needs and desires of almost any traveler. Old Sturbridge Village offers the museum, can provide dining to large groups as well as lodging. Further, very large groups may need additional options for dining and lodging which Sturbridge has plenty of.
- 2) Sturbridge is positioned perfectly for easy access and proximity to major international gateway cities including NYC and Boston.
- 3) We are located within the popular New England region and Old Sturbridge Village is a great stop along a larger route offering a dining experience, a full day of exploration and historical education, or an overnight where additional sites and regional experiences can be found.
- 4) Earlier this year, Old Sturbridge Village conducted an attitudinal research study on our audience. We found that 1/4 of the people engaging with Old Sturbridge Village were "Guide Groupies" as we call them. They are highly motivated and prefer to take part in guided tours of any destination. This is a group who is defined by seeking out group tours for their leisure time, and would likely be the same audience that can be found through tour operators.

The goal of this project, which we are calling The Travel Trade Sales & Marketing Program, are as follows:

- Provide a focused and strategic approach to increasing group tours revenue
- Build and expand on existing relationships with group tours operators and receptive prospective operators
- Attract and increase both domestic and international group tours to Old Sturbridge Village
- Work in partnership with the STA as well as local state and tourism offices
- Align with other New England tourism destinations to attract groups as part of regional itinerary
- Identify opportunities to cross sell services (museum admission, food and beverage, lodging and shopping); as well as with other area businesses for additional revenue-generating

## activities

Finally, our target market for this project would be:

- Tour Operators located within a 10 hour drive radius who travel in and around New England for day trips and multi day trips.
- Geographic locations: New York State; New Hampshire; Vermont; Connecticut; Rhode Island; Maine; Maryland; Ohio; Pennsylvania and Canada
- We will also be pitching operators who particularly cater to: History Buffs, Hands-on Explorers, and Family Focusers\*

\*Along with "Guide Groupies" our research identified three other strong attitudinal groups that are motivated to engage with Old Sturbridge Village, and we can pitch that messaging to tour group operators.

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## Funding amount requested \*

\$25,000

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Provide a detailed explanation of what your funding will be spent on. Be specific. Generalizations like "marketing" or "entertainment" are not acceptable. \*

This is a 3-part program that we will partner on with Break The Ice Media (BTI), who is the current marketing, media and PR agency for Old Sturbridge Village. BTI's sole focus is on destination marketing and they have a dedicated team specifically for the travel trade sector. They will provide a much-needed sales arm for lead generation, partnership development, tracking and reporting and closing sales.

- 1) Sales & Marketing Lead Generation (handled by BTI)
- 2) Tour Implementation and Coordination (handled by OSV)
- 3) Attendance at ABA (American Bus Association) Marketplace to secure one-on-one meetings with tour operators (handled by BTI)

#### PROGRAM DETAILS:

- 1) Sales & Marketing Lead Generation Strategy (handled by BTI)

This is a 9-month commitment ideally starting in September 2019-May 2020

1a) Relationship Building: Compile a list of contacts who have visited Old Sturbridge Village in the past. Identify opportunities to reach out to this audience through direct mail, email newsletter or individual outreach. Invite them back to the museum for a site visit, touting new offerings and current opportunities.

1b) Identify Lead Generation Sources: This includes attendance at American Bus Associations Marketplace in January 2020 (see #3), individual outreach and hosting of one off tour operator/group travel leader tours, and/or editorial opportunities in group focused publications (Group Travel Leader, Group Tour Magazine, etc.) This part of the program will also include pursuing:

>>Existing Lead Lists : Continue development and follow through of OSV's existing lead lists of group tour operators. Those lead lists will be targeted through direct mail, personal phone calls, e mail, in person meetings, and site visits.

>>Tourism Industry leads : Follow up on leads generated through the tourism industry including Discover New England, Brand USA and regional organizations

>>Site Visits: Host site visits for well qualified leads. (Goal to host minimum of 1-2 site visits with receptive operators in 2020)

>> Prospecting: Place a minimum of 25 individual cold/warm sales touches per month with potential group and travel trade prospects. A touch is a point of contact with a prospect. It could be an in person meeting, phone call, email or direct mailing. Also includes full account

service, benchmark and measurement, sales cycle follow through, monthly reporting.

1c) Develop Print/Online Collateral: Create collateral that supports OSV's group tour goals and speaks to the different types of groups that can visit the museum. Consider the differences between student groups and/or senior groups, for example, and what type of experiences each would be looking for. Have collateral available in print/PDF form and online via the OSV website.

Some of this information is on the OSV website currently but needs to be expanded in order to appeal to a wider range of groups. Types of collateral may include: eNewsletter, one-page sell sheet, trade show signage or materials. Collateral will also include information about the town of Sturbridge and its variety of assets (shopping, dining, trails, etc.) to promote the ability for the tour operator to book additional activities in the area.

## 2) Tour Implementation and Coordination (handled by OSV)

Old Sturbridge Village is prepared to employ an individual who will serve as our "boots on the ground." This position will collaborate with BTI during the sales nurturing process to provide appropriate packages and pricing for the various offerings at Old Sturbridge Village (museum admission, special programming, dining and/or lodging). Additionally, our implementation coordinator will provide on-site tours as needed. Once the sale is closed, BTI will hand the lead to our coordinator, who will handle finalizing contracts, details, and be the main contact to answer any questions the tour group operators may have before or during their visit.

## 3) Attendance at ABA (American Bus Association) Marketplace to secure one-on-one meetings with tour operators (handled by BTI)

ABA marketplace is the premiere trade show of the travel trade with a focus on networking, education and connecting business leads in order for organizations to secure business with tour group operators. Taking place each January, this trade show provides OSV the opportunity for one-on-one meetings with tour operators as well as additional contacts through general show networking and the ABA database. An average of 30 meetings are typically booked per organization/tour operator with up to 54 max. (The earlier you sign up, the more bookings you can secure). This is also the right place to sell the entire town - when our representative is sitting in front of the tour group operator and can have a conversation about the whole area.



Provide a COMPLETE budget for your application amount. Be specific and ensure that your totals add up correctly. \*

#1) BTI fees - \$20,000; #2) OSV coordinator position \$0 (OSV will cover); #3) \$5,000 membership in ABA plus attendance fees and travel expenses to trade show

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How will this proposal engage with the general public? \*

By bringing bus tours back to the area, it will be another way to increase revenues, in turn, helping to sustain our own living history museum keeping it vibrant and relevant for the people of the area and our residents who get free admission to The Village.

---

What is the estimated economic impact to Sturbridge? The STA is particularly interested in the numbers of hotel rooms sold, the tax revenue collected from those room sales, the number of local businesses utilized and the guaranteed revenues they received based on agreed upon contracts (Example 1: 100 room nights at \$100/room \* 6% sales tax = ~\$9,400 for hotel and ~\$600 for Sturbridge; Example 2: \$2,000 contract with Sturbridge restaurant for catering an event). \*

Estimated based on securing 5 tour groups in 2020 (conservative): Costs per tour group (averages based on past history): Museum admission @ discounted = \$1000 revenue (no tax); Lodging/28 rooms = \$2800 revenue (\$168 tax – 6%); Dining/1 meal = \$1200 revenue (\$75 tax – 6.25%); Additional programming/demonstration per group (if chosen) = \$250 revenue (no tax); Shopping at Village and/or other local businesses (estimated) \$1500 revenue (\$93.75 tax); TOTAL REVENUE PER GROUP: \$6750 X 5 GROUPS = \$33,750; TOTAL TAX PER GROUP: \$336.75 X 5 GROUPS = \$1683.75

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Are you expecting to make any revenues from this project? \*

☒ Yes

☐ No

☐ Maybe

If "Yes" or "Maybe," where will/might those revenues go? \*

Museum Operations

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If this is for an event, please provide the date/times for the event, as well as its location(s).

