

Sturbridge Tourist Association

A Committee of the Town of Sturbridge

Regular Meeting Agenda

11 September 2019, 6:00pm

Center Office Building, 301 Main Street, Second Floor Meeting Room

1. Call to Order
2. Review of Previous Minutes – 14 August 2019
3. Treasurers Report
4. Old Business
 - a. Request for Proposal – Branding and Marketing Study
 - i. Ranking of Technical Proposals
 - ii. Review of Price Proposals
 - iii. Ranking of Price Proposals
 - iv. Ranking of Overall Proposals
 - b. Funding Request – Old Sturbridge Village
 - c. Funding Request – Gatehouse Media
5. New Business
 - a. Discover Central MA – Pagio Invoice
6. EDTC Report
7. Next Meeting – October 9th
8. 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.

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Sturbridge Tourist Association

A Committee of the Town of Sturbridge

Meeting Minutes

14 August 2019 – 6pm

Center Office Building – 2nd Floor Meeting Room

Members: Brian Amedy (BA); Tom Chamberland (TC); Dawn Merriman (DM); Jeff Ardis (JA); Nick Salvador (NS).

Staff: Kevin Filchak (KF), Economic Development & Tourism Coordinator; Jeff Bridges (JB), Town Administrator.

Guests: Nathan Hardt (NH), OSV; Sarah Blackwell (SB), Break the Ice Media (BTI); Rhonda Vaccaio (RV), BTI; Chris Tieri (CT), OSV; Gary Zima (GZ), Hamilton Rod and Gun Club (HRGC); Kevin Soucie (KS), HRGC; Diane Galipeau (DG), Gatehouse Media.

1. Call to Order – BA called the meeting to order at 6pm and welcomed Dawn Merriman as the newest member to the Sturbridge Tourist Association.
2. Approval of Previous Minutes – 10 July 2019 – **BA MOVED to accept the minutes as written, NS seconded. APPROVED (3-0-2).**
3. Selection of Chair / Vice Chair for FY2020 – BA explained the goal of filling the position of Chair and Vice Chair. **TC MOVED to reappointed BA as chair. NS seconded APPROVED (5-0). BA MOVED to reappointed TC as Vice-Chair. NS seconded. APPROVED 5-0.**
4. Treasurers Report – KF noted purchases. TC asked about encumbered. **TC MOVED to accept the Treasurers Report. BA seconded. APPROVED (5-0).**
5. New Business
 - a. Funding Request – Old Sturbridge Village – Second Review – [Discussed third] BA welcomed the presenters and noted that due to his close contact with OSV he would yield his chair to TC for the discussion. CT explained BTI's history and why they were chosen as the destination marketer for OSV; an audit showed that OSV was lacking in digital marketing, but also in connecting with tour bus companies. CT noted that it was not in the budget this year to undertake such an initiative, hence their request to the STA. CT explained the benefit of this project to the town as a whole. CT said the goal is to build relationships with businesses, and explained that their request has been altered

