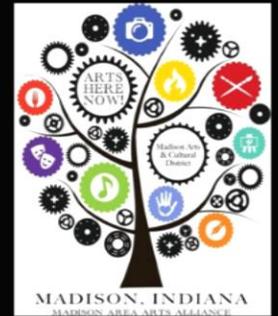# Jefferson County Tourism
Caucus 2021

Objectives

- A calibration of the tourism stake holders to review and level set on 2021 objectives and goals

- Discuss the current state of collaboration amongst the teams

- Identify any gaps that we see in our current approach to tourism in the county

- Develop a stronger strategic vision of what the participants want our county to look like in 10 years as it relates to tourism, and build a plan from that vision

- Roundtable discussion on new trends in marketing and technology

- Cultivate a good sense of who is going to do what, with mutual agreed upon action items and accountability moving forward

Calibration

Who's Who

Current State from Roundtable

◈ Good communication and engagement happening today

◈ Strong talent inside of the local teams

◈ Good reach at the local level

   ◈ Most effort today is being done on social media, i.e. Facebook and Instagram

◈ JCBT just funding VMI today, not any of the other groups

   ◈ VMI is limited in staff, but effective in keeping content pushed out

◈ Major interest by all parties to work closer together

◈ Groups are working together – but we still have silo's

◈ Tourism is up and growing and all parties played a role in that success

◈ Most of the groups are spending a large amount of time fundraising

◈ Limited staffs across the board with some overlap in messaging

◈ No clear overarching County approach to branding, structure or long term goals

Gaps Today

◈ No collaborative message/branding for all stake holders is mapped out today with a 3-5 year plan

◈ No coordinated website with bump out options to see everything the county has to offer

    ◈ Silos for art, music, architecture, sports, lodging and recreation

◈ Limited new technology being used or planned for because of resources ($)

◈ Seen as Madison only. We do not have an overarching County focus

◈ No strategic planning to combine quality of life for residents and tourism (come for a visit, stay for a lifetime)

◈ Limited National reach or focus by targeted market for tourism and advertising

◈ Branding lacking for total County package. Silo's and older brands that are stale

◈ Not working close today with the young residents or our local colleges with a clear vision

◈ Visitor's center is not an asset that is being used to it's potential

◈ No shared resources across the group. Overlap in expenses and messaging is costing money that could be re-invested

◈ Groups are spread thin and under funded. No scale or leverage opportunities

◈ No community trained tourism ambassadors with a consistent message

◈ No true KPI's in place today to measure success for the groups

◈ Mid-week business conference playbook is not in place today

◈ No shared CRM system or marketing portal today that is shared among the groups.

◈ Google and/or keyword search is fragmented across the teams

Collaboration/Future State

Future State Goals

- Collaborated County Marketing Plan
- Best in Class technology and strategy
  - Unified Webpage, Messaging and Branding
  - Web based vs print strategy defined with an investment plan in place
- Shared Resources/Services
- Move to a proactive vision and plan and away from a reactive structure
- Highly attractive Welcome Center to is a Destination Spot
  - Maker Space potentially
- Strategy focus from JCBT
  - Invest in new verticals like recreation, music, arts, conventions etc. Board to set direction and help launch
  - Get to a 2-3 times/year board review for funding request
    - Keep back funding to respond to major needle moving events
    - Use shared services marketing over giving money
  - Expanded marketing team beyond one person from VMI that has a marketing background (as the budget allows)
  - JCBT focus on building infrastructure and bold moves more than worrying about how much a billboard cost
  - Steering committee approach with local stakeholders to develop and mold the future for tourism. Allows key groups to have a larger voice and allows for consistency year over year

Industry Veterans with Madison Roots

Behind Authentic Redevelopment

Dr. Michael W-P Fortunato is an internationally published scholar, researcher, author, entrepreneur, community developer.

Michael received a Ph.D. in Rural Sociology and an M.S. in Community Economic Development from Penn State University's College of Agricultural Sciences, Department of Agricultural Economics, Sociology, and Education in 2011.

