FISCAL YEARS 2019-2021
APRIL 1, 2019 – JUNE 30, 2021

2019/2021 STRATEGIC BUSINESS PLAN
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DEAR SONOMA COUNTY PARTNERS:

We have made tremendous progress this year and are proud of our achievements. We launched our new brand “Life Opens Up,” for those who go their own way, promoting our progressive community, and authentic experiences that connect people and encourage them to discover more. We built a best-in-class leadership team that will take our destination to the next level. We established measurable goals and objectives that will help tell our story to all of our stakeholders and have reestablished our core values, providing us with a solid foundation from which we can build trust with our stakeholders, residents, visitors, and elected officials.

While we have accomplished many things, our work has just begun. This year will be a critical year as we transition from a destination marketing organization to a destination stewardship organization, with a goal of ensuring everything we do is in the best interest of the county. We will move to the execution phase of the destination master plan this year, which takes a lead role in identifying how Sonoma County will evolve as a destination. Tourism and hospitality is a crucial component of the Sonoma County economy and employs more than 22,300 of its residents. This process will help ensure SCT is an organization that is truly part of the community and is concerned with protecting and thoughtfully growing the areas economic, social, cultural, and industrial resources.

Our operational priorities are:

1. **Drive Business** – Continue to build on our new brand through robust sales and marketing programs that create personal connections with audiences and drive purchase decisions.

2. **Drive Destination Stewardship** – SCT will craft a program platform that shows thoughtful stewardship of the county, determining the right level of marketing, sustainable programming, and opportunities for the hospitality and tourism community to give back to where we live, work, and play.

3. **Drive Incremental Revenue** – We will develop a sustainable funding model that will ensure we have the funds to promote our destination effectively. We will take an entrepreneurial approach to obtaining incremental revenue, such as developing corporate partnerships and a consumer loyalty program and evaluating our current and (potential) business improvement area (BIA) funding mechanisms.

This is an exciting time for our organization. There is much work to be done but I’m confident that we will continue to work together to reach the aspirational goals in this plan. Your continued commitment, dedication, and focus will be imperative as we evolve into a destination stewardship organization. We have a great opportunity in front of us, I look forward to working together to achieve our goal to be a premier global destination.

Thank you for all you do to support Sonoma County Tourism.

Steve Jung
*Chair, Sonoma County Tourism*
“ACROSS THE SONOMA MOUNTAIN WISPS OF SEA FOG ARE STEALING. THE AFTERNOON SUN SMOULDER IN THE DROWSY SKY. I HAVE EVERYTHING TO MAKE ME GLAD I AM ALIVE. I AM FILLED WITH DREAMS AND MYSTERIES. I AM SUN AND AIR AND SPARKLE. I AM VITALIZED, ORGANIC.”

– JACK LONDON
As stewards of the Sonoma County experience, Sonoma County Tourism is committed to helping ensure the resources found here are nurtured, protected, and responsibly enjoyed for generations to come.

Beginning now, we’re working both internally and externally to achieve what many of you have already achieved – to be a sustainably focused organization and to encourage both our partners and visitors to commit to a sustainable destination experience.

SCT is taking the long view. This year, we will undertake the development of a destination marketing plan. Now is the time for us to take hold of our future and this process will allow us to do that. It’ll be hard. It’ll require tough choices. It’ll take everyone’s input. But, in the end we will have a roadmap to becoming the Sonoma County we want to become. This will allow us to separate the noise from the real potential, and help all groups marketing the county to align under a shared vision.

We also will enhance our marketing through telling your stories. This is a time when the tourism marketing arena has never been more crowded. Every destination wants to be the newest and coolest wine, craft (whatever), food, and millennial experience region. Sonoma County simply needs to be its best, most authentic self and we will shine. From fifth generation winemaker to recent transplant artisans, the compelling stories that can be told are almost endless. We commit to amplifying your richly textured and immensely interesting stories.

We also are working with all our teams to ensure we provide the greatest value to our partners. Our Group Business Development team has completely revised how it sells the region to meeting planners and how it shares information with our partners. Our Global Tourism Development group is finding innovative resources and programs that help connect partners with the travel trade. Take some time to review the programs within this plan.

We continue to be in a complex and evolutionary time for tourism in Sonoma County. We hope this plan provides a clarifying framework for all to better understand and support our region’s collective long-term goals.

Thank you for your partnership.

Claudia Vecchio
President/CEO
MISSION

Promote overnight stays and encourage tourism within Sonoma County.

VISION

A robust economy for Sonoma County businesses and residents balanced with stewardship of the region’s natural, cultural, industrial, and intellectual assets.

ORGANIZATIONAL EVOLUTION

SCT will move from being a destination marketing organization (DMO) to a destination stewardship organization (DSO) with the goal of ensuring all programming is in the best interest of Sonoma County. The core programming around sales and marketing remains, but activities and plans show strong leadership for the long-term sustainability of the county and its residents.
CORE VALUES

STRATEGIC
SCT approaches all programs and opportunities with a foundation of research and structured with consideration for all potential program outcomes and impacts to the organization, key stakeholders, and the county at large.

TRANSPARENT
All budgets and programs administered by SCT are done so within an environment of transparency. This helps ensure all stakeholders have a high level of understanding regarding the operational effectiveness of the organization and can champion the organization as an efficient steward of the funding provided.

COLLABORATIVE
SCT is successful only if its partners and stakeholders are successful. This occurs within a robust business-development environment offering opportunities for constituents to benefit from partnerships with the organization and gain business-driving benefits from the programs administered by the organization.

SERVICENTRIC
The organization is committed to providing best-in-industry service to both trade professionals and visitors. As a community steward, SCT will ensure our partners and all residents believe we are “in this together” and we will work to accomplish what’s in the best interest of Sonoma County.

ENTREPRENEURIAL
SCT operates as an ambitious and nimble business, seeking new opportunities for revenue and growth. SCT staffers work to find business development opportunities that may be cross functional with the best interest of the organization in mind.