from their original proposal. CT detailed the staff position that would be started at OSV for this project and BTI's role specifically about its sales reps. RV explained how their business to business process worked, stating that Sturbridge would benefit by talking about professional development. RV shared an example of Cayuga County, a client of theirs. RV explained their proposed positioning and messaging strategy. RV said they would create a one page itinerary sheet and an e-newsletter for those tour operators who are within a ten hour drive time of Sturbridge. CT explained that the village had done an attitudinal segmentation that showed the Village audience consisted of history buffs, family focusers, hands on learners, and guide groupies. RV talked about lead generation process for getting to these groups. JA asked why traffic had been dropped over the years. CT asked BA who gave background of bus tours in Sturbridge, noting that people stopped putting the effort into the process. CT talked about Discover Central MA and noted their interest to participate. RV said that the Publick House is brining families tours to town. RV said there's a lot of similar communities to Sturbridge at these trade shows and if one does not have contacts with vendors then it makes bringing tours difficult. RV explained more of the lead generation and specifically the trade and travel show referenced in the bid. CT explained that the next steps, inviting community partners to the Village to have community bonding/brainstorming sessions for building relationships. RV said she'd be a resource for businesses. JA asked if this would be the Community / Tour Readiness and CT and RV said yes. General discussion on tour readiness. CT said she spoke with OSV and looked at an 18 month commitment to the program, reducing their ask this fiscal year to \$12,500 and the same amount requested in FY 2021. OSV would invest \$25,000 of their own in the project during this period. DM asked about average age of the visitors; RV said the average age was seniors/baby boomers but that millennials are bringing their parents on the tours more. DM noted that elderly tours are decreasing using town as stopover vs. destination. General discussion. TC noted previous campaigns in norther New England were not strong and asked about international travel. RV said international travel is very lucreative and competitive, said that will be something to look at eventually. TC brought up trails as another area to sell Sturbridge, he also brought up need to bring student groups; RV agreed and said that it is another lucreative market. NS asked about how allocations would work with fiscal years and TC explained. General discussion on budget. TC noted he appreciated the decrease but until the amount for the RFP is known, he is hesitant to commit funds. KF asked if delay would be problem for OSV, CT said no. JA said he was pleased with the presentation and plans, and would like to connect the chosen RFP vendor to this project. CT said they can position themselves with whomever is selected. RV said group is based on collaboration. **TC MOVED to defer a decision to August 28th meeting. NS seconded. APPROVED (4-0-1).** BA noted that all positions at the Village must work together and be on the same page for this to be a success. [NH, SB, RV, CT left the meeting].

JA brought up KF cautions in Cover Memo. BA said that his theory is that they went to the Board and got some buy in from the Board of Director who will help to fund this proposal. General discussion on funding of this program and the staffing of the OSV question. JA asked if KF has any lingering concerns, KF said staffing for event. BA said that STA should also be at the table during any discussion. General discussion on

collecting data and sharing data with the RFP vendor. BA also raised the point of OSV being closed and having a bus group. JB noted that Monday's may be a slow day and that it may be something that could be opened for these bus groups. General discussion on the hotel rooms at the village and overflow to other hotels. General discussion on bus group size. BA suggested asking JA's question, "Do they really have someone on staff now, or are they willing to bring someone on from outside?" "What do they do when the Village is closed?" General discussion on tours.

- b. Funding Request – Gatehouse Media – Frist Review – [Discussed first]. DG present to speak on behalf. Explained that the campaign would be \$500/month with 50k views and would run September – December. DG went over the campaign results from the STA's spring campaign, noting that the campaign went very well. NS asked about the industry average and DG explain averages. TC asked about the recent purchase by Gatehouse media of Gannet, DG said that there won't be any significant changes in Central MA but new opportunities may open. TC asked if this gives new opportunities, DC said no decisions made yet. General discussion on the merger and the opportunities they could yield. TC noted that there has been a good relationship with Gatehouse but that with the RFP this year it makes the decision challenging. TC would prefer to make a motion to table this for now, BA echoed that same sentiment. JA asked if a digital program could be put together quickly, DG said yes. JA asked about targeting in previous campaign, KF said that cities in New England were targeted. JA asked for more targeted data to see if the STA needs to tweak the zip codes, DG said yes that it possible. **TC MOVED to postpone a decision to the Sept. meeting. BA seconded. APPROVED (5-0).** [DG left the meeting].
- c. Funding Request – The Big MOE – First Review [Discussed second] – GZ and KS representing. KS explained the request. KF explained the purchase from previous years. JA asked why the cost of insurance went up. KS and GZ noted that there have been incidents at other clubs, but not at the Hamilton Rod and Gun Club. GZ explained the activities at the event and why people are cautious with these events. BA raised the question of whether the STA should cover the insurance cost of the event, noting he would be more comfortable covering another cost for the event, noting that the insurance was removed from the Herbfest. TC recalled the debate, and he noted he had used the STA's scoring sheet and there was some missing information, saying the application lacked detail. TC asked if the HRGC could better track information about people staying at the Big MOE for more detailed data point. General discussion on data from the Big MOE and discussion on hotels. DM talked about how the Comfort Inn tracks the event. TC noted he is in favor of supporting the request this year but next year would be interested in covering something else at the event. General discussion on other events at the HRGC, KS talked about the Reinheart Archery event in recent months. BA talked about getting event to KF for increased promotions. KS talked about the recent car shows. **TC MOVED 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. DM seconded. APPROVED 5-0.** [GZ and KS left the meeting].

