

# CLACKAMAS COUNTY BOARD OF COUNTY COMMISSIONERS

## Study Session Worksheet

**Presentation Date:** July 10, 2012    **Approx Start Time:** 2:00pm    **Approx Length:** 1 hour

**Presentation Title:** Tourism & Cultural Affairs Update: Agency Contract, Five-Year Business Plan, Arch Bridge Re-Opening Event

**Department:** Tourism & Cultural Affairs (CCTCA)

**Presenters:** Danielle Cowan/CCTCA, Jeannine Breshears/CCTCA, Daphne Wuest, TDC Chair and Peter Watts/TDC Vice Chair

**Other Invitees:** Tourism Development Council Members

### **WHAT ACTION ARE YOU REQUESTING FROM THE BOARD?**

**Item 1)** Review and consideration of awarding new 5-year contract for marketing agency services for the Department of Tourism & Cultural Affairs (CCTCA) with borders perrin norrande (sic; herein referred to as BPN), based on the Scope of Work in the RFP, the Phase 1 proposal from BPN, and the final contract terms from BPN dated June 28th, 2012.

**Item 2)** Review and comment on CCTCA's DRAFT Five-Year Business Plan.

**Item 3)** UPDATE: Arch Bridge (Oregon City/West Linn) Re-Opening

### **EXECUTIVE SUMMARY:**

**Item 1)** The Tourism Development Council (TDC), on behalf of the County, has a contract with a marketing agency to work with the Council and CCTCA staff to create and execute marketing strategies that promote to visitors this destination we call Oregon's Mt. Hood Territory. The previous contract was with Turtledove Clemens for one year with four, one year renewals. All renewals allowed for in the 2007-2012 contract have been used and expired as of June 30, 2012.

CCTCA worked with Purchasing to solicit an RFP for a marketing agency. We set up a two phase process. In the first phase we reviewed seven written proposals and recommended four finalists for presentations in phase two. The phase one review committee members were: Peter Watts - TDC Chair, Daphne Wuest - TDC Co-chair, Tammy Thompson - Monarch Hotel, Courtney Ries - Travel Portland, and Danielle Cowan/Jeannine Breshears/Jae Heidenreich - CCTCA staff.

The four agencies selected for phase two were BPN, Grady Britton, Turtledove Clemens, and Fish Marketing. The presentations were made on June 11, 2012, with one hour for the agency to present their creative brief, followed by 45 minutes for Q&A. The phase two review committee followed the rating procedures set up by the Purchasing staff. The phase two review committee members were: Peter Watts - TDC Chair, Daphne Wuest - TDC Co-chair, Frank Casarez - TDC member, Steven Steinberg - TDC member, Judiaann Woo - Travel Oregon, Courtney Ries - Travel Portland, Jessica Curtis - Clackamas Town Center, and Danielle Cowan/Jeannine Breshears/Annie Bailey - CCTCA staff.

**Item 2)** Per County Ordinance, CCTCA, in coordination the TDC, is to develop, adopt and implement a Tourism Development and Promotion Business Plan. This Plan addresses

elements of: tourism promotion, tourism development, conventions, visitor information services, special events and festivals, and the County Fair. The Plan may be revised from time to time, subject to Board of County Commissioners' approval.

Copies of the summary and detailed versions of the draft business plan are attached. These were written in collaboration with the TDC. Copies of the Plan were provided to our tourism partners at our May Tourism Week Event wherein we asked for input.

The Department recently sent out an email survey to our partners list serve soliciting input. While the survey instrument will remain open through July 6th, 90% of respondents reported being satisfied with the priorities as outlined in the plan and 94% reported satisfaction with the stated goals. Sixty-five percent of respondents ranked "Enhanced Visitor Services mobile technology" as being the most important priority over the next five years. CCTCA is pleased to report we have already made headway on this front with the release of our first ever mobile website and our recently revamped website which includes on-line booking and on-line itinerary planning.

When the survey instrument is closed, CCTCA, in collaboration with the TDC, will finalize the draft plan and will bring it forth to the BCC for its consideration and approval.

**Item 3)** In January of 2010, the Oregon Department of Transportation (ODOT) closed the Arch Bridge for refurbishing. CCTCA, in close partnership with the Willamette Falls Heritage Area Coalition (WFHAC), successfully coordinated a multicultural bridge closing event. It was a cold and raining Saturday morning, but approximately 825 joined us for the ceremony.

Because of the success of the closure event, ODOT asked CCTCA and the WFHAC to coordinate the bridge opening celebration which is scheduled for Friday, October 12 through Sunday, October 14. This event, called Willamette Falls Festival is actually a series of events including a unique art event with artists featuring work derived from found items from the river and an interactive public sculpture made also of river reclaimed items; a farmer's market featuring locally grown foods and other agricultural products; a first fish celebration sunset drumming by the tribes, as well as a tribal canoe landing and friendship dance demonstration; illuminated flotillas of kayaks and other personal watercraft on the river; music and dancing, fireworks, a fun run/walk and or triathlon; a new pedestrian heritage tour; geocache event; a parade of cars spanning the time that the bridge has been in existence; a public wedding; an official bridge opening ceremony; and a host of other activities, attractions and features.

Major partners in this endeavor include the Cities of West Linn and Oregon City, Clackamas County, the Willamette Falls Heritage Area Coalition, the Confederated Tribes of Grand Ronde, Portland General Electric, West Linn Paper Company and a host of other supportive entities that we are working collaboratively with to bring this major event to life.

This Willamette Falls Festival has an official logo and marketing tools are under development as well as a sponsorship program. In the 2007 Tourism Master Plan there is a goal of creating a signature event for the region. With the level of involvement and amount of attention being directed towards the Falls Festival, TDC is anticipating that the Willamette Falls Festival has the potential of being such an event.

**FINANCIAL IMPLICATIONS (current year and ongoing):**

**Item 1)** The contract is based each year on a "not to exceed" amount that is determined in the County budgeting cycle. The amount for 2012-13 is \$705,000 and is further broken down as Advertising (432400) \$535,000; Marketing Materials (432403) \$115,000; and Professional Services (431000) \$55,000. These categories will be broken down into specific projects and an

estimate for each project will be agreed to before any funds are allocated. The proposed agency monthly retainer is \$4,583.33 and covers the agency time for creative conception, analysis and reporting, general meetings that are not related to a specific project such as monthly TDC meetings, state tourism meetings and community meetings where we need the input of the marketing agency.

**Item 2)** The new Five-Year Master Plan, when formally adopted, will provide high-level policy direction for CCTCA staff and the TDC. Fiscal year allocations of staff and financial resources will be continue to be guided by the CCTCA's Year to Year Business Plan, which is developed in coordination with the TDC.

**Item 3)** As with the closure event, CCTCA will be contributing some financial resources towards making the Bridge ReOpening/Festival of the Falls a successful event. In addition to providing and paying for an event coordinator and other hard costs such as geocaching coins and logistics assistance, the Tourism Department's contribution also includes significant staff involvement.

**LEGAL/POLICY REQUIREMENTS:**

**Item 1)** The initial contract will cover a one-year period from the date of the award, with additional one year terms upon mutual consent of CCTCA and BPN. The total term of the contract will not exceed five years, including all allowable renewal periods.

**Item 2)** Per County Ordinance, CCTCA, in coordination the TDC, is to develop, adopt and implement a Tourism Business Plan and the Board of County Commissioners ultimately approves the Business Plan.

**Item 3) NA**

**PUBLIC/GOVERNMENTAL PARTICIPATION:**

N/A

**OPTIONS:**

**Item 1)**

1. Review and comment, for Chair's signature, on new contract with BPN marketing services.
2. Request TDC to reject all the proposals received and redo the RFP process.

**Item 2)**

1. Approve the outreach approach that TDC has undertaken for the renewal of its 5-year Business Plan and approve the direction and components of the Five-Year Business Plan as outlined.
2. Suggest alternative or additional priorities and goals that the BCC would like to see incorporated into the next 5-Year Master Plan.

**Item 3)**

1. NA

**RECOMMENDATION:**

**Item 1)**

The TDC, the review committee and CCTCA staff respectfully recommend that a new contract be implemented with BPN for the agency to provide marketing services.

**Item 2)**

The TDC respectfully recommends that the BCC approve the public involvement approach that we have undertaken in developing a new Business Plan and the Business Plan components as outlined, but we welcome your ideas and comments.

**Item 3)**

The TDC respectfully requests that the BCC put the dates for the Willamette Falls Festival on its collective calendar and that Commissioners consider attending and participating in as many of the events as they like and are able to accommodate.

**ATTACHMENTS:**

**Item 1)** Marketing Agency RFP

**Item 1)** BPN Phase One proposal

**Item 1)** BPN final contract terms, June 28, 2012

**Item 2)** 2012-2017 Business Plan – Detailed Version (DRAFT)

**Item 2)** 2012-2017 Business Plan – Summary Version (DRAFT)

**Item 3)** Copy of Willamette Falls Festival Logo

**Item 3)** Current list of proposed activities

**SUBMITTED BY:**

Division Director/Head Approval \_\_\_\_\_

Department Director/Head Approval   Danielle Cowan  

County Administrator Approval \_\_\_\_\_

For information on this issue or copies of attachments, please contact <u>  Jim Austin  </u> @ 503- 742-5901
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## Fiscal Impact Form

**RESOURCES:**

Is this item in your current work plan and budget?

- YES    **Items 1, 2 & 3**  
 NO

**START-UP EXPENSES AND STAFFING (if applicable):**

**ONGOING OPERATING EXPENSES/SAVINGS AND STAFFING (if applicable):**

**Item 1)** The contract is based each year on a "not to exceed" amount that is determined in the County budgeting cycle. The amount for 2012-13 is \$705, 000 and is further broken down as Advertising (432400) \$535,000; Marketing Materials (432403) \$115,000; and Professional Services (431000) \$55,000.

**Items 2 & 3) NA**

**ANTICIPATED RESULTS:**

**Item 1)** BPN is responsible to report metrics monthly, by campaign, by quarter and on an annual basis. By medium, the metrics are: Website traffic (via Google analytics); Digital banners (via MediaMind); SEM metrics (via Google); Print (via impressions, CPM, fulfillment cards); TV (via Nielsen); Email. BPN will report all metrics in a comprehensive and clear document to CTTCA for distribution to TDC and other stakeholders. In the report, analysis will be included that connects website traffic and actions performed on the site to media spend to provide correlation and context.

**Items 2 & 3) NA**

**COSTS & BENEFITS:**

<b>Costs:</b>							
	<b>Item</b>	<b>Hours</b>	<b>Start-up Capital</b>	<b>Other Start-up</b>	<b>Annual Operations</b>	<b>Annual Capital</b>	<b>TOTAL</b>
	Advertising						\$535,000
	Marketing Materials						\$115,000
	Professional Services						\$55,000
	<b>Total Start-up Costs</b>						
	<b>Ongoing Annual Costs</b>						
<b>Benefits/Savings:</b>							
	<b>Item</b>	<b>Hours</b>	<b>Start-up Capital</b>	<b>Other Start-up</b>	<b>Annual Operations</b>	<b>Annual Capital</b>	<b>TOTAL</b>
	<b>Total Start-up Benefit/Savings</b>						
	<b>Ongoing Annual Benefit/Savings</b>						

**REQUEST FOR PROPOSALS**  
**2012 MARKETING AGENCY SERVICES**  
**TOURISM AND CULTURAL AFFAIRS**

**BOARD OF COUNTY COMMISSIONERS**

**CHARLOTTE LEHAN, Chair**

**JIM BERNARD, Commissioner**

**JAMIE DAMON, Commissioner**

**ANN LININGER, Commissioner**

**PAUL SAVAS, Commissioner**

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**Steve Wheeler**  
**County Administrator**

**Lane Miller**  
**Purchasing Manager**

**Tom Averett**  
**Buyer**

**COUNTY REQUEST FOR PROPOSAL OPENING**

**DATE:** **April 30, 2012**

**PLACE:** **Clackamas County Purchasing**  
**Clackamas County Public Services Building**  
**2051 Kaen Road, Oregon City, OR 97045**

**TIME:** **4:00 PM**

## SCHEDULE

REQUEST FOR PROPOSAL ISSUED	April 9, 2012
LAST DATE FOR SPECIFICATION PROTEST	SEVEN (7) days prior to RFP Opening
RFP OPENING	April 30 2012 4:00 PM
LAST DATE TO PROTEST AWARD	SEVEN (7) days from the Intent to Award

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**SECTION 1**  
**REQUEST FOR PROPOSALS**

## SECTION 1

### REQUEST FOR PROPOSALS

Notice is hereby given that Clackamas County, through its Board of County Commissioners, will receive sealed proposals per specifications until **4:00 PM, April 30, 2012**, to provide

#### 2012 MARKETING AGENCY SERVICES

No Proposals will be received or considered after that time.

Clackamas County is requesting proposals from qualified and interested firms for professional services related to developing and implementing marketing and advertising plans for the Tourism & Cultural Affairs Department, based on the current TCA Master Plan Update 2007-12, FY 2011-12 Business Plan, as well as planning work documented in the previous Master Plans and Destination Audit. These documents are found online at [www.mthoodterritory.com/partners/](http://www.mthoodterritory.com/partners/) on the tourism Partners' Resource section. In addition, TCA is currently undertaking a process to develop its next five-year Business Plan which will be available in July 2012.

Proposal packets are available at Clackamas County Purchasing, Clackamas County Public Services Building, 2051 Kaen Road, Oregon City, OR 97045, telephone (503) 742-5444 between the hours of 7:00 AM and 6:00 PM Monday through Thursday. Sealed proposals are to be sent to Lane Miller – Purchasing Manager at the Kaen Road address. Proposals will be opened in the Purchasing Department, located on the fourth floor of the Public Services Building, at the designated time.

Each proposal must contain a statement as to whether the vendor is a resident vendor, as defined in ORS 279A.120. This **is not** a public works contract subject to ORS 279C.800 through 279C.870, the Davis Bacon Act (40 U.S.C. 3141 et seq.).

The Clackamas County Board of County Commissioners reserves the right to reject any and all proposals not in compliance with all prescribed public bidding procedures and requirements, and may reject for good cause any and all proposals upon the finding that it is in the public interest to do so and to waive any and all informalities in the public interest. In the award of the contract, the Board of County Commissioners will consider the element of time, will accept the proposal or proposals which in their estimation will best serve the interests of Clackamas County and will reserve the right to award the contract to the contractor whose proposal shall be best for the public good.

DATED this 9th day of April, 2012

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Lane Miller, Purchasing Manager

**SECTION 2**  
**INSTRUCTIONS TO PROPOSERS**

## SECTION 2

### INSTRUCTIONS TO PROPOSERS

#### 2.1. GENERAL

Proposers shall study carefully and conform to these "Instructions to Proposers" so that their proposals will be regular, complete and acceptable.

#### 2.2. PROPOSALS

All proposals shall be legibly written in ink or typed and comply in all regards with the requirements of this solicitation.

Proposals carrying orders or qualifications may be rejected as irregular.

All proposals shall be signed in ink in the blank spaces provided herein (Section 4). If the proposal is made by a firm or partnership, the name and address of the firm or partnership shall be shown, together with the names and addresses of the members. If the proposal is made by a corporation, it shall be signed in the name of such corporation by an official who is authorized to bind the contractor. The proposals will be considered by the County to be submitted in confidence; proposers will be notified if a request is made for public disclosure of the proposal prior to completion of the evaluation and negotiation process.

#### 2.3 SUBMISSION OF PROPOSALS

All proposals must be submitted in a sealed envelope bearing on the outside the **name and address of the contractor**. If the proposal is forwarded by mail, the sealed envelope containing the proposal and marked as directed above must be enclosed in another envelope addressed as follows:

Clackamas County Purchasing  
Attention: Lane Miller, Purchasing Manager  
**2012 MARKETING AGENCY SERVICES**  
Clackamas County Public Services Building  
2051 Kaen Road  
Oregon City, OR 97045

#### 2.4. RECEIPT AND OPENING OF PROPOSALS

Responses shall be submitted prior to the time fixed in the advertisement for proposals. Proposals received after the time so designated will be considered late proposals and will be returned unopened.

No responsibility will be attached to any official of the County for the premature opening of, or the failure to open, a proposal not properly addressed and identified.

The proposals will be considered by the County to have been submitted in confidence. At the time fixed for the opening, the proposals shall be opened so as to avoid disclosure of contents to competing offerors, the public and the media during the process of evaluation and negotiation. A register of proposals shall be prepared and shall be open for public inspection after contract award along with the contents of the proposals. Once the closing time and date arrive, the names of the offerors submitting proposals are read

publicly. No other information will be disclosed during the evaluation and negotiation process unless required by law.

## **2.5. WITHDRAWAL OF PROPOSALS**

Proposals may be withdrawn by written or telegraphic request received from the contractors prior to the time fixed for opening. Negligence on the part of the vendor in preparing the proposal confers no right for the withdrawal of the proposal after it has been opened. The proposal will be irrevocable until such time as the Board of Commissioners:

- a. Specifically rejects the response, or;
- b. Awards a contract and said contract is properly executed.

Contractors' responses shall be valid for at least ONE-HUNDRED TWENTY (120) days.

## **2.6. MODIFICATION**

Any proposer may modify his/her proposal by registered communication at any time prior to the scheduled closing time for receipt of proposals, provided such communication is received prior to the closing time. The communication should not reveal the proposal price but should provide that the final price or terms will not be known until the sealed proposal is opened.

## **2.7. ACCEPTANCE OR REJECTION OF PROPOSALS**

In the award of the contract, the Board of Commissioners will consider the element of time, will accept the proposal which in their estimation will best serve the interest of Clackamas County, and reserves the right to award the contract to the contractor whose proposal shall be best for the public good. The Board of Commissioners reserves the right to accept or reject any or all. Without limiting the generality of the foregoing, any proposal which is incomplete, obscure or irregular may be rejected. Only one proposal will be accepted from any one firm or association. Any evidence of collusion between proposers may constitute a cause for rejection of any proposals so affected.

The County shall, pursuant to ORS 279A.120, for the purposes of awarding the contract, add a percent increase on the proposal of a nonresident proposer equal to the percent, if any, of the preference given to that proposer in the state in which the proposer resides. "Resident proposer" means a proposer that has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the proposal, has a business address in this state and has stated in the proposal whether the proposer is a "resident proposer".

The County may accept any items or groups of items of any offer, unless the proposer qualifies his/her offer by specific limitations.

## **2.8. ADDENDA AND INTERPRETATIONS**

No oral interpretations shall be made to any proposer as to the meaning of any of the contract documents or be effective to modify any of the provisions of the contract documents. Every request for an interpretation shall be made in writing and addressed to the Purchasing Manager and, to be given consideration, shall be received at least **SEVEN(7)** days prior to the date set for the opening of proposals. Any and all such interpretations will be mailed to all prospective proposers (at the respective address furnished for such purposes) not later than two (2) days prior to the date fixed for the opening of proposals. Failure of

any proposer to receive any such addendum or interpretation shall not relieve such proposer from any obligation under this proposal as submitted. All addenda so issued shall become as much a part of the contract documents as if bound herein.

**2.9. NONDISCRIMINATION**

The successful contractor agrees that, in performing the work called for by this proposal and in securing and supplying materials, contractor will not discriminate against any person on the basis of race, color, religious creed, political ideas, sex, age, marital status, physical or mental handicap, national origin or ancestry unless the reasonable demands of employment are such that they cannot be met by a person with a particular physical or mental handicap.

**2.10. FAILURE TO SUBMIT OFFER**

If no offer is to be submitted, do not return the RFP. Failure of the recipient to offer, or to notify the issuing office that future solicitations are desired, will not result in removal of the name of such recipient from the mailing list for the type of supplies or services covered by the solicitation.

**2.11. PREPARATION OF OFFERS**

Proposers are expected to examine the specifications, schedules and all instructions.

Each proposer shall furnish the information required by the solicitation. Proposers shall sign the solicitation and print or type their name on other submitted exhibits and each continuation sheet thereof on which an entry is made. Erasures or other changes shall be initialed by the person signing the offer. Proposals signed by an agent are to be accompanied by evidence of his/her authority unless such evidence has been previously furnished.

Proposers shall state a definite time for delivery of supplies or for performance of services.

Time, if stated as a number of days, will include Saturdays, Sundays and holidays.

**2.12. INQUIRIES**

Questions regarding this Request for Proposals shall be addressed to:

**Mr. Lane Miller, Purchasing Manager, 503.742.5444.**

**2.13 SPECIFICATIONS LIMITING COMPETITION**

Proposers may comment on any specification or requirement contained within this RFP, which they feel limits competition in the selection of a proposer to perform the services herein defined. Protests shall detail the reasons and any proposed changes to the specifications. Such comments shall be formal in writing, and are to be addressed to:

**Clackamas County Purchasing Manager  
Specification Protest, 2012 Marketing Agency Services -  
2051 Kaen Road,  
Oregon City, OR 97045**

Such comments shall be submitted to Clackamas County no later than **five (5)** days prior to the opening date. No comments will be accepted after that time.

**2.14. EMPLOYEES NOT TO BENEFIT**

No employee or elected official of Clackamas County shall be admitted to any share or part of this contract or to any benefit that may arise therefrom; but this provision shall not be construed to extend to this contract if made with a corporation for its general benefit.

**2.15. COUNTY FURNISHED PROPERTY**

No material, labor or facilities will be furnished by the County unless otherwise provided for in the Request for Proposal.

**2.16. NOTICE OF INTENT TO AWARD**

The notice of intent to award of the contract by Clackamas County shall constitute a final decision of the County's intent to award the contract if no written protest of the award is filed with the County Purchasing Manager within **SEVEN (7)** calendar days of the notice of intent to award. If a protest is timely filed, the award is a final decision of the County's intent to award only upon issuance of a written decision denying the protest and affirming the award. The award and any written decision denying protest shall be sent to every proposer who provided an address.

Right to Protest: Any actual proposer who is adversely affected or aggrieved by the County's award of the contract to another proposer on the same solicitation shall have **SEVEN (7)** calendar days after notice of intent to award has been issued to submit to the County Purchasing Manager a written protest of the award. The written protest shall specify the grounds upon which the protest is based. In order to be an adversely affected or aggrieved proposer with a right to submit a written protest, a proposer must be next in line for award, i.e. the protester must claim that all higher rated proposers are ineligible for award because they are non-responsive or non-responsible. The County will not entertain protests submitted after the time period established in this rule.

**2.17. REIMBURSEMENT**

There is no expressed or implied obligation for Clackamas County to reimburse responding firms for any expenses incurred in preparing proposals in response to this request.

**2.18. DEFAULT**

The County may, subject to the provisions of paragraph (4) below, by written notice of default to the Contractor, terminate the whole or any part of this contract in any one of the following circumstances.

1. If the Contractor fails to make delivery of the supplies or to perform the services within the time specified herein or any extension thereof; or
2. If the Contractor fails to perform any of the other provisions of this contract, or so fails to make progress as to endanger performance of this contract in accordance with its terms, and in either of these two circumstances does not cure such failures within a period of ten (10) days (or such longer period as the County may authorize in writing) after receipt of notice from the County specifying such failure.

3. In the event the County terminates this contract in whole, or in part, as provided in paragraph (2) above of this clause, the County may procure, upon such terms and in such manner as the County may deem appropriate, supplies or services similar to those terminated, and the Contractor shall be liable to the County for any excess costs for such similar supplies or services; provided, that the Contractor shall continue the performance of this contract to the extent not terminated under the provisions of this clause.

4. Except with respect to defaults of subcontractors, the Contractor shall not be liable for any excess costs if the failure to perform the contract arises out of causes beyond the control and without the fault or negligence of the Contractors. Such causes may include, but are not restricted to, acts of God or of the public enemy, acts of the County in either its sovereign or contractual capacity, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes and unusually severe weather; but, in every case, the failure to perform must be beyond the control of both the Contractor and subcontractor, and without the fault or negligence of either of them, the Contractor shall not be liable for excess costs for failure to perform, unless the supplies or services to be furnished by the subcontractor were obtainable from other sources in sufficient time to permit the Contractor to meet the required delivery schedule.

5. The rights and remedies of the County provided in this clause shall not be exclusive and are in addition to any other rights and remedies provided by law or under this contract.

6. As used in paragraph (4) of this clause, the terms "subcontractor" and "subcontractors" mean subcontractor(s) at any tier.

#### **2.19. PAYMENTS**

The contractor shall be paid, upon the submission of proper instruments as outlined below, the prices stipulated in the proposal for services rendered and accepted, less deductions, if any, as provided.

1. No claims will be considered for payment until the services are rendered with the exception of Solicitations or Purchase Orders that designate otherwise.

2. Payments will be made monthly, or as agreed, within 30 days following receipt of any claims supported by an invoice and a duplicate.

3. For a period of one year after payment of any claim, Clackamas County reserves the right, under this contract, to recover any damages due the County as specified in the Clause of this contract entitled "Default".

#### **2.20. TAXES**

Taxes, whether State or Federal, shall not be included in proposal prices. Clackamas County is generally exempted from Federal taxes, specifically, but not limited to excise and transportation taxes.

#### **2.21. LITIGATION:**

In the event litigation is necessary the Contractor agrees that such will be conducted in the Courts of Clackamas County and/or the State of Oregon.

#### **2.22. SUBCONTRACTORS**

Contractor shall not use subcontractors to perform the Work unless specifically pre-authorized in writing to do so by the County. Contractor represents that any employees assigned to perform the Work,

and any authorized subcontractors performing the Work, are fully qualified to perform the tasks assigned to them, and shall perform the work in a competent and professional manner. Contractor shall provide, if requested, any documents relating to subcontractor's qualifications to perform required Work.

## **2.23 INTERGOVERNMENTAL COOPERATIVE**

Pursuant to ORS 279A and Clackamas County procurement rules, other public agencies shall have the ability to purchase the awarded goods and services from the awarded Contractor(s) under terms and conditions of the resultant contract.

Any such purchases shall be between the Contractor and the participating public agency and shall not impact the Contractor's obligation to Clackamas County. Any estimated purchase volumes listed herein do not include other public agencies and Clackamas County makes no guarantee as to their participation.

Any bidder, by written notification included with their solicitation response, may decline to extend the prices and terms of this solicitation to any and/or all other public agencies.

Clackamas County grants to any and all public serving governmental agencies, authorization to purchase equivalent services or products described herein at the same submitted unit bid price, but only with the consent of the Company awarded the contract by the County.

**SECTION 3**

**GENERAL INFORMATION AND SCOPE OF WORK**

## SECTION 3 GENERAL INFORMATION AND SCOPE OF WORK

The TCA will sign a multi-year contract with the selected agency to provide a continuity of marketing support, with annual review of contract terms and compensation. The initial contract would cover a one-year period from the date of the award, with additional one year terms upon mutual consent of the County and the Agency. The total term of the contract will not exceed five years, including all allowable renewal periods.