TRUSTED
As a destination stewardship organization, SCT will work on behalf of the county and its tourism industry partners to achieve aspirational overarching goals, share successes and failures, and create an environment of open communication.
ORGANIZATIONAL PRIORITIES

DURING THE 2019-2021 TIMEFRAME, SONOMA COUNTY TOURISM WILL WORK TO CREATE A SOLID FOUNDATION FOR LONG-TERM PLANNING AND DEVELOPING LEGACY PROGRAMS THAT WILL PUT THE ORGANIZATION IN THE BEST POSITION TO ASSIST THE COUNTY INTO THE FUTURE.

DRIVE BUSINESS
Continue to build on the Life Opens Up brand through robust sales and marketing programs that create personal connections with audiences and drive purchase decisions. Develop opportunities for BIA properties and local businesses to promote their own entities through attendance at travel trade shows, through cooperative consumer marketing campaigns, and through engagement with travel trade and media during in-market visits.

DRIVE DESTINATION STEWARDSHIP
As a destination stewardship organization (DSO), SCT will craft a program platform that shows thoughtful stewardship of the county. This means determining the right level of marketing, sustainable tourism programming and opportunities to give back to the community all while working to achieve the overall mission, vision, and values of the organization.

DRIVE INCREMENTAL REVENUE
SCT will take an entrepreneurial approach to obtaining incremental revenue. Programs will be launched that help drive revenue through corporate partnerships, consumer loyalty, potential BIA/BID funding sources, and more.
KEY MESSAGES

CONSUMERS
- Life Opens Up in Sonoma County. For those who go their own way, Sonoma County is a progressive community of artisans who create meaningful and down-to-earth experiences that connect people and encourage them to discover more.
- Sonoma County is situated 30 miles north of San Francisco’s Golden Gate Bridge. The vast county offers diverse natural, cultural, and cultivated resources. Amongst the agricultural bounty and world-class wines, ancient redwood forests, secluded ocean coves, and authentic small towns, visitors will find unmatched experiences.
- Now is the perfect time to visit Sonoma County. This genuine and adventurous wine country destination continues to offer new tours and experiences, spectacular new lodging properties, and a burgeoning craft brew industry that all create inspiring and exciting vacation experiences.
- Sonoma County is committed to creating a sustainable and responsible travel experience. Most of its vineyards are 100% sustainable, many of the hotels and restaurants incorporate sustainable practices, and Sonoma County Tourism provides incentives for visitors who practice sustainable tourism measures.
- The mild climate makes Sonoma County the perfect travel destination anytime of the year.
- Sonoma County Airport (STS) provides non-stop flights from several Western cities and one-stop accessibility to much of the world.
- Sonoma County is an ideal location for life’s celebrations, including weddings, family reunions, graduations, and other milestones.

TRAVEL TRADE
- Sonoma County, located 30 miles north of San Francisco, provides the best of Northern California Wine Country for business travel through meetings, incentive trips, and companies focused on sustainability.
- Sonoma County Tourism provides free services to find the best venues for events and meetings, matching hotels, restaurants and activities with the needs of meeting planners and tour operators.
- Throughout the county, meeting planners will find a blend of traditional and unique venues. Personalized services specializing in RFP distribution, assistance with site tours, and off-site dining and team-building programs.

LOCAL STAKEHOLDERS
- Tourism in Sonoma County has an economic impact of more than $2.1 billion annually and represents more than 22,300 local jobs.
- Taxes collected from visitors mean $102.1 million is returned to the county, and used to fund government operations, regional parks, arts and cultural organizations, affordable housing, and public safety.
- SCT’s efforts are divided into three main segments of travelers: individual leisure travelers, meetings and groups, and “tour and travel,” which are the buyers of packaged travel such as tour operators and travel agents. Combining these three segments provides a balanced portfolio of potential travelers, so SCT can bring more overnight visitors throughout the year.
- Sonoma County Tourism is committed to long-range planning. Through working with a skilled consultant, the organization will work with stakeholders to develop a tourism master plan.
OVERARCHING KEY PERFORMANCE INDICATORS (KPIs)

1. Increase revenue to Sonoma County by 2% ($43.5 million) year-over-year through tourism-based activities. Funding will be realized with the transient occupancy tax (TOT) funding stream and as identified as visitor spending in the Dean Runyan economic impact study. As a benchmark:
   - 2018 overall destination spending was $2.175 billion (Dean Runyan Economic Impact Survey)
   - 2018 TOT collection in the unincorporated areas was $2,107,840

2. Initiate an incremental funding model for Sonoma County Tourism that “grows the pie” for the organization’s sales and marketing budgets.
   - Year 1 Goal: $500,000
   - Year 2 Goal: $1 million

3. Develop and begin to implement a destination master plan designed to identify a responsible long-term approach to destination planning and development.
   - Develop and implement a destination sustainability/stewardship platform that creates opportunities for visitors to embrace responsible tourism practices.

4. Create new sales, marketing, and international outreach cooperative partnerships that provide local partners the chance to build business and enhance the Life Opens Up brand through partner alignment.

5. Reconstruct the organization’s financial operations including financial management, contracting, investments, and accounts payable and receivables – all within a fully transparent environment.

6. Review and revise as needed, Sonoma County Tourism’s guiding ordinances and bylaws to reflect current needs and opportunities.
1. Build a data-driven foundation
2. Drive visitation
3. Spearhead long-term destination stewardship
4. Enhance value through robust partnerships
5. Run an effective business
INITIATIVE 1
BUILD A DATA-DRIVEN FOUNDATION
BUILD A DATA-DRIVEN FOUNDATION

**Develop Research and Integrated Systems to Inform Business Practices**—
Ensure all programs are developed and executed with a basis in data-driven insights.

- Establish and grow a formalized research program at Sonoma County Tourism ensuring all programming decisions are developed based on insights derived from formalized research data.
  - Develop comprehensive research program, with collaboration across all SCT business teams.
  - Integrate visitor data, hotel performance data, marketing ROI reports, and other related/industry research to help create and measure effective campaigns and messaging platforms.
  - Provide economic impact data to key stakeholders on an annual basis.

- Take a strategic, long view of SCT’s integrated systems and work to develop enhancements that work to provide maximum organizational efficiency and effectiveness.
  - Harness the full power of enterprise platforms and systems (*databases, messaging platforms, third-party vendors*) through customization, high usage, and integration.
  - Establish and grow segmented e-newsletter subscribers, based on customer interests and destination pillars.