- d. Request for Proposal – Opening of Technical Proposals – [Sturbridge Procurement Officer JB was present for opening of RFPs]. KF explained the RFP process, noting 20 had applied. TC noted for proposed methodology, members think about how many questions are left after reading each proposal, for social media, think do they have it or not. JA suggest that points should be justified for each proposal, TC explained that this will come into play once price is considered. KF said all things must be justified. TC asked about those not being justified, KF said read everything and score. NS said that he has scheduling conflict; group suggested moving date to 8/27 so that he could be present for the vote.

BA opened the technical packages for the RFP in full view of the STA and the Chief Procurement Officer, JB. The following were recorded as submitting their proposals on time and correctly.

- i. Blue Seed Solutions
- ii. Strategic and Creative Marketing
- iii. Avant Marketing
- iv. Sperling Interactive
- v. Open the Door
- vi. Mass Live Media / Advance Travel and Tourism
- vii. Field Goals US
- viii. Direggio
- ix. Hub Collective LTD
- x. Artyfact
- xi. Innovative Planning
- xii. Contrast and Company
- xiii. Guide
- xiv. Stebbings Partners
- xv. Paul Fahey
- xvi. DCI
- xvii. O'Neill and Associates
- xviii. Engage Strategies
- xix. Chandlerthinks
- xx. Hemsworth Communications

Members received a copy of each bid for personal review over the following two weeks.

6. Old Business – None.

7. EDTC Report – KF encouraged members to review on own time and to ask questions if any via email or phone.

8. Correspondence – KF noted that the TLGV had send a thank you letter to the STA for their donation to their upcoming annual event at the Publick House.
9. Next Meeting – 28 August 2019 at 6pm – moved to 27 August at 6pm.
10. Adjourn – **BA MOVED to adjourn at 20:35. TC seconded. APPROVED (5-0).**

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Break

Account	Account #	Original Total	Revenue Adjustments	Revised Total	Expenditure	Current Total Balance
Community Support	24400 56552	\$ 40,359.00	\$ -	\$ 40,359.00	\$ 6,111.50	\$ 34,247.50
Marketing and Advertising	24400 56551	\$ 109,974.00	\$ 5,285.00	\$ 115,259.00	\$ 4,953.50	\$ 110,305.50
Benefits	24400 51210	\$ 13,734.00	\$ -	\$ 13,734.00	\$ -	\$ 13,734.00
Salaries / Wages	24400 51130	\$ 19,223.00	\$ -	\$ 19,223.00	\$ 2,192.40	\$ 17,030.60
Tourism	58618	\$ -	\$ -	\$ -	\$ -	\$ -
Total		\$ 183,290.00	\$ 5,285.00	\$ 188,575.00	\$ 13,257.40	\$ 175,317.60

FY 2019 Encumbered Funds*	24400 56551	\$ 5,285.00	\$ -	\$ 5,285.00	\$ -	\$ 5,285.00
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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	39%	94%	33%	36%
August	39%	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	17%	81%	54%	30%
August	17%	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

Community Support	FY2020	FY2019	FY2018	FY2017
July	9%	5%	13%	7%
August	9%	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	4%	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

Community Support	FY2020	FY2019	FY2018	FY2017
July	91%	95%	87%	93%
August	91%	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%
Marketing	FY2020	FY2019	FY2018	FY2017
July	100%	99%	97%	100%
August	96%	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

**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.

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 TOWN OF STURBRIDGE
 STA JULY 2020