### **3.1 BACKGROUND**

Clackamas County Tourism & Cultural Affairs (TCA) is the recognized Destination Marketing Organization (DMO) for Clackamas County, branded as Oregon's Mt. Hood Territory (OHMT). TCA is a partnership in tourism with community, business, arts, cultural and heritage organizations of the county. Together, we deliver programs and activities that enhance visitor experiences, encourage overnight stays and improve the quality of life for residents. This department works to balance the interests of visitors, businesses, other organizations and government through innovative leadership and strategic investment of resources and staff.

The TCA tourism program is funded by tax dollars generated from a county-wide transient room tax (TRT) of 6%. The amount of funding available for any given period varies with the lodging occupancy and room rate. These tax dollars are to be used for the development and promotion of tourism in Clackamas County. The Tourism Development Council (TDC) is a nine-member advisory group appointed by the Clackamas County Board of Commissioners to advise and oversee the program/budget of TCA. The Cultural Affairs program includes alignment with the Clackamas County Arts Alliance.

It is also important to note that TCA is a participant in state tourism programs through Travel Oregon and their Regional Cooperative Marketing Program (RCMP). OHMT has been placed in three of the seven regions – Willamette Valley, Greater Portland and Mt. Hood/Gorge. We are partners in each region in marketing plans that are funded by a portion of the state lodging tax of 1%.

#### Marketing Background

An effective destination marketing program demonstrates the ability to increase the awareness of the County's visitor experiences through implementation of targeted and partner-based advertising, sales and visitor service strategies resulting in increased visitor spending and increased occupancy/revenue per available room (REVPAR) in commercial lodging facilities. The main objective in marketing is to deliver the Oregon's Mt. Hood Territory brand message to reach our audience of local, regional, national, and international markets. Historically our target audience is 24-65 years of age; predominately leisure visitors; and some business and group packaged travel. Our primary niches include outdoor recreation, agritourism, and heritage/culture.

Historically, TCA's marketing campaigns have included print advertising (leisure media, co-op partner program); digital (banners, PPC); social media; and more recently broadcast. Responding to the changing behaviors of consumers in the trip planning process, advertising focuses are changing to respond to these trends. TCA's advertising call to action includes [www.MtHoodTerritory.com](http://www.MtHoodTerritory.com) (toll free number when applicable) for consumer access and inquiries, which are fulfilled with the annual Travel Planner (print and online view).

### **3.2 PROJECT SCOPE:**

Clackamas County is requesting proposals from qualified and interested firms for professional services related to developing and implementing marketing and advertising plans for the Tourism & Cultural Affairs Department, based on the current TCA Master Plan Update 2007-12, FY 2011-12 Business Plan, as well as planning work documented in the previous Master Plans and Destination Audit. These documents are found online at [www.mthoodterritory.com/partners/](http://www.mthoodterritory.com/partners/) on the tourism Partners' Resource section. In addition, TCA is currently undertaking a process to develop its next five-year Business Plan which will be available in July 2012.

It is expected that the selected agency will provide services that include but are not limited to:

- Leading brand/messaging development for TCA (Oregon's Mt. Hood Territory brand refresh or overall redesign);
- Developing marketing plans and recommend the appropriate media and strategies to be most effective in achieving objectives;
- Guiding selection of the best advertising placements for all forms of media (print, digital, keyword search, TV, radio);
- Providing brand style guides and messaging, prepare and write advertising copy;
- Designing, producing and placing approved advertising, including a cooperative advertising program with tourism partners;
- Creating and producing print collateral;
- Developing and executing online marketing;
- Coordinating with website design;
- Developing and executing of promotional campaigns and other marketing programs;
- Coordinating with public relations program for integrated strategies between paid placements, earned media and publicity;
- Assisting with strategic long-term planning and research gathering from sources such as Dean Runyan Associates, Longwoods International, and PhoCusWright, and coordination in developing any needed market research projects with any future research firm

The selected agency is considered a partner with the staff and coordination between the agency and the staff is through the Destination Marketing Manager at TCA. The selected agency will also interface with the Communications and Public Relations Coordinator. Designated agency staff will need to attend monthly TDC meetings and regular monthly TCA staff meetings as well as monthly TCA marketing task force meetings and some community tourism meetings. The selected agency will be a partner in facilitating a comprehensive and coordinated tourism destination plan throughout the County. Marketing agency approvals are dependant upon the stage of the project. Initial approval of most new projects would be presented to the Council and perhaps the County Commissioners, but then the implementation stage approvals are by the executive director and/or marketing manager.

We employ a fulltime staff person in the County Technology Services department and all website management, development and coding on the site is done through that staff person. The marketing agency will provide the overall marketing strategy and artistic design that will enhance our presence in the ever changing online marketing world.

In addition, the selected Marketing agency will coordinate with a separate social media vendor as selected by a separate contract, to provide recommendations and oversight to maintain brand style and integrity as established through the creative style guide and messaging. CCTCA will solicit and manage a separate social media contract. The selected agency for the Marketing Contract can be considered for the Social Media

Contract if interested and must submit a separate proposal from the Marketing RFP, when the social media RFP is issued.

The selected agency shall provide the TCA with professional marketing services that will be outlined in a contract for services including an approved annual program of work/budget for each year of the contract based on the Master Plan 2007-12, currently being updated as a Five-Year 2012-17 Business Plan. The selected agency may also be requested to provide recommendations and/or services for leveraging TCA's marketing dollars through cooperative promotions and marketing projects which may involve both private and public sector organizations. TCA's cooperative advertising program is successful for our partners in providing a cost effective means for them to advertise in publications and online placements that they can not otherwise afford. Given the realities of new technology and online mediums, the co-op programs are changing and fewer partners are participating. TCA is looking at how to restructure the program to better meet the needs of partners and provide effective and cost efficient marketing strategies within these partnerships.

TCA prides itself on the quality of the professional marketing program it implements, the attention to detail given to all strategies, the leadership provided to tourism partners in the destination and the return on investment achieved by the marketing program. All programs must continue to these standards and ultimately are measured by the amount of visitor spending in the County, the lodging occupancy/average room rate and the results identified in each Annual Business Plan.

Services for media planning and placement shall be compensated through the standard commissions received from advertising placements. Other approved work will be compensated with an agreed monthly retainer and/or on an hourly basis. All projects will be approved through a written estimate to be signed by TCA staff before the project commences. The total budget for this contract is not to exceed \$705,000 during the first year of the contract. Funding for the subsequent years of the contract will be dependent on TRT receipts and the approved annual Budget/Business Plan.

The TCA will sign a multi-year contract with the selected agency to provide a continuity of marketing support, with annual review of contract terms and compensation. The initial contract would cover a one-year period from the date of the award, with additional one year terms upon mutual consent of the County and the Agency. The total term of the contract will not exceed five years, including all allowable renewal periods.

### **3.3 QUESTIONS ON TECHNICAL INFORMATION:**

Questions relating to materials in the Scope of Work (SECTION 3) and the Proposal Response (SECTION 4) shall be addressed to:

**Jeannine Breshears**  
**Tourism and Cultural Affairs**  
**Destination Marketing Manager**  
**(503) 655-8419**  
**jeannine@mthoodterritory.com**

### **3.4 QUESTIONS ON LEGAL INFORMATION:**

Questions relating to this proposal or proposal document (excluding SECTIONS 3 and 4) shall be addressed to:

**Lane Miller**  
**Purchasing Manager**  
**(503) 742-5444**

**SECTION 4**  
**PROPOSAL RESPONSE**

**SECTION 4**

**PROPOSAL RESPONSE**

Submitted by: \_\_\_\_\_

Address: \_\_\_\_\_

Date: \_\_\_\_\_, 2012

Phone number: \_\_\_\_\_ Fax number: \_\_\_\_\_

The undersigned, through the formal submittal of this proposal response, declares that he/she has examined all related documents and read the instruction and conditions, and hereby proposes to assist the County to provide **2012 MARKETING AGENCY SERVICES** as specified, in accordance with the qualifications documents herein, for the price set forth in the Response submittal attached hereto, and forming a part of this Proposal.

The Contractor, by his signature below, hereby represents as follows:

**(a)** That no Commissioner, officer, agency or employee of Clackamas County is personally interested directly or indirectly in this contract or the compensation to be paid hereunder, and that no representation, statement or statements, oral or in writing, of the County, its Commissioners, officers, agents, or employees had induced him to enter into this contract and the papers made a part hereof by its terms;

**(b)** The Proposer and each person signing on behalf of any proposer certifies, in the case of a joint proposal, each party thereto, certifies as to its own organization, under penalty of perjury, that to the best of their knowledge and belief:

1. The prices in the proposal have been arrived at independently, without collusion, consultation, communication, or agreement for the purpose of restraining competition as to any matter relating to such prices with any other proposer or with any competitor;
2. Unless otherwise required by law, the prices which have been quoted in the proposal have not been knowingly disclosed by the proposer prior to the proposal deadline, either directly or indirectly, to any other proposer or competitor;
3. No attempt has been made nor will be made by the proposer to induce any other person, partnership or corporation to submit or not to submit a proposal for the purpose of restraining trade;

**(c)** The proposer fully understands and submits its proposal with the specific knowledge that:

1. The selected proposal must be approved by the Board of Commissioners.
2. This offer to furnish **2012 Marketing Agency Services** will remain in effect at the prices proposed for a period of not less than 120 calendar days from the date that proposals are due, and that this offer may not be withdrawn or modified during that time.

**(d)** That this proposal is made without connection with any person, firm or corporation making a bid for the same material, and is in all respects, fair and without collusion or fraud.

**(e)** Vendors shall use recyclable products to the maximum extent economically feasible in the performance of the contract work set forth in this document.

**(f)** That the Proposer accepts all terms and conditions contained in this RFP and that the RFP and the Proposal Response, and any modifications, will be made part of the contract documents. It is understood that all proposals will become part of the public file on this matter. The County reserves the right to reject any or all proposals.

**(g)** That the proposer holds current licenses that businesses or services professionals operating in this state must hold in order to undertake or perform the work specified in these contract documents.

**(h)** That the proposer is covered by liability insurance and other insurance in the amount(s) required by the solicitation.

**(i)** That the proposer qualifies as a carrier insured employer or a self-insured employer under ORS 656.407 or has elected coverage under ORS 656.128.

**(j)** That the Proposer is legally qualified to contract with Clackamas County.

**(k)** That the Proposer has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation or national origin. Nor has proposer or will proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a minority, women or emerging small business enterprise certified under ORS 200.055, or a business enterprise that is owned or controlled by or that employs a disabled veteran, as defined in ORS 408.225

**(l)** The proposer agrees to accept as full payment for the services specified herein, the amount as shown in his/her proposal.

[ ] Resident Bidder, as defined in ORS 279A120

[ ] Non-Resident Proposer, Resident State \_\_\_\_\_

The names of the principal officers of the corporation submitting this Proposal, or of the partnership, or of all persons interested in this Proposal as principals are as follows:

_____	_____
Name	Title
_____	_____
Name	Title
_____	_____
Name	Title

(If Sole Proprietor or Partnership)

In witness hereto, the undersigned has set his (its) hand this \_\_\_\_\_ day of \_\_\_\_\_, 2012

\_\_\_\_\_  
Name of Firm

\_\_\_\_\_  
Signature of Proposer

(If Corporation)

In witness whereof the undersigned corporation has caused this instrument to be executed by its duly authorized officers this \_\_ day of \_\_\_\_\_, 2012

\_\_\_\_\_  
Name of Corporation

\_\_\_\_\_  
By

\_\_\_\_\_  
Title

CONTRACT MANAGER:

Name \_\_\_\_\_ Title: \_\_\_\_\_

Telephone number: \_\_\_\_\_

## PROPOSAL CONTENTS AND FORMAT

### 4.1. Vendors must observe submission instructions and be advised as follows:

**4.1.1.** Proposals must be submitted in a sealed envelope, bearing on the outside the name and address of the vendor, the name of the project for which the proposal is submitted and the time and date of the scheduled opening.

**4.1.2.** If the proposal is forwarded by mail, the sealed envelope containing the proposal and marked as directed above, must be enclosed in another envelope addressed to the Purchasing Manager, Clackamas County Purchasing, 2051 Kaen Road, Oregon City, OR 97045

**4.1.3.** No proposal will be accepted after **4:00 PM April 30 2012.**

**4.1.4.** **EIGHT (8)** copies of the Technical Component and **One** copy of the Financial Component proposal are to be supplied. One set of Signed Originals shall be included and clearly identified as such.

**4.1.5.** Clackamas County reserves the right to solicit additional information or proposal clarification from the vendors, or any one vendor, should the County deem such information necessary.

**4.1.6.** All questions regarding the request for proposal process should be directed to Mr. Lane Miller, Purchasing Manager, during regular business hours.

**4.1.7.** If a vendor is unable or unwilling to meet any Clackamas County RFP requirement, an explicit statement to that effect must be made in the proposal as an exception.

**4.1.8.** This request for proposals and all supplemental information in response to this RFP will be a binding part of the final contract entered into by the selected vendor and Clackamas County.

**4.1.9.** Any Proposer supplied material that may be considered confidential, to the extent allowed under Oregon Public Records Law, must be so marked with statutory exemption asserted.

**4.1.10.** Clackamas County reserves the right to reject any or all proposals and to accept the proposal deemed most advantageous to the County.

**4.1.11.** Any and all costs incurred by the consultant in the preparation and delivery of their response or in anticipation of receiving a contract are those of the consultant and will not be reimbursed.

**4.2.** The CONTRACTOR must supply copies of all contracts the County will be expected to sign with the proposal.

### 4.3. **SUBMISSION**

**PROPOSAL RESPONSES ARE TO BE SUBMITTED IN A SEALED ENVELOPES CLEARLY IDENTIFYING PROPOSERS NAME, THE PROPOSAL NAME, THE OPENING DATE AND TIME. THE RESPONSES ARE TO BE DELIVERED UNOPENED TO THE PURCHASING MANAGER'S ATTENTION.**

### 4.4. **PROPOSAL CONTENTS/SELECTION CRITERIA**

Proposal Responses will be subjected to a two phase evaluation process. The highest scoring proposers (a maximum of 3) at the end of phase one will be invited to participate in phase two. The Proposer shall provide the following information in the proposal in the order of their appearance below. This information is scored as in Section 5, Evaluation & Selection. The proposal shall describe the specific qualifications of the firm (and any subcontractors) to perform the work proposed. Demonstrated experience and available staffing must be clearly stated. The proposer must demonstrate a clear and concise understanding of requested tasks and activities based on the information provided. This proposal will be reviewed with the following standards.

#### **4.4.1 PHASE ONE CRITERIA:**

#### **4.4.2 Project understanding and approach**

Provide information in enough detail so that TCA can determine that the agency has a thorough understanding of the services required by this project. Illustrate the firm's creative abilities in proposing how the firm will work with Oregon's Mt. Hood Territory, and demonstrate the firm's evolving strategy through new and changing technologies.

#### **4.4.3 Creative Approach**

Include information on the agency's creative process, corporate culture and similar work done for other clients. Provide information on the steps that would be taken to create the marketing/advertising strategies for OMHT. Provide samples of work created for projects similar in size and scope that demonstrate the agencies creativity.

#### **4.4.4 Agency Qualifications and Experience**

- All team members including subcontractors included on the team shall be identified. Demonstrated experience and available staffing must be clearly stated.
- Provide background information describing your business, including an overview of your capabilities to provide the requested service, a comprehensive overview of the capabilities of your business, and your ability to develop a tourism destination marketing organization's advertising campaign.
- Proposal must demonstrate ability to establish and maintain functional, productive working relationships with workgroups composed of staff and volunteers. Describe the agency style when working with clients, preferably in the public sector with volunteer advisory committees from a broad variety of backgrounds and interests.
- Provide a summary of Marketing/Advertising Services of this nature provided to any current clients in Clackamas, Lane, Washington and Multnomah Counties as well as tourism clients from outside these counties. Provide a summary of experience with Governmental Accounts or non-profit agencies of similar size and scope to project as described in this solicitation. Provide contact names, dates that the services were provided, addresses and telephone numbers. References will be checked to verify the agency's ability to perform similar tasks.
- Detail your knowledge of tourism in Clackamas County

#### **4.5 PHASE TWO CRITERIA:**

Phase Two will consist of an agency presentation of a creative brief outlining a comprehensive marketing - advertising campaign including an overview of proposed implementation strategies. Detailed information, *including the most current 2012-13 Scope of Work and the 2012-17 Business Plan outline, will be provided to each agency to assist in preparation of their presentation.* The presentation should include an overview of the percent of budget to be allocated to each strategy presented. Agency staff (and subcontractors that are part of the proposal) that would have major roles in the program should be part of the presentation. Firms selected for Phase Two will have three weeks to prepare their presentation and are eligible for a \$1000 stipend for the time and materials needed to prepare the presentation. The presentation will be no more than one hour with an additional one hour allowed for questions and answers. A briefing with the TCA Executive Director and Marketing Manager will be made available to all finalists prior to the beginning of the preparation period. It will be a group briefing. All other questions and contact with TCA must be done in writing (via e-mail is satisfactory) and all questions/answers will be shared with all finalists

##### **4.5.1 Information to be evaluated in Phase Two:**

##### **4.5.2 Level of understanding of Clackamas County tourism evident in presentation**

##### **4.5.3 Relevance of creative brief including implementation strategy to current FY 11-12 Business Plan and 2012-17 Business Plan Outline**

##### **4.5.4 Creativity of presentation**

##### **4.5.5 Flexible marketing program to meet changing mediums and evolving technologies**

##### **4.6 Cost**

**Annual cost is to be submitted at the time of the presentation in a sealed envelope marked "Financial Component-TCA Marketing/Advertising Plan" bearing the date of the presentation and the agency name.** The cost component must include the total annual cost for the contract with break outs showing a schedule of prices for specific services including staff hourly charges and the monthly retainer with a precise definition of expenses covered by this retainer.

**SECTION 5**  
**EVALUATION AND SELECTION CRITERIA**

**SECTION 5**

**EVALUATION AND SELECTION**

**5.1 PROPOSAL REVIEW:**

A committee will be appointed to evaluate the submitted Proposals. Proposals will be subject to a two phase evaluation process.

**Phase One** will consist of an evaluation of the written proposal submitted to verify completeness and compliance with the criteria outlined in Section 4.3, Proposal Response. Proposals will be independently scored and points will be totaled and assigned based upon each proposer's response to the criteria outlined in Section 3. A maximum of the three highest scoring proposals will be requested to participate in Phase Two.

**Phase Two** will consist of an agency presentation of a creative brief outlining a comprehensive marketing - advertising campaign including an overview of proposed implementation strategies. The presentation should include an overview of the percent of budget to be allocated to each strategy presented. (refer to Section 4.4, Proposal Response).

**5.2 AWARD CRITERIA:**

The following criteria will be considered in evaluating all proposals. A major deficiency in any one category can disqualify a contractor.

<b>PHASE ONE</b>	<b>POINTS AVAILABLE</b>
<b>Project understanding/quality of the proposal, and overall management strategy</b>	<b>0-45</b>
<b>Creative approach</b>	<b>0-30</b>
<b>Qualifications, Experiences &amp; References</b>	<b>0-25</b>
<b>PHASE ONE</b>	<b>TOTAL POINTS</b>
	<b>0-100</b>

**PHASE TWO**

<b>Level of understanding of Clackamas County tourism evident in presentation</b>	<b>0-10</b>
<b>Relevance of creative brief including implementation strategy to current FY 11-12 Business Plan and 2012-17 Business Plan Outline</b>	<b>0-30</b>
<b>Creativity of presentation</b>	<b>0-30</b>

**Flexible marketing program to meet changing mediums and evolving technologies**

**0-10**

**Cost**

**0-20**

**PHASE TWO**

**TOTAL POINTS**

**0-100**

**FINAL SELECTION WILL BE MADE BASED UPON THE POINTS AWARDED ONLY IN PHASE TWO.**

Once a selection has been made, the County will enter into contract negotiations to commence on July 1, 2012. During negotiation the County may require any additional information it deems necessary to clarify the approach and understanding of the requested services. Any changes agreed upon during contract negotiations will become part of the final contract. The negotiations will identify a level of work and associated fee that best represents the efforts required. If the County is unable to come to terms with the highest scoring proposer, discussions shall be terminated and negotiations will begin with the next highest scoring proposer. The County reserves the right to reject any and all proposals. In the award of the contract, the Board of County Commissioners will consider the element of time, will accept the proposal or proposals which in their estimation will best serve the interests of Clackamas County and will reserve the right to award the contract to the contractor whose proposal shall be best for the public good.

**SECTION 6**

***SAMPLE PERSONAL CONTRACT FORM***

**SAMPLE PERSONAL SERVICES AGREEMENT**

This contract is entered into by and between Clackamas County, hereinafter referred to as the COUNTY, and *XXXXXXXXXXXXXXXXXXXX* hereinafter called the CONTRACTOR, to provide the services described in Section II below. The following provisions shall comprise this contract:

**I. COMPENSATION:**

**A.** The COUNTY agrees to compensate the CONTRACTOR on a fee-for-service basis at the rates outlined in the Proposal Response. This agreement covers the period from execution through *XXXXXXXXXX*. Total maximum contract compensation not to exceed *\$XXXXXXXXXXXX*. Invoices presented in connection with this Agreement are due and payable upon presentation. All charges will be billed monthly where appropriate. By their signatures below, the parties to this contract agree to the terms, conditions, and content expressed herein. The Contractor agrees to perform the scope of work as described in the contract documents and meet the performance standards set forth therein. The term of this contract will be for one year with the ability to renew the contract for up to FOUR (4) additional one year terms with the written approval of both parties.

**B.** The CONTRACTOR is engaged hereby as an independent contractor and will be so deemed for purposes of the following:

1. The CONTRACTOR will be solely responsible for payment of any Federal or State taxes required as a result of this agreement.
2. This contract is not intended to entitle the CONTRACTOR to any benefits generally granted to COUNTY employees. Without limitation, but by way of illustration, the benefits which are not intended to be extended by this contract to the CONTRACTOR are vacation, holiday and sick leave, other leaves with pay, tenure, medical and dental coverage, life and disability insurance, overtime, Social Security, Workers' Compensation, unemployment compensation, or retirement benefits (except insofar as benefits are otherwise required by law if the CONTRACTOR is presently a member of the Public Employees Retirement System).
3. The CONTRACTOR shall pay employees for work in accordance with ORS 279B.020 and ORS 279B.235, which are incorporated herein by this reference.

All subject employers working under this contract are either employers that comply with ORS656.017 or employers that are exempt under ORS 656.126.

**C.** The CONTRACTOR certifies that, at present, he is not a program, County or Federal employee.

**D.** The CONTRACTOR certifies that he is not a member of the Public Employees Retirement System.

**II. SERVICES TO BE PROVIDED:**

The contractor shall do, perform, and carry out in a satisfactory manner, the work as described in the Request for Proposals issued *XXXXXXXXXX*, the Proposal Response opened at the time of closing on *XXXXXXXXXX* for the rates established therein. The CONTRACTOR shall meet the highest standards prevalent in the industry or business most closely involved in providing the appropriate goods or services.

**III. OWNERSHIP**

All work products of the Contractor which result from this contract ("the work products"), except material previously and mutually identified as confidential, shall be provided to County upon request and shall be considered the exclusive property of the County. In addition, if any of the work products contain intellectual

property of the Contractor that is or could be protected by federal copyright, patent, or trademark laws, or state trade secret laws, Contractor hereby grants County a perpetual, royalty-free, fully paid-up, nonexclusive and irrevocable license to copy, reproduce, perform, dispose of, use and re-use, in whole or in part, and to authorize others to do so for County business, all such work products, including but not limited to: databases, templates, file formats, scripts, links, procedures, materials, training manuals and other training materials, specially created key commands, and any other information, designs, plans, or works provided or delivered to the County or produced by Contractor under this contract.

**IV. CONSTRAINTS:**

The CONTRACTOR agrees:

**A.** If the services to be provided pursuant to Section II are professional and/or consultative, the CONTRACTOR shall not delegate the responsibility for providing those services to any other individual or agency.

**B.** This contract is expressly subject to all applicable State contracting laws and further, it is expressly subject to the debt limitation of Oregon counties set forth in Article XI, section 1 of the Oregon Constitution, and is contingent upon funds being appropriated therefore. Any provisions herein which would conflict with laws are deemed inoperative to that extent.

**C.** Pursuant to the requirements of ORS 279B.220 through 279B.230 and Article XI, Section 10 of the Oregon Constitution, the following terms and conditions are made a part of this agreement:

**1.** CONTRACTOR shall:

- a.** Make payments promptly, as due, to all persons supplying to CONTRACTOR labor or materials for the prosecution of the work provided for in this agreement.
- b.** Pay all contributions or amounts due the Industrial Accident Fund from such CONTRACTOR incurred in the performance of this agreement.
- c.** Not permit any lien or claim to be filed or prosecuted against Clackamas County on account of any labor or material furnished.
- d.** Pay the Department of Revenue all sums withheld from employees pursuant to ORS 316.167.

**2.** If CONTRACTOR fails, neglects or refuses to make prompt payment of any claim for labor or services furnished to CONTRACTOR or a subcontractor by any person in connection with agreement as such claim becomes due, the proper officer representing Clackamas County may pay such claim to the person furnishing the labor or services and charge the amount of the payment against funds due or to become due CONTRACTOR by reason of this agreement.

**3.** CONTRACTOR shall promptly, as due, make payment to any person or partnership, association or corporation furnishing medical, surgical and hospital care or other needed care and attention incident to sickness and injury to the employees of CONTRACTOR, of all sums which CONTRACTOR agrees to pay for such services and all monies and sums which CONTRACTOR collected or deducted from the wages of CONTRACTOR'S employees pursuant to any law, contract or agreement for the purpose of providing or paying for such services.

**D.** The CONTRACTOR shall indemnify, save harmless and defend the COUNTY, its officers, commissioners and employees from and against all claims and actions, and all expenses incidental to the investigation and

defense thereof, arising out of or based upon damage or injuries to persons or property caused by negligence of the CONTRACTOR or the CONTRACTOR'S employees.

E. CONTRACTOR'S failure to perform the scope of work identified or failure to meet established performance standards shall be subject to consequences that include but are not limited to:

1. Reducing or withholding payment;
2. Requiring the CONTRACTOR to perform, at the CONTRACTORS expense, additional work necessary to perform the identified scope of work or meet the established performance standards; or
3. Declaring a default, terminating the contract and seeking damages and other relief under the terms of the contract or other applicable law.

V. **INSURANCE REQUIREMENTS**

A. **Commercial General Liability**

Required by COUNTY  Not required by COUNTY

The CONTRACTOR agrees to furnish the COUNTY evidence of commercial general liability insurance in the amount of not less than \$1,000,000 combined single limit per occurrence / \$2,000,000 general annual aggregate for personal injury and property damage for the protection of the COUNTY, its officers, commissioners and employees against liability for damages because of personal injury, bodily injury, death or damage to property, including loss of use thereof, in any way related to this contract. The COUNTY, at its option, may require a complete copy of the above policy.