- Assist local partners and destination marketing organizations with making decisions through providing data specific to the municipality/destination.
  - Work with the Sonoma County Economic Development Board and research vendors to identify and create research programming for local entities.
  - Communicate research data to partners on a quarterly basis and as new information is available.

**KEY PERFORMANCE INDICATORS:**

1. Conduct organization-wide analysis of research gaps and redundancy, with the goal of developing a comprehensive body of research at SCT by June 30, 2020.
2. Conduct organization-wide analysis of Simpleview usage, with a goal of creating a roadmap to onboard more SCT functions and processes onto the platform by June 30, 2020.
3. Create updated measurement of earned media efforts/results, with goal of roll out by January 1, 2020.
INITIATIVE 2
DRIVE VISITATION
CONSUMERS

Drive Brand Integration – Work started in FY18/19 to roll out and socialize Sonoma County’s “Life Opens Up” brand to all our markets, key stakeholders, and the community at large.

• Create brand equity and efficiency across all channels, ensuring key contractors and partners understand the brand architecture, voice, and purpose.
• Work collaboratively among Marketing and Communications, Group Business Development, and Global Tourism Development to streamline messages, create efficiencies, and break down silos.
• Review all brand integration opportunities across the organization – trade shows, conferences, industry events, advertising, giveaways, messaging platforms, etc. – and work holistically to ensure appropriate levels of integration.
• Develop toolkit and associated messaging for SCT local hospitality partners to leverage the Life Opens Up brand in their materials and on their channels.
• Identify opportunities with local and regional organizations who may be interested in leveraging the Life Opens Up brand.
• Identify speaking opportunities in the community to socialize the Life Opens Up brand.
• Identify and leverage partnership opportunities with companies, celebrities, or other brands to elevate and promote Life Opens Up.
• Focus on fresh, timely, and relevant content production, especially video, to surface and showcase unique destination differentiators.
  —Develop video series, capturing unique, compelling Sonoma County people to help tell our many destination stories.
  —Create comprehensive through-line of content development, from media relations pitching, through content creation, and finally to promotion/distribution.
  —Identify potential content partners that align with SCT’s brand pillars and target markets.

Create Awareness of Sonoma County in Emerging Markets – Incorporate a fully integrated marketing/communications program to create awareness of and a compelling purchase proposition for Sonoma County in emerging markets, primarily those with direct flight access to the destination, including Los Angeles (LAX), Orange County (SNA), San Diego (SAN), Portland (PDX), Seattle (SEA), Phoenix-Sky Harbor (PHX), Dallas/Fort Worth (DFW), and Denver (DEN). Other potential markets include New York City, Chicago, and Washington, D.C.

• Develop campaigns and programs that increase the stay, primarily mid-week, and off-peak business for Sonoma County.
• Create and surface unique destination experiences that help project Sonoma County’s unique destination differentiators.
• Develop and execute highly targeted earned media efforts to generate positive, compelling news stories and in-depth education about Sonoma County in-market.
• Identify and leverage key partnerships such as Visit California, the Trio partners (Sonoma County Tourism, Sonoma County Vintners, Sonoma County Winegrowers), area destination marketing organizations, SF Travel, and Brand USA to help tell our destination stories.
• Create and leverage brand partnership with high-value company or celebrity.
• Leverage social influencers to help “open up” those markets to Sonoma County.
• Utilize in-flight magazines, airline credit cards, and the airlines themselves to forge partnerships and reach customers.
• Continue to work with STS and airline partners to encourage additional flight growth and support existing routes through marketing and media relations efforts.

Invite Customers from Core Markets – Provide messaging and compelling invitations to loyal and new visitors from existing markets who know Sonoma County well.

• Continue messaging and invitations to existing markets like the Bay Area and Sacramento.
  —Leverage targeted advertising and social media.
  —Focus on off-peak and “need” periods for these markets.
  —Utilize targeted earned media efforts to place stories in these markets and get media outlets from these markets to originate programming from Sonoma County.
• Identify and leverage key partnerships such as SF Travel to help tell our destination stories.
• Create compelling campaigns that work to increase awareness of and drive overnight visitation to Sonoma County.
• Create and surface unique destination experiences that help project Sonoma County’s unique destination differentiators.
Compel International Visitation – Develop compelling marketing and media outreach that drives visitation from key international markets, encouraging visitors to stay longer and spend more money in the destination.

- Develop culturally specific marketing strategies in targeted international markets
  - Determine appropriate spend and focus (trade, media relations, marketing) per country.
  - Develop media relations strategies, per country, based on spend and focus.
  - Identify and leverage key partnerships such as Visit California, Brand USA, and SF Travel to help tell our destination stories.
  - Increase measured value of earned media efforts in target markets.
- Create compelling campaigns that work to increase awareness of and drive overnight visitation to Sonoma County.
- Create and surface unique destination experiences that help project Sonoma County’s unique destination differentiators.

**KEY PERFORMANCE INDICATORS:**

1. Drive 25,000 leisure room nights via targeted advertising and promotions in FY19/20.
2. Secure high-value coverage in both international and domestic targeted media outlets that generate advertising value of at least $10 million.
3. Register 1,000 new subscriptions to SCT e-newsletters in FY19/20.
4. Create and execute at least three seasonal campaigns, targeting specific need periods to drive overnight visitation and zeroing in on key target markets.

TRAVEL TRADE (DOMESTIC AND INTERNATIONAL)

**Travel Trade Education** – Educate key global industry partners (travel agents, tour operators, wholesalers, and receptive operators) on all aspects of Sonoma County through:

- Sonoma County Travel Pro (SCTP) – Optimize the new SCTP online training platform and ensure it meets the needs of partners.
  - Plan and execute an annual schedule of training sessions and webinars through the SCTP program contacts and industry partnerships for greater reach and participation.

**Destination Experience** – Create a program around destination and product experience for key global industry partners (travel agents, tour operators, wholesalers, and receptive operators) that includes:

- Robust in-market familiarization program that provides a sellable experience in the destination.
- Timely and relevant follow-up with agents and operators to generate Sonoma County itineraries within tariffs.