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If this is for an event, how are you marketing said event? Be specific.

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Will this project draw visitors to Sturbridge? If so how can you be sure?  
Please note, a "visitor" is defined by the Massachusetts Office of Travel and Tourism (MOTT) as someone who (A) travels over 50 miles and/or (B) stays overnight. \*

Yes, this entire program is designed to target only "visitors."

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If the project is drawing a majority of its patrons from less than 50 miles/patrons don't stay overnight (i.e. not a "visitor" by MOTT's definition), please explain how it supports Sturbridge. \*

We are aiming to draw from beyond 50 miles, specific regions to include: • New York State; New Hampshire; Vermont; Connecticut; Rhode Island; Maine; Maryland; Ohio; Pennsylvania and Canada

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Is there anything else that you feel is important for the STA to consider for your application?

Pursuing and closing tour group clients has a long lead time, as tour group operators make their plans months in advance. With that said, the longer we hold off putting into place a program like this one, the longer we postpone getting groups to come to town. Once a program like this is in place, it can build off itself. For instance, if a tour group operator has a good experience, they will likely do annual (or more!) trips to Sturbridge. Additionally, we will secure positive reviews and use that to promote the tours moving forward. This is an initial investment in the long-term plan of bringing back tour groups to the Sturbridge area.

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**Review and Submit**

## Additional Requirements

All applicants are required to adhere to the Funding Policy guidelines adopted by the Sturbridge Tourist Association. A link to the most recent iteration of the policy is found at the start of this funding application.

Any and all funding is contingent upon the Sturbridge Tourist Association receiving recognition as a sponsor of the event in question. Failure to do so is cause for the STA to revoke the applicant's funding.

Depending upon the size and scale of the event, the STA reserves the right to request additional information from the applicant.

Within sixty (60) days of the conclusion of the project, the STA expects that the applicant shall submit a Post Event Evaluation to the Committee summarizing the outcome of said project.

As grantee for the project as detailed in this application, I certify that these statements made herein are true and that the funds requested to be disbursed fulfill the purpose indicated in the approved application. [If your application was approved with a condition] I further certify that the conditions imposed on the project have been met. Furthermore I agree to adhere to any and all the policies and requirements of the Sturbridge Tourist Association as stated above and in their Funding Policy guidelines, acknowledge that failure to adhere to the aforementioned items could result in the revocation of any and all funding received. \*

☒ I have read and agree to adhere to all STA policies and requirements as stated above

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# Page Break



# Town of Sturbridge

Economic Development & Tourism Coordinator  
Kevin Filchak, M.P.A. 

Date: 8 August 2019  
To: Sturbridge Tourist Association  
Subject: Cover Memo – Gatehouse New England

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## Overview

Gatehouse Media has returned to discuss a second run of their ad campaign that had an initial run in the spring of 2019. They would like to conduct a similar campaign that would run for four months at \$500 per month from September through December. The campaign would allow the STA to target by zip code the audience that it would like to reach. Gatehouse New England will be present at the meeting to discuss their proposal in more depth.

I would remind the STA that marketing funding is limited this fiscal year due to the branding and marketing strategy development. As such it should weigh the cost/benefit of this campaign against what is currently being done/contracted to be done.

## Suggested Motion

If the STA concurs, the following motion would be in order:

*MOVE to approve \$2,000 from the Marketing line item to conduct a fall marketing campaign with Gatehouse New England.*

# Sturbridge Tourist Association - Funding Application

This is the funding application for the Sturbridge Tourist Association. Please answer each section completely and with as much detail as possible.

Questions can be directed to the Economic Development and Tourism Coordinator at (508) 347-2500 ext. 1411.

## Email address \*

dgalipeau@gatehousemedia.com

## Name

Diane Galipeau

## Organization

Gatehouse New England

## Please identify what type of organization you represent

- ☒ For profit
- ☐ Nonprofit
- ☐ Government
- ☐ Private citizen / volunteers
- ☐ Other: \_\_\_\_\_

## Phone Number

774.364.0296

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Before continuing please read and review the STA's Funding Request Policy (found here:

[https://www.town.sturbridge.ma.us/sites/sturbridgema/files/uploads/sta\\_funding\\_policy-09132018.pdf](https://www.town.sturbridge.ma.us/sites/sturbridgema/files/uploads/sta_funding_policy-09132018.pdf)) and then click the box confirming you have read and agree to said policy. \*

☒ I have read and agree to follow the STA funding request policy.

The STA receives funding requests from numerous applicants and has limited funding. As such your request may or may not be allocated in full or in part. The STA will make that determination based on their funding policies (see above) and available funding. Please check below indicating that you understand that this is a possibility and that funding may or may not be allocated for your application. \*

☒ I acknowledge and understand the above statement.

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## Funding Information

In this section you will detail your monetary request from the STA and explain how your project will support tourism in Sturbridge.

Please provide a detailed explanation of why you are seeking funding from the STA?

In return of providing Sturbridge Tourist Association a Fall 2019 Digital Campaign

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## Funding amount requested \*

\$2000

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Provide a detailed explanation of what your funding will be spent on. Be specific. Generalizations like "marketing" or "entertainment" are not acceptable. \*

An Online Digital Advertising Campaign providing 50,000 impressions within a mile radius or using specific zip codes to target your demographics of STA

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Provide a COMPLETE budget for your application amount. Be specific and ensure that your totals add up correctly. \*

\$500/month Total Cost = \$2000

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How will this proposal engage with the general public? \*

Within a specific mile radius or using specific zip codes to target your demographics of STA discussed ahead of time prior to campaign going live

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What is the estimated economic impact to Sturbridge? The STA is particularly interested in the numbers of hotel rooms sold, the tax revenue collected from those room sales, the number of local businesses utilized and the guaranteed revenues they received based on agreed upon contracts (Example 1: 100 room nights at \$100/room \* 6% sales tax = ~\$9,400 for hotel and ~\$600 for Sturbridge; Example 2: \$2,000 contract with Sturbridge restaurant for catering an event). \*

50,000 impressions(ads) for an event are seen by 25,000 that attend an event and spend \$100 in sturbridge, ma (spent on retail/food/event tickets/ etc) that would be a total spent of \$2,500,000

Are you expecting to make any revenues from this project? \*

☒ Yes

☐ No

☐ Maybe

If "Yes" or "Maybe," where will/might those revenues go? \*

Towards the cost to set up and create

If this is for an event, please provide the date/times for the event, as well as its location(s).

n/a

If this is for an event, how are you marketing said event? Be specific.

n/a

Will this project draw visitors to Sturbridge? If so how can you be sure?  
Please note, a "visitor" is defined by the Massachusetts Office of Travel and Tourism (MOTT) as someone who (A) travels over 50 miles and/or (B) stays overnight. \*

We can have the digital ads directed to the STA website of monthly events

If the project is drawing a majority of its patrons from less than 50 miles/patrons don't stay overnight (i.e. not a "visitor" by MOTT's definition), please explain how it supports Sturbridge. \*

Targeting specific audience in and or neighboring towns/states to make sure they see ads and have them click to learn more about what is happening in Sturbridge and when it is happening

Is there anything else that you feel is important for the STA to consider for your application?

We would like to meet again at your monthly meeting and discuss tactic options if you are willing

Review and Submit

## Additional Requirements

All applicants are required to adhere to the Funding Policy guidelines adopted by the Sturbridge Tourist Association. A link to the most recent iteration of the policy is found at the start of this funding application.

Any and all funding is contingent upon the Sturbridge Tourist Association receiving recognition as a sponsor of the event in question. Failure to do so is cause for the STA to revoke the applicant's funding.

