

AUGUST 2024

# VISIT SAN LUIS OBISPO

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PROPOSAL FOR STRATEGIC PLANNING SERVICES



photo by Josh Hild on Unsplash

Jacqui Clark-Charlesworth  
Tourism & Community Promotions Manager  
Visit San Luis Obispo

Dear Jacqui:

I deeply believe that no organization should operate without a good Strategic Plan. Using a very small percentage of your time to do strategic planning allows you to be intentional about how you spend the *rest* of your time as an organization. Further, in a time of great change and ongoing uncertainty, having the north star of a strategic plan keeps an organization focused and efficient.

Although we know one another well, let me re-introduce myself: I'm a destination strategist who has led travel and tourism projects across a multitude of challenges: sustainability, recovery, and destination development. My past clients span the U.S. and include Brand USA, Travel South, nine state tourism agencies including Visit California, to dozens of county and municipal destinations ranging in scale from Park City, Utah to San Francisco Travel. I've been doing this work for over a decade.

As you consider the proposals you receive for your Strategic Plan, I'd like to highlight a few key attributes that I believe set the Whereabout team and approach apart:

- » Our approach seeks to get **solid, reliable information** during research and planning, and we are expert at converting that information into **actionable insights** that can drive your strategic direction.
- » Through my work throughout San Luis Obispo County—and directly with Visit San Luis Obispo—over a decade, I've gained understanding of the tourism landscape in the SLO region. We are **familiar with SLO**, yet bring **fresh, expert eyes** to thinking about your future.
- » Our engagement with destinations across the U.S. brings with it an understanding of **trends and emerging innovations** that will help you create a plan responsive to our time.
- » As a small firm designed specifically for planning efforts like yours, you'll receive the **responsiveness and personalized service** that this process deserves.

On behalf of my team, we are enthusiastic about the opportunity to help Visit San Luis Obispo optimize the direction of your organization and look forward to the opportunity to share more about Whereabout's approach with you.

Sincerely,



Matthew Landkamer  
Founding Principal, Whereabout

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# EXECUTIVE SUMMARY

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## UNDERSTANDING OF THE PROJECT

The TBID in San Luis Obispo, self-assessed by the hotels in the City, exists to fund the marketing of San Luis Obispo to drive overnight tourism, resulting in general economic benefit and quality of life improvements for the residents of SLO.

This third five-year Strategic Plan will guide the ongoing evolution of Visit San Luis Obispo, helping to prioritize efforts and therefore budget assignments, and providing an overarching strategy that the Marketing Strategy can ladder up to.

This strategy needs to recognize where the organization has been, take account of its opportunities and constraints, and imagine an even more prosperous future.

## AN EXPERIENCED TEAM

The team proposed for this project, Matthew Landkamer and Stacy Humphrey, has worked together on strategy projects for destinations for over four years. Matthew has been helping destinations craft strategies for 12 years, and has led the strategic planning team for both of Visit San Luis Obispo's past strategic plans, as well as a number of other destinations in San Luis Obispo County.

Their work across the United States developing strategies for DMOs, as well as their deep knowledge of the local stakeholder environment in the SLO region, uniquely qualify them for this work.

## A PROVEN APPROACH

The three-phase approach proposed for this work has been developed and adapted over time through working with dozens upon dozens of DMOs—it is a speedy and industry-specific process that results in actionable and responsive strategic plans.

## AN APPROPRIATE TIMELINE

Although strategic planning processes may be accomplished more quickly, the six-month process proposed allows enough time for proper stakeholder engagement and reflection before bringing a final plan to your Board for approval.

## TOTAL COST

For the work described in this proposal, Whereabout requests \$30,000, inclusive of consulting fees and travel costs

# ABOUT WHEREABOUT



Whereabout is a **destination futures studio** focused on stewardship. We believe that every destination can achieve a sustainable balance between a robust visitor economy, protection of natural resources, and resident quality of life—and that setting a long-term vision for the future is the first step. We've worked with destination organizations across the U.S. at every scale to create destination assessments, strategic plans, stewardship plans, and marketing plans.