**Marketing and Communications** – Establish, maintain and grow partnerships with key global industry partners (travel agents, tour operators, wholesalers, receptive operators, and distribution channels), keeping Sonoma County top-of-mind for current programs, sales opportunities, and future product planning through:

- Integrated Communication Plan – Build an integrated communication plan that aligns with marketing and media relations initiatives for Sonoma County messaging across the travel trade community. Plan to be nimble and encompass emails, newsletters, social media, LinkedIn, WhatsApp, etc.
- Collateral; Creation and Distribution – Create innovative marketing collateral to be distributed and translated, as appropriate
- Marketing Campaigns – Source and execute marketing campaigns in coordination with in-market rep agencies and/or key global industry partners to drive incremental room nights to Sonoma County.
- Traditional Industry Partnerships (Brand USA, Visit California, SF Travel, California Destinations) – Leverage traditional partnerships to extend reach across key markets.
- New and Non-traditional Partnerships (Oregon, Denver, John Deere Tractors, VIC Australia) – Seek and establish new and/or non-traditional partnerships to extend reach across key markets.
- Sales Missions and Client Events – Plan and execute a targeted schedule of global sales missions and client events. These missions and events provide SCT and our partners an in-market opportunities to meet with, train and update local travel trade professionals about Sonoma County.
- Trade Shows – Plan and execute a targeted schedule of global trade show participation. At each, SCT will meet with highly targeted travel trade professionals in order to understand their needs and identify opportunities for Sonoma County to gain a greater presence in itineraries and sales offerings.
  - Strive to achieve at least 25% of all meetings with new contacts.
MEETING & INCENTIVE TRAVEL PLANNERS

Lead Generation – Focus on increasing lead generation into Sonoma County. By working closely with our partners, we will saturate our target markets with specially crafted communications and solicitations, in-market visits, and tradeshows. The priority will be to develop new relationships while balancing efforts to continue to foster current relationships with our loyal customer base.

- Focus majority of time on uncovering new business and referring incoming leads to destination partners not already sourced. Leads forwarded to lodging partners by Group Business Development managers will receive assistance as needed to secure business.
- Assign territories in alignment with existing and future flights into STS.
- Identify, solicit, and develop account base of organizations committed to sustainability.
- Attend tradeshows, orchestrate in-market sales missions, and provide partner opportunities.
- New business potential clients are targeted via prospecting efforts utilizing tools provided by SCT to include Knowland, LinkedIn, and Simpleview. Utilization of SCT incentive program as a closing tool. Requests made by partners and evaluated by SCT, will be funded to secure business into Sonoma County. Program will be evaluated on an annual basis to identify new/additional opportunities to align with ongoing SCT initiatives and to ensure program remains relevant to local industry trends.

Communication and Content – Provide a comprehensive communication plan that allows SCT to target prospective and existing client base with creative messaging that will allow us to stay top of mind in target markets. Efforts will encompass many different online platforms including, but not limited to, emails, newsletters, social media, and paid advertising. Content creation and distribution will include:

- Weekly, monthly, and quarterly content focused on group business segment and distributed amongst various channels.
- Strategic and frequent messaging to new and existing accounts is done in the form of newsletters, email blasts, and other digital messaging to saturate the target markets.
- Updated content placed on the website regularly to ensure the site is a relevant, useful resource for meeting planners.
- The Group Business Development team, in partnership with the Marketing team, will develop a comprehensive advertising plan to reach the audiences that align with target markets, affiliations and third-party planners. Content will send cohesive messaging and will complement the efforts of partners.
- Specialized presentation materials will be developed to ensure partners are promoted across various market segments.

Destination Exposure – Provide meeting planners with educational information on the destination through training sessions in their perspective markets and in-person visits to Sonoma County. Focus will be placed on creating personalized experiences either on a one-to-one basis or as a group that are crafted based on individual meeting planner profiles.

- Plan sales training missions to align with target markets.
- Coordinate in-destination familiarization trips in collaboration with partners, targeting specific segments and planner profiles. Itineraries will include activities that will allow partners to showcase their venues and services.
- Support in-market site inspections at partner properties to aid in closing business and provide prospective groups opportunities to experience the destination firsthand.
- Provide guidelines to hotel partners to identify qualifications for site visit assistance.

Extended Meeting Attendance – Maximize opportunities that may arise with the reopening of the Moscone Center in San Francisco and through SF Travel to create reasons for attendees to extend their stay with a trip to Sonoma County.

- Leverage SF conventions and meetings for extend-your-stay/bleisure market.

KEY PERFORMANCE INDICATORS:

1. Increase partner referrals for BIA hotels by 15%.
2. Increase partner introductions for BIA hotels by 15%.
3. Create and execute a new integrated familiarization program for at least 60 (total) domestic and international travel agents/tour operators/receptive operators.
4. Increase lead generation by 10% year-over-year.
5. Support, plan, and execute qualified familiarization tours, site experiences, and sales calls/client events using SCT Destination Experience resources and pre-qualification questionnaire.
6. Create 200 targeted group meeting messages distributed via social media, email, and newsletter communications annually designed to drive increased lead generation.
7. Execute 10 new paid marketing campaigns with a focus on room night production and a 5% incremental room night realization.
INITIATIVE 3
SPEARHEAD
LONG-TERM DESTINATION STEWARDSHIP
“SUSTAINABLE DEVELOPMENT IS THE PATHWAY TO THE FUTURE WE WANT FOR ALL. IT OFFERS A FRAMEWORK TO GENERATE ECONOMIC GROWTH, ACHIEVE SOCIAL JUSTICE, EXERCISE GOVERNMENTAL STEWARDSHIP, AND STRENGTHEN GOVERNANCE.”
- BAN KI MOON (KOREAN DIPLOMAT, 8TH SECRETARY-GENERAL OF THE UNITED NATIONS, 2007-2016)

SPEARHEAD LONG-TERM DESTINATION STEWARDSHIP

Sonoma County Tourism exists to drive visitation to the destination and fuel the economic engine that provides foundational services for residents. Tourism and hospitality are crucial components of the Sonoma County economy and an employer for more than 22,300 who work in this industry. This destination stewardship will help ensure SCT is an organization truly part of the community and one concerned with protecting and thoughtfully growing the areas economic, social, cultural, and industrial resources.