B. **Automobile Liability**

Required by COUNTY  Not required by COUNTY

The CONTRACTOR agrees to furnish the COUNTY evidence of personal automobile liability insurance in the amount of not less than \$500,000 combined single limit for bodily injury and property damage for the protection of the COUNTY, its officers, commissioners, and employees against liability for damages because of bodily injury, death or damage to property, including loss of use thereof in any way related to this contract. The COUNTY, at its option, may require a complete copy of the above policy.

C. **Professional Liability**

Required by COUNTY  Not required by COUNTY

D. If the CONTRACTOR has the assistance of other persons in the performance of this contract, and the CONTRACTOR is a subject employer, the CONTRACTOR agrees to qualify and remain qualified for the term of this contract as an insured employer under ORS 656. The CONTRACTOR shall maintain employer's liability insurance with limits of \$100,000 each accident, \$100,000 disease each employee, and \$500,000 each policy limit.

E. If any other required liability insurance is arranged on a "claims made" basis, "tail" coverage will be required at the completion of this contract for a duration of thirty-six (36) months or the maximum time period the CONTRACTOR'S insurer will provide "tail" coverage as subscribed, or continuous "claims made" liability coverage for thirty-six (36) months following the contract completion. Continuous "claims made"

coverage will be acceptable in lieu of "tail" coverage, provided it's retroactive date is on or before the effective date of this contract.

**F.** The insurance, other than the professional liability and workers compensation insurance, shall include the COUNTY as an expressly scheduled additional insured. Proof of insurance must include a copy of the endorsement showing the COUNTY as a scheduled insured. Such insurance shall provide sixty (60) days written notice to the COUNTY in the event of a cancellation or material change and include a statement that no act on the part of the insured shall affect the coverage afforded to the COUNTY under this insurance. This policy(s) shall be primary insurance as respects to the COUNTY. Any insurance or self-insurance maintained by the COUNTY shall be excess and shall not contribute to it.

**G.** Contractor shall require that all of its subcontractors of any tier provide insurance coverage (including additional insured provisions) and limits identical to the insurance required of the Contractor under this Agreement, unless this requirement is expressly modified or waived by the County.

**VI. SUBCONTRACTS:**

The CONTRACTOR shall be responsible to the COUNTY for the actions of persons and firms performing subcontract work. The CONTRACTOR certifies that the CONTRACTOR has not discriminated against minority, women, or emerging small business enterprises, or a business enterprise that is owned or controlled by or that employs a disabled veteran, in obtaining subcontracts.

**VII. TERMINATION: AMENDMENT:**

**A.** This contract may be terminated by either party upon at least TEN (10) days written notice to the other.

**B.** This contract and any amendments to this contract will not be effective until approved by the Board of County Commissioners of Clackamas County.

**C.** This contract supersedes and cancels any prior contracts between the parties hereto for similar services.

By their signatures below, the parties to this contract agree to the terms, conditions, and content expressed herein. The Contractor agrees to perform the scope of work as described in the contract documents and meet the performance standards set forth therein.

XXXXXXXXXXXXXXXXXXXXXXXXXXXX  
XXXXXXXXXXXXXXXXXXXXXXXXXXXX  
XXXXXXXXXXXXXXXXXXXXXXXXXXXX

CLACKAMAS COUNTY  
BOARD OF COMMISSIONERS

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
XXXXXXXXXXXXXXXXXXXX  
XXXXXXXXXXXXXXXXXXXX

\_\_\_\_\_  
Name, Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

\_\_\_\_\_  
Telephone/Fax Number

**SECTION 7**

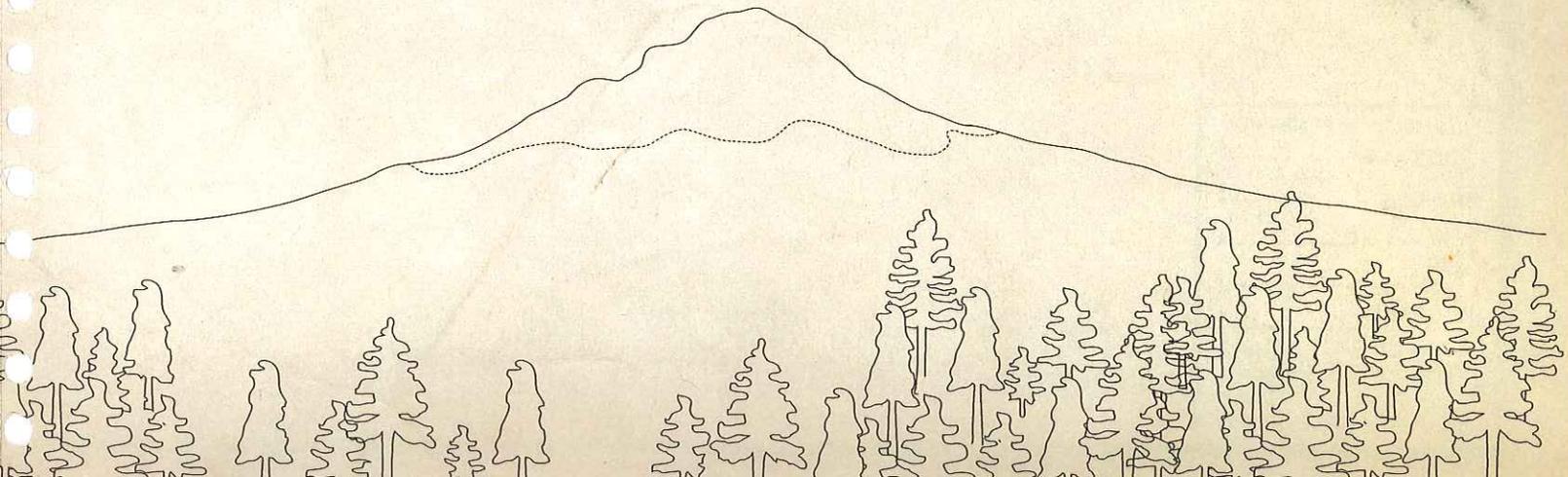
**INSURANCE CERTIFICATE(S)**

*(to be submitted at the time of contract execution)*

**2012 MARKETING  
AGENCY SERVICES  
CLACKAMAS COUNTY  
TOURISM &  
CULTURAL AFFAIRS**

April 30, 2012

**borders  
perrin  
norrander**



**borders**  
**perrin**  
**norrander**

April 30, 2012

Thank you for allowing us the opportunity to complete the RFP. Borders Perrin Norrander (BPN) is a full-service advertising agency based in Portland for the last 34 years. We are an independent business focused on delivering results for our clients. As a curious group of advertising professionals, we challenge the norm and take a fresh, innovative approach to solving complicated marketing challenges. Our agency shines in its creativity, collaborating with clients and media vendors alike to deliver meaningful, cost-efficient programs.

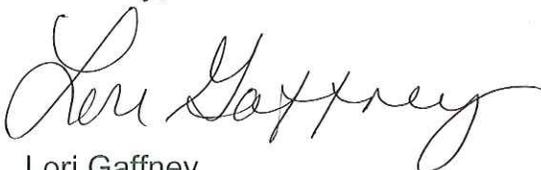
BPN is uniquely qualified to be a trusted marketing partner for Clackamas County Tourism & Cultural Affairs (TCA) for several reasons; we understand how to effectively message to outdoor enthusiasts and appreciators through our work with Columbia Sportswear and Mountain Hardwear, we know how to reach Oregonians (one of your key targets) from our experience working with Oregon Lottery, and most importantly, we know how to market destinations and generate positive results as we have done with Telluride and Monterey County Convention & Visitors Bureau.

Having learned the value of both brand building and transactional messaging for our travel clients, we understand the steps visitors take to planning a trip and have proven successful tactics to reach travelers every step of the travel planning journey. Not to mention, we have a track record of developing co-op programs that partners are excited about and participate in.

TCA would be a valuable client to BPN and we would be proud to represent your brand. We have all of the agency disciplines (strategy, account, creative and media) under one roof along with the experience in destination marketing and the passion and drive to work collaboratively with you to deliver positive results.

We appreciate you and your team for the time, effort and interest in reviewing our RFP. We look forward to hearing from you.

Sincerely,



Lori Gaffney  
Partner/Media Director  
118 SW First Avenue  
Portland, OR 97204  
503-417-8241

SECTION 4

PROPOSAL RESPONSE

Submitted by: Borders Perrin Norrander

Address: 110 SW First Ave, Portland OR 97204

Date: April 27, 2012

Phone number: 503.227.2506 Fax number: 503.227.4827

The undersigned, through the formal submittal of this proposal response, declares that he/she has examined all related documents and read the instruction and conditions, and hereby proposes to assist the County to provide **2012 MARKETING AGENCY SERVICES** as specified, in accordance with the qualifications documents herein, for the price set forth in the Response submittal attached hereto, and forming a part of this Proposal.

The Contractor, by his signature below, hereby represents as follows:

(a) That no Commissioner, officer, agency or employee of Clackamas County is personally interested directly or indirectly in this contract or the compensation to be paid hereunder, and that no representation, statement or statements, oral or in writing, of the County, its Commissioners, officers, agents, or employees had induced him to enter into this contract and the papers made a part hereof by its terms;

(b) The Proposer and each person signing on behalf of any proposer certifies, in the case of a joint proposal, each party thereto, certifies as to its own organization, under penalty of perjury, that to the best of their knowledge and belief:

1. The prices in the proposal have been arrived at independently, without collusion, consultation, communication, or agreement for the purpose of restraining competition as to any matter relating to such prices with any other proposer or with any competitor;
2. Unless otherwise required by law, the prices which have been quoted in the proposal have not been knowingly disclosed by the proposer prior to the proposal deadline, either directly or indirectly, to any other proposer or competitor;
3. No attempt has been made nor will be made by the proposer to induce any other person, partnership or corporation to submit or not to submit a proposal for the purpose of restraining trade;

(c) The proposer fully understands and submits its proposal with the specific knowledge that:

1. The selected proposal must be approved by the Board of Commissioners.
2. This offer to furnish **2012 Marketing Agency Services** will remain in effect at the prices proposed for a period of not less than 120 calendar days from the date that proposals are due, and that this offer may not be withdrawn or modified during that time.

(d) That this proposal is made without connection with any person, firm or corporation making a bid for the same material, and is in all respects, fair and without collusion or fraud.

(e) Vendors shall use recyclable products to the maximum extent economically feasible in the performance of the contract work set forth in this document.

(f) That the Proposer accepts all terms and conditions contained in this RFP and that the RFP and the Proposal Response, and any modifications, will be made part of the contract documents. It is understood that all proposals will become part of the public file on this matter. The County reserves the right to reject any or all proposals.

(g) That the proposer holds current licenses that businesses or services professionals operating in this state must hold in order to undertake or perform the work specified in these contract documents.

(h) That the proposer is covered by liability insurance and other insurance in the amount(s) required by the solicitation.

(i) That the proposer qualifies as a carrier insured employer or a self-insured employer under ORS 656.407 or has elected coverage under ORS 656.128.

(j) That the Proposer is legally qualified to contract with Clackamas County.

(k) That the Proposer has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation or national origin. Nor has proposer or will proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a minority, women or emerging small business enterprise certified under ORS 200.055, or a business enterprise that is owned or controlled by or that employs a disabled veteran, as defined in ORS 408.225

(l) The proposer agrees to accept as full payment for the services specified herein, the amount as shown in his/her proposal.

Resident Bidder, as defined in ORS 279A120

Non-Resident Proposer, Resident State \_\_\_\_\_

The names of the principal officers of the corporation submitting this Proposal, or of the partnership, or of all persons interested in this Proposal as principals are as follows:

Terry Schneider  
Name

Chairman / Creative Director  
Title

John Van Arkel  
Name

Partner / Creative  
Title

Lori Gaffney  
Name

Partner / Media Director  
Title

(If Sole Proprietor or Partnership)

In witness hereto, the undersigned has set his (its) hand this \_\_\_\_\_ day of \_\_\_\_\_, 2012

\_\_\_\_\_  
Name of Firm

\_\_\_\_\_  
Signature of Proposer

(If Corporation)

In witness whereof the undersigned corporation has caused this instrument to be executed by its duly authorized officers this 27 day of April, 2012

Borders Perrin Norrander  
Name of Corporation

x Terry Schud  
By

Chairman / Creative Director  
Title

CONTRACT MANAGER:

Name Lori Gaffney Title: Partner / Media Director

Telephone number: 503-417-8241

**ADDENDUM #1 TO THE REQUEST FOR PROPOSALS  
FOR 2012 MARKETING AGENCY SERVICES**

To: All Proposal and Document Holders

Date: April 23, 2012

This Addendum No.1 issued prior to receipt of Proposals will become part of the Contract Documents, superseding the originals to the applicable extent indicated. Providers shall be responsible for issuing information to those furnishing bids and quotations to them.

**Section 4.4.3, Creative Approach**

**Add the following sentence at the end of the section:**

Samples of work created for projects similar in size and scope to the TCA project **may** be submitted on either a flash drive or DVD. Eight copies of such samples shall be submitted.

All Proposers shall acknowledge receipt and acceptance of this Addendum No. 1 by signing in the space provided and submitting the signed Addendum with the proposal. Proposals submitted without this Addendum may be considered informal.

Lane Miller – Purchasing Manager

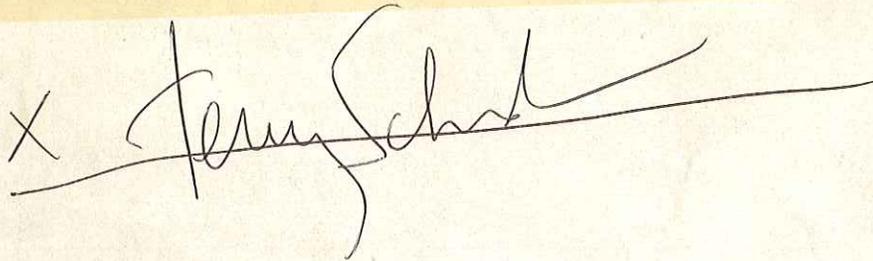
Received, acknowledged, and conditions agreed to this 29<sup>th</sup> day of April, 2012.

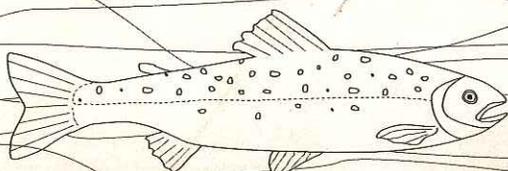
Proposer: Borders Perrin Norranden

By: Terry Schuch

We are Borders Perrin Norrande. And we are excited to introduce ourselves to TCA. To get our response underway, we prepared a creative narrative on the next page about Oregon's Mt. Hood Territory for you. Please also refer to our enclosed flash drive for additional creative, case studies and our agency manifesto. Enjoy.

Borders Perrin Norrande is a resident vendor as defined in ORS279A.120. We operate under Oregon State BIN number 0980700-6.

X 



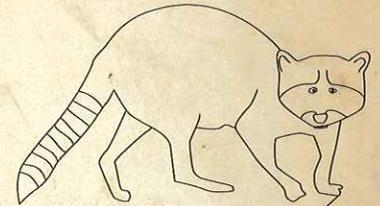


## **THIS IS THE TERRITORY. MT. HOOD TERRITORY.**

A wonderland that welcomes all. A place of the wild, the gentle, the tall and the deep. This is an optimistic place, vibrant with life, sweeping with opportunity and abundance. Anchored by a mountain that fills the sky. Tethered by history. Home of towering trees that know the time before time, land heated within the earth and frosted by snow from the highest skies.

Around here roof racks play hard, topped with kayaks and bikes and snowboards, cross-country skis, farm-cut Christmas trees whistling in the wind and the biggest fattest pumpkin you can heave and ho. Here days start with a sweet 'n sticky donut from Joe's and end with a walk through an art gallery without walls and the water of a lake in your toes. **This is the Territory, the place where all the good things in life are welcome. Mt. Hood Territory.**





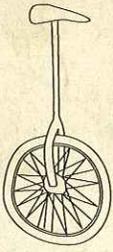
#### 4.4.2 Project understanding and approach

For clarity and comprehensiveness, we have chosen to split this question into three parts.

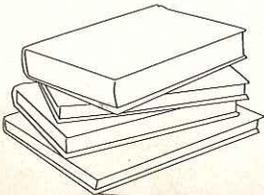
**Part. 1: Provide information in enough detail so that TCA can determine that the agency has a thorough understanding of the services required by this project.**

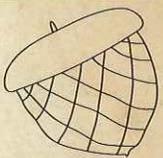
We are delighted at the opportunity to participate in the 2012 Marketing Agency Services RFP process for Clackamas County Tourism & Cultural Affairs (TCA). Borders Perrin Norrande (BPN) is uniquely positioned to handle the services required for this project due to our vast experience in marketing services for large and small clients for over 30 years, and our proven track record in generating positive results in the tourism and travel industry. We offer a broad range of services to help our clients connect with their consumers and move their businesses forward. The services we offer at BPN we understand to be critical to executing this project:

- Creative development and production
- Consumer planning, brand message development, research and analysis
- Media strategy, planning and buying
- Digital and mobile creative and media development
- Experiential marketing and social media
- Brand promotion campaign and retail strategy development
- Design (logo/ brand identity, style guidelines, packaging)
- Collateral, signage and environmental development
- Loyalty, CRM strategy, execution and management
- Coordination with public relations teams
- Creation and management of co-op advertising programs



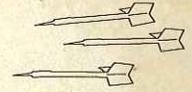
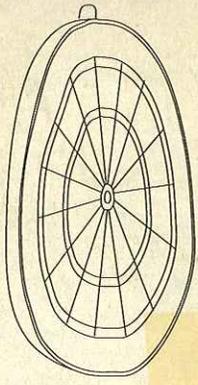
With respect to TCA and Oregon's Mt. Hood Territory (OMHT), we understand that TCA is the recognized Destination Marketing Organization (DMO) for Clackamas County. Multiple partners make up the TCA, from community organizations and businesses and art organizations to cultural and heritage organizations all within the county. Delivering programs and activities that enhance visitor experiences, encouraging overnight stays and improving the quality of life for residents are all important to the long term health of OMHT as a destination. We understand that TCA's main objective is to deliver Oregon's Mt. Hood Territory's brand message to reach local, regional, national and international markets.





In a destination with such an abundance of offerings, including outdoor recreation, agritourism, heritage and culture, OMHT seems primed for growth. We understand the assignment for this project as developing and implementing a marketing plan and advertising for the Clackamas County Tourism & Cultural Affairs department based on the TCA Master Plan Update 2007-12 FY 2011-12 Business Plan, as well as planning work from the previous Master Plans and Destination Audit. From our experience with tourism clients, we understand the need to balance the interests of visitors, businesses, other organizations and government. Increasing visitor spending and Revenue per Available Room (RevPAR) are important to the growth of the destination. Seizing the opportunity to strengthen awareness of OMHT experiences will also be critical to cultivating destination growth. Building strong co-op opportunities that tourism partners will want to participate in will continue to strengthen your membership and deliver added exposure for your brand. Social media, public relations and promotions will also play a role in success. Activating local residents as ambassadors is another very important component that can contribute to the growth of OMHT as a destination.

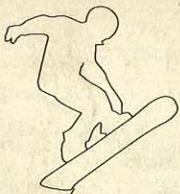




**Part. 2: Illustrate the firm's creative abilities in proposing how the firm will work with Oregon's Mt. Hood Territory.**

Most BPN employees are longtime residents of Oregon and our families have grown up appreciating Oregon's Mt. Hood Territory. We are passionate about the region and passionate about building resonant communications that will drive results for TCA. We hope that our narrative about Oregon's Mt. Hood Territory helps demonstrate our creative ability and creative passion for this project.

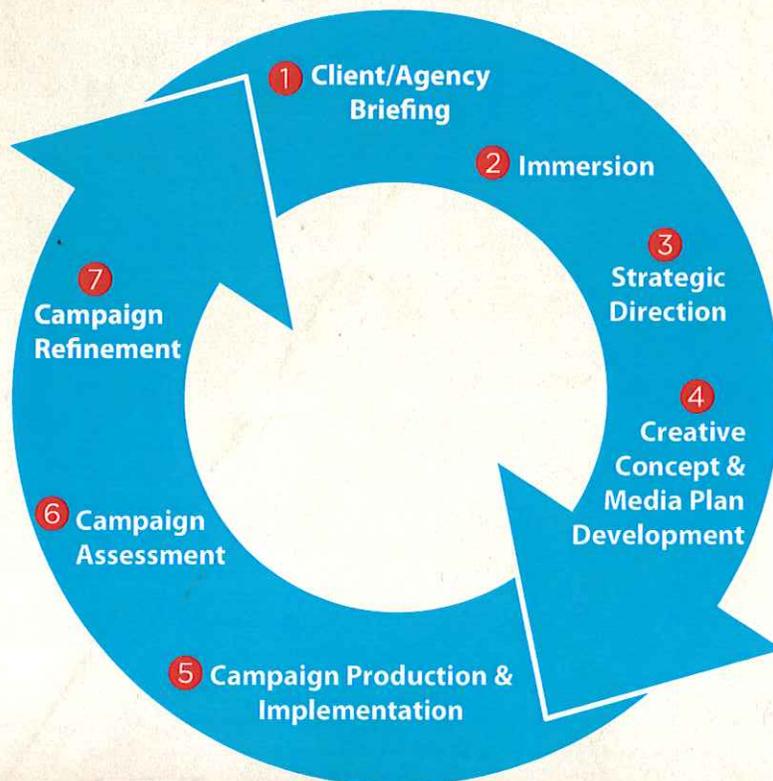
BPN has a long history of creating successful integrated communication campaigns. We approach each creative challenge with a fresh perspective and work tirelessly to find solutions that involve, engage, and spark consumer action. Each campaign's goal is to build out a creative idea that transcends any specific medium and possess the range to extend across multiple media.



@

We believe close collaboration with clients is the only path to success. Clients are at the core of our process and Clackamas County Tourism & Cultural Affairs would be no exception. Our team would establish regular status meetings, work sessions, and frequent contact with TCA to ensure we are in lock-step throughout the communication development process. This approach would help manage TCA's expectations and guarantee a productive, efficient relationship.

While we tailor our approach to fit each assignment, here is our best practices approach to developing marketing communication and advertising. Although it appears to be a linear process, in reality it functions as a non-linear flexible process. That said, each project has these key phases included.

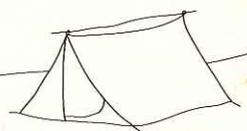


### **Client/Agency Briefing**

At the start of the project we would meet with TCA for a kick-off meeting(s) to learn about your marketing objectives and the assignment. We believe starting with clear and measurable goals is what keeps us focused on delivering favorable results. At this meeting(s) we develop a working relationship structure and process between TCA and BPN in order to streamline communication and tasks, establish procedures and set expectations.

### **Immersion**

Our next step is typically to conduct a brand audit by gathering all recent qualitative and quantitative research from you. If we deem it important, we might interview key stakeholders inside and outside the organization. We review the competitive landscape, mine primary and secondary research for consumer insights, and talk with consumers if the budget allows.



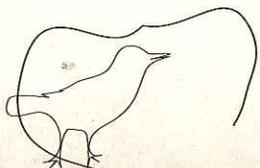
## **Strategic Development**

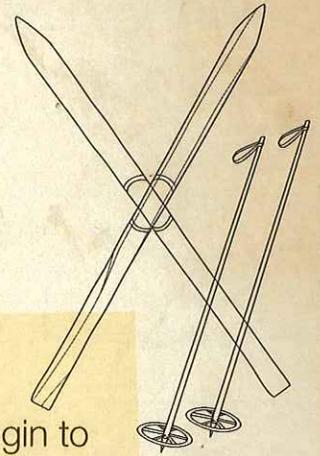
At this phase, informed by TCA's input and the learning from the immersion phase, BPN drafts a creative brief to establish:

- Communication objectives
- Key message
- Competitive, category, or regulatory considerations
- Target audience(s) demographics and psychographics
- Production budget

During this phase we develop a messaging strategy by segment/target to ensure that TCA's messages connect, resonate and effectively influence diverse audiences.

We understand that given the RFP process outlined, that if we are fortunate enough to participate in Phase Two, TCA asks for a creative brief and strategies. In our typical process, this phase would include critical input from our client and collaboration to ensure that the strategic development aligns with the Business Plan.





### **Creative Concept and Media Plan Development**

Using the creative brief as a guide, the creative team(s), begin to explore various creative directions. Most often, we validate the work with consumers through qualitative or quantitative research to ensure we are communicating effectively and our messaging is relevant. This is particularly important when there are diverse audiences to be influenced.

Working collaboratively with the creative team(s), the media team will develop the media plan which includes goals, strategies, tactics, plan options and budget details. All of the options are a result of thorough examination of media proposals from vendors, analysis of target audience research, reach and frequency delivery and qualitative data for the various target audiences, and of course, cost efficiency. The recommended plan is accompanied with rationale based on relevant research.

BPN will prepare and present a formal recommendation of the creative and media. TCA will have many opportunities to share any questions, comments or concerns. BPN will respond and provide additional support or revisions.

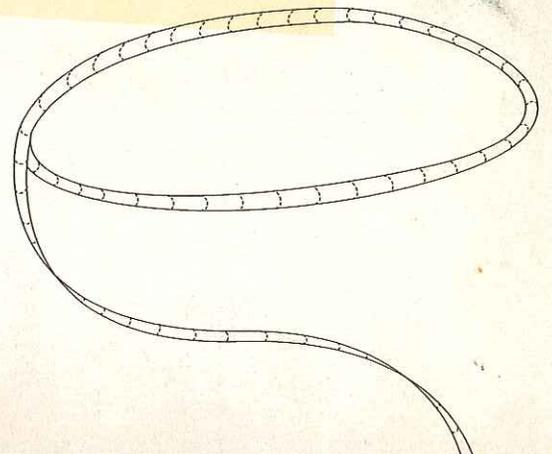
### **Campaign Production and Implementation**

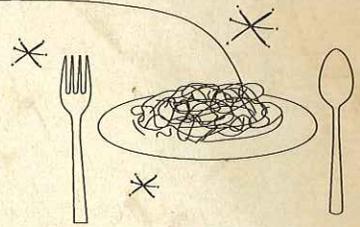
Once the final creative elements and media plan are approved by TCA, we move into the campaign production and implementation phase. We will develop detailed production schedules to ensure efficiency and identify multiple approval checkpoints for TCA. Prior to commencement of any production, detailed production estimates will be presented to TCA for review and approval.

Upon plan approval from TCA, BPN will issue a media authorization to be signed by TCA and returned to BPN. The signed authorization allows BPN to negotiate with media vendors on behalf of TCA. BPN will then work closely with all media vendors to negotiate schedules, rates and added value which may include no-charge spots, website exposure, email blasts, billboards, texting campaigns, promotions, etc. BPN will publish a comprehensive, final media plan that outlines schedules for each media vehicle and any added value or promotional opportunities.