Depending upon the size and scale of the event, the STA reserves the right to request additional information from the applicant.

Within sixty (60) days of the conclusion of the project, the STA expects that the applicant shall submit a Post Event Evaluation to the Committee summarizing the outcome of said project.

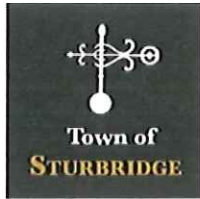
As grantee for the project as detailed in this application, I certify that these statements made herein are true and that the funds requested to be disbursed fulfill the purpose indicated in the approved application. [If your application was approved with a condition] I further certify that the conditions imposed on the project have been met. Furthermore I agree to adhere to any and all the policies and requirements of the Sturbridge Tourist Association as stated above and in their Funding Policy guidelines, acknowledge that failure to adhere to the aforementioned items could result in the revocation of any and all funding received. \*

☒ I have read and agree to adhere to all STA policies and requirements as stated above

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# Page Break



# Town of Sturbridge

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A.

Date: 8 August 2019

To: Sturbridge Tourist Association

Subject: Cover Memo – Hamilton Rod & Gun Club

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## Overview

The Hamilton Rod and Gun Club is requesting the STA's support for their annual Big MOE event in September. This is the second request from the Club as they came last year for a similar request; that included covering costs of volunteer food and restocking the lake. This year the Club is only seeking support to cover their insurance costs which is priced, following a competitive bid, at \$5,467. The Club notes in their application that this event draws several thousand to the community and contributes to the Town's meals tax. They also note that this has spillover benefits for the hotels, shops and restaurants in town.

If this event is to be supported, it should be done so only if the Club lists the Town of Sturbridge as an additionally insured party.

## Suggested Motion

If the members concur, the following motion would be in order:

*MOVE to allocate \$5,467 from the Community Support line item to support the purchase of insurance for the Big MOE subject to the Town of Sturbridge being listed as an additionally insured party on the policy.*

# Sturbridge Tourist Association - Funding Application

This is the funding application for the Sturbridge Tourist Association. Please answer each section completely and with as much detail as possible.

Questions can be directed to the Economic Development and Tourism Coordinator at (508) 347-2500 ext. 1411.

## Email address \*

racing69@aol.com

## Name

Kevin R. Soucie

## Organization

Hamilton Rod & Gun Club (HRG)

## Please identify what type of organization you represent

☐ For profit

☒ Nonprofit

☐ Government

☐ Private citizen / volunteers

☐ Other: \_\_\_\_\_

## Phone Number

5088646773

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Before continuing please read and review the STA's Funding Request Policy (found here:

[https://www.town.sturbridge.ma.us/sites/sturbridgema/files/uploads/sta\\_funding\\_policy-09132018.pdf](https://www.town.sturbridge.ma.us/sites/sturbridgema/files/uploads/sta_funding_policy-09132018.pdf)) and then click the box confirming you have read and agree to said policy. \*

☒ I have read and agree to follow the STA funding request policy.

The STA receives funding requests from numerous applicants and has limited funding. As such your request may or may not be allocated in full or in part. The STA will make that determination based on their funding policies (see above) and available funding. Please check below indicating that you understand that this is a possibility and that funding may or may not be allocated for your application. \*

☒ I acknowledge and understand the above statement.

---

## Funding Information

In this section you will detail your monetary request from the STA and explain how your project will support tourism in Sturbridge.



Please provide a detailed explanation of why you are seeking funding from the STA?

The Big MOE has become an institution bringing thousands each year to Sturbridge for this one day "Free" event to expose families and young people to a wide variety of outdoor activities. Over the last two years obtaining insurance for this event has become a sticking point. It used to be that we could run 2 years of events with one rider at a cost of \$2500. This practice was disallowed and last year we were required to purchase insurance (competitively bid) for \$5467.00. For what is a "free" event to the participants the cost of insurance resulted in a operating lost in 2017. We have enjoyed support from a number of sponsors, however without additional support changes in what is offered or additional sponsors will be needed.

Funding amount requested \*

\$5467.00

Provide a detailed explanation of what your funding will be spent on. Be specific. Generalizations like "marketing" or "entertainment" are not acceptable. \*

The full amount of the request will be spent on the insurance for the event.

Provide a COMPLETE budget for your application amount. Be specific and ensure that your totals add up correctly. \*

\$5467.00 event insurance

## How will this proposal engage with the general public? \*

On a cold rainy day in September 5 years ago more than 2500 attended this event. On a beautiful Fall day the next year over 6000 visitors came to HRG Club. Because of the change in insurance rider requirements we now require a signed release allowing for an accurate count of attendance. Parking is at Galileo Drive where visitors are afforded the opportunity to obtain services along the Route 20 corridor before or after the event. HRG has averaged paying \$3800 yearly in meals taxes alone over the last 5 years related to the events hosted by the Club. This event is the Club's "give back" where we enjoy hosting other events bringing other groups to Sturbridge. Each year we host a Car Show in first week of August. Reinhardt Archery in June. The Italian Motor Cycle Club bringing thousands more to Town filling hotel beds and enjoying local services.

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What is the estimated economic impact to Sturbridge? The STA is particularly interested in the numbers of hotel rooms sold, the tax revenue collected from those room sales, the number of local businesses utilized and the guaranteed revenues they received based on agreed upon contracts (Example 1: 100 room nights at \$100/room \* 6% sales tax = ~\$9,400 for hotel and ~\$600 for Sturbridge; Example 2: \$2,000 contract with Sturbridge restaurant for catering an event). \*

On average, between 3500-6000 visitors will attend the event. Many of these visitors will be staying at local hotels and dining at the many restaurants that the town of Sturbridge has to offer. Many retail stores in the area will also benefit from the influx of visitors to the town for this event.

---

## Are you expecting to make any revenues from this project? \*

☐ Yes

☒ No

☐ Maybe

If "Yes" or "Maybe," where will/might those revenues go? \*

N/A

If this is for an event, please provide the date/times for the event, as well as its location(s).

Hamilton Rod & Gun Club 9/22/19 All Day

If this is for an event, how are you marketing said event? Be specific.

Yes, major advertising has begun in July. At a State level the event will be promoted by Fish and Wildlife, FAWNS, Sportsman Clubs throughout the State promote. Hard-copy fliers are distributed beginning in July, providing the opportunity for sponsorship. Since this is a yearly event it has become an annual event attended by scout groups including a troop from the Cape.

Will this project draw visitors to Sturbridge? If so how can you be sure?  
Please note, a "visitor" is defined by the Massachusetts Office of Travel and Tourism (MOTT) as someone who (A) travels over 50 miles and/or (B) stays overnight. \*

Yes. From past years, visitors have joined us from all over New England.

If the project is drawing a majority of its patrons from less than 50 miles/patrons don't stay overnight (i.e. not a "visitor" by MOTT's definition), please explain how it supports Sturbridge. \*

Patrons are drawn to the event from both locally and all over New England. Restaurants, gas stations, retail stores will all benefit from the influx of patrons drawn to the event.

## Is there anything else that you feel is important for the STA to consider for your application?

This is a fun filled family event enjoyed by both young and old. We feel this event is instrumental for the youth to enjoy the outdoors and experience many opportunities such as fishing, biking, kayaking, archery or just simply to enjoy the outdoors.

---

## Review and Submit

## Additional Requirements

All applicants are required to adhere to the Funding Policy guidelines adopted by the Sturbridge Tourist Association. A link to the most recent iteration of the policy is found at the start of this funding application.

Any and all funding is contingent upon the Sturbridge Tourist Association receiving recognition as a sponsor of the event in question. Failure to do so is cause for the STA to revoke the applicant's funding.