SUSTAINABILITY

The Sonoma County Winegrowers and several vintners are committed to ensuring Sonoma County will be the first 100% sustainable wine region in the nation. It’s time for the tourism industry to partner with these efforts. To mitigate the impacts of tourism at the coast, generate opportunities for visitors to become protectors of the natural resources through a commitment to planning, and integrating sustainable measures that help ensure the natural and cultural abundance found in Sonoma County endures well into the future.

The World Tourism Organization defines sustainable tourism as “…management of all resources in such a way that economic, social, and aesthetic goals can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and balanced life support systems.”

Sustainable tourism is a platform for achieving development objectives in several sectors, including economic growth, environmental conservation, education, and good governance.

During FY19-20, Sonoma County Tourism will identify partnerships, research destination best practices, and gain insights from various local, state, national and global agencies as the foundation for creating a plan that integrates the appropriate components, partners and practices.

KEY PERFORMANCE INDICATORS:
1. Identify partners within the economic growth, environmental conservation, education, governance, and marketing arenas that can drive the conversation.
2. Weave sustainability into the overall destination master plan.
3. Identify potential partners including corporations, retailers, celebrities, and other partners who can assist with program activation.
4. Craft a Sonoma County commitment statement and key measures for responsible visitation.

SONOMA LOYAL

Incentivizing consumer behavior is often a good way to shift behavior. Continuing the work started in FY18, we will evaluate the opportunities that come with a destination loyalty program. Visitors to Sonoma County are predisposed to loyalty through the wine clubs offered at wineries and the hotel brand loyalty programs. This program would not interfere with these current programs but build broader destination loyalty. This can help accomplish a few critical objectives:

- Encourage travelers to be good stewards of Sonoma County.
- Help incentivize travel during off-peak times.
- Create incremental marketing revenue for the destination.

KEY PERFORMANCE INDICATORS:
1. Devise the structure and elements of a loyalty program.
2. Identify partner opportunities.
3. Identify potential consumer benefits.
4. Determine contractor to help create and administer the program.
5. Bring the program to market.

CRISIS PLANNING AND EXECUTION

The October 2017 wildfires punctuated the need for a crisis plan. In FY17, Sonoma County Tourism crafted a crisis plan for use internally and was shared with key partners through a series of meetings and town halls. During FY 19-21, SCT will ensure the plan is updated and ready to mobilize should a crisis occur.

SCT has interacted with the County of Sonoma to ensure our plan aligns with the county’s emergency management plan.

As part of a bifurcated approach to the fall travel season, SCT will set aside $500,000 (July – November) to ensure funds are available to enact a crisis management effort should the need arise.

KEY PERFORMANCE INDICATORS:
1. Plan is updated on an annual basis.
2. SCT staff, board, and committees are educated regarding the plan and each person’s role in executing.
3. Should the need arise, the plan is executed as designed.
DESTINATION MASTER PLANNING

Tourism and hospitality will continue to be a major economic engine for Sonoma County for the foreseeable future. To be successful, the collective destination will benefit from taking the long view on how it develops. The decisions made by elected officials and policy leaders will influence growth, targeted visitor demographics, and brand integration.

Continuing the foundational work begun in FY18, Sonoma County Tourism will move to the execution phase of a destination master plan. This plan, developed during FY19-21, will allow the organization to take a lead role in identifying how Sonoma County will evolve as a destination. Through this process, a series of community outreach programs, opportunities to interact with elected officials, and visioning sessions, the residents will provide input into the destination we hope to become.

Guided by a consultant, this process will require a full year to develop and execute. At the conclusion of the effort, Sonoma County will have a workable master plan that will provide a roadmap for making decisions that pertain to tourism-related issues.

KEY PERFORMANCE INDICATORS:
1. Work with the selected consultant to identify the plan timeline, community engagement components and overall plan development execution.
2. Administer the destination master planning process as agreed upon.
3. Produce the destination master plan.
4. Communicate the plan to key stakeholders.
5. Put the plan into action.
INITIATIVE 4
ENHANCE VALUE THROUGH ROBUST PARTNERSHIPS
ENHANCE VALUE THROUGH ROBUST PARTNERSHIPS

**Partner Services** – Lead efforts in sharing knowledge, providing insights, making introductions, and facilitating business opportunities for Sonoma County tourism business partners and the travel trade industry through:

- **Partner Referrals** – Actively solicit, make, and fulfill travel trade requests for Sonoma County partner businesses.
- **Partner Introductions** – Work closely with travel trade professionals to identify product gaps, program needs and opportunities, and facilitate introductions to partners for new business opportunities.
- **Training and Information Sessions** – Create and execute a calendar of industry- and information-driven training sessions.
- **Industry Insights** – International travel is a promising market, but it’s also one that can be difficult to see immediate results. To ensure partners and stakeholders understand the value of marketing to the global traveler, the Tourism Development team will develop and distribute a global industry newsletter that contains statistics, policies, and regulations, work being done by national agencies, and market insights.

**Product Development** – Work with the travel trade to identify existing “market ready” product for expanded distribution, and to identify product gaps allowing Sonoma County partners to modify existing or create new product for distribution. Product development may involve modification of an existing product or its presentation, or formulation of an entirely new product that satisfies a newly defined customer want or market niche.

- **Product Development** – Provide insights, guidance, and support to partners as they identify and develop existing tourism product for increased sales and marketing opportunities and reach.
- **New Product Development** – Provide insights, recommendations, access to resources, and support to assist partners with the development of new tourism-ready product.
- **Itinerary Development** – Identify and create new itinerary programs and partnerships for promotion across travel trade channels; including, but not limited to, Sonoma County, California, multi-state, flight markets.
  - **New Market Strategy: Outdoor Adventure.**
    - Identify and create a two-year strategy around one Sonoma County pillar for a targeted segment of the travel trade, especially as it aligns with sustainable tourism platform.
    - Work with the Economic Development Board’s Outdoor Recreation Council to create product and engage with partners.
  - **Niche Market Strategy: Sustainability and Socially Conscious Travel** – Identify and create a two-year strategy around a niche Sonoma County pillar for a targeted segment of the travel trade.