BPN stewards the media buys on a regular basis to ensure that goals are being met and the plan is optimized. We make modifications, secure make-goods or credits for broadcast, create detailed weekly analytics for digital campaigns and proof of performance for print and outdoor. We will also deliver detailed monthly budget reports to TCA.

BPN utilizes sophisticated accounting software to reconcile invoices and pay vendors. BPN will provide invoices and cost recaps to TCA. Once all discrepancies are resolved and BPN approves any adjustments, the vendors will be issued payment.





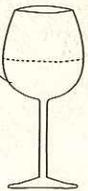
### **Campaign Assessment**

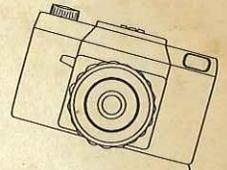
The agency designs a customized approach to gauging the success of campaigns, using measures such as sales data, web metrics, and client proprietary tracking studies. In cases where the campaign message is intended to shift attitudes, we recommend pre- and post-campaign surveying among the target audience to see whether the needle has moved.

Once the program is complete and all media vendor invoices have been paid, BPN will prepare a presentation for TCA. We will identify and evaluate the campaign activities including proof of performance for added value programs along with successes, lessons learned and recommendations for future strategies and tactics.

### **Campaign Refinement**

The work doesn't stop when our campaign has run. After the campaign, we collect our campaign results and evaluate them against our key performance indicators set prior to the campaign. We use the learning from those results to refine our strategy and messaging into the next campaign. Markets change, business goals change and target audiences change. We are skilled at adapting our clients' communications to respond to those and other changes to create continued success.



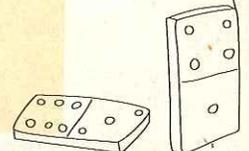


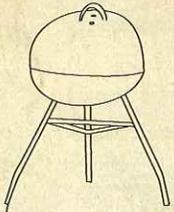
**Part. 3: Demonstrate the firm's evolving strategy through new and changing technologies.**

Technology plays a very critical role in the travel sector with four out of five active travelers (adult who has purchased or participated in an activity, tour, event or attraction while traveling in the past year) shopping online when comparing and choosing travel activities (source: PhoCusWright's Consumer Travel Report Second Edition, 2011). We've learned this through our work with Monterey County Convention and Visitors Bureau (MCCVB) in California, and will use our work with them as an example of how technology is utilized. We also understand that the travel buying experience falls into discrete phases: dreaming, planning, booking, experiencing and sharing.

Marrying the high use of technology in travel with key phases in the travel buying experience, we worked with MCCVB to utilize a number of different technologies to reach travelers every step of the way. We are always evaluating new technologies to ensure that we are meaningfully connecting and continuing to enhance the travel experience. Additionally, San Francisco is the biggest feeder market to Monterey and the residents of San Francisco are some of the most tech-savvy adults in the US.

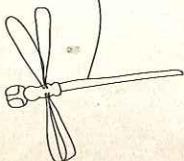
**Dreaming:** To reach potential travelers during this phase we placed highly interactive digital banners that ran prior to the key season. The goal of the digital was to take travelers further down the planning cycle by engaging and encouraging them to select travel activities (shopping, food & wine, golf, spa, romance, etc) that interested them. We requested their

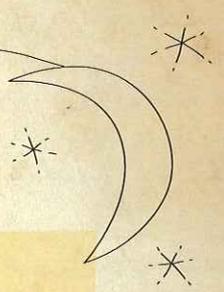
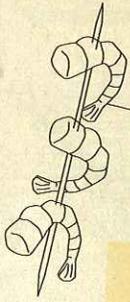




email addresses in-banner and followed up with a customized email highlighting their selected interests with itineraries, travel packages, booking links, and other relevant information. We also had an extensive SEM program that targeted travelers in key markets with specific interests. Sponsored and dedicated emails through relevant partners (Daily Candy, Weekend Sherpa, Snooth, Tasting Table, Outside Magazine, etc.) were geared to reach adults with specific interests that correlate to activities found in Monterey County. All of these digital efforts drove travelers to the SeeMonterey.com website to learn more and book a vacation.

**Planning:** Our goal during this phase was to reach adults as they were in the active planning phase. We know that Monterey might be just one of many choices, so our SEM campaign included keywords for our competitors such as Lake Tahoe, Santa Barbara and Sonoma. We continued running the interactive banners to engage travelers and drive them to SeeMonterey.com. We also had a sponsored Monterey page on TripAdvisor with a dynamic calendar, event listings and links to the visitors guide, interactive map, photos and videos. All of this is intended to romance the destination and get travelers to consider traveling to Monterey.





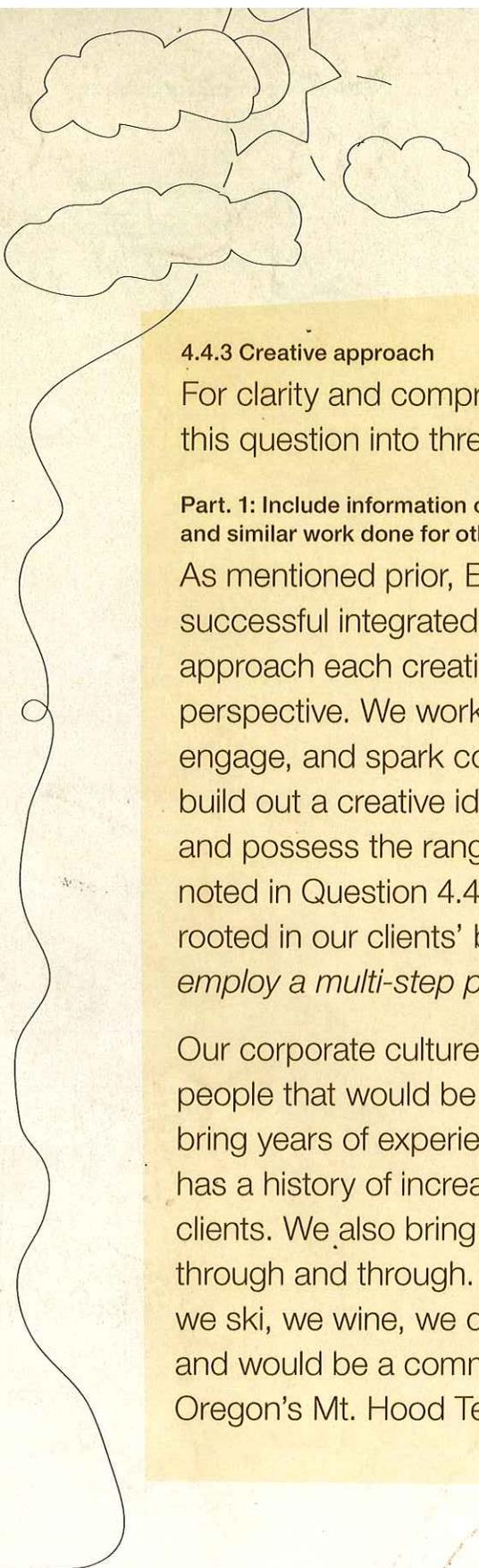
**Booking:** This is when the rubber meets the road and we want to make it as easy as possible for travelers to book their vacations to Monterey. To do so, booking bots were included in-banner that click through to search results and one-step booking. At this point we know travelers are active on OTA's such as Expedia, Travelocity and Orbitz and we make sure our banners are served to our audience there. We went one step further and pursued meaningful additional value by negotiating to have the Travelocity Gnome travel to Monterey.

**Experiencing:** Once travelers get to Monterey, digital tools enhance their travel experience through a Monterey mobile app that can be downloaded from a QR code placed on posters at the Visitor Center (app has since been replaced by a mobile site).

**Sharing:** McKinsey & Company recently did a study of 20,000 adults and researched how consumers make purchase decisions. With the proliferation of media and technology, today's consumers are well-informed, sophisticated and discerning. Before making decisions consumers actively evaluate their choices. It is during this evaluation phase that 2/3 of the touch points are consumer driven marketing activities such as internet reviews and word of mouth (via social media) versus only 1/3 that involve company-driven marketing. This is why it is so critical to encourage visitors to share their experiences and provide content on social media. We continue to help MCCVB grow their Facebook likes and Twitter followers. On Facebook we used sponsored stories which highlighted promotions and events. For Twitter we took a

unique approach and worked with Trazzler to deliver a social media promotion which encouraged adults to tweet about their favorite things to do in Monterey. We capitalized on Trazzler's strong Twitter following as well as utilized Twitter's new sponsored tweets. This was a success for Monterey because MCCVB increased their Twitter followers by 131%. It was such a success for Twitter, they are now using this promotion as a case study on their site. We also participate in Travelocity's highly read blog, the Window Seat, which will focus travelers' experiences in Monterey. MCCVB has very robust Pinterest boards featuring members, activities and photos all showcasing the beauty of Monterey, playing a key role in content creation. All of these digital sharing elements are designed to increase the user driven content.

The digital campaign elements delivered very favorable results for all key performance indicators. Website traffic visits to SeeMonterey.com in 2011 increased 24% versus 2010. Online bookings in 2011 placed on SeeMonterey.com increased 238% versus 2010. Facebook likes increased 58% and as mentioned, Twitter followers increased 131%.



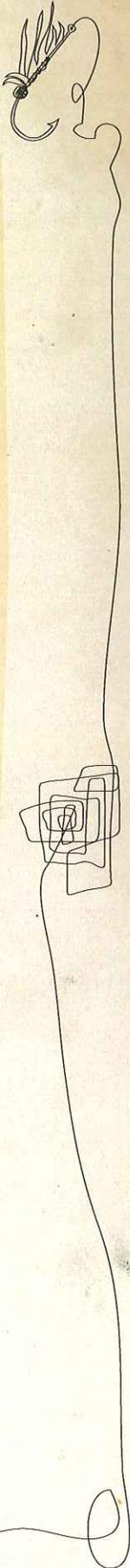
#### 4.4.3 Creative approach

For clarity and comprehensiveness, we have chosen to split this question into three parts.

**Part. 1: Include information on the agency's creative process, corporate culture and similar work done for other clients.**

As mentioned prior, BPN has a long history of creating successful integrated communication campaigns. We approach each creative challenge with a fresh and unique perspective. We work tirelessly to find solutions that involve, engage, and spark consumers. Each campaign's goal is to build out a creative idea that transcends any specific medium and possess the range to extend across multiple media. As noted in Question 4.4.2, our process is client-centric and rooted in our clients' business and marketing goals. *We employ a multi-step process, previously outlined on page 8.*

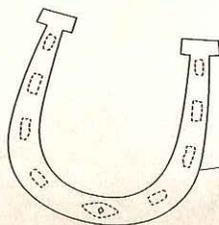
Our corporate culture is professional and Oregonian. The people that would be assigned as your core team collectively bring years of experience across many industries. Our agency has a history of increasing value and delivering results for our clients. We also bring a fresh perspective. We are Oregonians through and through. We bike, we hike, we fish, we camp, we ski, we wine, we dine. We are energized and inspired, and would be a committed, dedicated partner in marketing Oregon's Mt. Hood Territory destination.

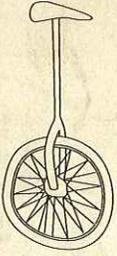


We have provided similar services to a number of clients based on the requirements and services stated for this project. Because of scope, results and similarity to TCA, the MCCVB case study is the most fitting example.

MCCVB's research indicated that a key barrier for visitors to the destination was their perception that they had seen and done everything there is to do in Monterey County. Research unveiled that the competitive strengths of Monterey County include scenery, charm, and the ability to put people in a different state of mind.

The overall marketing goal of this campaign was to highlight the diverse assets in Monterey County and broaden perception to diverse audiences that Monterey County has a lot to offer repeat and new travelers alike. The key performance indicators (KPIs) for success were increases in website traffic and online bookings on SeeMonterey.com and occupancy rates and RevPAR versus a year ago.

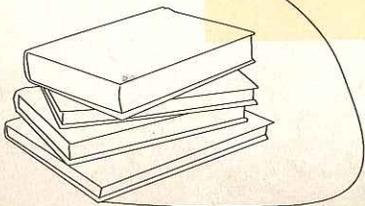




Stunning beauty abounds all across the county and the campaign relied heavily on quality photography to showcase this beauty. A trip to Monterey County appeals to adults who are active and are interested in adventure travel, food and wine, golf, and shopping. MCCVB is comprised of more than 800 members and it was important to create a campaign that was flexible enough to include a broad range of sights and activities.

The campaign was deployed across all consumer touch-points in a multi-media (print and digital including display, search, email, website and social media) program designed to be interactive, informative and emotionally inspiring such that travelers would consider Monterey as a viable vacation destination. Multiple executions across all media highlighted the various images and activities in a carefully crafted photographic mosaic.

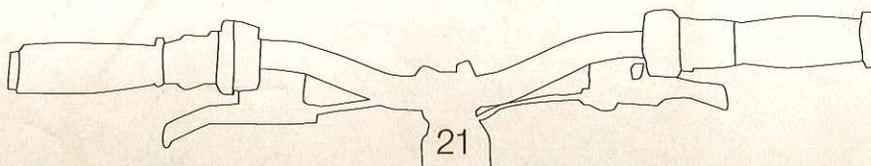
We also developed a robust co-op program for MCCVB tourism partners, giving them opportunities to advertise in media channels that they might not have the budget for as individual entities. We grew the total number of partners from 14 in FY11 to 49 in FY12. By listening to the needs of the partners and developing favorable, multi-budget level programs, we were able to accommodate more types of partners across the county. These programs have included digital placements, print placements and email communications for both leisure and group target audiences. This FY, 7% of MCCVB's media budget was funded through partner co-op programs. Additionally, we maximized the budget by partnering with Visit California through their co-op programs that helped increase our reach on a national level.



We worked closely with the client to leverage the core campaign message and brand platform across all consumer connection points, from the website to the Visitor Center, social media to search advertising.

The campaign has delivered very favorable results for all key performance indicators; website traffic visits to SeeMonterey.com in 2011 increased 24% versus 2010, online bookings in 2011 placed on SeeMonterey.com increased 238% versus 2010, and occupancy rates and RevPAR were both up nearly 5%. This is particularly noteworthy as 2010 was the year the US Open was held in Monterey and sold out the destination.

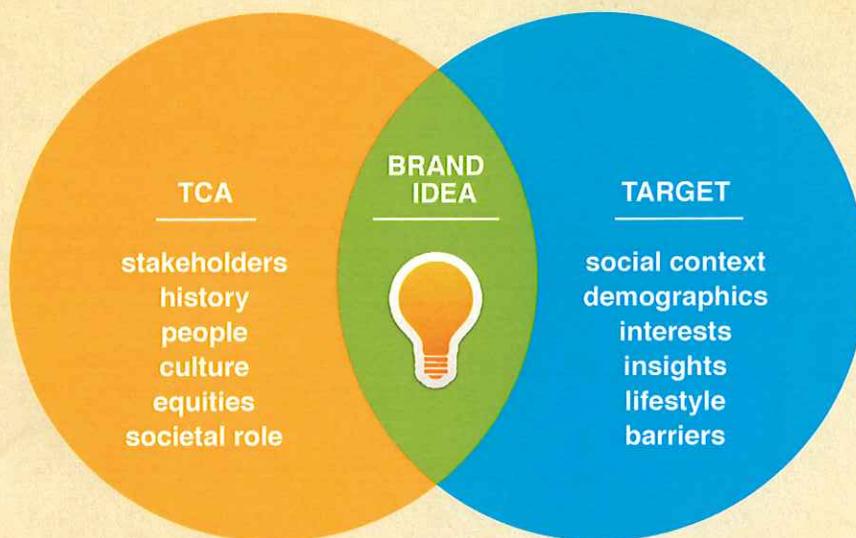
We also conducted an Advertising Effectiveness & Brand Perception Study that revealed that the advertising rated excellent in communication and impact attributes – i.e. “The ad portrays Monterey County as a desirable destination” and “This ad makes me want to get more information on Monterey County.” The study also revealed that respondents who were aware of the advertising traveled to Monterey at a rate 18% higher than those who did not see the advertising. [SMARI, Advertising Effectiveness & Brand Perception Study, December 2011]





**Part. 2: Provide information on the steps that would be taken to create the marketing/ advertising strategies for OMHT.**

The steps that we would take in creating marketing and advertising strategies would not be unlike our agency process described. The agency briefing, immersion and strategic development phases would be critical to developing strategies for OMHT that would guide development of effective, result-generating communications.



### **The Brand Idea**

Our process for creating marketing/advertising strategies and the brand idea for OMHT would involve evaluating core brand truths about OMHT as well as your target audience. The method of unearthing those brand truths helps us articulate a strong “ownable” position for your brand. Uniting that positioning with details about your target audience sets us on a course to create engaging, meaningful communications designed to move the needle for you business. *Please see steps starting on page 9.*

Part 3: Provide samples of work created for projects similar in size and scope that demonstrate the agency's creativity.

See pages 24-41 and enclosed DVD.

**DVD contents:**

Agency Introduction

Monterey County CVB Case Study

Forest Park Coservancy Case Study

Oregon Lottery TV

Beaver Creek :30 TV

Beaver Creek Microsite

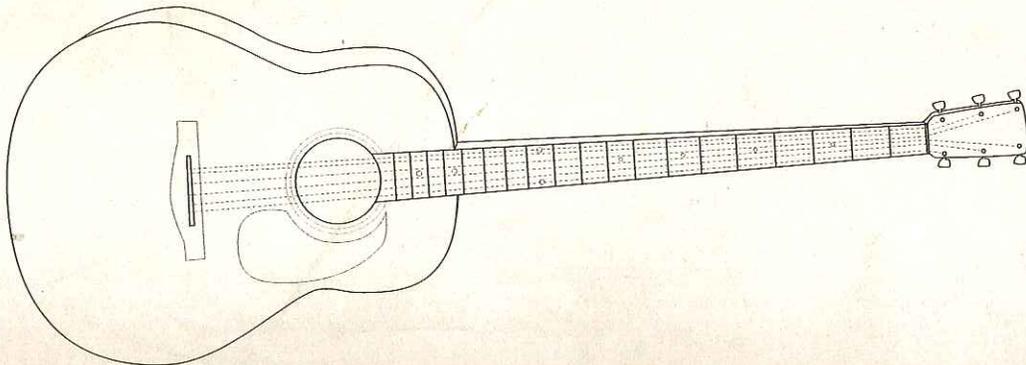
Zumwalt :30 TV

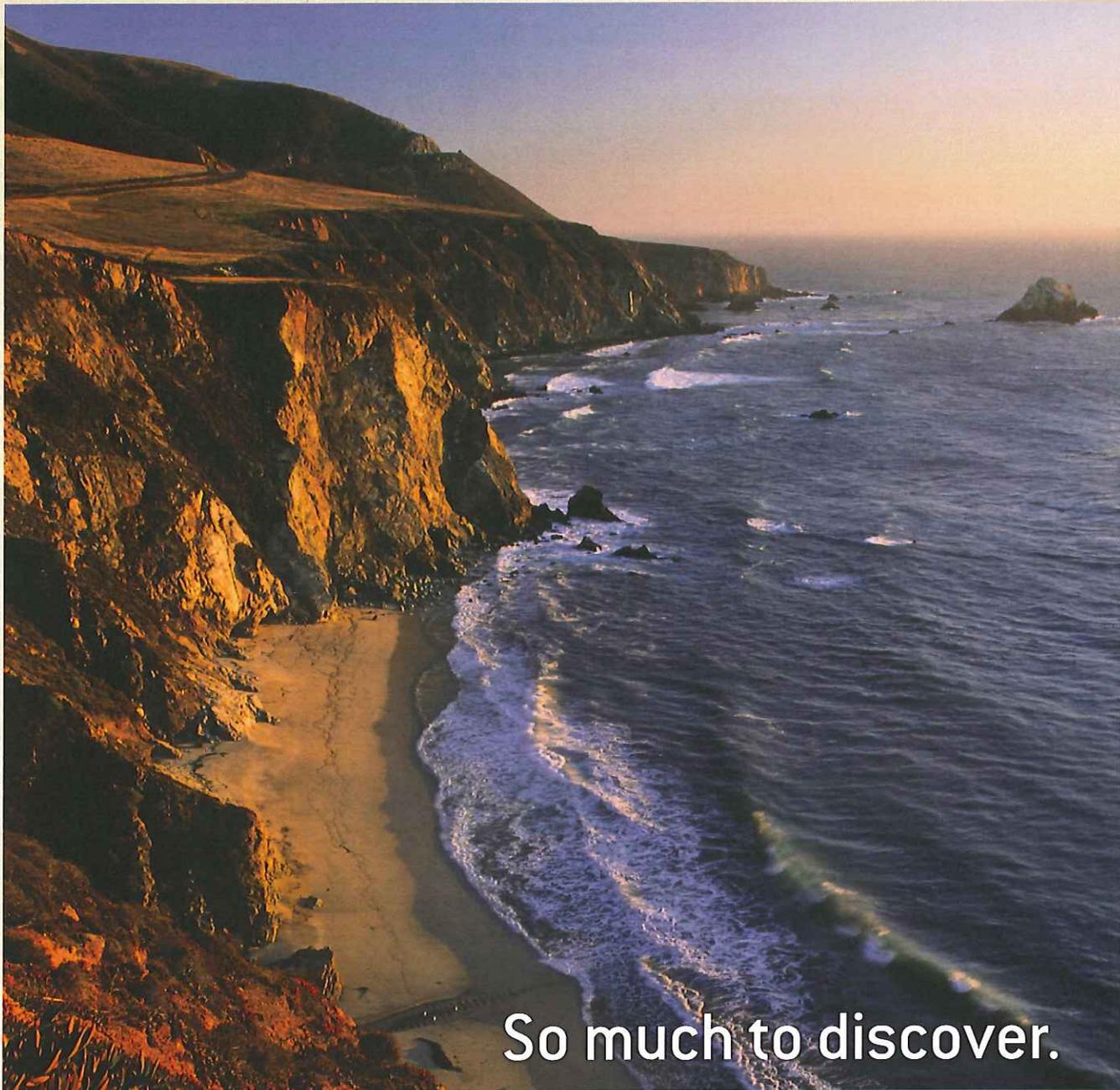
Fort Stevens :30

Mattress :30

NOAA :30

Surfrider Foundation :30 TV





So much to discover.

Why is it that Monterey has such an overabundance of Conde Nast Readers' Choice awards? You'll find the answer all around you.

Book your vacation now at [SeeMonterey.com](http://SeeMonterey.com) or call 866-900-9188.

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CALIFORNIA



Monterey County CVB Print Ad

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### Amtrak® Coast Starlight®

The Coast Starlight provides daily service to Monterey via thruway connections at Salinas. Discover hassle-free travel and relax aboard Amtrak.

Visit [Amtrak.com](http://Amtrak.com) or call 800-USA-RAIL.



### Elkhorn Slough Safari Nature Boat Tours

See seals, sea otters, sea lions, and hundreds of birds from a guided relaxing, stable pontoon boat on the wetlands of Elkhorn Slough, Moss Landing, California.

Check out our video!

Book online at [www.elkhornslough.com](http://www.elkhornslough.com)  
or call 831-633-5555



### Big Sur River Inn

Nestled amid towering redwoods along the scenic Big Sur River, the River Inn is the essence of the Big Sur experience. Relax in one of our comfortable guest rooms and enjoy a delicious meal in our historic dining room.

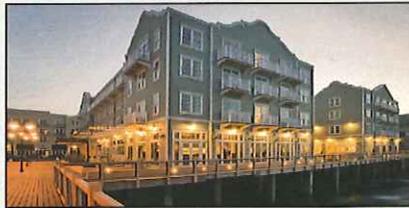
46840 Highway One, Big Sur, California 93920  
831-667-2700 | 800-548-3610  
[www.bigsurriverinn.com](http://www.bigsurriverinn.com)



### Carmel Mission Inn

Our Carmel CA hotel offers a great lodging value serving Carmel-by-the-Sea and Monterey CA. Accommodations for business or pleasure. Contact us direct for the best rates, packages & service.

800-348-9090 | [www.carmelmissioninn.com](http://www.carmelmissioninn.com)



### InterContinental The Clement Monterey

Experience more at Monterey's newest and most stylish full-service waterfront hotel—more value, more relaxation, more innovative cuisine and more possibilities for fun.

750 Cannery Row, Monterey, CA 93940



### Pine Acres Lodge

Discover our intimate hideaway nestled in the pines. 10% off your first reservation when you mention this ad.

1150 Jewell Avenue | Pacific Grove, CA 93950  
831-372-6651

Book your vacation now at [SeeMonterey.com](http://SeeMonterey.com) or call 866-900-9188.

**MONTEREY**  
CALIFORNIA

Carmel-By-The-Sea | Del Rey Oaks | Marina | Monterey | Pacific Grove | Salinas | Sand City  
Seaside | Soledad | Pebble Beach | Moss Landing | Carmel Valley | Big Sur | Salinas Valley

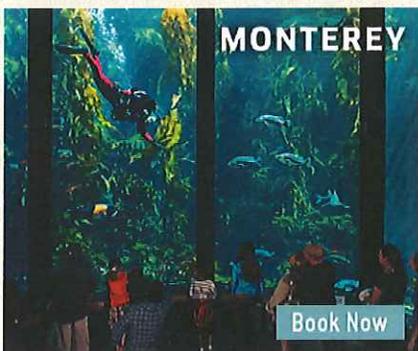
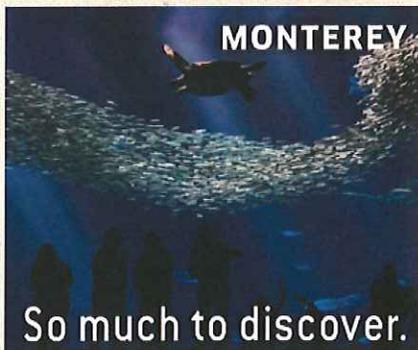
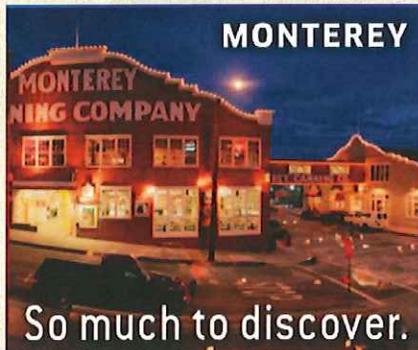
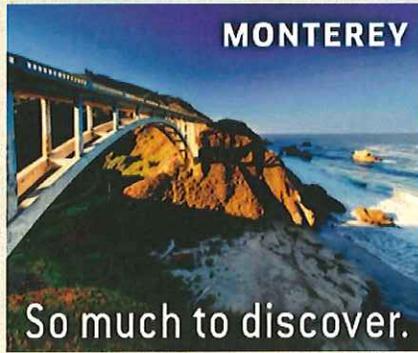


<b>Golf</b> 	Click your interests to start planning your Monterey County getaway. Outdoor Lodging Shopping <b>SUBMIT</b>	<b>Food Wine</b> 		
<b>Family</b> 	<b>Lodging</b> 	<b>Outdoor</b> 	<b>Spa</b> 	<b>Shopping</b> 
<a href="http://SeeMonterey.com">SeeMonterey.com</a>				

	Enter your email address to receive your customized trip plan and special offers. <input type="text"/> <b>SUBMIT</b>			
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Monterey County CVB  
728x90 Expandable  
Banner Ad (storyboard)



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SeeMonterey.com

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● Hotel Only ● Activities ● Deals ● Packages

Check In:  Rooms:

Check Out:  Adults:

Kids:

**Book Now** Book online or call 866-900-9188

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Monterey County travel information. Outdoors, lodging, shopping, and more!  
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#### Monterey's Top Scenic Drives

Monterey County's scenic drives range from the legendary to the little-known. Here are six top favorites, including several best-kept secrets. Read on for descriptions, as well as several interactive Google Maps to help you plan your trip. [Learn more.](#)



#### Outdoor Events:

March 28: Big Sur's Mud Run

April 14-17: Sea Otter Classic

April 29-May 1: Avia Wildflower Triathlon

May 1: Big Sur International Marathon

September 9-11: Pacific Grove Triathlon

September 22-26: Monterey Bay Birding Festival

So many choices. So little time. Monterey County is a premier destination for those who love the outdoors. Biking, hiking, walking, boating, hang gliding and animal watching are just a few of the activities that lure visitors to Monterey and make residents thankful they live here. Whether you want to watch the whales or climb a mountain along breath-taking Big Sur, walk the Recreation Trail or dive the depths in the country's largest marine sanctuary, there is no more spectacular place to enjoy the outdoors than Monterey County. [Learn more.](#)

#### Monterey Bay Kayaking Vacation Package

This Monterey Bay Kayaking Vacation Package is a perfect getaway for anyone wanting to discover the scenery and beauty of Monterey Harbor! No experience required, this guided kayak tour is especially recommended for families with children ages 3 years and up.

