

September 19, 2019

Cheryl Cuming
Administrator
Santa Maria Valley TMD

Hello, Cheryl:

Thank you for reaching out about Coraggio facilitating a Strategic Opportunities Discussion for the Santa Maria Valley TMD. The SOW overview below will give you a sense of how we will approach the work and the investment required.

Preparation and Advance Work

We would like to set some phone time with you and key leaders. Our purpose will be to hear from you what you expect in terms of outcomes for the day, as well as learn about any current strategic challenges or opportunities you believe will be important to consider as the goals are being discussed with the larger group.

We will then begin thinking through the agenda and the best approach for the retreat. As always, our goal is to design our approach in a way that ensures the participants will arrive at the intended outcome(s), while at the same time having a positive and engaging experience from start to finish. In advance of the retreat, we will share our approach, including our proposed agenda, with you and make any revisions you believe are necessary. A draft approach to the facilitation is included in the “Facilitation” task description below.

Facilitation

Your facilitator, Matthew Landkamer, will come prepared with all the materials and exercises necessary to ensure an engaging retreat that gets to good strategic decisions. Although you won't be able to craft a complete strategic plan in one day, we will be able to help you align on strategic priorities for the organization—a roadmap that will ensure the efficient use of your funding and other resources.

We envision a four-hour morning retreat that will include approximately 30 stakeholders representing different facets of the Santa Maria tourism economy. Beyond leadership of the TMD, participants might include attractions, restaurants, wineries, event organizers, event venues, and city staff.

Intended outcomes for the retreat include:

- Clarity regarding stakeholder challenges
- Perspective and guidance on future programs
- Recommendations of any structural changes for the TMD, such as boundary changes or changes to allowed activities
- Information and perspective needed to manage a successful TMD renewal in a way that best meets the needs of the community

The group assembled for the retreat will give perspective and advice to TMD leadership, who will ultimately be responsible for taking all perspectives into account and identifying a strategic path forward. Activities during the retreat might include:

- Alignment on an ideal future state for the visitor economy in Santa Maria, and the TMD's role in creating that future
- Identification of the relative Strengths, Weaknesses, Opportunities, and Threats (SWOT) of Santa Maria related to competitive destinations
- Reflection on the “hard truths” about Santa Maria's tourism economy
- Prioritization of gaps to fill and strengths to build upon
- Identification of ways to measure success

It is important to point out that this retreat will not consider specific marketing strategies or identify marketing spends—that is work that takes place in the marketing plan. Rather, this is about describing the operational strategies the SMV TMD needs to undertake to ensure the ongoing health of the visitor economy.

Recap

Within two weeks of the event, we will work with the leadership of the Santa Maria Valley TMD to take the group's feedback into consideration and come to final alignment on the direction forward. We will document these decisions in a simple overview document that will serve as your Strategic Roadmap.

Investment

The requested investment for this work is \$5,525, not including travel/overnight expenses—which will be charged through at cost. We will provide an invoice upon completion of the project, due net 15.

Approvals

Name:
Title:

Trever Cartwright
President, Coraggio Group