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FOR 2020 01

ACCOUNTS FOR: 244	STURBRIDGE TOURIST ASSN	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
<hr/>								
24400	STURBRIDGE TOURIST ASSN							
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24400 51130	SALARIES/WAGES	19,223	0	19,223	2,192.40	.00	17,030.60	11.4%
24400 51210	EMPLOYEE BENEFITS	13,734	0	13,734	.00	.00	13,734.00	.0%
24400 56551	MARKETING/ADVERTISI	109,974	5,285	115,259	.00	.00	115,259.00	.0%
24400 56552	COMMUNITY SUPPORT	40,359	0	40,359	3,000.00	.00	37,359.00	7.4%
	TOTAL STURBRIDGE TOURIST ASSN	183,290	5,285	188,575	5,192.40	.00	183,382.60	2.8%
	TOTAL STURBRIDGE TOURIST ASSN	183,290	5,285	188,575	5,192.40	.00	183,382.60	2.8%
	TOTAL EXPENSES	183,290	5,285	188,575	5,192.40	.00	183,382.60	

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TOWN OF STURBRIDGE
 STA JULY 2020

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FOR 2020 01

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
GRAND TOTAL	183,290	5,285	188,575	5,192.40	.00	183,382.60	2.8%

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

Budget Reconciliation

Department	Sturbridge Tourist Association
Month	July 2019
Balance Agree	X
Balance Does Not Agree	

Explanation of Variance: NA

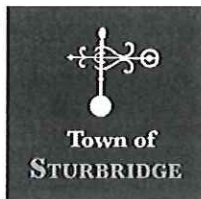

Kevin Filchak, M.P.A.

Department Head


28 August 2019

Date

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Town of Sturbridge

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

Date: 22 August 2019
To: Sturbridge Tourist Association
Subject: Guidelines for RFP Review / Selection

Below is a guide for how the process of RFP review can occur at the 27 August meeting.

1. Ranking of Technical Proposals
 - a. Using the excel sheet provided, please go through and provide the group with your individual ranking for each of the first three evaluation criteria (Administrative Assistance will be provided with excel sheet for accurate calculations).
 - b. Have a discussion whereby you identify three pros and three cons about the technical aspect of the application.
2. Review of Price Proposals
 - a. Open each envelope individually. For each vendor record what their proposed price is for the project.
 - b. Open ALL bids first before ranking them.
3. Ranking of Price Proposals
 - a. Using the excel sheet provided, please go through and provide the group with your *individual* ranking for the price evaluation criteria.
4. Ranking of Overall Proposals
 - a. Before continuing, tally all scores and provide a ranking for each proposal.
 - b. Consider each bid; determine which provides the most advantageous proposal for the STA and the town (please view the attachment if you need to review the RFP requirements).
 - c. The STA can reach this determination in a number of ways. One suggestion is that you take the top ten most advantageous, and remove from consideration the ten least advantageous. Repeat this process to select the top five most advantageous proposals and remove the five least advantageous. Repeat this process with the top five until the most advantageous proposal is selected.

If there are questions, please direct them to the Town's Chief Procurement Officer Jeff Bridges who will be present for the meeting.

Attachment – RFP Selection

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

- 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.

From:  "Jeff Ardis" <JeffreyArdis@Charter.net>
Subject: PLEASE FORWARD TO STA (thanks - Jeff)
To:  **Kevin Filchak**

Thu, Aug 29, 2019 1:05:35 PM 

Attachments:  Attach0.html / Uploaded File

14K

Hi Kevin –

Would you please circulate this to the group? I happened to just empty my deleted emails so don't have one you sent copying everyone to capture the addresses.

All:

Disappointing that we couldn't convene on Wednesday, but these things happen.

Unfortunately, now I'M the one about to throw a wrench in the scheduling works. I am starting a new job on Tuesday (Sep 3rd) as business development director for a UK-based company called IBT Online (www.IBT.onl) that does website localization and online marketing for small & medium-sized exporters. I will be spending most of the week attending a conference in Boston. Then from Sep 9th-11th (now likely extended to 12th & 13th) I will be traveling in Maine, New Hampshire, and Vermont with my new boss meeting partners, customers, and prospects.

Kevin shared the feedback that most people want to meet next Wednesday Sep 4th. I just can't make that work, even on day two of a new job I am trying to get back to Sturbridge to meet my 7th-grade daughter's new teachers during Parent Night at the junior high.