Depending upon the size and scale of the event, the STA reserves the right to request additional information from the applicant.

Within sixty (60) days of the conclusion of the project, the STA expects that the applicant shall submit a Post Event Evaluation to the Committee summarizing the outcome of said project.

As grantee for the project as detailed in this application, I certify that these statements made herein are true and that the funds requested to be disbursed fulfill the purpose indicated in the approved application. [If your application was approved with a condition] I further certify that the conditions imposed on the project have been met. Furthermore I agree to adhere to any and all the policies and requirements of the Sturbridge Tourist Association as stated above and in their Funding Policy guidelines, acknowledge that failure to adhere to the aforementioned items could result in the revocation of any and all funding received. \*



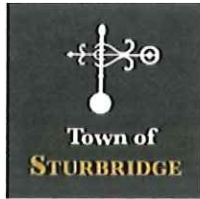
I have read and agree to adhere to all STA policies and requirements as stated above

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# Town of Sturbridge

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A. 

Date: 8 August 2019  
To: Sturbridge Tourist Association  
Subject: RFP - Next Steps

---

Below is a brief summation of the next steps in the RFP process:

- 8/14/2019
  - ▶ All RFP's submitted to EDTC by 12:00hrs.
  - ▶ RFPs shall be opened during the STA's meeting and the names of each vendor shall be preserved in the meeting record.
  - ▶ All proposals shall be checked to ensure that they meet the rules of the RFP, those that violate any terms of the RFP shall not be considered further.
  - ▶ Copies of each technical proposal shall be provided to the STA members; price proposals shall remain sealed in the EDTC's office.
- 8/14/2019 – 08/28/2019
  - ▶ STA members shall review and rank each proposal individually using the attached score sheet.
- 08/28/2019
  - ▶ STA members shall review and rank each proposal as a group using the scores developed individually.
  - ▶ STA members shall open price proposals during the meeting and rank each, again recording proposed prices into the record.
  - ▶ STA members shall rank each proposal taking into consideration both the technical and price proposals.
  - ▶ STA members shall select the vendor that is most advantageous to the STA and the Town.
- 08/28/2019 – mid September
  - ▶ EDTC and Town Administrator shall negotiate a contract with the selected vendor.

## STA - RFP Comparative Evaluation Criteria

[illegible]



# Sturbridge Tourist Association

*A Committee of the Town of Sturbridge*

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## **Proposal Submittal Deadline and Submittal Address (mailing or hand delivery):**

**14 August 2019, by 12:00 pm**

Town of Sturbridge  
Attn: Kevin Filchak, M.P.A.  
301 Main Street  
Sturbridge, MA 01566

## **Sturbridge Tourist Association – Initial Review of Technical Proposals**

Week of 14 August 2019

## **Sturbridge Tourist Association – Ranking of Technical Proposals and Review of Price Proposals**

Week of 28 August 2019

## **Sturbridge Tourist Association – Vote Selecting Proposal**

Week of 28 August 2019

## **Anticipated Contract Start Date**

16 September 2019

## **Contact Information**

Kevin Filchak, M.P.A.  
(508) 347-2500 ext. 1411  
[Kfilchak@town.sturbridge.ma.us](mailto:Kfilchak@town.sturbridge.ma.us) (any and all questions shall be submitted in writing to this email address)

**The Town of Sturbridge reserves the right to reject any or all proposals or portions thereof, to accept a proposal or portion thereof, and to waive any informality.**

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## Overview

The Sturbridge Tourist Association (STA), represented by the Economic Development and Tourism Coordinator (EDTC), is seeking proposals for the development of a town brand and a three (3) year marketing strategy for the community. The STA will use these to promote Sturbridge to the public at large over the next few years.

## Background

Sturbridge is a vibrant community with a diverse business base that benefits from its proximity to several major inter and intra state roadways. The town is home to fourteen hotels, almost fifty restaurants, three breweries and numerous merchants. However what the town is best known for is Old Sturbridge Village which, as the largest living history museum in New England, can and has drawn over 250,000 patrons a year to our community. Beyond the numerous eateries, hotels and the Village, the town is host to a number of burgeoning economic and entertainment sectors. Sturbridge is rapidly becoming a wedding destination with locations such as the Publick House and Hyland Orchard drawing hundreds of couples from across the country to wed in this idyllic New England community. For outdoor enthusiasts the town is building new outdoor trails every year; there are currently over thirty miles of available trails in town. Finally, the town is expanding its outreach efforts by creating local events that foster community spirit and encourage patronage of local businesses. All told Sturbridge hosts many wonderful things to see and experience.

It must be stated that Sturbridge greatly benefits from the revenues brought in by its tourists and visitors. Over the past ten years the town has seen yearly increases in the revenues that it collects from the hotel/motel room tax and the same is seen over the past eight years for our meals tax. In 2018 alone the town collected \$999,165 in hotel/motel tax revenues and \$464,678 in meals taxes. The revenues generated from local tourism are put towards one of three categories. First is the general fund to offset local operational costs. The second is the Betterment Committee which funds public safety, recreation and beautification efforts in town. The third and final way those dollars are spent is through the STA which uses its allocation to support tourist related events in, and marketing of, the community as well as funding the EDTC position.

## Project

Over the past several years the town, through the funding the STA receives, has worked to promote itself and its businesses regionally and across the northeast. This has consisted of various multi-media campaigns done with different outlets, at different scales, and for different lengths of time. This leads to several challenges for Sturbridge as it is unclear how much of an impact, if any, these campaigns are having at attracting visitors to town. Furthermore Sturbridge does not have a clear message it is trying to convey beyond encouraging people to visit the community.

Therefore the STA is soliciting proposals to develop (A) a community brand that can be used both internally and by our local and regional partners (both public and private), and (B) a three (3) year marketing strategy that can be used to promote all that Sturbridge can offer its visitors.

The desired services to be provided by the applicant are described in the Scope of Services section of this RFP.

Any questions pertaining to the services required by the Town of Sturbridge or the technical aspects of this RFP should be directed, **in writing**, to Kevin Filchak, M.P.A., Economic Development and Tourism Coordinator at [kfilchak@town.sturbridge.ma.us](mailto:kfilchak@town.sturbridge.ma.us). Questions must be received no later than **7 August 2019 at 4:00pm**. Questions received after that time will not be answered.

The Town of Sturbridge reserves the right to accept or reject any or all proposals if it is deemed to be in the best interest of the Town to do so. The Town of Sturbridge may cancel this RFP in whole or in part, at any time whenever such an act is deemed to be in its best interest.

A **sealed** written proposal, **with separately sealed** technical and price proposals shall be submitted to:

Town of Sturbridge  
Attn: Kevin Filchak, M.P.A.  
301 Main Street  
Sturbridge, MA 01566

**Six (6) copies of the proposal must be received no later than 12:00pm on Wednesday, 14 August 2019.** The final contract price and fee will be negotiated with the highest ranked proposal.

## Scope of Service

The chosen consultant will be expected to develop a community brand and subsequent three (3) year marketing strategy for Sturbridge that will involve the following components:

- A written examination of Sturbridge's current brand and marketing strategy, identifying strengths, weaknesses, opportunities and threats;
  - Written report to be submitted to the STA via the EDTC;
- Develop a profile of the types of Sturbridge visitor (location traveled from, purpose of travel, interests, media preferences, etc.);
  - Written report to be submitted to the STA via the EDTC;
- Conduct research to see how Sturbridge residents and businesses view the community;
  - It must include two community meetings: one for the general public and the other for key stakeholders (businesses, local and regional partners, etc.);
  - Written summary of the meetings to be submitted to the STA via the EDTC;
- Develop a town brand and written brand guidelines and publically present to a joint meeting of the Sturbridge Tourist Association and the Board of Selectmen;
  - Develop a written strategy for how the Town can adopt said brand (may be included as a part of the marketing strategy);



- Develop a written three (3) year marketing strategy for the town to market itself to those visitors profiled;
  - Publically present written strategy to the Sturbridge Tourist Association;
- Provide technical assistance, support and guidance during the initial rollout of the brand and strategy (last two months of the bid contract, anticipated May and June 2020).