He also holds a dual Bachelors degree in Finance/International Business and International Studies. He is a subject area expert in the fields of community and economic development, communitybased entrepreneurship, rural and small urban development strategy, social science research, and community/regional leadership.

Content-1
Attract. Engage. Grow.

CREATIVE INSIGHT COMMUNITY DEVELOPMENT

HOME   SERVICES   ABOUT US   CONTACT US

distressed small

town economies deserve just as much support and attention as large metropolitan areas.

ARTS-BASED DEVELOPMENT: BUILDING CREATIVE COMMUNITIES

Arts and culture can be powerful community assets. Arts-based economic and community development is often cited as a means to improve quality of life for communities while attracting jobs, tourists, and new residents. The arts sector is also a competitive tool that can generate income and tax revenues while strengthening the regional economy, education, civic engagement, and youth development. Arts centers, arts incubators, arts and music festivals, and a variety of other combined strategies can be used to support and build local arts economies, but they should also be self-supporting whenever possible. While there are a lot of trendy ideas and jargon going around, how do you figure out what will work best in your community?

Tell me more

BUSINESS INCUBATION AND ENTREPRENEURSHIP: BUILDING ENTREPRENEURIAL COMMUNITIES

Many business incubators have failed since they started to become trendy in the 1980s, mostly as a result of poor planning, unrealistic goals, inexperienced management, or a lack of community support. However, successful incubator models and best practices have been demonstrated since 1959, although they have to be customized for different communities. Retaining incubated businesses is also important, but often poorly managed. Whether it's arts incubators or technology incubators, our approach uses lessons learned from best practices, current research, and our own direct experience in building, running, and advising incubator programs.

Tell me more

FOOD HUBS AND COOPERATIVES: BUILDING FOOD COMMUNITIES

Food hubs and co-ops often run on thin margins and can take a long time to become self-sustaining if they don't fail before then. One solution is to combine food hub aggregations and marketing strategies with related but higher-margin services, such as commercial kitchens for value-added food processing, contract processing, rental, classes, and incubation of food entrepreneur businesses. Another approach is to combine the co-op with a connected restaurant, food delivery services for seniors and children, and other strategies that can also draw federal or state funds to help these programs get started. Food networks and collaborations can also be built up around these programs for stronger community development.

Tell me more

MAKERSPACES: BUILDING NEW MANUFACTURING BUSINESSES

"Makerspaces" are shared community facilities for the public to make things with high-end manufacturing equipment and other tools for multiple crafts. Laser cutters, 3-D printers, and computerized machine tools are often provided along with training in how to use them. These spaces are typically used by both professional craftspeople and hobbyists, and the interaction of these users creates a supportive environment for learning, prototyping, experimentation, collaboration, and community building. For communities interested in expanding their options for economic development, creation and support of a makerspace provides the opportunity to launch new manufacturing businesses started by "maker-entrepreneurs" while upgrading local workforce skills and building community.

Marketing Strategy

Our Marketing strategy services include marketing audits, marketing workshops, SEO analysis, site scanning, persona development, market segmentation, planning and execution.

Dan Galvin

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Outline

Jefferson County Board of Tourism
Outline of proposed Content-1 Services

The Jefferson County Tourism Caucus on March 19th, 2021 provided Content-1 both an opportunity to better understand the current state of tourism stakeholders' organizations, objectives and collaborative initiatives, and to present best practice processes involved in the development and implementation of digital marketing efforts. With this understanding and with the interest expressed by stakeholders in developing more effective and measurable marketing efforts, Content-1 suggests the following outlined course of action meeting once a month for six months.

Formation of a Tourism Stakeholders' Committee
Marketing representatives from each of the organizations in attendance at the March 19th Caucus will be invited to form a committee for the purpose of further developing each of their brands, identifying their objectives and KPIs to measure their success, and creating personas and effective messaging to be used for digital marketing purposes in the future. The committee will then work together to roll-up their individual organizations' findings to agree upon a brand that will serve as an umbrella to all of the organizations (Visit Madison). Key messaging for the brand will be created and plans for how the diverse Madison tourism groups will collaborate with each other in the future will be addressed.