Brian, I sensed that you want to make this selection as quickly as possible. However, I am asking the group to slow the process down and schedule our next meeting for Thursday September 12th. I believe it's imperative that the whole committee (including Kevin, the ecodcv professional with a master's degree in this stuff!) be part of these discussions. I realize reading these detailed proposals that this project is vitally important to the town, and we owe it to all the businesses and residents to get it right. We will be spending a lot of money over an extended period of time to put Sturbridge back on the map and we have to find the right partner.

I'm not worried about the timeframe. Yes – we need to respect some seasonality for execution (meaning we need the final plan next summer / early fall, not Christmas 2020). But it should be easy for our preferred partner to shift a 9- or 10-month process a month or so. I don't feel compelled to rush back to OSV and BTI to tell them what we're spending so they can write up a revised invoice for the bus tour marketing plan. We all agree it's a good idea and I think they know we will execute it and help fund a presence there. We can take that up as soon as possible – but in my view everything is secondary to this RFP.

Perhaps we can do something to accomplish more between now and our next meeting. In the spirit of

Mitt Romney's "48% principle", I'll bet we would agree on a few that should definitely be finalists and more that shouldn't be considered further. **Why don't we all share our top few rankings with Kevin (not just the scorecard but with some qualitative comments) and see if we can agree on a finalist pool of 4 or 5 to discuss?** If not we can debate those "on the bubble", but it helps narrow down. If Kevin (or Kevin and Brian and TA Jeff, to meet regulations) has to open the price proposals and capture the data, that's fine. But frankly I don't care about the costs for any but the finalists. We know the one we like best won't be the least expensive. And we can always go back to the preferred candidate and ask them to re-scope within our budget.

Please give this some thought and share your feedback. This is an exciting opportunity and we should all be fully engaged.

Thanks! Enjoy the long weekend.

Jeff

P.S.: I'll start with my list of a few I believe MUST be considered seriously (in no particular order among them):

1. Guide Studio (OH)
2. DCI (NYC)
3. Engage Strategies (WDC)
4. Innovative Planning / FHI with Camoin Associates (Albany)
5. Overitt (Albany)
6. Stebbings Partners (North Attleboro)
7. Hemsworth (FL)

(It's tough, isn't it?)

Jeff Ardis

JeffreyArdis@Charter.net

+1 (860) 930-4522

Connect with me on LinkedIn at:

<https://www.linkedin.com/in/jeffardis>

From:  "Jeff Ardis" <JeffreyArdis@Charter.net>

Thursday, August 29, 2019 1:05:35 PM 

Subject: more considerations (Jeff)

To:  **Kevin Filchak**

Attachments:  Attach0.html / Uploaded File

12K

Kevin, would you please also share this with the group?

ALL:

For sake of the greater dialogue, I wanted to share with you some of the criteria I considered when reviewing the proposals:

At the end of the day, which proposals “got me thinking”?

1. Do they have the right kind of experience – in the right places?
 - a. “place marketing” is different from corporate branding
 - b. Are they close enough to be managed easily, while being far enough away to have a fresh view of Sturbridge (maybe Mass Live and Oregon don’t fit)?
 - c. Bonus points for having worked with historically significant communities in New England or the Northeast
2. Do they “get” our goal – the need for an over-arching marketing message that is compelling across the entire Sturbridge experience?
3. Are they scalable & flexible, not only with recommendations but also with implementation cost?
4. Do they bring something “out of the box” or unique to the process, a different approach?
 - a. Wayfinding expertise?
 - b. The M3 survey technique?
 - c. The idea of black & white logos for initial review so people focus on concept and not color?

Jeff Ardis

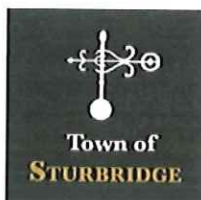
JeffreyArdis@Charter.net

+1 (860) 930-4522

Connect with me on LinkedIn at:

<https://www.linkedin.com/in/jeffardis>

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Break



Town of Sturbridge

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A. 