## Proposal Submission Procedures

1. The submission and review of the proposal shall comply with the purposes and intent of Massachusetts General Law Chapter 30B and all other applicable laws of the Commonwealth.
2. Proposals must be received no later than 14 August 2019 at 12:00pm. An original and six (6) copies must be submitted together with a transmittal letter signed by an authorized official of the firm.
3. The price proposal shall be submitted on the form found at the end of this RFP, in a separate, sealed envelope clearly marked "**Price Proposal – Branding/Marketing.**" Price proposals that are submitted in the same envelopes as the technical (non-price) proposals shall be rejected without further consideration. The price proposal shall include adequate provision for all proposed services.
4. Proposals and/or quotes may be changed or withdrawn prior to but not subsequent to 14 August 2019. Changes or corrections may be made by submission of such changes, in writing and in sealed envelopes, which identifies the submitting party and indicates that it contains a change or correction to the proposal for "**Branding /Marketing.**"

## Submission Requirements

The following shall be considered to be the minimum requirements for submission. Each proposal shall contain the following.

- 1) Transmittal letter, no longer than two (2) pages in which the applicant must:
  - a. State your firm's understanding of the services to be performed and the work products to be provided as defined in the Scope of Services section of this RFP.
  - b. Make a positive commitment to perform the work within the required timeframe.

*The transmittal letter must be signed by the individual authorized to negotiate and contractually bind the firm.*

- 2) Timeline
  - a. Applicant shall provide a clear timeline from start of contract (assume start date of 16 September) through 30 June 2020.

- i. Timeline shall highlight key goals and milestones the applicant plans to achieve during the contract period.

3) Professional experience

- a. Identify staff who will be assigned to this project. Provide resumes (which may be included as appendices) showing relevant past experience, education, training, etc.

4) References:

- a. Applicant must submit a complete list of all jobs performed in the past three (3) years that are similar in size and scope to this project with contact names and telephone numbers. For each municipal contract the applicant was awarded in the last three (3) years, the following shall be provided:
  - i. Client contact name
  - ii. Contact telephone number
  - iii. Contact mailing address
  - iv. Summary of project scope
  - v. Amount of initial contract award
  - vi. Final total project cost
  - vii. Explanation for any difference between initial and final project costs
- b. Town reserves the right to contact the reference provided, and use the information gained from the references as part of the factors used in determination of the contract award.

5) Non Collusion and Tax Compliance Forms contain in this RFP.

## Quality Requirements

The following shall be considered minimum standards necessary to perform the scope of work. Acceptable evidence or certification must be provided to demonstrate the minimum standards are being met. Failure to meet the minimum standards as described below shall result in a rejection of the proposal.

- The Applicants' understanding of the Town's needs, the objectives and goals to be achieved and the work involved, and the nature and intent of the proposed public process;
- The quality and depth of the experience and expertise of the individuals who will do the work, and their track record in providing similar successful assistance in other tasks of this nature;
- Appropriateness of the project organization and individual team members; the identity, qualifications, and competence of the individuals (including and sub-consultants) who would actually do and/or be responsible for conducting the project, and the role of each in its completion;

- Quality of the Applicant's technical approach with emphasis on capacity to participate in a productive manner in staff and public meetings, taking into account comments and ideas from members of the public, town officials and staff;
- Appropriateness of the Applicant's Price Proposal, overall cost and the ability to perform the assigned tasks with a time frame and budget acceptable to the Town;
- Overall quality and responsiveness of the proposal;
- Other relevant criteria to be applied uniformly to all respondents.

## Comparative Evaluation Criteria

Each Applicant must indicate if and how they meet the following Comparative Evaluation Criteria. Responses to each of these criteria will be judged in three (3) rating categories: Highly Advantageous, Advantageous and Not Advantageous.

A composite rating for each proposal will be based on the rating of each of the following Comparative Evaluation Criteria.

### 1) Proposed Methodology

- Highly Advantageous – The plan of services proposes a detailed, logical, and highly efficient scheme for producing a complete report that addresses all of the project objectives stated in the RFP.
- Advantageous – The plan of services proposes a credible scheme for producing a complete report that addresses most of the required issues.
- Not Advantageous – The plan of services is not sufficiently detailed to fully evaluate, or the plan does not contain all the components necessary to produce a complete report that addresses all of the required issues.

### 2) Social Media

- Highly Advantageous: Applicant has greater than five years of experience developing marketing strategies that include social media components.
- Advantageous: Applicant has between five and three years of experience developing marketing strategies that include social media components.
- Not Advantageous: Applicant has less than two years of experience developing marketing strategies that include social media components.

### 3) Research Capabilities

- a. Highly Advantageous: Applicant has the capability to research and develop understandings of the Sturbridge tourist population using data sources that will identify groups nationally.
- b. Advantageous: Applicant has the capability to research and develop understandings of the Sturbridge tourist population using data sources that will identify groups in at least the New York and New England regions.
- c. Not Advantageous: Applicant has the capability to research and develop understandings of the Sturbridge tourist population using data sources that will identify groups in the Tri-State area only.

## Contract Award

The Town of Sturbridge will review the proposals and then make an overall evaluation, rating each proposal as either highly advantageous, advantageous or not advantageous. Those proposals failing to meet the Quality Requirements shall be deemed as non-responsive and shall be rejected.

The Town will determine the most advantageous proposal from a responsible and responsive proposer, taking into consideration the applicant's experience, staff capacity, references, proposed plan of services, or any other evaluation criteria set forth in the RFP as well as the proposal price.

As previously noted, the Town reserves the right to reject any proposal that, in its sole judgment, fails to meet the minimum requirements of this RFP; that is incomplete, conditional, or obscure; that contains additions or irregularities; in which errors occur, or if it is deemed to be in the best interests of the Town to do so.

The Town reserves the right to waive minor discrepancies or permit a proposer to clarify such discrepancies and so conduct discussions with all qualified proposers in any manner necessary to serve the best interest of the Town.

This contract is intended to be awarded to the selected applicant the week of 28 August 2019 and the scope of services detailed in this RFP shall be completed by 30 June 2020.

Proposals must be received prior to 12pm on Wednesday, 14 August 2019. **Faxed or electronic copies shall not be considered.**

Proposal should be mailed or delivered too:

Town of Sturbridge  
Attn: Kevin Filchak, M.P.A.  
301 Main Street  
Sturbridge, MA 01566

Questions concerning this RFP shall be made, in writing, to the EDTC at [kfilchak@town.sturbridge.ma.us](mailto:kfilchak@town.sturbridge.ma.us).

## Attachment 1: Certification of Non-Collusion

The undersigned certified under penalties of perjury that this proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word 'person' shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity or group of individuals.

---

Signature of Individual Submitting Proposal

---

Name of Business

---

Date

## Attachment 2: Tax Compliance Certification

Pursuant to M.G.L. c.62C, §49A, I certify under the penalties of perjury that to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

---

Signature of Individual or Corporate Name

---

Social Security Number or Federal Identification  
Number

---

By  
Corporate Officer (if applicable)

---

Date

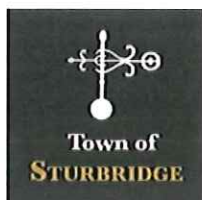


## Attachment 3: Proposal Price Sheet

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# Town of Sturbridge

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A.