#### Package includes:

- A stay at the Embassy Suites Monterey Bay Seaside
- Monterey Bay Kayaks - 2 Hour Guided Natural History Tour of Monterey Bay. [Book now.](#)

#### Sample Itinerary

Noon You've scored one of the top camp sites on the Pacific Coast, and you're not going to waste any time getting there! Though your campsite is at Julia Pfeiffer Burns State Park, check in is at Pfeiffer Big Sur State Park, 12 miles north of your destination. You won't be able to check in until 2pm; you're here early to squeeze in a little hike before setting up camp.

Park at the day-use parking area up the hill, then find the signed trailhead for the Valley View trail. Follow the trail first toward the left to the Valley Overlook, which has a breathtaking view from below of Pfeiffer Falls and the surrounding redwoods. [See full itinerary.](#)



#### Lodging Events:

April 28-May 1: Pebble Beach Food and Wine

May 12-15: Carmel Art Festival

May 20-22: Cooking For Solutions

May 21-22: Ferrari Challenge  
June 10-11: Monterey Wine Festival

June 11: Monterey Beer Festival

June 24-26: Monterey Bay Blues Festival

Once you arrive at the confluence of mystical and surreal, the question becomes: where to stay? The choices are as varied as Monterey County's landscape. Quaint, decadent, understated, austere — which beckons you? From historic mansions turned bed-and-breakfasts, to world-famous resorts, there are 300 lodging options in Monterey County from which to choose... [Learn more.](#)

#### World-Famous Monterey Package

See the sights that made Monterey famous! Enjoy some of the most gorgeous scenery in the world as you take the Scenic Movie luxury bus tour of the Monterey Peninsula legendary and most-filmed spots, including the Monterey Bay Aquarium, Pebble Beach, the Lone Cypress, Cannery Row, and more. Visit the National Steinbeck Center and learn all about Nobel Prize-winning author John Steinbeck and his work. Your accommodations are at the Casa Munras Hotel, ideally located near many of the most visited attractions in Monterey. Fishermans Wharf, The Monterey Bay Aquarium and the shops and restaurants in the downtown area are just steps away from the hotel. [Book now.](#)

#### Sample Itinerary

Once you've checked into your hotel, head to the Monterey Conference Center in downtown Monterey. Your Monterey County orientation begins with a tour on the Monterey Movie Tours motorcoach.

This unique tour shows off both Monterey's most remarkable scenery and its history. As you drive by Monterey's most notable scenic spots and along legendary 17-Mile Drive, monitors on board the bus will show the locations as they have appeared in films throughout the years. [See full itinerary.](#)



#### Shopping Events:

April 9-10: Good Old Days Celebration and Crafts Show

May 7-8: Monterey Bay Spring Fest Arts & Crafts Faire

July 31: Moss Landing Antique Street Fair

Monterey County's shopping scene is full of great deals and extraordinary surprises, from fine art to locally owned boutiques and everything in between. In Moss Landing, travelers pull off Highway 1 to explore antique shops, art galleries and high-fashion showrooms. South of Moss Landing, Carmel-by-the-Sea offers personal attention, luxury boutiques and charming wine tasting rooms. Cannery Row's shops give visitors a taste of Monterey's nautical heritage. In addition to personal attention and unique, affordable goods, shoppers in Monterey County enjoy variety. The region's stores, studios and retail centers are as diverse as its beach, mountain and vineyard landscapes. That means the perfect purchase is never hard to find. [Learn more.](#)

#### Sample Itinerary

The hot handbags of Stella Page Design have been featured in Emmy gift bags and on the arms of celebrities like Angelina Jolie, Demi Moore, Goldie Hawn, Jada Pinkett Smith, California's former First Lady Maria Shriver and Salma Hayek. Visit the one-of-a-kind design studio and showroom, where Stella Page Design's unique bags are crafted.

The Haute Enchilada Art Cafe is both a dining destination and an art gallery. It's known throughout the area for its elegant take on both Mexican and traditional cuisine, as well as the high-profile paintings and sculptures in the gallery behind the dining room. Browse, then fuel up for a focused 48 hours of shopping! [See full itinerary.](#)

Monterey County Convention & Visitors Bureau P.O. Box 1770, Monterey, CA 93942 1-877-MONTEREY info@mcovb.org

In partnership with Monterey County and the cities of Carmel-by-the-Sea, Del Rey Oaks, Marina, Monterey, Pacific Grove, Salinas, Sand City, Seaside, Pebble Beach, Moss Landing, Carmel Valley, Big Sur, and Salinas Valley.

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Tweet to SeeMonterey

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**SeeMonterey** @SeeMonterey

What a pretty day! RT @Yum\_Waffles: Lovers point #monterey #beach #ocean #water is.gd/Ve4/VN

← View photo

51m
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**SeeMonterey** @SeeMonterey

It's gorgeous and sunny here! RT @keeks3602: Hoping for a beautiful day in Monterey!

1h
- 

**SeeMonterey** @SeeMonterey

Currently Dylan Woo hoot Monterey can't wait to see you!

← In reply to Dylan Powers

1h

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Aaron Mahony



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**See Monterey**  
 17,819 likes · 323 talking about this · 56 were here

Like Message

Travel/Leisure

SeeMonterey has official travel info for Monterey, Carmel-by-the-Sea, Big Sur, Pacific Grove, Pebble Beach, Carmel Valley, Salinas Valley, Moss Landing.

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**Bronson Pinchot**  
 Public Figure

Like

Create a Page

Description

From Wikipedia, the free encyclopedia

**Bronson Alcott Pinchot** (born May 20, 1950) is an American actor. He has appeared in several feature films, including *Risky Business*, *Beverly Hills Cop* (and reprising his popular supporting role in *Beverly Hills Cop III*), *The First Wives Club*, *True Romance*, *Courage Under Fire* and *It's My Party*. Pinchot is probably best known for his role in the ABC family sitcom *Perfect Strangers* as Basil Karkopoulos from the fictional Greek-like island of Mypos.

Personal life

Pinchot was born in New York City, New York, the son of Rosina (née Axta), a typist, and Henry Pinchot (originally Poncharvassly), a bookbinder. His mother was Italian-American, and his father, who was of Russian descent, was born in New York and raised in Paris. Pinchot was raised in southern California. After graduating from South Pasadena High School, where he was number one in his class and valedictorian, he went to Yale University on a full scholarship. He was placed in Morse College there and graduated magna cum laude. He began college studying fine art but became interested in acting when he won a role in a college play and was discovered by a casting director which resulted in a role in the feature film *Risky Business*.

Source

Description above from the Wikipedia article Bronson Pinchot. Reprinted under CC-BY-SA. Full list of contributors here. Community Pages are not affiliated with, or endorsed by, Facebook.

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People You May Know

- 

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 Monterey County  
 3 mutual friends

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 76 likes 5 comments 480 repins

Susanne Haring onto Favorite Places & Spaces

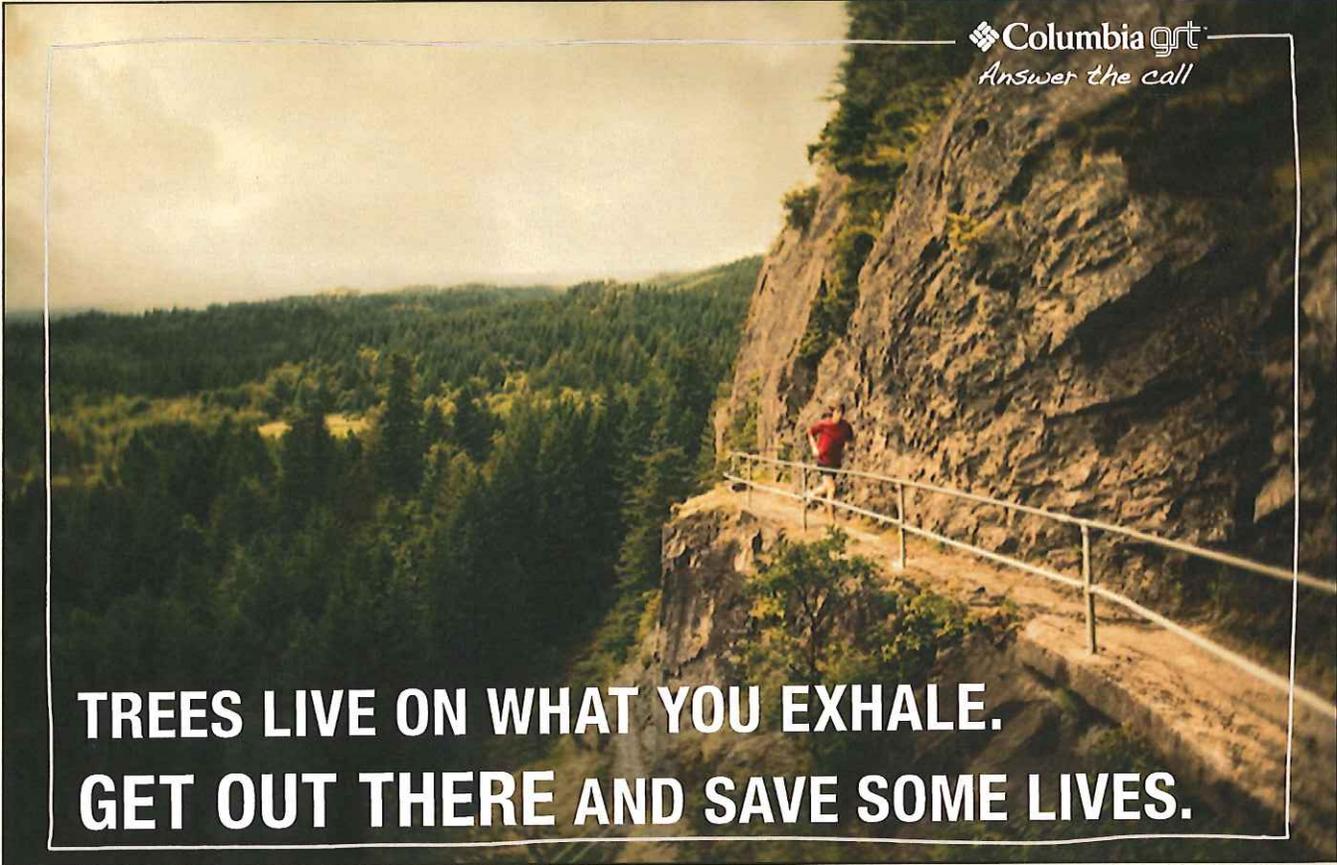
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**Monterey**  
 1 repin

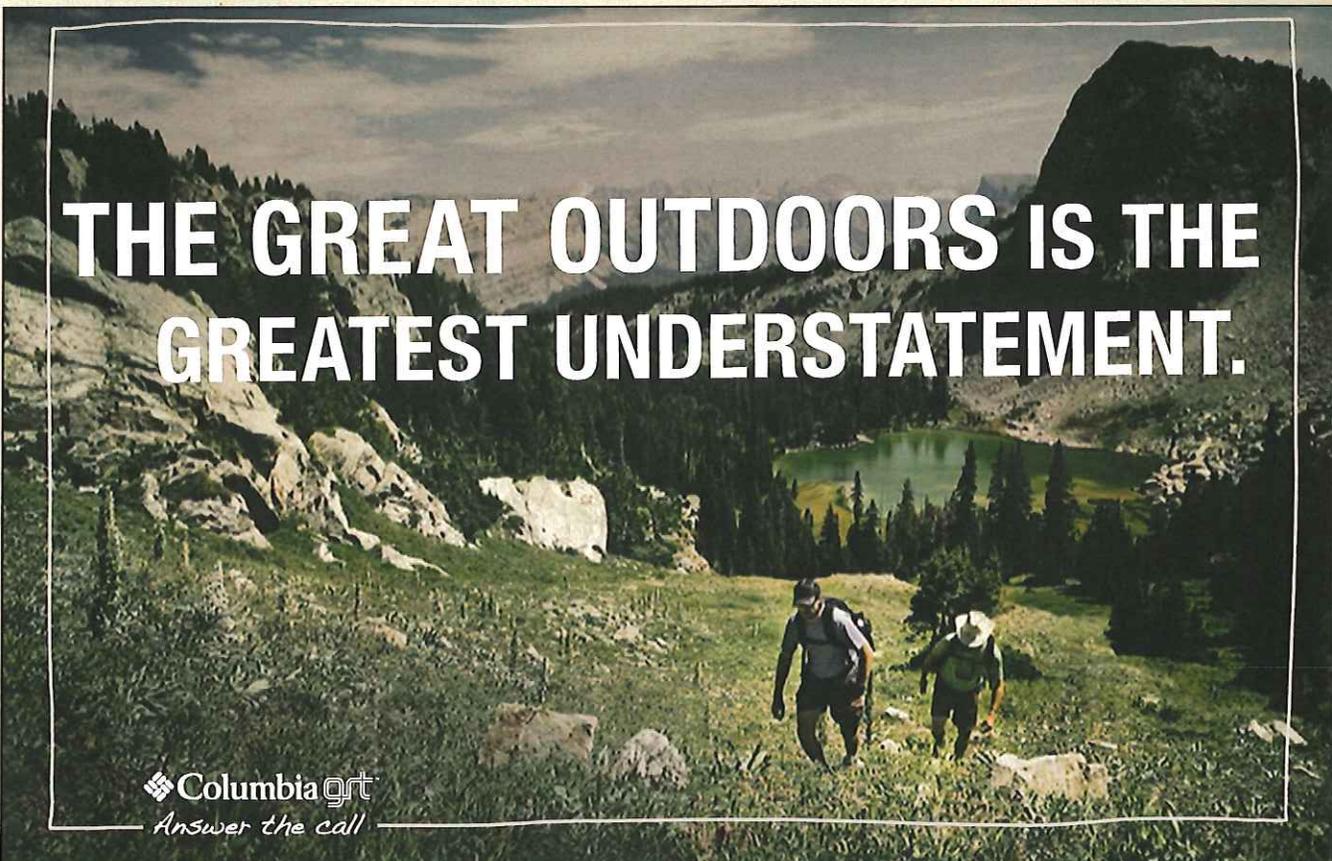
Danica onto Kitchens

 Columbia *grt*  
*Answer the call*



**TREES LIVE ON WHAT YOU EXHALE.  
GET OUT THERE AND SAVE SOME LIVES.**

*Love it*  
Columbia Sportswear  
Print Ad



**THE GREAT OUTDOORS IS THE  
GREATEST UNDERSTATEMENT.**

 **Columbia** *grt*  
*Answer the call*

Columbia Sportswear  
Print Ad

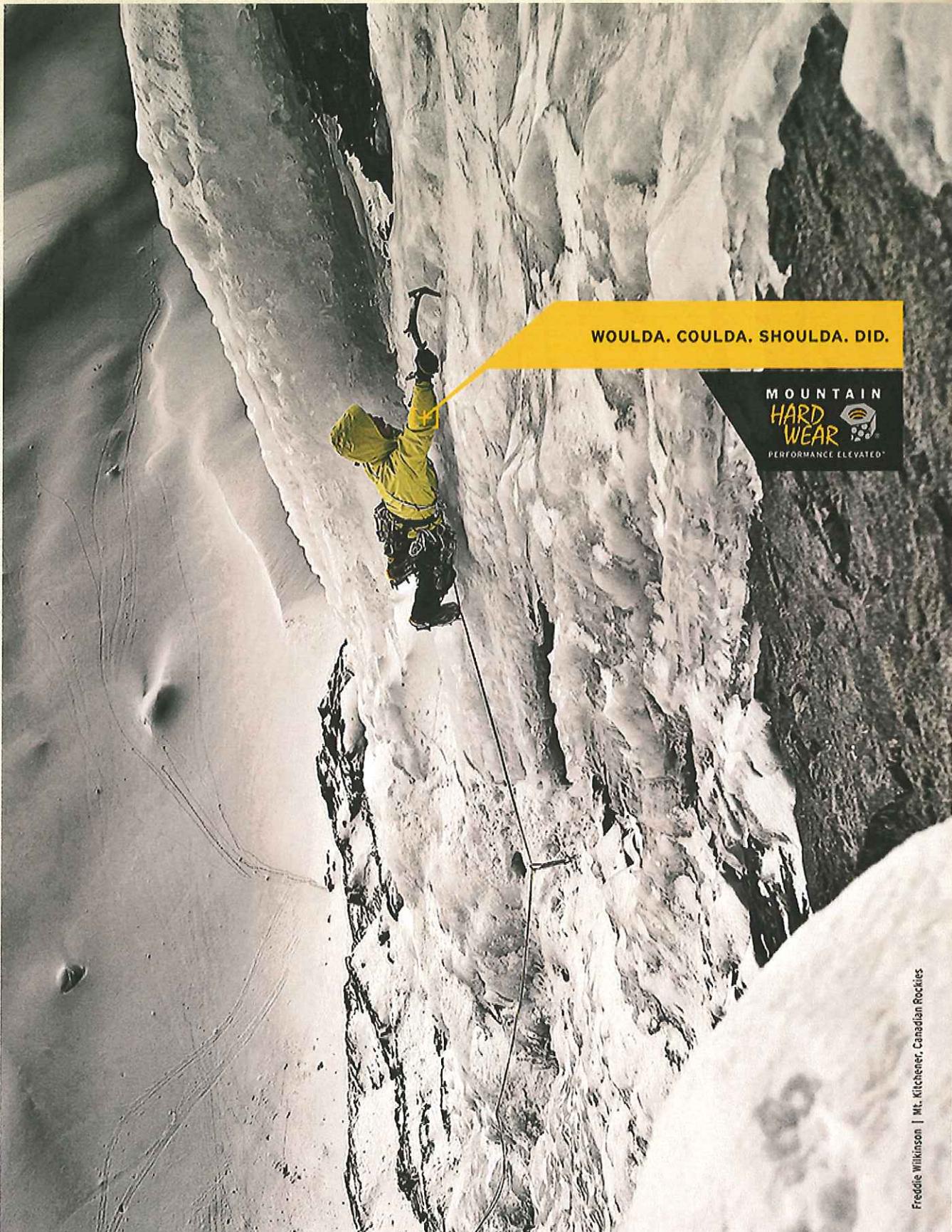


ABOVE 15,000 FEET TREES NO LONGER GROW.  
BUT PEOPLE DO.

**MOUNTAIN  
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Andrew McLean | Mount Superior, Utah

Mountain Hardwear  
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Freddie Wilkinson | Mt. Kitchener, Canadian Rockies

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It does good things™ 

Go  ing.

Lottery Dollars helped restore Fort Stevens State Park.

*Lottery games should be played for entertainment only.*

It does good things™ 

Go  ing.

Lottery Dollars helped restore Fort Stevens State Park.

*Lottery games should be played for entertainment only.*

Oregon Lottery  
"Fort Stevens" OOH



**Lottery Dollars helped  
restore Fort Stevens  
State Park.**



**It does good things™**

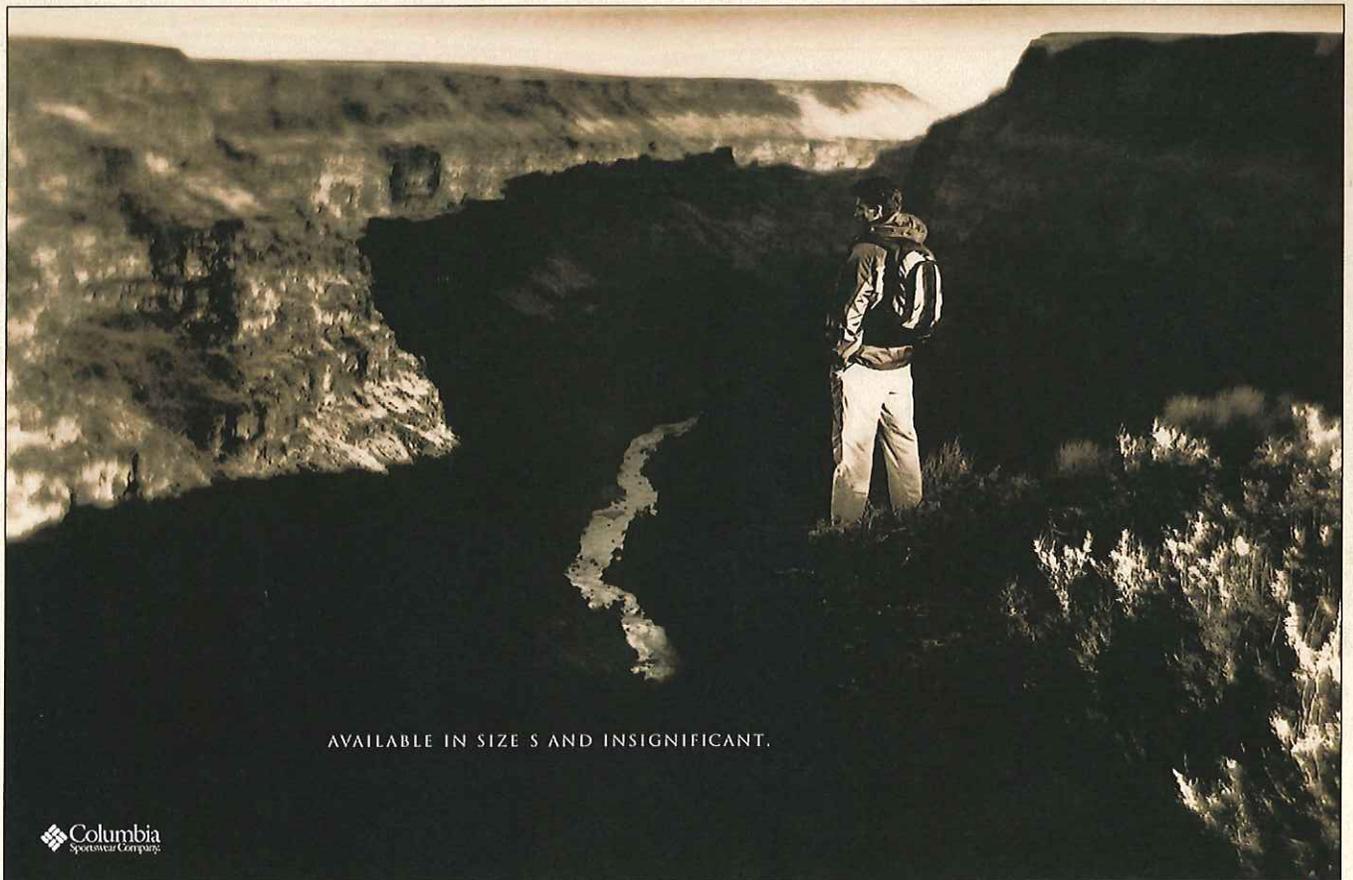
Oregon Lottery  
"Fort Stevens" Digital  
(Storyboard)



 Columbia  
Sportswear Company  
[columbia.com](http://columbia.com)

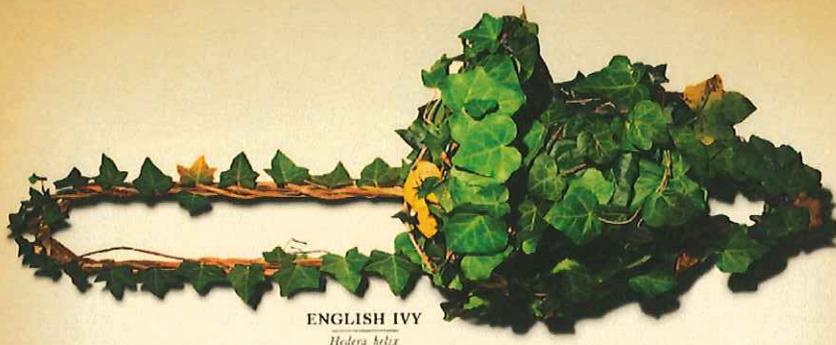
Columbia Sportswear  
"Taxidermy" Poster

*Love it!*



AVAILABLE IN SIZE S AND INSIGNIFICANT.

Columbia Sportswear  
"Welcome" Poster (top) "Insignificant" Poster (bottom)

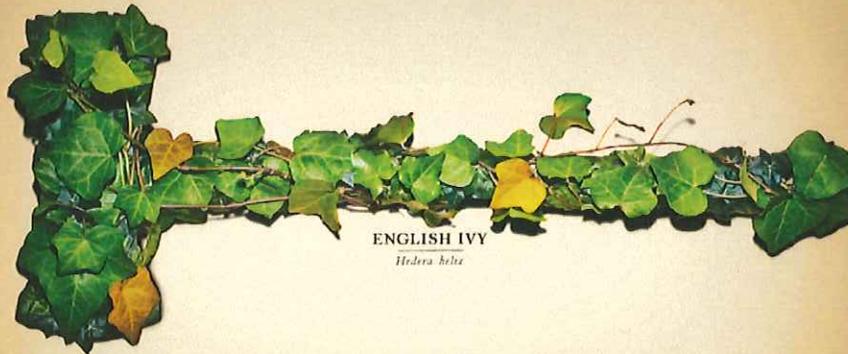


ENGLISH IVY  
*Hedera helix*

## THE TREES OF FOREST PARK ARE IN DANGER.

Forest Park is under attack. Invasive plant species such as English Ivy have gained a foothold and are taking a heavy toll on native trees and plant life. The consequences reach far beyond the park's boundaries,

to the quality of the region's air, water and wildlife habitat. Help the Forest Park Conservancy in its fight to protect one of Portland's natural treasures. Find out how at [RestoreForestPark.org](http://RestoreForestPark.org).