Date: 22 August 2019
To: Sturbridge Tourist Association
Subject: Cover Memo – Old Sturbridge Village

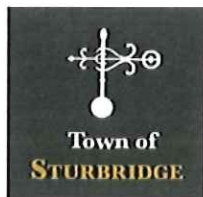
The STA has reviewed the initial application, asked written questions, and had a formal interview with both Old Sturbridge Village and the members of Break the Ice Media. The STA postponed the vote until a vendor for the RFP project was chosen.

It is recommended that the STA consider any spring marketing initiatives or other expenses that may occur in the first half of calendar year 2020, including those that may be associated with the rollout of the new branding/marketing campaign as described in the proposals.

Suggested Motion

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

MOVE to allocate from the Marketing line item \$12,500 for Old Sturbridge's Village and Break the Ice Media's initiative to solicit bus tour operators to Sturbridge.



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

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

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 1 2 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

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.

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:

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

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

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) 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.

Funding amount requested *

\$25,000

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

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

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

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

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

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."

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

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.

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.

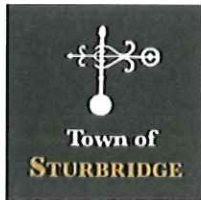
As grantee for the project as detailed in this application, I certify that these statements made herein are true and that the funds requested to be disbursed fulfill the purpose indicated in the approved application. [If your application was approved with a condition] I further certify that the conditions 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: 22 August 2019
To: Sturbridge Tourist Association
Subject: Cover Memo – Gatehouse

The STA has reviewed the initial application, and had a formal interview with Gatehouse New England. The STA postponed the vote until a vendor for the RFP project was chosen.

It is recommended that the STA consider any future marketing initiatives or other expenses that may occur in the first half of calendar year 2020, including those that may be associated with the rollout of the new branding/marketing campaign as described in the proposals.

Suggested Motion

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

MOVE to allocate from the Marketing line item \$2,000 for a fall/winter campaign with Gatehouse New England.



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

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

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) 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?

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

Funding amount requested *

\$2000

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

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

\$500/month Total Cost = \$2000

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

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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From:  Stephanie Ramey <Sramey@discovercentralma.org> Wed, Sep 04, 2019 1:22:02 PM 

Subject: STA - Advertisement

To:  **Kevin Filchak**

Cc:  Paul Giorgio <pgiorgio@pagioinc.com>

Attachments:  Attach0.html / Uploaded File 6K

Hi Kevin,

Nice speaking with you yesterday. I have cc'd Paul Giorgio on this email and had a brief conversation with him yesterday regarding your ad in the visitor guide.

Paul mentioned STA always runs an ad. I just want to confirm that you will not be moving forward with one in the Spring/Summer edition.

I was thinking about this for a bit yesterday afternoon. It would be a shame to not have the town represented in an edition. We distribute over 35,000 copies not only locally, but also along I-84, I-90 in Boston and Providence (and other locations).

If you will be running an ad in the Spring, DCM will comp. the half page as our agreement states. If you will not be running an ad, then Paul can make an adjustment to the current invoice.

Please advise...

Thanks!

Steph

Stephanie Ramey
Executive Director
Discover Central Massachusetts
(508) 753.1550 x300
sramey@discovercentralma.org
www.discovercentralma.org

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Break



Town of Sturbridge

Economic Development & Tourism Coordinator

Kevin Filchak, M.P.A.

Date: 4 September 2019

To: Jeff Bridges, Town Administrator

CC: Sturbridge Tourist Association

Subject: EDTC – Monthly Update – August 2019

Below is my monthly update for August 2019. If there are any questions regarding the contents, please contact me for more information.

Annual License Renewals

On 6 August I organized a meeting with those departments involved in the annual licensing process. The goal was to agree upon a process for conducting and completing the renewals that was amenable to all. The meeting was productive and all parties agreed on a path forward for the renewals. Following the meeting, staff organized and prepared cover letters, fee sheets and the renewal application. At this time I have emailed or mailed ninety-nine (99) renewal notices to businesses in Sturbridge (see attached list).