**Partner Education** – Continue to provide relevant training opportunities to our partners.

- Develop training plan with Group Business Development committee to provide ongoing training support on topic identified.
- Create and maintain “destination training” on an annual basis. Training will be focused on providing educational instruction and materials to partners that align selling strategies as a destination.

**Partner Service Liaisons** – Create an extension of hotel partners sales teams by providing support, referrals, and selling tools not readily available. Through utilization of Cvent, Simpleview, Knowland, and LinkedIn, the team will provide destination referrals, advertising opportunities, and prospecting lists designed to complement the sales efforts.

- Align Group Business Development managers with specific hotels to as a liaison. Determine needs of these hotels as it relates to “need dates,” prospecting lists, special promotions, marketing content, etc. Action plans will be developed with the partner hotels to address specified needs.
- Work closely with planners to forward leads to partners not originally sourced thus increasing the opportunity to convert leads within the destination.
- Provide specialized prospecting lists as requested to hotel partners to complement their local prospecting efforts.
- Share leads received and connections made with perspective and current meeting planners while participating in tradeshows/sales missions with select hotel partners based on planner profiles and needs.

**Community Engagement** – Establish and maintain relationships with key local stakeholders, thereby establishing Sonoma County Tourism as a trusted, valuable partner.

- Create and continue conversations with elected officials, business leaders, partners, and others, to talk about the importance of tourism to Sonoma County’s economic and cultural well-being.
  - Reach out to new elected officials early on to indoctrinate them into the importance of Sonoma County’s tourism industry, and SCT’s role in the tourism ecosystem.
  - Identify opportunities to establish or grow relationships with current key elected officials.
- Work closely with the Coraggio Group in the development and execution of the destination master plan to ensure all applicable groups are included in the conversations.
• Leverage new Community Engagement committee to help guide, inform and shape future community engagement initiatives.
  – Utilize discussion items from January 2019 board retreat work groups to help shape and guide the direction of SCT’s community engagement efforts.
• Create strong connections between community engagement and every key function of SCT.
• Socialize key SCT organizational priorities, activities, and results in the community, including partners.
• As SCT transitions to a destination stewardship organization, engage with the community to share what that means and encourage them to identify/create sustainable tourism initiatives that SCT can help promote.
• Through “Tourism Cares” programming, convey strong community awareness through activities that give back to local organizations and help protect and preserve Sonoma County’s human and natural resources.
• Continue to administer the Certified Tourism Ambassador (CTA) program, creating opportunities for hospitality industry professionals, volunteers, and residents to enhance visitor experiences and encourage longer stays and higher spend.

KEY PERFORMANCE INDICATORS:
1. Increase travel industry destination training sessions by 20% through Sonoma County Travel Pro, webinars, sales missions, client events, and trade shows.
2. Conduct a survey with partners to determine SCT value in the meetings/incentive arena.
3. Complete annual destination experience training and semi-annual refresher courses to hotel and experience partners.
4. Ensure bi-monthly check-ins, initiated and conducted by Group Business Development managers, with directors of sales for designated BIA partners to provide additional support and marketing assistance.
5. Provide three Group Business Development selected training sessions for lodging partners annually.
6. Undertake project to unify visitors guide, map, web, and e-newsletter properties under one umbrella, to maximize revenue generation and unify messaging across all platforms. Goal is to have plan developed for this by March 1, 2020.
7. Increase score of annual partner survey by two percentage points over FY18/19.
INITIATIVE 5
RUN AN EFFECTIVE BUSINESS
RUN AN EFFECTIVE BUSINESS

During the FY19-21 biennium, Sonoma County Tourism will continue to work to improve its financial and operational business components, with the goal of ensuring the vision of operating at the highest level of accountability and efficiency are achieved.

During this plan time period, SCT will undergo a complete assessment and operational overhaul of its finance and accounting systems to ensure the organization has the proper financial platforms and financial service partners. Our goal is to ensure all channels are accessible to the appropriate staff members to enable structured budget management, proper checks and balances, segregation of duties, and timely reconciliations.

INCREMENTAL REVENUE

With much of Sonoma County Tourism’s funding at the discretion of others and the current softness in the market, it is imperative the organization shores up an ongoing revenue source through programs that raise incremental funding.

During this plan timeframe, SCT will work with its internal teams and external vendors to identify opportunities to develop ongoing revenue sources, and may include:

- Marketing partnerships for local businesses allowing additional exposure through SCT programs and assets.
- Cooperative marketing programs for local partners providing additional marketing reach through SCT paid advertising campaigns.
- Potential membership structure for SCT.
- Corporate sponsorships/marketing partnerships for brand-aligned companies.
- Loyalty program incremental funding.

The programs will be identified and begun during this plan timeframe.

**KEY PERFORMANCE INDICATORS:**

1. Initiate an incremental funding model for Sonoma County Tourism that “grows the pie” for the organization.
   - Year 1 Goal: $500,000
   - Year 2 Goal: $1 million

FINANCIALS AND ACCOUNTING

Sonoma County Tourism is committed to ensuring all funds are allocated and spent at the highest level of efficiency and have absolute transparency. SCT will conduct its financial and operational programs with an unsurpassed level of integrity.

Budgeting and Accounting – Sonoma County Tourism will operate within its approved budget, maximizing each dollar spent. The budget will be reviewed on a monthly basis with the board and committees, and available to any member of the public who asks to see it.

With input from the finance and legal committee, the board, and the respective program committees, the SCT leadership team will be responsible for managing the budget within their program areas and will track the ongoing budget usage to ensure proper expenditures.

SCT will incorporate the best practices of accounting including invoicing and paying bills according to organizational policy. Full policies and procedures for best practice accounting will be expanded and distributed to the staff and board.

Contracting – Sonoma County Tourism works with a number of external vendors. Ensuring the procurement process and contract oversight aligns with California state law and are in the best interest of SCT, is essential for running an effective business.

During this plan period, SCT will ensure all contracts are current, have measurable performance metrics, invoicing is done in accordance with the contract, and all payments made to contractors fall within budget.