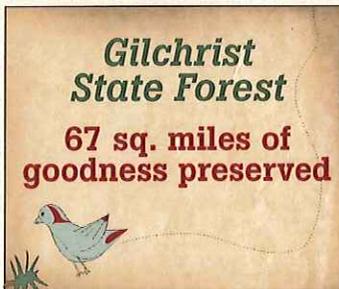
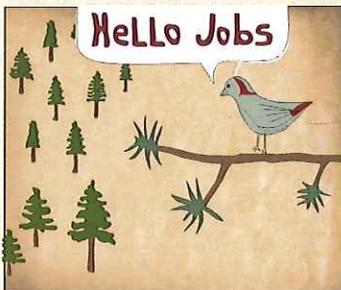
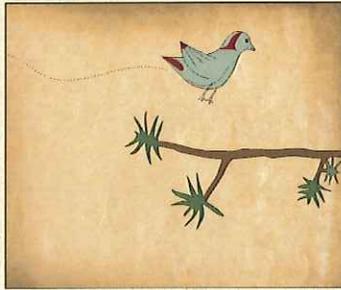
ENGLISH IVY  
*Hedera helix*

## NATIVE PLANTS ARE UNDER ATTACK IN FOREST PARK.

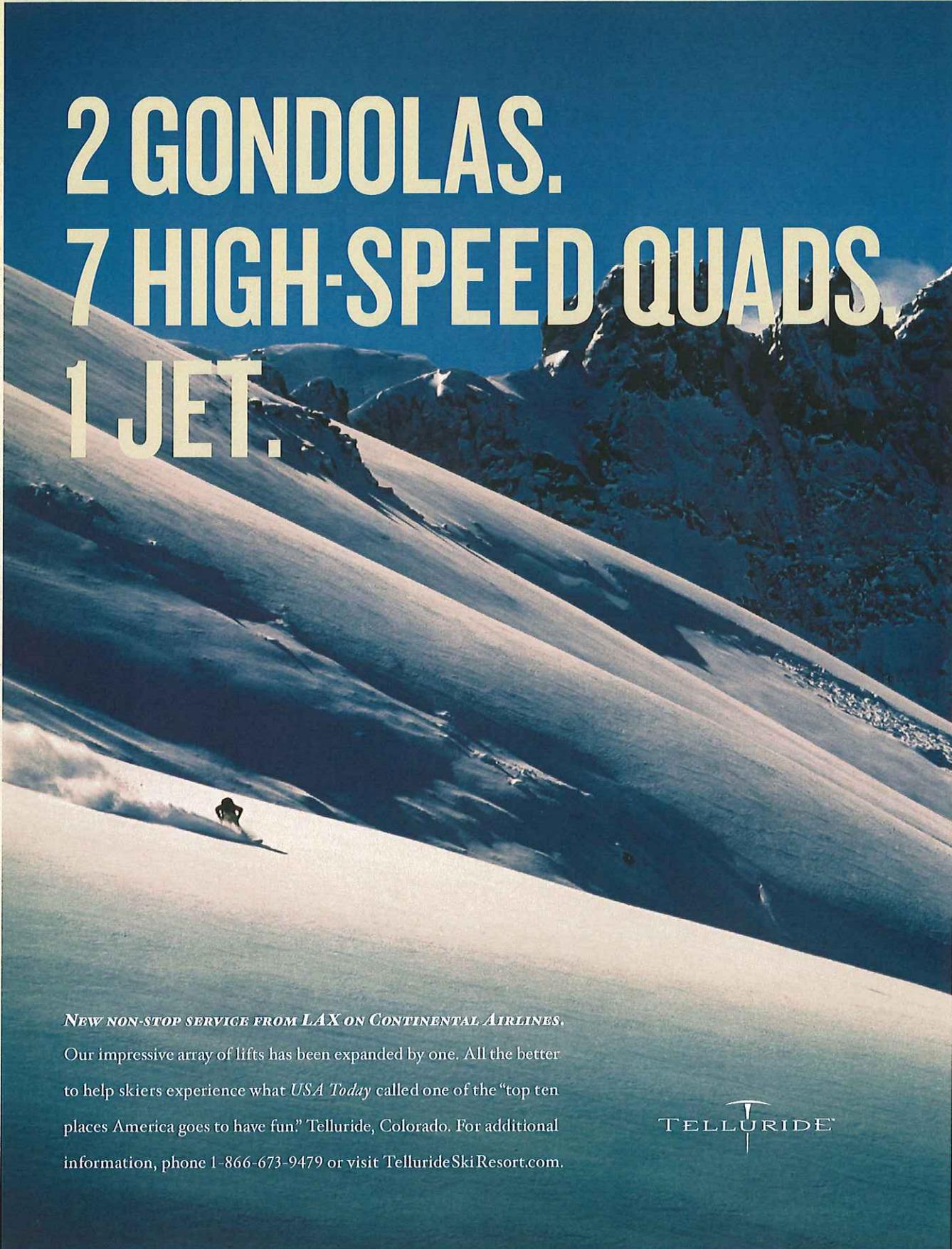
Forest Park is under attack. Invasive plant species such as English Ivy have gained a foothold and are taking a heavy toll on native trees and plant life. The consequences reach far beyond the park's boundaries,

to the quality of the region's air, water and wildlife habitat. Help the Forest Park Conservancy in its fight to protect one of Portland's natural treasures. Find out how at [RestoreForestPark.org](http://RestoreForestPark.org).





Oregon Lottery  
"Gilchrist" Digital  
(Storyboard)



# 2 GONDOLAS. 7 HIGH-SPEED QUADS. 1 JET.

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Telluride  
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**2 GONDOLAS.**

**2 GONDOLAS.  
7 HIGH-SPEED QUADS.**

**2 GONDOLAS.  
7 HIGH-SPEED QUADS.  
1 JET.**

New non-stop service from  
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Visit [TellurideSkiResort.com](http://TellurideSkiResort.com)

**TELLURIDE**

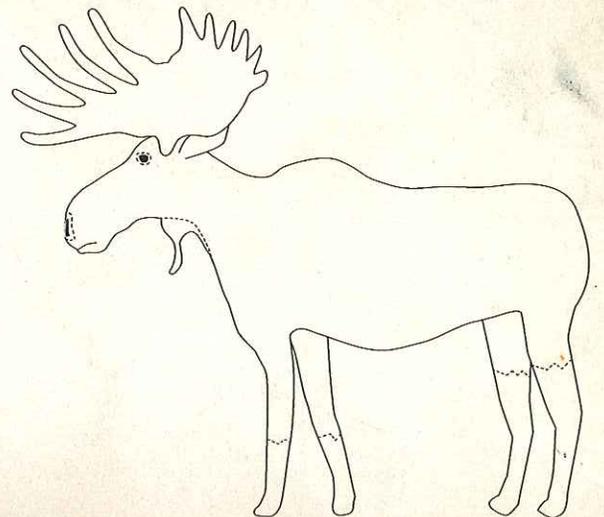
Telluride  
Digital (Storyboard)

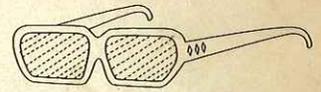
#### 4.4.4 Agency Qualifications and Experience

All team members including subcontractors included on the team shall be identified. Demonstrated experience and available staffing must be clearly stated.

#### **Staff and experience**

Our goal is to be active, efficient and effective to make it easy for our clients to interact with the agency. The TCA team at BPN would have key leaders for each discipline. Some clients prefer a single point of contact, while others prefer reaching out to the specialist. It doesn't matter to us. We believe all of our employees are key employees who are charged with creating success for our clients. The primary team members for the TCA business would be the following:





**Loralee Stapleton**, whom everyone calls “LL” is BPN’s Account Director and would oversee all aspects of the relationship with TCA. She would manage the communication flow between TCA and BPN as well as the internal and external process to create and develop the communication. BPN charges her with knowing the client’s business almost as much as our clients know their business. The account team is responsible for ensuring all deadlines are met on time and that all projects remain in scope. LL runs a tight ship and as a client, you can be assured that she is accessible and organized as well as a great listener and problem solver. LL has worked with many clients, including Monterey County Convention and Visitors Bureau, Sprint, Nike, Wilson/ DeMarini, Enron Broadband Services, Ultimate Electronics, Rejuvenation and the Oregon Lottery.

**Jessica Hagerty**, Assistant Account Executive, is new to the agency business, joining BPN after graduating from University of Colorado in 2011. Sharp, detail oriented, responsive and a keen listener, Jessica brings fresh creativity and a seasoned-beyond-her-years client focus to our team. Give her a problem and she’ll have multiple solutions before noon. Her experience already includes working with clients such as Monterey County Convention and Visitors Bureau, Oregon Lottery, Wilson/ DeMarini and USA Pears.

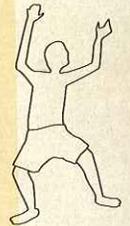
**Terry Schneider**, Creative Director, oversees the development and production of all creative elements including, but not limited to: TV, radio, magazine, newspaper, outdoor, digital display ads, mobile, email marketing, search, collateral, social media and brand identification. His results oriented focus is best demonstrated by Columbia Sportswear, which he helped to grow from a \$1.6 million business to over \$1.6 billion in annual sales. His experience includes Monterey County Convention and Visitors Bureau, Telluride, Washington Mutual, US Bank, BlueCross BlueShield, Oregon Lottery and Intel.

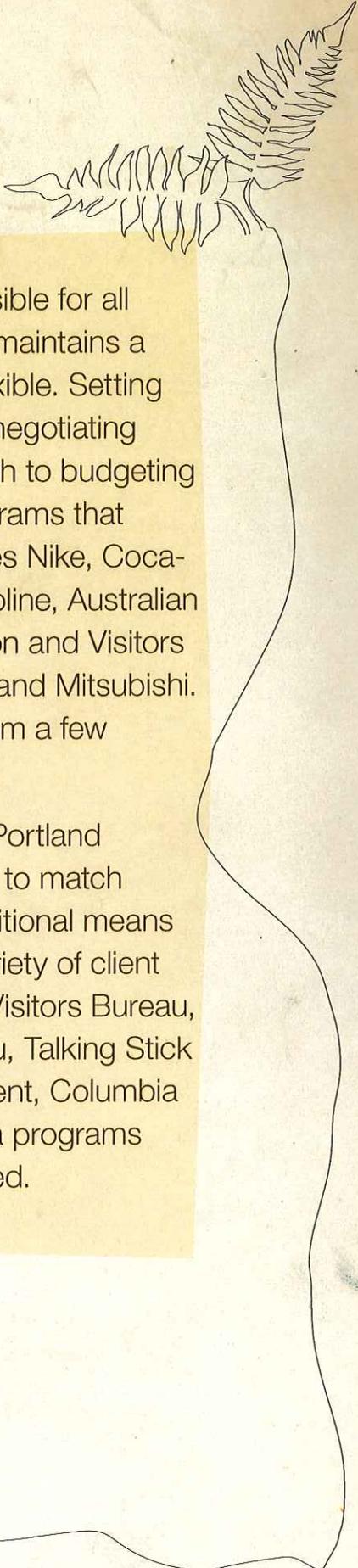
**John Heinsma**, Writer, focuses on resonant creative that connects. His work helped Valvoline move from #4 to #1 in the marketplace, and his experience extends to brands such as Intel, Mountain Hardwear, Land Rover, Telluride, Monterey County Convention and Visitors Bureau, Kimpton Group and Columbia Sportswear. John constantly pokes and prods at the possible, questions the status quo and works fluently across many platforms.

**Ben Bellayuto**, Art Director, is originally from Texas, and made his way to Portland via Miami, Amsterdam and San Francisco, working at shops like Venables Bell & Partners and Strawberry Frog. He has crafted campaigns for clients such as Louisiana Office of Tourism, Seaside Florida, Kashi Foods, Audi and HBO.

**Todd Davidson**, Writer, has a knack for cutting straight to the heart of what makes companies interesting, whether repositioning a renowned brand with a simple line (“Leave nothing undone” for Leatherman Tools) or stretching big ideas across multi-channel campaigns. His work has helped make good things happen for Chandon, Air New Zealand, Oregon Lottery, Louisiana Economic Development, Baton Rouge Area CVB, Gulf County Florida Tourism, Yakima Racks, Umpqua Bank, Pabst Brewing Company, Energy Trust of Oregon, Sprint, USA Pears and many others. He was born in Louisiana and returns occasionally to fight gators for crawfish.

**Leslee York**, Brand Strategist, grounds our creative solutions with her articulate assessment of the consumer. She would work closely with TCA and BPN’s creative and media teams to clearly define the audiences—what motivates them and the best strategy to reach them and incite action. She manages all consumer research both qualitative and quantitative. She has helped define strategies and brand positions for a broad range of clients such as Monterey County Convention and Visitors Bureau, Columbia Sportswear, Telluride, Monster.com and Stanley Works, among others.





**Lori Gaffney**, Media Director, would be responsible for all of the media planning and buying for TCA. BPN maintains a full-service media department that is fast and flexible. Setting solid objectives with measurable results, artfully negotiating rates and added value and a disciplined approach to budgeting allows us to deliver efficient communication programs that maximize all investments. Her experience includes Nike, Coca-Cola, Miller Brewing, Columbia Sportswear, Valvoline, Australian Tourist Commission, Monterey County Convention and Visitors Bureau, Telluride, Paramount Hotel NY, Porsche and Mitsubishi. She's worked for clients with budgets ranging from a few dollars to a few hundred million.

**Andrea Brown**, Associate Media Director, is a Portland native, and enjoys finding new and creative ways to match media with the creative message using both traditional means and new media tactics. She has worked on a variety of client accounts, including Scottsdale Convention and Visitors Bureau, Monterey County Convention and Visitors Bureau, Talking Stick Resort, Thunderbird School of Global Management, Columbia Sportswear and PacifiCorp. Her innovative media programs continue to keep our creative folks very challenged.



**Scott Fox**, Broadcast Producer, has more than ten years of experience in finding smart, creative and resourceful ways to produce work for our clients. Whether it is an online video, radio spot or TV spot, Scott has produced work for clients such as Monterey County Convention and Visitors Bureau, Columbia Sportswear, Valvoline and Oregon Lottery.

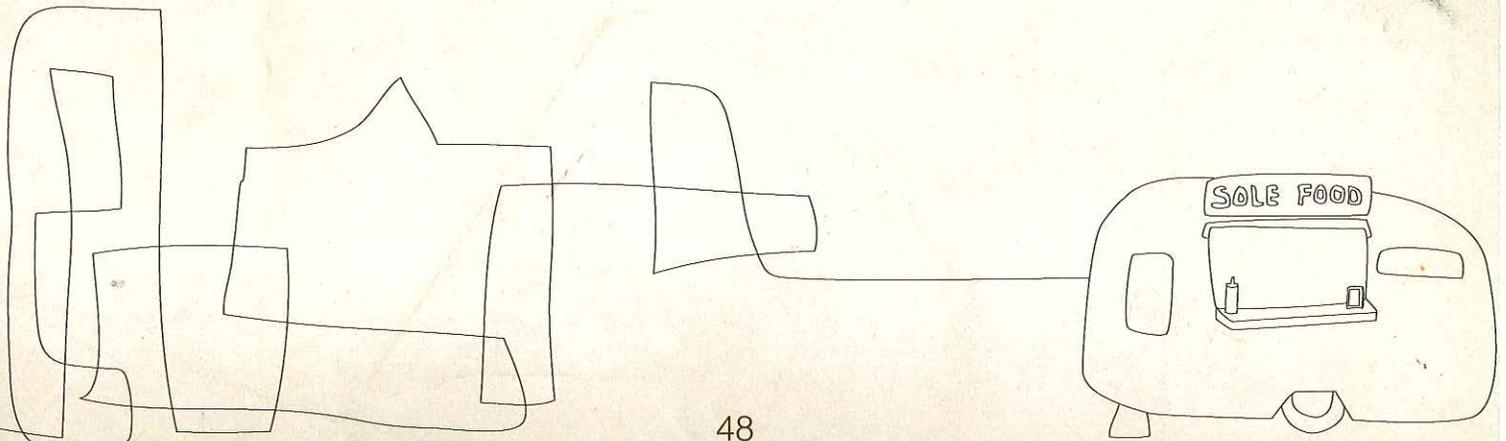
**Holly Carman-Fujioka**, Production Studio Manager has an unusual last name but is a regular gal. Holly's graphic design degree led her through years of work in studios and ad agencies in San Diego. But after her fill of SoCal she and her family relocated to Oregon and never looked back. With a Project Management certification, Holly managed the schedules and production for materials for the Oregon Lottery's multi-million dollar advertising budget. From print ads, point-of-sale, outdoor, web and promotional event materials – across the board there's not much Holly hasn't handled. As Production Studio Manager she is happily challenged by our team of creatives.

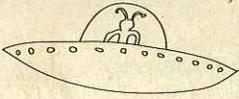
**Aaron Mahony**, Studio, is a consummate computer nerd, and never ceases to amaze with his Photoshop skills. A problem solver and expert file builder makes him one of the most popular guys in the studio. His attention to detail and pride of workmanship is something we rely on to get clients' files out the door, on time and to spec.



4.4.4 Provide background information describing your business, including an overview of your capabilities to provide the requested service, a comprehensive overview of the capabilities of your business, and your ability to develop a tourism destination marketing organization's advertising campaign.

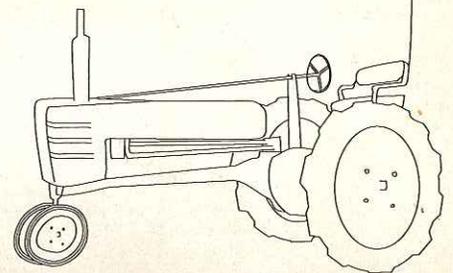
Borders Perrin Norrande (BPN) is a full-service, independently-owned advertising agency based in Portland that was founded in 1977. Three partners are actively involved in our clients' business each day at the agency: Terry Schneider, CEO/Creative Director; Lori Gaffney, Media Director and John Heinsma, Writer. The partners, along with Loralee Stapleton, Account Director, oversee the agency. As a team they have worked together for more than twelve years. They contribute different perspectives, but remain focused on providing an environment where talented, dedicated employees who possess a natural curiosity and passion for communication can be stimulated to challenge convention.





In order to remain best in class over the years, BPN has expanded and evolved our services to meet a changing marketplace. What has not changed through the years is our belief that effective communication must be true to the brand, grounded in consumer insight and deliver results. All disciplines are housed under one roof and we work closely to develop the communication programs. We value and expect creativity across all departments. We have vast experience in all forms of marketing and advertising communications including TV, radio, newspaper, outdoor, cinema, direct mail, digital, social media, magazine, email marketing, mobile, loyalty programs, search marketing, experiential marketing and promotions.

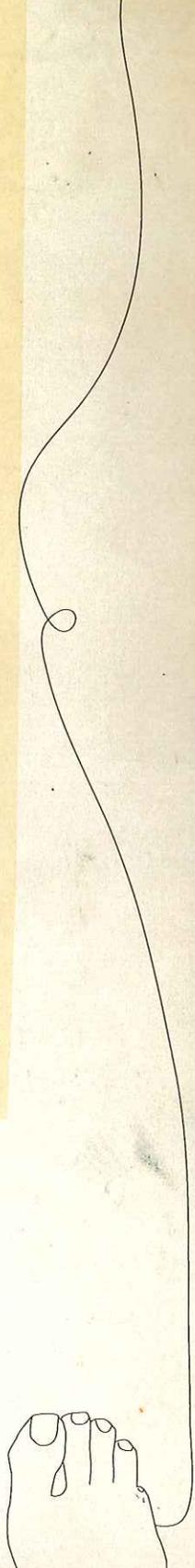
We feel that we are uniquely positioned to help TCA with its marketing and advertising challenges because of our capabilities, as well as our track record in creating campaigns that generate results, both for businesses in general as well as tourism-industry clients. Telluride and MCCVB are two specific examples of our strong, relevant experience.

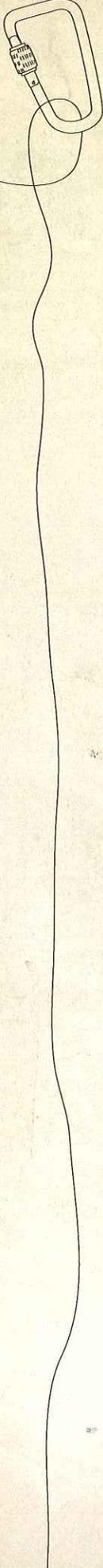


## Telluride

Telluride, a ski resort and town deep in the Colorado mountains, is one of the last undiscovered premiere snow sport destinations in the U.S. Its primary asset (remote location) was also its primary liability. It has a well-deserved perception for being “hard to get to”. With limited dollars, the challenge was to significantly increase awareness and visitation with new customers. Success was found by convincing the target audience that Telluride is a unique, independent resort for independent-minded visitors and differentiating it from other western ski destinations by making its remote location a reward.

Unique positioning, smart targeting and a tightly integrated campaign allowed Telluride to reach potential customers where they live and play, garnering tremendous results like record pre-season bookings, 60% of capacity and the biggest ski day in Telluride history all following the campaign launch. Internet bookings were up over 600% and flights from LAX (a new market) booked 30 days out. And finally, search engine optimization resulted in a return of 350% on investment in ticket sales (\$54,000).





## **Monterey County Convention & Visitors Bureau**

Monterey County, CA is beautiful but few visitors ventured beyond the known tourist attractions. Research revealed that while 90% of consumers in key markets were aware of Monterey County and most had visited, there was a belief that they had seen and done everything there is to do in Monterey County. Reports unveiled that the competitive strengths of Monterey County include scenery, charm, and the ability to put people in a different state of mind.

The overall marketing goal of this campaign was to highlight the diverse assets in Monterey County and broaden perception to diverse audiences that Monterey County has a lot to offer repeat and new travelers alike. The key performance indicators (KPIs) for success were increases in website traffic and online bookings on SeeMonterey.com and occupancy rates and RevPAR versus a year ago.

The campaign has delivered very favorable results for all key performance indicators. Website traffic visits to SeeMonterey.com in 2011 increased 24% versus 2010. Online bookings in 2011 placed on SeeMonterey.com increased 238% versus 2010. Occupancy rates and RevPAR were both up nearly 5%. This is particularly noteworthy as 2010 was the year the US Open was held in Monterey and sold out the destination.

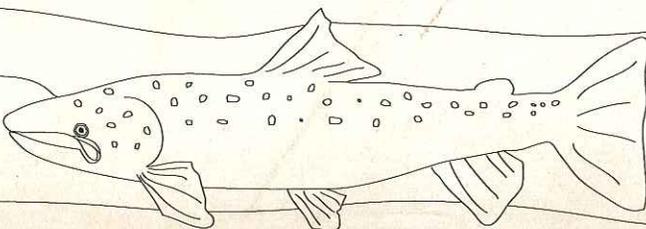
**4.4.4 Proposal must demonstrate ability to establish and maintain functional, productive working relationships with workgroups composed of staff and volunteers. Describe the agency style when working with clients, preferably in the public sector with volunteer advisory committees from a broad variety of backgrounds and interests.**

We work with partners in the same way we work internally. Our clients, both staff and volunteers, become part of our team. Our process always starts with a thorough briefing and includes many check-ins along the way. All team members utilize Basecamp, the leading web-based project management and collaboration tool to efficiently communicate to all parties and insure that milestones are met throughout the projects.

BPN's employees are expected to deliver excellent customer service. Whether we are working with Oregon Lottery, non-profit Forest Park Conservancy or boards like NW Pear Bureau, our approach is to employ the following key principles:

**Assign senior level management**

BPN assigns senior personnel to manage each account. The benefit of having a senior person managing the business is that they have experience with various clients and situations and the maturity to professionally handle what may come their way. The account management staff is the voice of the client to the agency team, and takes that responsibility very seriously.





### **Manage expectations**

We always start by setting clear expectations. Knowing upfront what the expectations are leads to successful collaboration. These can include establishing deadlines, budgets, responsibilities and deliverables.

### **Setting goals**

Goal setting can sometimes be an arduous task but we find when we are all in agreement about the goals for a specific project/campaign it is a much easier and efficient process. Where possible, these goals should be measurable.

### **Listen**

We take listening very seriously. This is how we learn. Everyone has a worthwhile point of view and should be treated with respect. It is through listening and contributing that great ideas are developed.

### **Deliver clear, concise, accurate materials... on time**

We deliver professional materials that make it easy for our clients to comprehend and share with other stakeholders within their organization. Our clients have the confidence in knowing that the materials we distribute are accurate and professional. Timeliness is very important to us. We develop timelines for all deliverables and stick to those timelines.

## **Collaborate**

At BPN, we believe close collaboration with clients is the only path to success. We allocate plenty of time for client check-ins and feedback, including weekly client status meetings and always make ourselves readily accessible. We insure excellent customer service through relationship monitoring, and find that our clients appreciate having the opportunity to tell us what is going well and what can be improved. We find it very effective in managing relationships, and invite constructive criticism, taking action to make changes where necessary.

For more than 34 years, we have worked with a wide variety of local, national and global clients. Many of the organizations we have experience working with are comprised of multiple departments and many stakeholders. We see collaboration with stakeholders in each department as an important part in a successful client relationship.



4.4.4 Provide a summary of Marketing/Advertising Services of this nature provided to any current clients in Clackamas, Lane, Washington and Multnomah Counties as well as tourism clients from outside these counties. Provide a summary of experience with Governmental Accounts or non-profit agencies of similar size and scope to project as described in this solicitation. Provide contact names, dates that the services were provided, addresses and telephone numbers. References will be checked to verify the agency's ability to perform similar tasks.

### **Oregon Lottery**

Most significantly, working with the Oregon Lottery for so many years has given us an opportunity to effectively communicate with many different stakeholders, including multiple department leaders, a board of commissioners, numerous legislators and Lottery beneficiaries. As a state agency, we are sensitive to their constant public scrutiny and need for transparency. After all, the final word with the Lottery is the Governor's and we never lose sight of that.