Bonfire

At this time the Recreation Director and I are working to organize a fall bonfire on the Town Common. The original planned date for the bonfire was 3 October from 4pm – 8pm. There are a number of local vendors lined up to participate including BT's Smokehouse and the Publick House. However, due to the recent issues with EEE and all activities on Town property banned from 6pm – 8am, it was determined that the event should be postponed until late October. At this time no secondary date has been chosen as it is unknown how long the EEE alerts may be in effect.

Business Breakfast – 10 September 2019

There will be a small business breakfast on 10 September at 8am in the Sturbridge Town Hall. The event is open to all businesses in Town and all have been encouraged to come. The focus will be to provide businesses with an update on what the Town has been working on, share information about the annual license renewal process and most importantly, give businesses the chance to ask questions. As usual I will be providing food and drink from Cedar Street Café. Finally, for those who cannot attend, the event will be filmed so that the link to the presentation can be shared.

Business Directory

A recognized challenge amongst staff is that each department maintains an individual list of businesses. Each list may and does have differing information on the same businesses. This problem became quite apparent during the license renewal process when emails or phone numbers proved incorrect across multiple lists.

To mitigate this, I am organizing a meeting between the Town Clerk, Building, Board of Health and Board of Selectmen offices to create a canonical list. More information to follow.

Commonwealth Community Compact

Following a solicitation for quotes beginning in July (see attached), two vendors submitted quotes to conduct the Commonwealth Community Compact grant. The selected vendor is McCabe Enterprises lead by Kathleen McCabe. Ms. McCabe's firm was approved for the grant on 3 September at a meeting of the Board of Selectmen. I met with Ms. McCabe and her associate on 4 September and had an initial conversation about the project. Initial plans are to conduct resident and business surveys in late October and early November and tie those in with the Harvest Festival to get more participation.

More information to follow in future reports.

Meetings with Businesses (G&F, Escape the Pike and OFS)

I met with several business owners and had several in depth conversations over the past month:

- Escape the Pike – 08/08/2019 – I met with the owner of the new Escape the Pike business here in town to talk about different ways the business can market itself.
- G&F – 08/13/2019 – I met with the General Manager and Chief Financial Officer to talk and learn more about their business.
- OFS – 08/21/2019 – I met with the General Manager of the facility to talk and learn more about their business.

Newsletters

Please follow the links below to view the newsletters for the month of September:

Business

www.sturbridge.gov/businesses/news/business-newsletter-september-2019

Event

www.sturbridge.gov/visitors/news/event-newsletter-september-2019

Pre-Concert Lawn Games on the Common

On 22 August the Special Events Committee held its first ever pre-concert lawn games on the Town Common. The event was relatively simple to set up and manage and was zero cost. It ran from 3:30pm to 5:30pm. Those who participated did so in the second hour leading up to the start of the concert and were using the games up until they were put away. This serves as a strong proof of concept for this type of activity. For the future, it might be best to restrict it to the hour prior to the start of the concert. These games could even be left out during the concert.

The Committee will discuss this at its next meeting and decide how it wishes to proceed.

RFP – Update

Twenty vendors submitted proposals for the branding and marketing RFP. These range from small to large firms from across the United States. There were numerous delays in scheduling a second meeting for this review; this was due to fault with schedules and our own email server. However the committee has found a day that works for the next meeting on 11 September. At that time a vendor will be chosen and work will begin shortly thereafter.

Senior Center Talk

I am scheduled to speak at the Senior Center on 9 September to discuss our local economy and answer their questions. I try and go to the Senior Center every few quarters to maintain a connection with those residents.

Sturbridge Road Race

As per the direction of the Special Events Committee, the Recreation Director and I have been beginning work on a fall road race. This race will be in support of local veterans and their families. We are working with the Veterans Agent to see what sort of resources we can bring to the event. There are a lot of details still to be determined but we have established a date for the race: 16 November.

More details to follow.

Tax Incentives – Updates

On 5 August the Board of Selectmen approved the updates to the new Tax Incentive Policy. Additionally, I have been speaking with Sturbridge Metallurgical and they are preparing to submit to the Town and the State their application for a Tax Incentive. Once that is done I shall begin the Tax Incentive process as per our new Town Policy.