During FY19, SCT will work with its finance and legal committee to review and revise the policies and procedures around competitive bidding and create a schedule of sending services out for bid.

**KEY PERFORMANCE INDICATORS:**

1. Entire financial system is assessed and transformed to meet accounting best practices.
2. All program budgets are spent to within 1% of their total annual operating budgets (without exceeding the budget unless otherwise approved).
3. The finance and legal committee reviews the accounting policies and procedures annually to ensure compliance with GAAP, government regulations, and best practices.
4. Contracts are reviewed and revised to meet the varying needs of SCT and its vendors.
5. All external vendors are contracted in compliance with California state law and SCT procedures.
6. SCT conducts the annual audits in compliance with its contract with the County of Sonoma.
7. Auditors issue a clean opinion of the financial statements. Should any audit exceptions be identified, the issues are resolved prior to the audit distribution.
8. Insurance coverage and rates are reviewed annually.
BUSINESS PROCESSES

SCT will manage effective, efficient, and strategically aligned business processes that integrate and capitalize on SCT’s staff and technology resources. SCT encourages the development of flexible, reliable, and collaborative business tools and technologies designed to support SCT’s mission, processes, staff, stakeholders, and customers.

County Annual Report and Marketing Plan – SCT will complete the annual report and marketing plan and deliver the document to the county on or before the stated deadline, allowing sufficient time for staff review, and approval from board of directors, Economic Development Board, and Board of Supervisors.

Policies and Procedures – During FY19-21, SCT will continue to review all its internal policies and procedures ensuring each creates clarity for the staff and best practice methods for the organization. Once developed, all policies and procedures will be conveyed to the staff to ensure they are integrated into each program.

KEY PERFORMANCE INDICATORS:
1. Provide the county-requested marketing plan and annual report before March 15 of each calendar year.
2. Review organizational policies and procedures; identify at least two to be revised, vetted, and approved.
3. Review IT procedures and platforms to ensure SCT has the most appropriate, cost efficient, and effective services as possible.

EMPLOYEE ENGAGEMENT

SCT recognizes that its team is its most valuable asset and that future success depends upon them. The organization will respect the dignity and worth of each individual and develop a work group that offers opportunities without regard to race, religion, sex, age disability, national origin, or other characteristic protected by law.

The organization will work to attract and retain high-quality individuals with the knowledge, skills, aptitude, and talent to achieve excellent performance in their jobs. The goal of SCT is to create a healthy work environment that stimulates growth, initiative, teamwork, and intelligent risk-taking. This vibrant human resource environment will exist within an accountable, performance-driven, and quality-oriented culture that promotes a sense of urgency and a bias toward action.

Organization Management – SCT will be viewed as a great place to work, offering competitive salaries and benefits, team development, and a managed workload amongst all employees. It is critical that employees are managed professionally and respectfully, in accordance to California state labor laws and regulations.

Employee Wellness – Helping employees achieve a level of personal wellness is critical for developing a balanced, focused, and engaged team. The wellness program is a popular perk for employees and has seen real results among employees. SCT will continue to provide this program and encourage employee health and wellness.

Also, through its ongoing employee benefit plan, SCT offers an employee assistance program that provides employees mental and emotional support in times of need.

Staff Training and Development – Helping SCT staff gain professional knowledge helps move the organization forward. During the plan time frame, SCT will identify the conferences, seminars, and other training opportunities for each team member that will allow for ongoing training and professional development. This also includes skills needed for everyday business processes such as technology and programs that can help elevate presentations and campaign elements that help the organization achieve its overarching goals.

KEY PERFORMANCE INDICATORS:
1. A “satisfied” or “very satisfied” rating is given to the organization through an annual employee survey performed to assess structure and communications.
2. All-staff meetings are held at least once per quarter to ensure employees are informed, empowered, and recognized.
3. Biennial salary and benefit surveys are performed.
4. A majority of employees are participating in the wellness program and report positive results.
5. Employees and their supervisors jointly establish career development plans that are reviewed and adjusted annually to align with the performance review time period.
6. The employee handbook is reviewed and updated annually.
7. All employees, contractors, and volunteers understand and comply with SCT policies and procedures and follow state and federal labor laws and regulations.
BOARD OF DIRECTORS/COMMITTEES ENGAGEMENT

Sonoma County Tourism will be most effective when it works in collaboration with an engaged group of board of directors, committee volunteers, and business partners. As the organization leads its destination management planning process, involvement from the board is critical.

**Board of Directors and Committee Meetings** – SCT will hold board meetings as required by its bylaws and ensure committee meetings are held at least once a quarter to ensure both the board and committees have the information needed to make well-informed decisions.

**Destination Master Plan** – The destination master plan process will be one that involves key stakeholders and a broad-based community outreach. Having board and committee involvement with this plan will be critical to its success. How this will unfold will be identified once the consultant is on board and the plan is developed.

**Annual Meeting** – SCT will hold an annual meeting to ensure compliance with its bylaws. This meeting will provide a platform to communicate the success and challenges of the organization during the previous 12 months, look ahead to the upcoming year, and ratify board members. The meeting will be held in the quarter following the end of each fiscal year.

**KEY PERFORMANCE INDICATORS:**
1. Conduct an annual board retreat, focused on issues and opportunities as identified by the board.
2. Conduct an annual meeting to include the official installation of SCT board members during the quarter following the end of the fiscal year.
3. Schedule board of directors and committee meetings following bylaws and committee charts of work/goals.
4. Implement a new board member orientation module.
5. Create, and update as needed, committee handbooks.
6. Conduct an annual board of directors and committee survey to assess SCT value, personal and business goals, board structure, and communications.

INDUSTRY ALLIANCE SUPPORT

Interacting with organizations involved with promoting Sonoma County and serving Sonoma County’s tourism and hospitality industry is critical for SCT’s engagement with the entire community.

As a key industry partner, SCT will work with the Sonoma County Hospitality Association on critical advocacy and industry training programs. SCT also will partner with the Trio members – Sonoma County Vintners and Sonoma County Winegrowers – to continue to raise awareness around Sonoma County wines and value on the global stage. The Trio will work collaboratively with a national public relations agency to generate media coverage around Sonoma County wines and wine tourism.