Before the first committee meeting
Start with a form-based marketing audit for each organization to complete in advance of the first committee meeting (Content-1 will provide). This provides a current state understanding of where each organization is from a branding and messaging perspective.

Meeting 1 – Discovery
Identify a Secretary to take minutes
Why are we here and what to we hope to accomplish?
Discuss deliverables each organization will walk away with at the end of 6 months
Review marketing audit (completed before the meeting) with each organization to establish a current state.
Explain homework for the next meeting

Meeting 2 – Brand Development
Walk organizations through the Branding process including:
- Marketplace Analysis
  - Brand Equities – elements of Trust, Quality, Exclusiveness
  - Market Valuation
  - Audience Segmentation

- Brand Building
  - Values
  - Beliefs
  - Purpose
  - Brand Equity

Right page

- Points of Differentiation
- Points of Parity
- Brand Character
- Brand Assets

- Execution
  - Messaging
  - Tag Line
  - Campaign formation

Meeting 3 – Objectives and KPIs

Identify Brand Objectives for individual organizations

Identify measurable Key Performance Indicators (KPIs) corresponding to each objective

Meeting 4 – Persona Development
Persona Development
Identify important personas expected to best respond to messaging from each organization and where they can be found

Meeting 5 - Messaging
- Developing key messages
- Comparing messages to brand development exercise
- Matching messages to personas
- Content calendar
- Influencers
- Proper frequency
- Campaign development
- Paid, earned and owned media

Meeting 6 - Umbrella Brand
- The role of Visit Madison and the role of its stakeholders
- Developing umbrella brand
- Developing umbrella messaging
- Future stakeholder collaboration

Cost
Our suggested cost structure for supporting these efforts is $1,200 per month.

Deliverables
Suggested deliverables to be developed by each organization during the 6-month process include:
- Current state marketing audit
- Brand understanding - including marketplace analysis, brand characteristics and messaging
- Brand objectives and matching Key Performance Indicators (KPIs) for measurement of success or failure
- Key personas or target audience descriptions
- Brand messaging unique to each organization
- Foundation for umbrella branding and messaging
- Foundation for future committee collaboration

Michael Fortunato

CREATIVE INSIGHT
community development
Madison, IN | Desert Hills, AZ | State College, PA

Jefferson County Board of Tourism
Proposal for Creative Insight Community Development (CICD) Services
June 26, 2021

Comprehensive: The Jefferson County Tourism Caucus was held on March 19, 2021. This meeting was convened to bring together key stakeholders from across the community who are involved in tourism- and lifestyle-related activities in an attempt to establish a) better communication across disparate organizations, and b) to develop the beginnings of a strategic vision about how the community can work inter-organizationally to support tourism in Jefferson County. In this meeting, it became clear that there were multiple opportunities for collaboration, but very little effort had been made to consolidate or coordinate efforts. Gaps in marketing strategy were also identified. An interest was expressed by the group in improving both marketing and strategic operations across these allied organizations.

Convening Stakeholders: To remedy this situation, action was suggested along two pathways. First, Content-1 Marketing (Louisville, KY) will work with these same key stakeholder groups to develop a strategy around marketing, segmentation, content, measurement, evaluation, and benchmarking. Second, Creative Insight Community Development (CICD) of Madison be retained to develop a strategic vision for the tourism alliance, focusing on the "why" of the group, and a plan for how these independent groups can work together effectively. These are highly synergistic activities that can be accomplished using the same stakeholder groups, often during the same meetings.

Key stakeholders include — but are not limited to — the Madison Area Arts Alliance (MAAA), Madison Main Street ("Main Street"), Visit Madison, Inc. (VMI), the Madison Area Chamber of Commerce ("the Chamber"), Madison Music Movement (M3), Jefferson County Historical Society (JCHS), Historic Madison, Inc. (HMI), and the City of Madison ("the City"). Through the proposed process, the stakeholder group will be encouraged to expand to include key tourism- and lifestyle-oriented businesspeople, involved citizens, and other groups who can make a positive contribution.