Reference:

Carole Hardy

(former Assistant Director for Marketing at Oregon Lottery)

caroleleehardy@gmail.com

5025 SE Weeks Court

Milwaukie, OR 97267

P: (503) 318-7967

Services provided: June 2004 – present



### **NW Pear Bureau**

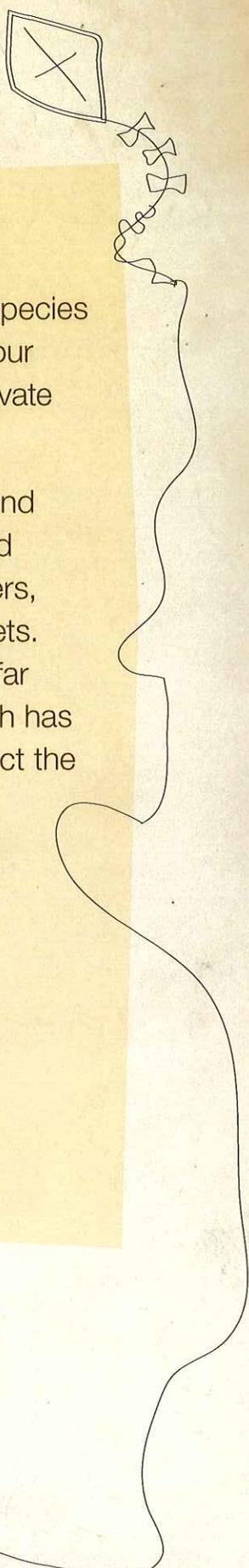
NW Pear Bureau, headquartered in Clackamas County, came to BPN last year in search of a fresh strategic perspective on marketing Northwest pears. The challenge was to educate consumers about how to check for pear ripeness. The business challenge went beyond marketing and advertising pears, and included making 1,600 pear growers across Oregon and Washington happy growers. Post campaign results revealed that ad awareness was up 3%, which was a statistically significant shift. The post-wave study results showed that unaided recall of the ripeness message was 7%, up from 0% prior to the campaign.

#### Reference:

Cristie Mather (Communications Director)  
cmather@usapears.org  
4382 SE International Way, Ste A  
Milwaukie, OR 97222-4635  
P: (503) 652-9720

Services provided: June 2010 – present





### **Forest Park Conservancy**

Portland's favorite park, Forest Park has invasive plant species taking over land once filled with native ones. As one of our pro-bono projects, we had to raise awareness and motivate people to take action but with no budget.

Working with the Forest Park board and its advocates and volunteers, we kicked things off with an event that united Portland media connections with the city's key influencers, encouraging them to join the cause and open their wallets. The results were \$50,000 in paid media donations and far times that in earned media. City Commissioner Nick Fish has since helped enact new park standards which will protect the park well into the future.

Terry Milner

Development Director for The Forest Park Conservancy

[terry@forestparkconservancy.org](mailto:terry@forestparkconservancy.org)

1505 NW 23rd Avenue

Portland, OR 97210

T: (503) 223-5449 Ext. 107

Services provided: 2009 – present

### **Monterey County Convention & Visitors Bureau**

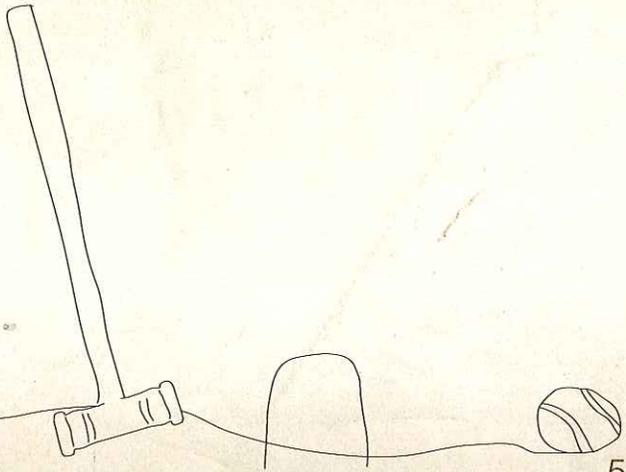
MCCVB, which spans 13 cities, has more than 800 members comprised of businesses, city leaders and boards. As we promote the full range of destination assets for recreational, cultural, environmental, business and visitor travelers, we are attentive to each and every member's needs and how they need to present themselves, both individually and as a whole. Additionally, through building a strong co-op advertising program, we have many opportunities to partner directly with members and provide them with advertising services that smaller, independent businesses may not have otherwise.

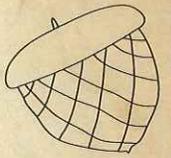
#### **Reference:**

Nicole Gustas (Former Director of Online Marketing –  
Monterey County Convention and Visitors Bureau)  
ngustas@tourism.australia.com

6100 Center Drive  
Los Angeles CA 90045  
P: (310) 695-3213

Services provided: August 2010 – present





#### 4.4.4 Detail your knowledge of tourism in Clackamas County

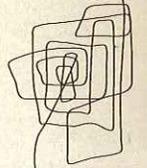
##### **The Organization**

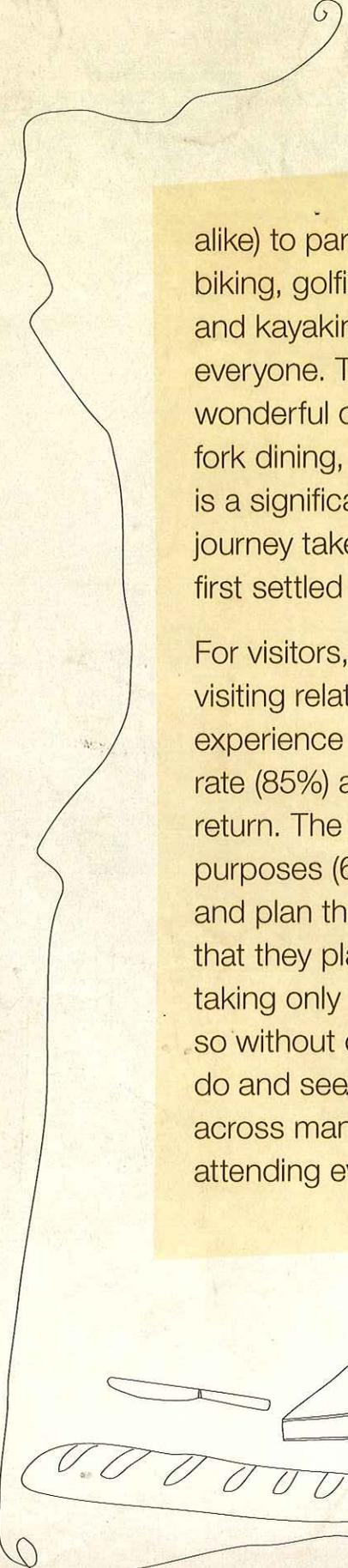
TCA serves as the Destination Marketing Organization for Clackamas County. As such, it is responsible for delivering marketing and promotional programs and activities that enhance the visitor experiences, encouraging overnight stays and tourism activity and improving the quality of life for residents in Clackamas County. The TCA is operated under Clackamas County and its Board of County Commissioners and the programs and budgets are managed by the Tourism Development Council (TDC). The TCA tourism program is funded by tax dollars generated from a county-wide transient room tax (TRT), in effect since 1992. The 6% TRT is obtained through visitor's overnight lodging (hotels, motels, vacation rentals, B&B, campgrounds and RV parks).

TCA balances the needs of many constituents. The TCA runs very efficiently and maximizes resources through its partnerships with Travel Oregon's Regional Cooperative Marketing Program (RCMP) and the Community Partnership Program (CPP) which provides funds to local communities to develop their own Tourism Action Plan (TAP).

##### **Visitors**

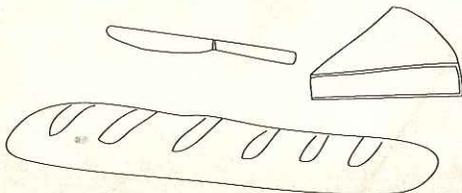
As long time Oregonians we have experienced tourism in Clackamas County and understand the gems we have right here including outdoor recreation, agricultural bounty and a rich cultural heritage. The county invites visitors (and natives

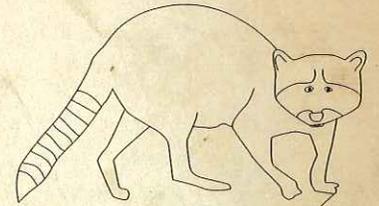




alike) to participate in outdoor activities including skiing, hiking, biking, golfing, horseback riding, rock climbing, canoeing and kayaking. Regardless of skill level, there is something for everyone. To compliment the outdoor activities, visitors enjoy wonderful culinary experiences with the uniqueness of farm to fork dining, vineyards, breweries and more. Additionally, there is a significant amount of cultural heritage that celebrates the journey taken by our pioneers and the Native Americans that first settled here.

For visitors, Mt. Hood is the “destination driver” along with visiting relatives/friends. The good news is that when visitors experience Clackamas County they have a high satisfaction rate (85%) and there is a high likelihood (81%) that they will return. The key reason for visitation to the county is for leisure purposes (61%). Visitors tend to be Adults 24-65, stay 2+ nights and plan their trip 1-3 months prior to their stay. We also know that they plan their own trip and don't labor over their planning, taking only 1 to 6 days, and when they travel, they tend to do so without children. Oregon's Mt. Hood Territory offers a lot to do and see, and visitors on average participate in 4.3 activities across many categories including shopping, outdoor activities, attending events and going to restaurants.





The summer is the best season to attract out-of-town visitors (70%) with higher incomes that spend more and stay longer. Fall also attracts more out-of-state visitors but to a lesser extent. During winter and spring, the majority of visitors are in-state spending less money per visit and fewer nights. Most visitors during winter, summer and fall stayed at full service hotels while more spring visitors stayed in limited service hotels. Source: BNRResearch, 2006.

### **The Opportunity**

We see several opportunities for TCA to increase visitation and enhance the visitors' experience. Some of these were already identified in your documents.

**More planning tools.** Because we know the planning cycle is quick and visitors are planning their own trips, it is critical to provide as many planning tools as possible. First and foremost, a robust SEM campaign that targets not only activities (skiing, kayaking, hiking and camping), but also targets using competitive destination keywords (Bend, Spokane, Yakima, etc.) is key; the state of Idaho is employing this tactic right now. The new [mthoodterritory.com](http://mthoodterritory.com) does a wonderful job with lots of valuable resources just one click away and a key priority should be to drive visitors to the website. Consider actively creating and encouraging content on review sites like TripAdvisor.

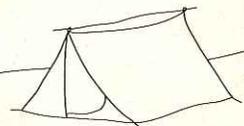
**Strong digital marketing.** To stay top of mind, tailor messages to niche targets and utilize retargeting tools to continue to reach visitors who might have come to mthoodterritory.com. Also consider running schedules on online travel agencies like Expedia, Travelocity and Orbitz and targeting competitive destination pages on travel review sites.

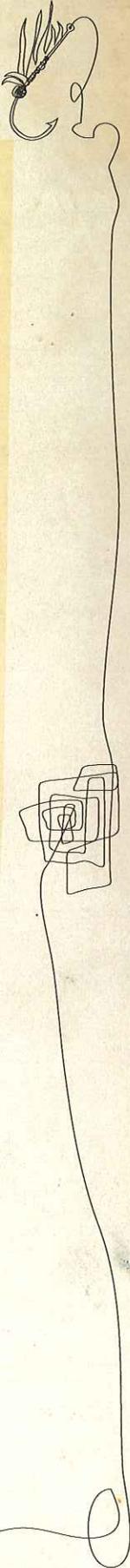
**Go beyond Mt. Hood.** While Mt. Hood is a primary draw, there are many great areas and activities that should be promoted. These could include Oregon Trail, wineries and equestrian activities.

**Locals as ambassadors.** Continue to focus on this important segment. Expose locals to all the county has to offer by developing ½ day and full day events and activities. Consider giving discounts and incentives to locals.

**Niche marketing.** Develop packages and market to niche groups like “girls’ getaway”, “romantic getaway”, “man-cations”, and geo-tourism. Make it easy for visitors to book these vacations with suggested itineraries.

**More annual events.** Create annual events (like Wooden Shoe Tulip Festival) that encourage visitors to return and ultimately, invite more friends and family.

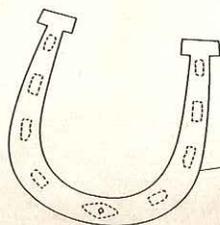




**Expand experiential travel offerings.** Some themes could include: foodie weekends with cooking classes taught by local chefs using seasonal food, geo-tourism weekends focusing on conservation and sustainability of the native plants and animals, and historical/cultural weekends with educators talking about the original settlers including a walk along the Oregon Trail.

**Create a mobile app.** There is quite a bit of planning that happens while at the destination including deciding on sightseeing attractions, recreation, history and culture and restaurants. An app would help visitors navigate through the county. The app could also incorporate what is now being handled on Tele Tales.

**Activate co-op partners.** Hold a partner meeting to present opportunities and solicit feedback. Discuss working together to develop packages that target to specific niche audiences.



Thank you

June 28, 2012

Jeannine Breshears  
Clackamas County Tourism & Cultural Affairs  
150 Beaver Creek Road, Suite 245  
Oregon City, OR 97045

Dear Jeannine,

Thank you for your time yesterday. The following outlines more details for the contract. There are three components: Process, Metrics and Financials.

### **Process**

BPN has a strict billing process. Work begins once an estimate produced by BPN is signed by Clackamas County Tourism and Cultural Affairs (CTTCA). This estimate is detailed and outlines all costs associated with the campaign and/or effort. Should the estimate change, it will be revised to reflect the updated charges and no work will incur that will exceed the original estimate without a revised client approval. BPN will track all changes and produce a monthly detailed expenditure report that reflects all estimates.

### **Metrics**

BPN is responsible to report metrics monthly, by campaign, by quarter and on an annual basis. By medium, the metrics are:

**Website traffic:** (via Google analytics) measuring total visits, unique visits, pageviews, pageviews/visit, average visit duration, referral traffic, traffic from paid search and traffic by device. BPN will also provide traffic flow within the mthoodterritory.com site and track conversion to agreed upon actions which could include requesting a travel planner, reviewing a travel planner online or taking advantage of special offers.

**Digital banners:** (via MediaMind) measuring click thru rates, engagement rates, conversion rates, CPM and impressions.

**SEM metrics:** (via Google) measuring click thru rates, impressions, CPM, clicks and cost per click.

**Print:** Impressions, CPM and fulfillment cards.

**TV:** (via Nielsen) measuring target rating point delivery and CPM

**Email:** Number sent, click thru rates, total impressions, open rate, CPM and CPC

BPN will report all metrics in a comprehensive and clear document to CTTCA for distribution to board and other stakeholders. In the report, analysis will be included that connects website traffic and actions performed on the site to media spend to provide correlation and context.

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## Financials

### Total Agency Contract not to exceed \$705,000 annually.

#### 1. Sales Materials

**\$115,000**

Several pieces will be covered in this line item. These include the travel planner/maps, calendar of events, banners for booths, photo file, out of market postcards, insert card, envelopes, VIC notebooks, trade show materials, promo items, community relations, unplanned items and brand refresh. Each piece will be individually estimated and will include agency time billed at BPN published rates listed below.

**Borders Perrin Norrander**

6.28.12

<b>Hourly Rates</b>			
<b><u>Account Service</u></b>		<b><u>Digital</u></b>	
Account Director-Loralee Stapleton	\$225	Interactive Producer	\$160
Account Supervisor	\$150	Digital Strategist	\$200
Account Executive	\$120	Digital Design-Aaron Mahony	\$200
Assistant Account Executive -Jessica Hagerty	\$65	Technology Development	\$160
Account Coordinator	\$60		
<b><u>Account Planning/Research</u></b>		<b><u>Media</u></b>	
Brand Strategist-Leslee York	\$225	Media Director-Lori Gaffney	\$225
Associate Planning Director	\$175	Associate Media Director-Andrea Brown	\$165
Account Planner	\$85	Media Supervisor	\$150
		Media Planner/Buyer	\$120
		Asst. Media Planner/Buyer-TBD	\$65
<b><u>Creative Services</u></b>		<b><u>Ad Production</u></b>	
Creative Director-Terry Schneider	\$260	Print Production Manager-Holly Carman-Fujioka	\$90
Associate Creative Director	\$200	Broadcast Producer	\$130
Sr. Art Director	\$150	Digital Art/Type-Aaron Mahony	\$145
Art Director-Ben Bellayuto	\$90		
Sr. Copywriter -John Heinsma	\$150		
Copywriter	\$90		
		<b><u>Administration</u></b>	
		General/Accounting	\$60

#### 2. Advertising

**\$535,000**

Advertising costs include creative and media costs.

##### ***Creative (estimated at 18%)***

**\$96,300**

Includes all development and production costs, but does not cover creative concepting time which is covered in agency fee.

##### ***Media (estimated at 82%)***

**\$438,700**

Media costs include net media costs plus a 12% fee.

#### 3. Agency Retainer

**\$ 55,000**

**To be paid monthly at the rate of \$4,583.33**

Covered expenses include the constant planning, account development and idea generation by the core brand team (Account Management, Creative, Media and Digital

departments) working on the business. Also includes attendance at CCTCA internal meetings, board meetings, committee meetings and key stakeholder meetings. In addition, fees include facilitating multiple project meetings, client-requested communications coordination with CCTCA partners, status meetings, conference reports, preparation and analysis of metrics, presentation decks and communications development process support. Also includes agency time to concept creative ideas.

Additional details on Brand Refresh and Destination Marketing Audit.

Brand Refresh \$15,000

This fee covers costs for BPN to review brand identity, recommend new identity as well as prepare style guidelines. Potential pieces to include: logo, letterhead, templates, business cards and presentation layout. Printing to be estimated separately.

Destination Marketing Audit \$20,000

BPN will conduct an audit of CCTCA defining the audience, brand attributes, core values, SWOT analysis and growth opportunities and competitive analysis.

Jeannine, again we are thrilled to be selected to work with you and your team and appreciate this opportunity.

Best regards,



Lori Gaffney  
President/Media Director

## **CCTCA 2012-17 Five-Year Business Plan Outline WORKING DRAFT (as of 5/8/12)**

### **Vision**

Serve as the leading force to grow and sustain tourism in Clackamas County through effective marketing and asset development strategies and by building strong partnerships with businesses, organizations, other governmental entities and citizens.

### **Mission**

Increase overnight stays and encourage visitors to linger longer in Clackamas County by serving as the primary destination resource for trip planning resulting in destination visits and by working in partnership to develop and enhance local tourism assets.

### **Insights- *Trends and External Factors that Influence County Tourism***

- Evolving Industry
- Evolving Technology
- Changing Traveler Behavior
- Shifting Revenue Resources
- Distressed, Declining and Under-developed Local Tourism Assets

### **Guiding Principles-*Section in which ongoing programs, projects and areas of responsibility are described***

- Leader in County and Regional Tourism
- Effective Marketing and Promotion of Clackamas County Tourism Assets and Opportunities
- Focused on the Three Pillars of Clackamas County Tourism:
  - Outdoor Recreation
  - Agri-Tourism
  - Cultural/Heritage Tourism
- Effective and Efficient Use of Public Resources
- Build and Strengthen Public and Private Partnerships

### **Strategic Priorities-*Items of focus in addition to on-going programs, projects and areas of responsibility***

- Position County to Seize Opportunities and Manage Threats/Barriers
- Create and Enhance Tourism Assets
- Enhance Marketing and Promotion Efforts through New Technologies and Mediums
- Build and Strengthen Partnerships and Coalitions to Increase Collaboration
- Develop New Tourism Products, Markets and Packages

### **Strategic Planning Process:**

#### **Step 1: Situational Strategic Drivers-**

Conduct assessments of the current operating environment. "What are we currently up against/facing?"

#### **Step 2: Stable Strategic Drivers-**

Filter the outcomes of the environmental assessment through Tourism's Vision, Mission and Guiding Principles. "Who we are and how we operate."

#### **Step 3: Resulting Strategic Priorities-**

Identify Strategic Priorities in alignment with Steps 1 and 2 above. "How do we add value?"

## Strategic Priorities Over the Next Five Years:

### I. Position Clackamas County Tourism as the "Destination Architect" to Seize Opportunities and Manage Threats/Barriers

Supporting Goals- (Each goal will have outlined initiatives to support it)

- Goal #1:** Conduct a SWOT Analysis of Agri-Tourism (*almost completed*)
- Complete data collection and analysis on the status, barriers and opportunities of Agri-Tourism assets within the county.
- Goal #2:** Conduct a SWOT Analysis of Outdoor Recreation-Specifically Bicycle Tourism; River Tourism; Sports Teams
- Complete data collection and analysis on the status, barriers and opportunities of Bicycle Tourism within the county.
  - Create survey instrument for data collection and analysis on the status, barriers and opportunities of River Tourism within the county.
  - Create survey instrument for data collection and analysis on the status, barriers and opportunities of Sports Teams and Events assets within the county.
- Goal #3:** Conduct a SWOT Analysis of Heritage/Cultural Assets
- Create a survey instrument to collect data on the status and analysis of the state of Heritage and Cultural assets within the county. Identify barriers and opportunities.
- Goal #4:** Conduct a SWOT Analysis of County Events Center Facilities
- Create a survey instrument to collect data on the status of the Events Center facilities and conduct an analysis of the barriers and opportunities for enhancement of the center to benefit Tourism within Clackamas County
- Goal #5:** Conduct a SWOT Analysis of the Tourism Potential of the Blue Heron site in Oregon City
- Create a survey instrument to collect data on the status of the Blue Heron facilities and conduct an analysis of the barriers and opportunities for enhancement of the site to benefit Tourism within Clackamas County.
- Goal #6:** Conduct a Marketing/Destination Audit  
*Short-term goals (1 year)-*  
TCA will continue with our key branding of Oregon's Mt. Hood Territory, but undergo a marketing/ destination assessment to determine where our efforts stand in the arena on an national and international level. The media environment is changing rapidly, so we will continue to rely on research to direct our efforts to respond to the changing consumer behavior and trends.
- Convene a work group on this subject
  - Assessment of how to conduct the audit -- either internal or external contractor
  - Utilize available research to assess our overall marketing strategies (i.e.: Longwoods, PhoCusWright)
  - Specify or clearly identify the demographics of our target audience

- SWAT analysis of print, online, broadcast, social media, Public Relations
- Assess ROI and economic impact of current program
- Solicit public and partner input in the process

**Goal #7:** Develop and Execute a County Tourism & Cultural Affairs Communications Strategy  
*Short-term goal (1 year)-*

The CCTCA communications strategy is the umbrella that overlays the marketing, social media, digital, PR and community outreach strategies and captures all their various elements. It touches all CCTCA departments, including the Marketing Department, Community Relations and Development. CCTCA, either in house or with an outside agency, will determine the various components of this strategy and the resources and assets available, including staff and budget, needed to deliver desired results.

## **II. Create and Enhance Tourism Assets; Integrate Tourism Products and Partners**

Supporting Goals- (Each goal will have outlined initiatives to support it)

**Goal #1:** Identify and Prioritize Projects and Opportunities from Agri-Tourism SWOT Analysis  
*Short Term Goals (1 Year) -*

- Convene stakeholder groups, Summarize needs and goals, assess implementation budget and timelines
- Offer custom-templated site and training for our interested local businesses
- Create "off the shelf" itineraries for tour operators
- Create tour operator notes - Online Resources

**Goal #2:** Identify and Prioritize Projects and Opportunities from Outdoor Recreation SWOT Analysis -Specifically Bicycle and River Tourism Design Studios  
*Short Term Goals -1 Year*

- Convene stakeholder groups, Summarize needs and goals, assess budget and timelines

**Goal #3:** Identify and Prioritize Projects/Opportunities from Heritage Assets SWOT Analysis  
*Short Term Goals (1 Year)*

- Convene stakeholder groups, Summarize needs and goals, assess budget and timelines
- Create "off the shelf" itineraries for tour operators
- Create tour operator notes - Online Resources

**Goal #4:** Identify, Prioritize Projects from County Events Center Facilities SWOT Analysis

**Goal #5:** Identify and Prioritize Projects and Opportunities from Marketing/Destination Audit  
*Short Term Goals (1 Year)*

- Solicit tourism-related options for physical assets (buildings)
- Investigate various online, interactive forums (such as blogs) to communicate local entrepreneurial needs, interests, opportunities
- Research re-zoning issues and possibilities
- Explore RV rentals for tour marketing
- Develop visitor training module for RV rentals and placement of our marketing collateral

*Medium-term goals (2-5 years)-*

- Convene an employee and partner committee to review and create recommendations and strategies from audit
- Develop strategies for projects as identified

**Goal #6:** Evaluate and Revise as appropriate the County's Visitor Information Centers Program and Implement Identified Strategies

*Short Term Goals (1 Year)*

- Convene stakeholder groups, Summarize needs and goals, assess budget and timelines
- Create "off the shelf" itineraries for tour operators
- Create tour operator notes - Online Resources
- Regularly visit and communicate with VICs in order to effectively provide optimal marketing connections, print and online resources, and PR or social media connections.
- Identify and pursue opportunities to incorporate VICs in marketing campaigns as resources allow.

**Goal #7:** Create and Serve as Lead for New Signature Event: Festival of the Falls (WFHAC)

*Short-term goals (1 year)-*

- Identify marketing assets and create sponsorship packages incorporating those assets.
- Create and implement marketing and promotional efforts.
- Identify and secure media partnerships.
- Develop supporting PR materials.
- Craft and submit story pitches to broadcast, print and online media.
- Create and implement an integrated social media strategy.

**Goal #8:** Incorporate Principles of Geotourism through the Integration of Products and Partners that Sustain, Reinforce, or Enhance the Unique Character of the County's Culture, Environment, Aesthetics, Heritage and Community Livability

**Goal #9:** Create an incentive system that encourages local projects that increase event or organizational capacity, expand target market audiences, leverage partnerships and other funding sources, and recognize higher levels of ROI.

### **III. Enhance Tourism Marketing and Promotion Efforts through New Technologies and Mediums**

Supporting Goals- (Each goal will have outlined initiatives to support it)

**Goal #1:** Conduct a Social Media Analysis of CCTCA Strategies

*Short-term goals (1 year)-*

- Solicit an RFP and implement the awarded contract.
- SWOT analysis of social media channels.
- Analyze and determine OMHT current customers and target audience.
- Determine what people are saying about OMHT across social channels.
- Analyze competitors and colleagues' social media strategy.

- Analyze existing social media efforts.
- Analyze ways the OMHT new website promotes/optimizes its social media efforts.
- Determine specific social media goals.
  - Determine whether CCTCA should use additional social media channels.
  - Determine whether CCTCA should use current social media channels in different capacities.
  - Determine metrics used to evaluate ROI.
- Assess the social media resources and budget available.
- Confirm effective social media policies are in place.

**Goal #2:** Develop Social Media Strategic Plan; Implement Plan  
 TCA will continually monitor the ever-changing social media communities and stay on top of current technologies and trends while engaging and expanding the followers.

*Short-term goals (1 year)-*

- Enhance OMHT presence through current social media channels.
- Create and execute an engagement plan/content calendar that aligns with broader marketing goals (recurring task).
- Regularly attend webinars, workshops, and seek out other outlets to stay on top of emerging trends (recurring task).
- Secure social media dashboard to ensure efficient creation and analysis of posts.