The SCT leadership team will work with the Sonoma County Vintners’ and Sonoma County Wine Growers’ executive teams to maintain a strong alliance and coordinate efforts regarding marketing, facilities, and board alignment.

The Sonoma County Economic Development Board (EDB) will remain an important partner in development of research, programs, outreach to the county, and budgetary assessments.

SCT also will continue to work with regional and statewide partners, including, SF Travel, Visit California, and CalTravel, on both promotional and educational/advocacy efforts. On the national level, SCT will work in partnership with the U.S. Travel Association, Brand USA, and Destinations International to help further domestic and international advocacy and promotional efforts.

**KEY PERFORMANCE INDICATORS:**
1. Meet with the Trio executive team at least quarterly to identify key issues and opportunities for the upcoming time period.
2. Work with the Sonoma County Hospitality Association to identify ways to help the organization move forward with staffing and programming that help bolster advocacy and industry training.
3. Meet with key members of the Sonoma County Economic Development Board at least once a quarter.
4. Engage with the BIA community through invitations to participate in board meetings and create annual succession plans for board rotation to increase awareness and transparency of SCT organization.
5. Integrate with regional and national organizations on advocacy and promotional opportunities as they arise.
**APPENDIX 1: ORGANIZATION OVERVIEW**

**Sonoma County Tourism** (known as SCT) is a private, non-profit 501(c)6 organization, and is the official destination stewardship organization (DSO) for promoting Sonoma County as a premiere overnight destination for domestic and international visitors.

SCT is staffed by dedicated professionals in the fields of new business development, marketing, communications, international business development, and administration. It is governed by a volunteer board of directors, with input from committees, stakeholders, and the general public.

*The total projected budget for FY19-20 is $8,128,000.*

**SCT is currently funded through two chief sources:**

1) **Business Improvement Area:** This source is derived from a 2% assessment on lodging properties with annual gross revenues of more than $350,000. This is collected from properties throughout Sonoma County, except the incorporated areas of Healdsburg and Sonoma.

   *FY19-20, the total BIA allocation is forecasted to be: $5,747,643
   This represents 71% of the total budget.*

2) **Transient Occupancy Tax (TOT):** Transient Occupancy Tax (TOT) – 1.25 points of the first 9% of TOT collected in unincorporated Sonoma County. In FY 19-20, this allocation will be based on the actual collections rather than based on the forecasted projection.

   *FY19-20, the total TOT allocation is projected to be: $2,355,531
   This represents 29% of the total budget.*

3) Additional revenue from registrations, investments, and other programs is projected at $24,816.

Funding goals for incremental revenue have not been included in the projected budget, but will be added as they become a reality.

Sonoma County Tourism facilitates the services, activities, and programs funded by BIA revenues covering all unincorporated areas of Sonoma County, as well as the cities of Cloverdale, Cotati, Petaluma, Rohnert Park, Santa Rosa, Sebastopol and Windsor. The organization's revenues from the TOT must be spent to promote tourism throughout Sonoma County.

Sonoma County Tourism exists as part of a countywide matrix of economic development entities, government, and private businesses that work to promote and manage the area for the travel and tourism segment.
For more information visit the Visitor statistics page, www.sonomacounty.com/statistics
SONOMA COUNTY TOURISM / STAFF AND BOARD OF DIRECTORS

SCT STAFF
Lori Angstadt / Vice President, Finance and Operations
Ben Boone / Marketing Coordinator
Nicole Bradin / Director of Community Engagement
Laura Broderick / Group Business Development Specialist
Erika Costa / Group Business Development Manager
Sierra Downey / Content Marketing Specialist
Jaimie du Bois / Tourism Development Manager
Nancy Garvey / Group Business Development Manager
Ariane Hiltebrand / Director, Market Insights and Systems
Paula Johnson / Director of Operations
Tracy Koch / Administrative Coordinator
Deleyse Langdale / Vice President, Global Tourism Development
Tina Luster / Manager, Domestic Media Relations
Devin McConnell / Community Engagement Specialist
Todd O’Leary / Vice President, Marketing and Communications
Jennifer Richards / Vice President, Group Business Development
Susan Takano / Tourism Development Manager
Birgitt Vaughan / Director, Global Media Relations
Claudia Vecchio / President/CEO
Katja West / Marketing Data & Systems Specialist

SCT BOARD OF DIRECTORS
Joe Bartolomei, Chair / Farmhouse Inn & Restaurant, Owner
Tom Birdsall / Hampton Inn - Windsor
Percy Brandon / Vintners Resort, General Manager
Sheryl Bratton / Sonoma County Administrator / Ex-Officio
Jennifer Buffo / Pure Luxury Transportation, Owner/COO
Thera Buttaro / Bodega Bay and Beyond, Owner
Patty Ginochio / Ginochio's Kitchen, Owner
Dustin Groff / Hotel Petaluma, General Manager
Michelle Heston / Fairmont Sonoma Mission Inn & Spa, Regional Director of PR Western US
Keo Hornbostel, Treasurer / Safari West, General Manager
Kristina Jetton / Flamingo Conference Resort & Spa, General Manager
Steve Jung, Chair / Doubletree by Hilton, General Manager
Karissa Kruse / Sonoma County Winegrowers, President
Jennifer Larocque / Administrator Analyst, County Administrator Office / Ex-Officio, Alternate to Sheryl Bratton
Rachel LeGrand, Secretary / Russian River Getaways, Owner
James Luchini / Francis Ford Coppola Winery, Manager, Hospitality Training & Development
Crista Luedtke / Boon Hotel, Owner
Kristen Madsen / Director, Creative Sonoma / Ex-Officio Alternate to Sheba Person-Whitley
John McAuliffe / Hyatt Regency Sonoma Wine Country, General Manager
Dan Parks / Sonoma Creek Inn, Owner
Ashish Patel / Olea Hotel, Managing Partner
Sheba Person-Whitley / Executive Director, Sonoma County Economic Development Board / Ex-Officio
Bert Rangel / Rivers End Restaurant & Inn, Owner
Peter Rumble / Santa Rosa Metro Chamber, CEO
Tim Zahner / Sonoma Valley Visitors Bureau, Executive Director