Date: 23 July 2019  
To: Potential RFP Applicants  
CC: Jeff Bridges, Town Administrator  
Subject: Responses to RFP Questions

---

## Overview

My office has received a number of questions regarding the Sturbridge Tourist Association's RFP for a branding and marketing strategy. To ensure that everyone has the same information, please see the questions received and my responses below.

Note: All comments (unless otherwise noted) were emailed back to the person inquiring. My exact responses are found below. Comments in brackets "[ ]" are additional comments not found in my initial email response that I have added here for clarity.

## Questions

*Please send me a copy of the Branding/Marketing RFP.*

---

There have been several variations of this question asked. For anyone looking for a copy of the RFP, please go to <https://www.town.sturbridge.ma.us/sturbridge-tourist-association/bids/rfp-branding-marketing-sturbridge-tourist-association>.

*Is the RFP only for the "strategy?" What about the actual "tactics" such as print, radio, billboards, social media? Should that be included in the proposal and if so, what budget is available for creating the ads, spots, social media posts, printing, ad buys etc.?*

---

At this time we are asking that all tasks be completed in the fiscal year so we are looking only at the strategy at this time. If you would like to create 'tactics' to include in a strategy that's fine, that we can leave up to your discretion. Ultimately we are looking at proposals that fulfill our scope of services listed in the RFP, not beyond that or beyond the end of the fiscal year (30 June 2020).

*Can you provide a budget range that will be set aside for this project?*

---

We are not providing a budget range for this RFP. We are asking all potential vendors to provide their best proposals based upon the scope of service listed in the RFP.

*What amount/type of data does STA possess that can be used in the customer profiling task?*

---

The STA does not have much data at this time. This is the hope for the RFP in that it will fill in those gaps.

[The data that the Town does possess is almost all online and can be found in previous studies and reports. Vendors are encouraged to check out [www.town.sturbridge.ma.us](http://www.town.sturbridge.ma.us) for more details].

*As the scale of our primary research activities are heavily dependent upon your available budget, would you please share a budget or not-to-exceed amount for this project?*

---

We are not providing any budget information at this time. We're asking potential applicants to present their best proposal based on the scope found in the RFP.

*[Can] companies from Outside USA can apply for this (like, from India or Canada )*

---

Any company can apply for this. However there will be community meetings/presentations so that will require someone to physically be here.

*[Do] we need to come over there for meetings?*

---

See above.

*Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)*

---

So long as all tasks that we ask in the RFP are met, where you complete the work is not relevant to us. But again this RFP will require your team to be in the USA multiple times so keep that in mind.

*Can we submit the proposals via email?*

---

No, hard copy only as per the requirements in the RFP.

*Looks like a significant investment has been made in wayfinding. Are these signs part of the re-branding effort?*

---

The wayfinding signs have been a significant investment you are correct. They were not part of any "brand" development in the way we are asking for in this RFP.

[These wayfinding signs, and the discussions had during their development cycle, may provide additional guidance for the chosen vendor once selected].



*Social media is a big part of this I imagine. Who runs the social media outlets today?*

---

I run the social media handle @visitsturbridge on twitter and our town [administrator] runs @SturbridgeMass also on Twitter. We also have various facebook accounts run by different committees such as Recreation and the Farmers Market.

*Can you share an example of a past campaign that you like and one that didn't hit the mark? Just an image of it and short overview.*

---

As I am not the one voting on the bids (the STA members are making the decision) I would be hesitant to provide you with a campaign that I thought was successful. I also do not feel it would be fair to ask the STA that question either as it could give your bid an unfair advantage. Therefore I would encourage you to review the RFP and see what some of the goals the STA has set out for this future brand.

*My company is reviewing your brand and marketing RFP and just would like to ask if you have any guidance for a budget range.*

---

Thank you for your question. No I do not have any guidance on that. I am hesitant to provide you a range as doing so may provide your bid with an unfair advantage over others. So that we're fair to you and your bid as well as others, I'm not going to provide you with a range but encourage you to review the bid and provide the best proposal based on our request in the RFP.

*Will we have access to any recent Sturbridge visitor data through your stakeholders or will it be completely up to us to develop the visitor profile? (We have a Research Department so it's not a problem, but it would also be good to have access to data from OSV, local hotels, breweries, etc.)<sup>1</sup>*

---

Any data that the town has access too would available to the selected vendor (some of that data is already on our town website [www.town.sturbridge.ma.us](http://www.town.sturbridge.ma.us)). Various stakeholders in town likely have additional data (though we are not privy to everything); we are aware of certain stakeholders who do have useful information for this project and we would direct the chosen vendor to those parties.

*Do you think two visits to Sturbridge – one for the initial tour and two community meetings and the second for the public presentation to the STA – would be sufficient or would you recommend more time on the ground?*

---

Our scope of service has the chosen vendor on site in Sturbridge for (A) two community meetings, one for general public and the other for stakeholders, (B) a brand presentation at a joint meeting of the STA and the Board of Selectmen, and (C) a public presentation to the STA for the three year marketing strategy. Those are four meetings which we require someone to be onsite. If you feel more time in Sturbridge is necessary, please explain that in your proposal and the STA will take that into consideration during their review.

---

<sup>1</sup> This and all following questions are the first time I have responded to them.

Note though that the RFP states, "The Town will determine the most advantageous proposal from a responsible and responsive proposer, taking into consideration the applicant's experience, staff capacity, references, proposed plan of services, or any other evaluation criteria set forth in the RFP as well as the proposal price.

*Is the 9-plus month timeframe (September 16, 2019 -June 30, 2020) set in stone? We typically do our branding and marketing strategies in a six-month timeframe, although we could spread it out if need be.*

---

All work must be completed by 30 June 2020 due to how our fiscal years work; this is the STA's timetable. Note that the last point in the scope of practice says, "Provide technical assistance, support and guidance during the initial rollout of the brand and strategy (last two months of the bid contract, anticipated May and June 2020)." So if the brand and strategy have been developed and presented, there is the expectation of support during the rollout of the process which may take a vendor to that nine month mark.

In any case, a detailed timeline is expected in the proposal where all of these details can be noted.

*In terms of references, not all of our branding and marketing strategies have been municipal contracts. Many have been with local economic development or destination marketing organizations. Is it ok to submit those entities as references too?*

---

The RFP asks for all jobs performed in the last three (3) years that are similar in size and scope. If a potential vendor does not have any municipal contracts, but has worked with local economic development/destination marketing organizations, include them and the STA will take that into consideration during their review.

*Can you share any insight on why you placed such an emphasis on social media on the Evaluation Criteria vs other forms of marketing?*

---

Given the ubiquity of social media, internet and cell phones use in everyday life, the STA recognized that this is something that needs to be a strong consideration in any branding / marketing strategy especially as these companies and platforms grow. The STA also wants to connect with different generations and the social media generation is one that we currently are not reaching to our full capacity and as such are putting extra emphasis on this in the RFP.

*Do you have a budget range you can share? We want to make sure this is a good fit for both of us. For instance, if you told us that you have about \$50,000-\$75,000 for this project, it's probably not a good fit for us. If you have \$85,000-\$125,000, it would be a good fit.*

---

See previous budget range responses.





# Town of Sturbridge

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A.

Date: 8 August 2019  
To: Potential RFP Applicants  
CC: Jeff Bridges, Town Administrator  
Subject: Responses to RFP Question – Final Round of Questions

---

## Overview

Below are the questions received since our first response to RFP questions on 27 July 2019 as well as my responses to them. Unless otherwise noted, assume all questions and responses are quotes. No further questions will be answered in regard to this RFP.

Questions are in bold font.