*Medium-term goals (2-5 years)-*

- Become the regional trusted source or "go to agency" for consumer-generated content and online visitor resource.
- As determined appropriate and as resources allow, conduct Facebook campaigns with co-op partnership opportunities.
- Research OMHT guest blogger partnerships and develop these partnerships when possible.
- Determine and allocate necessary resources for new social media strategies as they are incorporated into CCTCA's social media plan.
- Create and implement additional appropriate social media policies as new social media outlets are incorporated into CCTCA's social media plan.
- Regularly evaluate and determine which social media channels are working and revise social media strategy accordingly.

**Goal #3:** Develop and Execute Revised Marketing Program Under New Agency Contract

**Marketing** - Over the past few years, OMHT has leveraged the consumer marketing programs of Travel Oregon, specifically Fall Oregon Bounty and Spring Outdoor Adventure - and soon to be incorporated is a winter campaign. As a DMO, we rely on Travel Oregon to build overall visitor awareness for Oregon, with our efforts directing and focusing the familiarity and selection of Mt. Hood Territory as the final trip destination. TCA will continue to partner and align our marketing programs and campaigns with Travel Oregon over the next five years.

*Short-term goals (1 year)-*

- Continue involvement and leadership within the three RCMP regions (Greater Portland, Mt. Hood/Gorge, Willamette Valley) (recurring task)
- Enhance content integration of our tourism business listings and events through Travel Oregon's ORB
- Evaluate OMHT's e-newsletter and redesign if necessary.
- Continue to grow OMHT's e-newsletter database through "opt-in" forms incorporated into social media and digital contests and promotions, as well as other outlets.
- Enhance awareness of aviation flights through PDX and develop a strategy to communicate to the new destination opportunities and target media buys

*Medium-term goals (2-5 years)-*

- Continue to create well-designed and high quality promotional campaigns that set OMHT apart and continue to market our tourism partners' offerings.
- Review and evaluate the continuation of "contest incentives" as a major component of the promotional campaigns.

**Advertising** - We will continue to adjust the percentage of advertising spend in the evolving media types of print, online, social media and broadcast, and monitor the amount of earned vs. paid media.

*Short-term goals (1 year) -*

- Continue advertising communication/messaging to motivate overnight travel to OMHT and stimulate consumers to linger longer and generate revenue streams for our partners (recurring task)
- Research and incorporate best practices and uses of new technologies into advertising messaging, such as QR codes (recurring task)
- Evaluate and evolve the co-op advertising program with our partners (recurring task)

*Medium-term goals (2-5 years)-*

- Enhance the presence and delivery of partners "specials and offers" (recurring task)
- Evaluate the continual need for well-designed and high quality print publications with online viewing options that continue to inspire travel choices and provide travel tools (recurring task)

**Travel Media Relations** - We will continue to build trusted relationships to increase earned-media placements through print, broadcast and online sources.

*Short-term goals (1 year)-*

- Assess the resources and budget available to purchase an annual membership for a PR media contacts/social media/press monitoring database and acquire one if possible.
- Cultivate and strengthen relationships with members of the media through social media channels, such as Twitter, LinkedIn and Facebook, as well as traditional channels, such as "meet the media" socializing events and conferences.
- Identify, follow and correspond with key bloggers and writers through social media channels, such as their blogs and Twitter in order to give credibility to CCTCA's knowledge of their work and the degree to which CCTCA story pitches align with that work.

- Continue to partner with Travel Portland to enhance media’s awareness/perception of OMHT in international markets.
- Update and expand upon OMHT’s PR materials.

*Medium-term goals (2-5 years)-*

- Assess the resources and budget available to develop and PR media tours, and execute those tours when possible, either in conjunction with Travel Oregon and Travel Portland or independently.
- Assess the resources and budget available to develop and PR FAM tours, and execute those tours when possible, either in conjunction with Travel Oregon and Travel Portland or independently.
- Continue to provide quality multimedia content to media by growing OMHT’s photo database and obtaining current and relevant b-roll footage.
- Create new ways to present PR materials in order to optimize their effectiveness as technologies change.

**Niche Groups** - We will continue to identify evolving and trending niche audiences and efficiently target to these audiences.

- Evaluate the strategy for domestic and international travel trade for consideration in attending trade shows, sales missions, along with the continuation of hosting Fam tours
- Canada as a growing market will provide expanded opportunities
- Continue International contracting with Travel Portland for key markets
- Weddings, groups and meetings are increasing audiences and opportunities for developing partnerships, campaigns, and targeted media buys
- Bicycle tourism, river related audiences and other outdoor recreational opportunities as developed
- Sports tournaments, sports teams and competitive sporting events

**Goal #4:** Undertake a Brand Assessment and Conduct a Brand Redesign or Refresh  
TCA will continue with our key branding of Oregon's Mt. Hood Territory, but undergo a brand assessment to determine whether a brand refresh or redesign is in order.

*Short-term goals (1 year)-*

- Work with the marketing agency to review the current branding efforts (OMHT, logo, tagline)
- Conduct public focus groups both within the County and in select west coast markets

**Goal #5:** Identify and Prioritize Technology Improvements from Marketing Audit

**Website** - [www.MtHoodTerritory.com](http://www.MtHoodTerritory.com) will continue to be the primary and trusted source of visitor information for trip planning and online booking. The website and dedicated mobile site will provide trip assistance while visitors are here, with easy accessible business listings and interactive mapping.

*Short-term goals (1 year)-*

- Expand online mediums as they continue to dominate consumer marketing channels

- Expand our mobile presence as mobile is becoming exceedingly more popular and mainstream as consumers increasingly use web browsing on mobile devices
- Implement international translation services with the website
- Continually evaluate and enhance the SEO performance and opportunities to reach this largest segment of online users
- Establish an efficient and effective method for updating our tourism inventory process and incorporating within iDSS

*Medium-term goals (2-5 years)-*

- Incorporate mobile apps or embrace new technologies that better reach and serve the consumer, such as "near field communication" (NFC) and text message marketing (SMS)
- Continually evaluate and enhance the interactive trip planning and mapping component of the web
- Research and implement photo and content sharing of reviews and rating opportunities to the web
- Research and incorporate ecommerce opportunities through online mediums
- Research and incorporate the use of co-op online advertising options through our website and newsletter channels

#### **IV. Build and Strengthen Partnerships and Coalitions to Increase Collaboration**

Supporting Goals- *(Each goal will have outlined initiatives to support it)*

- Goal #1:** Create a Greater TCA Presence within Local Communities and Among Partners  
*Short Term Goals (1 Year)-*
- Encourage full participation in TCA's annual Tourism Week celebration by partner communities
  - Provide support and assistance to partners in coordinating events.
  - Regularly visit and communicate with local partners and communities in order to effectively provide optimal PR services and outreach and marketing connections.
  - Identify and pursue opportunities to engage local communities and partners in social media and PR instructional workshops and presentations.
  - Identify and pursue opportunities to engage local communities and partners in marketing campaigns as resources allow.

- Goal #2:** Identify and Cultivate Partnerships with Local Tourism Businesses and Other Tourism-Related Organizations and Individuals; Other County Departments as appropriate

*Short Term Goals (1 Year)-*

- Connect with Tour Operators from the Greater Portland, mid-Valley and Hood/Gorge area to introduce them to our area, adding value as centralized resource
- Initiate and conduct partner fam tours
- Develop tools for Willamette Valley Visitor Association "Wine Trail" program
- Create winetrail letter of introduction, map and decals for business outreach

*Medium-term goals (2-5 years)-*

- Regularly visit and communicate with new local tourism businesses and other tourism-related organizations and individuals in order to effectively provide optimal PR services and outreach and marketing connections.
- Identify and pursue opportunities to engage these new partners in social media and PR instructional workshops and presentations.
- Identify and pursue opportunities to engage new partners in marketing campaigns, promotion of packages, and through the special offers program.
- Identify and pursue opportunities to engage VICs staff in educational opportunities and organized research tours around the County.

**Goal #3:** Create a County Heritage Tourism Roundtable to Address Local Heritage Issues

**Goal #4:** Develop/Refine Partnership Program with Federal Agencies, including the U.S. Forest Service, the Bureau of Land Management, National Parks and Federal Highways.

*Short Term Goals (1 Year)-*

- Spearhead work for local partnership / MOU signing on the Willamette River Water Trail
- Act as convener for Wayfinding and Trails agencies to further related BTS work
- Create regular and ongoing dialogue with permit holders and USFS Permit Process division to better understand the requirements and opportunities available to stakeholders

*Mid-Term Goal (2-5 Years) -*

- Facilitate our partner opportunities, points of commerce along the trail.
- Identify and implement marketing opportunities and programs for the Mt. Hood Scenic Byway and other recreational opportunities as they present themselves.

**Goal #5:** Revise Visiting Friends & Relatives Program- Continue to Engage Local Residents as Territory Ambassadors, as well as Expand the Reach of the MVIC by Attending Out-Of-Area Events and Trade Shows

*Short Term Goals (1 Year)*

- Organize annual Visitor Services referral program and annual fam trips between Visitor Services areas.
- Expand the marketing message delivered through our mobile presence through attending consumer fairs and events in select west coast markets
- Expand the special offers and coupon section of website with monthly outreach

*Medium-term goals (2-5 years)-*

- Develop and engage ambassador volunteer program or business recognition program
- Develop a business co-op sponsorship with the MVIC at local and out of area events, better matching businesses to the appropriate opportunity
- Research and incorporate a rebate travel incentive program for residents
- Incorporate an outreach school component to better educate the young children on the benefits and opportunities for local travel

**Goal #6:** Engage with Partners to Address Transportation and Land-Use Issues that Impact Tourism within the County Including But Not Limited to:

- a. Mt. Multimodal; Parking
- b. Bicycle Tourism
- c. Accessibility to Destination Assets
- d. Rest Areas
- e. Snow Park

**Goal #7:** Develop and implement a Partner Training Program on Current Issues, Topics, Skills

**Goal #8:** Increase the effectiveness of the Community Partnership Program  
*Short Term Goals (1 Year)*

- Guide and assist partner communities to ensure local processes start in the First Quarter of the Fiscal Year
- Ensure open and inclusive project solicitation and selection process
- Reduce duplication of local projects already addressed at county level

## **V. Develop New Tourism Tools, Resources, Products, Markets and Packages**

Supporting Goals- (Each goal will have outlined initiatives to support it)

**Goal #1:** Evaluate Strategy for Domestic and International Travel Trade for Participation in Trade Shows, Sales Missions, and Hosting Fam Tours

*Short Term Goals (1 Year)-*

- Collaborate with Travel Oregon and Travel Portland travel-trade teams in participating in and financially supporting sales missions to:
  - 1) determine current tour operator needs and
  - 2) to bring to market our previously unrepresented lodging properties and recreational experiences.
- Implement schedule for timely travel trade leads fulfillment, quarterly Tour operator “touch base” with fresh images and “What’s New”
- Develop relationships with local receptive operators and visiting tour operators to introduce them to Farm Loop experiences.

*Medium-term goals (2-5 years)-*

- Develop and implement marketing and PR efforts as identified and resources allow

**Goal #2:** Develop and Market New Tours, Experiences and Trails from Agri-Tourism Products/Assets

*Short Term Goals (1 Year)-*

- Work with County Planning to develop easily-understood brochure geared to farmers wishing to establish/expand their Agri-Tourism offerings.
- Introduce county leadership and travel trade partners to Farm-Loop experiences.

*Mid- Term Goals (2-5 Years)-*

- Solicit entrepreneurial chefs / planners for Farm to Table, saleable experiences.
- Offer custom-templated-site and training for our interested local businesses
- As new agri-tourism tours, experiences and trails develop, create media kits and other PR materials as appropriate and resources allow.
- Develop and implement social media strategies as appropriate and resources allow.
- Develop and implement marketing strategies as appropriate and resources allow

**Goal #3:** Develop and Market New Tours, Experiences and Products from Cultural Heritage Tourism Assets

*Short Term Goals (1 Year)-*

- Evaluate existing cemetery tour work for mapping and podcast tour marketability.
- Offer custom-templated-site and training for our interested local businesses
- Ensure that all funding efforts (Geocaching, Mapping, etc.) are vetted for potential and appropriate tie-ins to Tourism niches of Outdoor Recreation, Agri-tourism, Heritage.)

*Medium Term Goals (2-5 Years)*

- Collaborate with Arts Cabins and High Cascades teams to increase the overnight stay opportunities for their audience.
- As new cultural heritage tours, experiences and trails develop, create media kits and other PR materials as appropriate and resources allow.
- Develop and implement social media strategies as appropriate and resources allow.
- Develop and implement marketing strategies as appropriate and resources allow.

**Goal #4:** Develop and Market New Experiences, Tours and Trails from Bicycle and River Tourism Studios Projects; Sports Teams

*Short Term Goals (1 Year)-*

- Create tools for implementation of Bicycle-Friendly “We Speak” business designation.
- Offer We Speak training for front-line personnel, organizing local experts and collateral.
- Offer custom-templated-site and training for our interested local businesses
- Develop and implement a social media presence with a dedicated Facebook page.
- Create and implement a process for template mapping of new bike routes and trails.

*Medium-term goals (2-5 years)-*

- As new bicycle and river tours, experiences and trails develop, create media kits and other PR materials as appropriate and resources allow.
- Develop and implement social media strategies as appropriate and resources allow.
- Develop and implement marketing strategies as appropriate and resources allow.
- Develop and enhance the marketing resource of [www.MtHoodTerritorySports.com](http://www.MtHoodTerritorySports.com) as a resource tool for promoting competitive sporting competitions and opportunities for spectators.

**Goal #5:** Develop and Share Tools and Resources to Assist Partners, Local Tourism Organizations and Businesses

- Develop and share social media tools either in person or through social media/digital outlets that could include instructional PowerPoint presentations, videos, webinars and other tools as emerging technologies present themselves.
- Develop and share marketing and PR tools either in person or through social media/digital outlets that could include media kits, press releases, multimedia pieces, editorial calendars, brochures, travel planners and other materials.

**Goal #6:** Prioritize Key Projects and Asset Development/Enhancements as Determined from the County Events Center Strategic Plan. Develop Partnership and Funding Strategies to Assist in Achieving Identified Priorities

*Short Term Goals (1 Year) -*

- Once the Strategic Plan is received, coordinate with County Events Center Board to establish connections with appropriate community partners to amplify reach of tourism-related projects.

*Medium-term goals (2-5 years)-*

- Develop and implement PR and social media strategies as appropriate and resources allow.
- Develop and implement marketing strategies as appropriate and resources allow.

**Goal #7:** Establish Development Grant Program to Assist in Funding Tourism Priority Projects

*Short Term Goals (1 Year)-*

- Establish Grant Program guidelines, best practices and other materials to ensure selection and funding of high-value ROI and leveraged Tourism projects
- Streamline grant application procedure at all levels to incorporate straightforward point evaluation system that consistently meets Tourism's goals and permits applicants room for creativity in achieving success without undue bureaucracy.

**Goal #9:** Create a Special Events Toolkit to Assist Tourism Partners and Businesses

#### **Resource Tools**

- Tour Operator Notes
- Tour Operator "Off-the-shelf" itineraries
- Custom-templated sites for partner web presence
- "We Speak" training modules and toolkit
- WVVA wine trail Benefits Intro packet with decals and resource directory

#### **Measurements of Success**

#### **Closing Summary**

## **Clackamas County Tourism & Cultural Affairs**

### **2012-17 Five-Year Business Plan Outline WORKING DRAFT (as of 6/9/12)**

#### **Vision**

Serve as the leading force to grow and sustain tourism in Clackamas County through effective marketing and asset development strategies and by building strong partnerships with businesses, organizations, other governmental entities and citizens.

#### **Mission**

Increase overnight stays and encourage visitors to linger longer in Clackamas County by serving as the primary destination resource for trip planning resulting in destination visits and by working in partnership to develop and enhance local tourism assets.

#### **Insights- *Trends and External Factors that Influence County Tourism***

- Evolving Industry
- Evolving Technology
- Changing Traveler Behavior
- Shifting Revenue Resources
- Distressed, Declining and Under-developed Local Tourism Assets

#### **Guiding Principles-*Section in which ongoing programs, projects and areas of responsibility are described***

- Leader in County and Regional Tourism
- Effective Marketing and Promotion of Clackamas County Tourism Assets and Opportunities
- Focused on the Three Pillars of Clackamas County Tourism:
  - Outdoor Recreation
  - Agri-Tourism
  - Cultural/Heritage Tourism
- Effective and Efficient Use of Public Resources
- Build and Strengthen Public and Private Partnerships

#### **Strategic Priorities-*Items of focus in addition to on-going programs, projects and areas of responsibility***

- Position County to Seize Opportunities and Manage Threats/Barriers
- Create and Enhance Tourism Assets
- Enhance Marketing and Promotion Efforts through New Technologies and Mediums
- Build and Strengthen Partnerships and Coalitions to Increase Collaboration
- Develop New Tourism Products, Markets and Packages

#### **Strategic Planning Process:**

##### **Step 1: Situational Strategic Drivers-**

Conduct assessments of the current operating environment. "What are we currently up against/facing?"

##### **Step 2: Stable Strategic Drivers-**

Filter the outcomes of the environmental assessment through Tourism's Vision, Mission and Guiding Principles. "Who we are and how we operate."

##### **Step 3: Resulting Strategic Priorities-**

Identify Strategic Priorities in alignment with Steps 1 and 2 above. "How do we add value?"

## Strategic Priorities Over the Next Five Years:

### I. Position Clackamas County Tourism as the "Destination Architect" to Seize Opportunities and Manage Threats/Barriers

Supporting Goals- (Each goal will have outlined initiatives to support it)

- Goal #1:** Conduct a SWOT Analysis of Agri-Tourism (*almost completed*)
- Goal #2:** Conduct a SWOT Analysis of Outdoor Recreation-Specifically Bicycle Tourism; River Tourism; Sports Teams
- Goal #3:** Conduct a SWOT Analysis of Heritage/Cultural Assets
- Goal #4:** Conduct a SWOT Analysis of County Events Center Facilities
- Goal #5:** Conduct a SWOT Analysis of the Tourism Potential of the Blue Heron site in Oregon City
- Goal #6:** Conduct a Marketing/Destination Audit  
TCA will continue with our key branding of Oregon's Mt. Hood Territory, but undergo a marketing/destination assessment to determine where our efforts stand in the arena on an national and international level. The media environment is changing rapidly, so we will continue to rely on research to direct our efforts to respond to these changes.
- Goal #7:** Develop and Execute a County Tourism & Cultural Affairs Communications Strategy

### II. Create and Enhance Tourism Assets; Integrate Tourism Products and Partners

Supporting Goals- (Each goal will have outlined initiatives to support it)

- Goal #1:** Identify and Prioritize Projects and Opportunities from Agri-Tourism SWOT Analysis
- Goal #2:** Identify and Prioritize Projects and Opportunities from Outdoor Recreation SWOT Analysis -Specifically Bicycle and River Tourism Design Studios
- Goal #3:** Identify and Prioritize Projects/Opportunities from Heritage Assets SWOT Analysis
- Goal #4:** Identify, Prioritize Projects from County Events Center Facilities SWOT Analysis
- Goal #5:** Identify and Prioritize Projects and Opportunities from Marketing/Destination Audit
- Goal #6:** Evaluate and Revise as appropriate the County's Visitor Information Centers Program and Implement Identified Strategies
- Goal #7:** Create and Serve as Lead for New Signature Event: Festival of the Falls (WFHAC).
- Goal #8:** Incorporate Principles of Geotourism through the Integration of Products and Partners that Sustain, Reinforce, or Enhance the Unique Character of the County's Culture, Environment, Aesthetics, Heritage and Community Livability

**Goal #9:** Create an incentive system that encourages local projects that increase event or organizational capacity, expand target market audiences, leverage partnerships and other funding sources, and recognize higher levels of ROI.

### **III. Enhance Tourism Marketing and Promotion Efforts through New Technologies and Mediums**

Supporting Goals- (Each goal will have outlined initiatives to support it)

**Goal #1:** Conduct a Social Media Analysis of CCTCA Strategies

**Goal #2:** Develop Social Media Strategic Plan; Implement Plan

**Goal #3:** Develop and Execute Revised Marketing Program Under New Agency Contract

**Marketing** - Over the past few years, OMHT has leveraged the consumer marketing programs of Travel Oregon, specifically Fall Oregon Bounty and Spring Outdoor Adventure - and soon to be incorporated is a winter campaign. As a DMO, we rely on Travel Oregon to build overall visitor awareness for Oregon, with our efforts directing and focusing the familiarity and selection of Mt. Hood Territory as the final trip destination. TCA will continue to partner and align our marketing programs and campaigns with Travel Oregon.

**Advertising** - We will continue to adjust the percentage of advertising spent in the evolving media types of print, online, social media and broadcast, and monitor the amount of earned vs. paid media.

**Travel Media Relations** - We will continue to build trusted relationships to increase earned-media placements through print, broadcast and online sources.

**Niche Groups** - We will continue to identify evolving and trending niche audiences and efficiently target to these audiences.

**Goal #4:** Undertake a Brand Assessment and Conduct a Brand Redesign or Refresh  
TCA will continue with our key branding of Oregon's Mt. Hood Territory, but undergo a brand assessment to determine whether a brand refresh or redesign is in order.

**Goal #5:** Identify and Prioritize Technology Improvements from Marketing Audit

### **IV. Build and Strengthen Partnerships and Coalitions to Increase Collaboration**

Supporting Goals- (Each goal will have outlined initiatives to support it)

**Goal #1:** Create a Greater TCA Presence within Local Communities and Among Partners

**Goal #2:** Identify and Cultivate Partnerships with Local Tourism Businesses and Other Tourism-Related Organizations and Individuals; Other County Departments as appropriate

**Goal #3:** Create a County Heritage Tourism Roundtable to Address Local Heritage Issues

**Goal #4:** Develop/Refine Partnership Program with Federal Agencies, including the U.S. Forest Service, the Bureau of Land Management, National Parks and Federal Highways.

**Goal #5:** Revise Visiting Friends & Relatives Program- Continue to Engage Local Residents as Territory Ambassadors, as well as Expand the Reach of the MVIC by Attending Out-Of-Area Events and Trade Shows

**Goal #6:** Engage with Partners to Address Transportation and Land-Use Issues that Impact Tourism within the County Including But Not Limited to:

- a. Mt. Multimodal; Parking; Snow Park
- b. Bicycle Tourism
- c. Accessibility to Destination Assets
- d. Rest Areas

**Goal #7:** Develop and implement a Partner Training Program on Current Issues, Topics, Skills

**Goal #8:** Increase the effectiveness of the Community Partnership Program

## **V. Develop New Tourism Tools, Resources, Products, Markets and Packages**

Supporting Goals- *(Each goal will have outlined initiatives to support it)*

**Goal #1:** Evaluate Strategy for Domestic and International Travel Trade for Participation in Trade Shows, Sales Missions, and Hosting Fam Tours

**Goal #2:** Develop and Market New Tours, Experiences and Trails from Agri-Tourism Products/Assets

**Goal #3:** Develop and Market New Tours, Experiences and Products from Cultural Heritage Tourism Assets

**Goal #4:** Develop and Market New Experiences, Tours and Trails from Bicycle and River Tourism Studios Projects; Sports Teams

**Goal #5:** Develop and Share Tools and Resources to Assist Partners, Local Tourism Organizations and Businesses

**Goal #6:** Prioritize Key Projects and Asset Development/Enhancements as Determined from the County Events Center Strategic Plan. Develop Partnership and Funding Strategies to Assist in Achieving Identified Priorities

**Goal #7:** Establish Development Grant Program to Assist in Funding Tourism Priority Projects

**Goal #9:** Create a Special Events Toolkit to Assist Tourism Partners and Businesses

### **Resource Tools**

### **Measurements of Success**

### **Closing Summary**

Williamette  
falls  
Festival



Willamette Falls Festival

Proposed Date: Friday, October 12-Sunday, October 14, 2012

The Willamette Falls Heritage Area Coalition in collaboration with ODOT, Clackamas County, the City of Oregon City, and the City of West Linn will be hosting events to commemorate the grand re-opening of the bridge to traffic on Monday, October 15, 2012. Proposed events would be located in the Oregon City and West Linn areas and on the bridge, or nearby.

Day/Time	Event	Location	Chair
<b>Friday, Oct 12</b>			
<b>evening</b>	Bridge open for walking	On the bridge	
	Ripple Effect Arts Walk	Downtown OC	Cheryl/Elizabeth/Sam
	Marching Band "Play-Off" between West Linn/OC?	On the bridge	<i>(Alice will check w/ OC Band Director for interest)</i>
	Grand Ronde Chef dinner benefit	MOOT	Siobhan/Daphne
	Heritage Displays (ongoing thru-out weekend). West Linn Restaurant Booths offering 'to go' box dinners	Event tent OC side	John Richards <i>(restaurant coordination)</i>
	OC restaurants encouraged to offer special items/' to go' box dinners	OC Main Street	John Richards/Daphne
	Interactive Public Sculpture Project	WL Side of Bridge	Cheryl/Elizabeth
<b>Saturday, Oct. 13</b>			
9 a.m. to 9 p.m.	Bridge open for walking	On the bridge	
10 a.m. -2 p.m.	Farmers Market	Event tent OC side	Jim Bernard
10a-4p	Bridge animation-art projects, historic re-enactors, performances etc.	On the bridge	Cheryl/Elizabeth/Lisa
10a-?	Interactive Public Sculpture Project	WL Side of Bridge	Cheryl/Elizabeth
10a-?	Heritage Tour/Geocaching		Lisa
10a-?	Ripple Effect Arts Walk	Downtown OC	Cheryl/Elizabeth/Sam
11a,1p,3p	Speaker Series including Bob Hadlow & Chris Leedham	MOOT	Susan
3p-7p	Great Performances—local acts	Event tent OC side	Rae Gordon
4:00-6:30	Native First Fish Celebration, drumming and demonstrations, lighted boat flotilla	Clackamette Park	Siobhan
	VIP Reception	MOOT	
8:00	Fireworks over the Falls		Alice/Sam/Thomas

<b>Sunday, Oct 14</b>	<b>Event Day</b>		
8-?	Fun Run, Bi-athalon, and/or Family bike pedal/fun run	On the bridge starting line?	Jim Austin
10a-?	Heritage Tour/Geocaching	?	Lisa
Morning	? Activity?	Tent on the OC side	?
Noon	Wedding-celebrate rededication with vow renewals	On the Bridge	Wendy (?)
10a-2p?	Interactive Public Sculpture Project	WL Side of Bridge	Cheryl/Elizabeth
1:00	Post Ceremony Reception w/ donated wedding cake	Tent on the OC side	Daphne
2:00	Ceremonial Bridge Opening/speeches, etc.	On the Bridge	Susan/Danielle
2:30	Bridge opening with walkers, bikes and ending with historic car parade	On the Bridge	?
3:00	Clean Up		
<b>Monday, Oct. 15</b>	<b>Bridge open to all traffic</b>		