Goals and Deliverables: At CICD, we believe that all planning efforts should be aimed at fast, feasible, and impactful collective action, and should never just sit on the shelf. Our processes use evidenced-based approaches to overcome common barriers to community action, and to getting results and outputs *fast*. The key goals of our engagement are as follows:

1) Goal: To review findings from the March 19, 2021 meeting.
2) Goal: To clarify the "why" of the allied group — the key motivating principle for participation and action.
3) Goal: To map the current network and linkages of participants, their core competencies, and to identify potential gaps in the network that can inhibit action.
4) Goal: To identify local opportunities for collective action, and gaps and needs that can be filled by the collaboration.
5) Goal: To develop useful terminology around investment in Madison's creative, tourism, and lifestyle-oriented assets.

The accomplishments of goals 1) through 5) will lead to the creation of the following deliverables:

6) Deliverable: To formalize a strategic vision for the alliance, including findings from steps 2) through 5) above, a network map of the local tourism ecosystem, and a strategy guide for how groups can work together based on their core competencies and missions (i.e., "who to call" and "how to engage/collaborate" when work needs to get done).
7) Deliverable: To create a 3-year hierarchical action plan with appropriate sequencing, aggressive but feasible deadlines, and group accountability protocols.
8) Deliverable: To identify needs for staffing or consulting and the associated costs to implement the action plan, or to support the alliance going forward.

Structure of Engagement Meetings: CICD proposes a series of six meetings dedicated to the strategic vision and operations for the alliance. Meetings will include a diversity of stakeholders from across the community. We recommend 2-hour meetings. The proposed agenda is as follows.

1) Review of Progress and "Why" Exercise. This meeting will review progress made in the March 19, 2021 meeting as a starting point for discussion. The meeting will use the Golden Circle model to examine each participants' "why," or main motivator, for participating. As an icebreaker exercise, the group will discuss terminology: what do we call our "lifestyle" and "tourism" sectors locally? This connects with discussions about marketing and branding.
2) Strategic Vision — "Postcard from the Future" Exercise. Participants will describe their ideal Madison in 2030 through a tourism lens. Key themes will be thematically analyzed, and will serve as the basis for a strategic vision.
3) Network Mapping and Core Competencies. Participants will conduct a network mapping exercise to determine who works with whom, and what gaps in the network can be filled. The facilitation will focus on how organizations can work together best. Participants will discuss core competencies, near competencies, and activities to be avoided.
4) Opportunity and Gap Identification and Prioritization. Based on the strategic vision exercise in 2), participants will systematically identify opportunities for development, gaps, and needs that are beyond the scope of any one organization at the table. These opportunities will be prioritized and sequenced based on importance and complexity using CICD's goal hierarchy matrix.
5) Solutions Broking, Short-Term Objectives, and Diversification. Combining the opportunity and gap exercise in 4) with the core competencies in 3), the facilitator will work with participants to organize solutions based on advantageous partnerships. The facilitation will then rely on key stakeholders to break down complex goals into short-term objectives, and to identify other stakeholders that should be at the table. A discussion will follow about ongoing needs that cannot be filled by the current team.
6) Refinement, Evaluation, Ownership, and Deadlines. With expanded attendance, stakeholder teams will refine the ideas from 5), set deadlines around short-term objectives, and assign ownership over those objectives. The facilitator will work with teams to develop KPIs tied to each goal, and accountability metrics for ongoing performance. Ongoing team capacity needs will be evaluated and considered.

Following the meetings, CICD will codify all data, analysis, and information into a coherent strategic vision and action plan.

Cost and Duration: 1,200.00 USD/month for six (6) months, which includes meeting facilitation, data analysis, and plan writing.

Facilitator: Dr. Michael W-P Fortunato is Founding Partner of CICD based in Madison, IN, with 15+ years experience in community and economic development on three continents.

Production Slots for Marketing Time