## Questions and Answers

**First, do you have data on the effectiveness of the various multi-media campaigns conducted over the past several years?**

We do have some data on this. Any data that we have we shall share with the selected vendor.

**And second, have you or any of your local partners conducted any recent audience research about the perceptions of Sturbridge as a destination?**

We have not but our partners do have some of this data. What data we can share we will do so.

**Considering we are located in Canada but have clients that we work across the US, would you have a local preference that may negatively impact our proposal response?**

All applications will be considered equally and shall be compared against the criteria detailed in the RFP.

**Would you be open to supporting our sustainability goals by reducing the number of printed copies or opting instead for an e-mail or USB only submission?**

While we respect your sustainable goals, we do require the submission of printed copies. If submitted in another format it will not be considered.

**For technical assistance with the brand rollout, do you mean running a campaign, building assets for the same, or..?**

The chosen vendor will help us begin to integrate the Brand and implement the marketing strategy.

**I know the STA page is located within the larger town site. Are you currently using Google Analytics on the STA page or larger town site?**

No we are currently not using Google Analytics on the site in any capacity.

**Is a separate landing page/URL for the Association permitted? (For example: [www.visitsturbridge.com](http://www.visitsturbridge.com), etc.) Or does the site structure need to remain the way it is now?**

The STA used to have [www.visitsturbridge.org](http://www.visitsturbridge.org) go to a separate tourism website. However once the town updated its own website the URL was redirected to [www.town.sturbridge.ma.us/for-visitors](http://www.town.sturbridge.ma.us/for-visitors). The STA still owns the [www.visitsturbridge.org](http://www.visitsturbridge.org) domain.

**Can you generalize any current geographical targets or markets from where you attract the majority of your visitors (radius, states, regions, etc.?)**

Please review the RFP for this answer.

**Have you completed any prior market research or community surveys which would be relevant to review prior to the work beginning?**

Limited work has been done. Anything that the town has access to will be provided to the selected vendor. Some information is available on our town website ([town.sturbridge.ma.us](http://town.sturbridge.ma.us)). See also addendum to RFP.

**Do you have and are willing to share contact databases of visitors to the area which can be utilized for segmentation and market research? If so, what type of contact information is included: name, email, home address, phone number, etc.? How many contacts are available?**

The Town and its partners in the private sector have some data, but it is not a lot. Again any data we have will be shared.

**Is there a ballpark number or budget in mind for the RFP?**

Please refer to the addendum found with the RFP.

**How many applicants are expected to bid on this RFP?**

Unknown.

**Will the Questions and Answers from other bidders be made available to all prior to bid deadline?**

Yes. Some have already been posted as an addendum to the RFP. The second round of questions with our responses will be posted this Wednesday or Thursday.

**Can we review creatives used in recent multi-media campaigns?**

Any previous or current campaigns we would provide to the chosen vendor and would be an active part of any discussions. Past campaigns have included campaigns with Yankee Magazine, Worcester Magazine and Discover Central MA.

**For the community meetings, does the STA have access to facility space for the meetings, or should we include these hard costs in our proposal?**



Yes the STA does have access to facility space and can scale to need. Spaces also have technology for presentations.

**Will the STA assist in publicizing the event or should we include time/media costs to do so?**

Yes the STA would assist in publicizing the event.

**Our Place Branding team at [REDACTED] is reviewing the RFP for Sturbridge town brand and marketing strategy, and we are wondering if there is a specific budget allocated for this project. If so, could you please share that with us?**

Please see the attached addendum to the RFP for the answer to that question.

**What is the allocated budget for this project (or at least budget range)?**

See responses in addendum.

**When referring to developing a community brand, that can mean a lot of things. What do you envision as the specific set of deliverables for that?**

Please review the scope of service.

**Is there any expectation of execution on the strategy? If so, what is the follow-on budget for execution? Or is this just to build a 3-year strategy that will be executed on by Sturbridge? The marketing plan is contingent upon your budget to not only produce the communications, but to run them.**

The scope of the RFP is only for FY2020. Implementation beyond that lies with the STA.

**What are the desired outcomes/KPIs and how do you anticipate success being measured?**

Please refer to the RFP.

**Related to media, is your expectation that this will be a national campaign, or regional as far as say New York and the North East?**

Please refer to the RFP.

**Does the STA have an existing data set with traveler information that can be leveraged, or is the expectation that the winning firm uses a 3rd party data set? Has a proprietary quantitative segmentation ever been commissioned? Would that be of interest, or is the expectation that traveler profiles are built from a 3rd party data set?**

Please refer to the RFP. Our databases are limited to mostly public sources or from our partner agencies, hence our various asks in the scope of service. However we will make available to you what we can.

**Is there a preferred or mandated format for the written reports (e.g. Microsoft Word, Microsoft PowerPoint, etc.)**

That can be determined once a vendor is chosen ahead of each deliverable. However, it is expected that regardless of the format that the chosen vendor will provide detailed deliverables.

**Has the STA worked with an outside partner/consultant/agency in the past? What was the experience?**

Not to this level. This is the first time that the STA has conducted a project at this scale.

**What sort of technical assistance do you envision needing in the last two months of this engagement?**

Initial guidance on implementation of the brand and initial beginning of marketing strategy.

Reviewing the RFP Scope of Services and Quality Requirements, knowing what recent past studies are available will help us greatly in preparing our proposal. Such studies would include, but not be limited to, regional plans, CEDS and WIOA Plans; as well as specialized studies for hotel and conference centers. Local plans for Mainstreet, Chamber of Commerce Strategic Plans, and other plans in place that Sturbridge has, will be very useful.

Any study such as the one's you referenced are publicly available either on our website or on one of our partner agency websites. I would refer you to those.

Also, we would like to know what research and marketing tools you license or have access to. These may include ESRI/EASI/ZOOM Prospector or similar demographic reports, Retail Lease Trac, ERA, Smith Travel Research (STAR) or similar database.

Our databases are limited to mostly public sources or from our partner agencies, hence our various asks in the scope of practice. However we will make available to you what we can.

**Are you all accepting proposals from applicants outside of Massachusetts and/or outside of the New England area?**

**Can you provide guidance on the budget (or budget range) for this project?**

Both of your questions are answered in the addendum posted with the RFP.

**Is there a target budget STA has in mind for this project?**

That question has been answered in the addendum to the RFP posted online.

**Have you previously worked with another firm on a similar project?**

No this is the first branding exercise of note; closest was a wayfinding (signage) project 2-3 years prior.

**Does STA have an Agency of Record?**

The STA is a committee of the Town of Sturbridge Massachusetts. It is a local government committee.

**Why is it important to complete this rebranding effort in the time frame allotted? Are there other external drivers that require a 10-month time frame?**



That is within our municipal fiscal year.

**Beyond the goals outlined in the RFP, what specific, measurable success criteria are outlined for this initiative? Please provide all key metrics/benchmarks for consideration.**

Please see the scope of services in our RFP for details.

**Our agency does not have an office in Massachusetts. Would that make a difference in the selection process?**

Please review the RFP and the addendum. In person meetings will be required and are part of the scope of services.

**Would you be so kind as to inform us if there is a do-not-exceed budget for this project and to what degree cost factors in the selection [for] the winning vendor?**

Both of your questions can be answered in either the RFP and or the addendum we posted answering questions similar to yours. I would direct you to those documents.

**I understand that Sturbridge EDTC is not providing a budget range, but has an official budget been approved?**

As per state law yes the Town does have to produce a yearly budget (which is has for fiscal year 2020) and this committee fall under that. I would direct you to our RFP and addendum for additional guidance.

**I subscribed to the RFP updates but never received an actual copy of the RFP nor do I see a link on the site. The only link I see is the addendum.**

You need to sign up and then you'll be able to access the RFP on the site. Once you input the information you can download a PDF of the RFP.

[There were several questions similar to this related to not being notified of the RFP. All RFP information can be procured on the State's Commbuys page or on our town's website under Bids/RFPs.]

**Do we need 6 copies of the Price Proposal?**

Yes

**When do you anticipate the two community meetings will take place, or will that be at our discretion?**

A date will be determined between the chosen vendor and the Town but should take place towards the beginning of the process.

**What specific visual collateral do you expect to be within the branding guidelines?**

The guidelines regarding use of our brand should be understandable and clear for both Town of Sturbridge staff and committees, as well as our partner agencies and businesses.

**When do you anticipate the presentation of the written brand guidelines to the joint meeting of the Sturbridge Tourist Association and the Board of Selectmen will be, or will that be at our discretion?**

A date will be determined between the chosen vendor and the Town but it must be within the timeframe described in the RFP.

**When do you anticipate the presentation of the three (3) year marketing strategy to the Sturbridge Tourist Association will be or will that at our discretion?**

A date will be determined between the chosen vendor and the Town but it must be within the timeframe described in the RFP.

**LEGAL NOTICES**

The Sturbridge Tourist Association is soliciting proposals from qualified vendors to develop a community brand for Sturbridge and a three (3) year marketing strategy. All details regarding scope of service, qualifications and the review process are included in the RFP which can be accessed at: <https://www.town.sturbridge.ma.us/bids>. It can also be access on the State's Central Register and at [www.commbuys.com](http://www.commbuys.com). All proposals are to be submitted in sealed envelopes to the Economic Development and Tourism Coordinator at 301 Main Street, no later than 12:00pm on Wednesday, 14 August 2019. Questions related to the proposals shall be submitted, in writing, to [kfilchak@town.sturbridge.ma.us](mailto:kfilchak@town.sturbridge.ma.us) no later than 7 August 2019 at 4:00pm.

July 07, 28, 2019

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July 07, 28, 2019

# Page Break





# Town of Sturbridge

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A.

Date: 8 August 2019  
To: Sturbridge Tourist Association  
Subject: Monthly Report – July 2019

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Below is a brief summary of my work since the last STA meeting. If you have questions, comments or concerns about any of the items listed below please contact me.

## Accela Training

On 8/12 and 8/13 I will participate in training for our new permitting software from Accela. This will allow me to see the progress of permits and will provide for excellent awareness of projects occurring in Sturbridge.

## Board of Selectmen Presentation

On 8/5 I presented to the Board of Selectmen on a number of important items. The first was a discussion of the RFP that the STA has undertaken over these past few months. I, along with Brian Amedy, met with and briefed the Board on our goals for the RFP and noted that we want the BoS involved in the process throughout. The Board was supportive of this initiative. Additionally, I provided updated versions of the Town's local Tax Incentive Policies (formerly TIF Policies) and an application for it; the Board adopted both documents.

## Business Breakfast

On 9/10 there will be a business breakfast held at the Sturbridge Town Hall. At this breakfast we shall hold our usual meeting style featuring an update from the town, a major topic of discussion, and ample time for question and answer at the end. This month we shall be talking about the annual renewal process and helping guide businesses through it. To register for this event, please email or call me at your convenience but no later than 9/6.

## Business Meetings

I have had several meetings with business owners over the past month. On 7/30 I met with the Chamber of Commerce to discuss local issues. On 8/8 I met with the owners of the new Escape the Pike escape room on Route 131 behind Teddy G's. On 8/13 I met with the General Manager of G&F in Fiskdale. On 8/21 I plan to meet with the General Manager of OFS on Hall Road.

## Business Tour

I have a potential business interested in hosting a business tour sometime this fall. I shall provide the STA with more information as it becomes available.

## Commonwealth Community Compact

I am currently collecting quotes from vendors to conduct an economic development self-assessment and strategy development. All vendors have been asked to submit quotes to my office electronically by 8/9. I should have an update for the STA at the meeting.

## Discover Central MA – Special Events Committee

I have volunteered to serve on DCM's newly formed Special Events Committee. The Committee is slated to meet on 8/14 at which time I should have information to report back to the STA.

## License Renewals

I have been working with staff to develop the license renewal process for businesses 2020 licenses. I chaired a meeting on 8/6 of inspection departments to finalize the license process and agree on the procedures. The license renewal packets shall be sent out to businesses within the next week.

## New Member – Dawn Merriman

I am excited to announce that the Board of Selectmen voted to approve Dawn Merriman as a member of the STA on 8/5. She is a hotelier with the Comfort Inn and Suites and will be an asset to the STA.

## Request for Proposal

As discussed, I have been overseeing the RFP process, answering questions from potential vendors and ensuring that the RFP was properly posted et al. All of this information can be found within the packet.

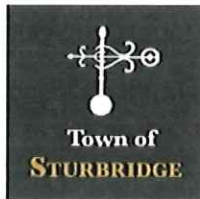
## Special Events Committee

On 7/16 I attended the Special Events Committee meeting. The Committee is preparing to hold several events this fall including a Lawn Games on the Common on 8/22, a Community Bonfire on 10/3 and a road race with a yet to be determined date. The Farmers Market will continue to run through 10/6.

## STR Report

I have provided a copy of the STR report for Q2 of 2019 for the members in their binders.





# Town of Sturbridge

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A.

Date: 25 July 2019  
To: Board of Selectmen  
CC: Sturbridge Tourist Association; Jeff Bridges, Town Administrator  
Subject: Request for Proposal – Branding and Marketing Strategy

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On behalf of the STA, I am providing the Board with an overview of a Request for Proposal (RFP) for the development of a town brand and a multi-year marketing strategy that the Sturbridge Tourist Association is currently conducting (see attached). As the Board is aware, it is the mandate of the STA to support tourism to and marketing of Sturbridge. It has done this over the years by funding major events<sup>1</sup> and by supporting marketing campaigns with major regional publications<sup>2</sup> that have brought thousands of patrons to Sturbridge. However it has been frequently noted that while we have a great product, our messaging of it lacks a cohesiveness that can sell the whole community. Additionally there is message confusion as there are a number of different factors that can make selling the community difficult.

Therefore it was the decision of the STA to make a significant investment this fiscal year to develop a coherent and readily understood town brand that can be used to market the community to a wide variety of audiences. This brand would then be used in a multi-year marketing strategy that is to be developed concurrently with the brand. The development of both will enable the town for the first time, to present a singular message of what Sturbridge is to residents, visitors and businesses alike. It must be noted, the goal here is not to create a logo; the goal is to create a message that will resonate with different audiences. Jeff Bezos, CEO of Amazon, said it most succinctly, "Your brand is what other people say about you when you're not in the room."

Throughout this process, the STA would like to have the Board of Selectmen be an active participant in these discussions and to provide its feedback throughout the process. Furthermore once a brand is developed, it is the STA's hope that the brand will be formally adopted by the town and used not just by the STA, but by everyone. This will require the Board and the STA to help implement and incorporate the new Sturbridge brand into daily use by staff and committees, as well as encouraging our private sector partners to use it as well in an effort to present a unified message to all.

It is the STA's hope that by developing this brand and marketing strategy, Sturbridge will gain another tool to promote itself to prospective residents, visitors and businesses alike. Once adopted and incorporated, this brand will support many different missions in Sturbridge and as such, the STA requests the Selectmen's support throughout this process.

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<sup>1</sup> Examples: Pintastic, Harvest Festival, Rick Hoyt Sturbridge Half Marathon, the Big MOE, etc.

<sup>2</sup> Examples: Yankee Magazine, Hartford Courant, Worcester Magazine, Albany Times Union, etc.