Primary Contact: Matthew Landkamer, Founding Principal  
(206) 349-5948 | [matthew@whereabout.travel](mailto:matthew@whereabout.travel)  
P.O. Box 3604 Portland, OR 97208



# WHEREABOUT TEAM

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**MATTHEW LANDKAMER**  
**PROJECT LEAD,  
DESTINATION STRATEGIST**

## CERTIFICATIONS

Professional Certificate  
in Sustainable Tourism,  
Global Sustainable Tourism  
Council (GSTC)

PROSCI® Change  
Management

Public Interest Design,  
SEED Network

## EDUCATION

B.A. in Fine Arts, Nebraska  
Wesleyan University

Matthew is a destination strategist, change leader, and idea generator. For nearly a decade, his work has been focused on helping destinations think strategically about their organization, their visitor economy, and their place. He has helped state tourism agencies and local DMOs across the country with Sustainable Destination Management Planning, recovery planning, strategic planning, and change management. He founded Whereabout in 2021 to focus his work around his belief that every destination can achieve a healthy balance between a robust visitor economy, protection of natural resources, and resident quality of life.

In addition to his client work, he's served on the U.S. Travel Board of Directors and has been invited to speak at conferences throughout the U.S. on topics such as destination resilience, destination strategy, and regional collaboration between destination organizations.

## RELEVANT PROJECTS

- » **Visit San Luis Obispo, CA**  
Strategic Plans\*
- » **Visit SLO CAL, CA**  
Strategic Plans
- » **Travel Paso, CA**  
Strategic Plan
- » **Highway 1 Road Trip, CA**  
Strategic Plan
- » **Visit Laguna Beach, CA**  
Strategic Plan
- » **Travel North Tahoe Nevada, NV**  
Strategic Plan
- » **City of Napa TID, CA**  
Strategic Plan
- » **Explore Butte County, CA**  
Strategic Plan
- » **Visit Santa Maria Valley, CA**  
Events & Festivals Strategy\*

projects marked with an \* performed under previous employment at Coraggio Group

# WHEREABOUT TEAM



**STACY HUMPHREY**  
**DESTINATION STRATEGIST**

## CERTIFICATIONS

Professional Certificate  
in Sustainable Tourism,  
Global Sustainable Tourism  
Council (GSTC)

PROSCI® Change  
Management

Project Management,  
PSU CEPE

Strategic Organizational  
Development, PSU CEPE

## EDUCATION

M.S.P. Urban Planning,  
Florida State University

Stacy Humphrey is a strategic planner, community advocate, and destination strategist. For over two decades, she has been focused on community visioning and problem solving, bringing in all community voices, and charting a path forward with the broadest benefit and support. Stacy has deep experience in travel & tourism and community economic development. She has helped local community and state tourism agencies across the country with tourism planning and in charting a course forward through economic recovery. Stacy founded Stacy Humphrey LLC in 2022 to focus her work on communities, strategy, and economic development.

## RELEVANT PROJECTS

- » **Great Rivers & Routes, IL**  
Strategic Plan
- » **City of Napa TID, CA**  
Strategic Plan
- » **Experience Champaign-Urbana, IL**  
Strategic Plan
- » **Oregon Coast Visitors Association**  
Strategic Plan
- » **Park City/Summit County, UT**  
Strategic Plan\*
- » **Illinois Office of Tourism**  
Illinois Tourism Strategy: Roadmap Through Recovery  
to Long-Term Success (not adopted)\*
- » **Town of Gilbert, AZ**  
Tourism Strategic Plan\*
- » **Heber Valley, UT**  
Tourism Master Plan\*
- » **City of Avondale, AZ**  
Avondale Tourism Plan\*
- » **Arizona Office of Tourism**  
Tourism Strategic Recovery Plan\*

Projects marked with an \* performed under previous employment at Coraggio Group

# APPROACH TO STRATEGIC PLANNING

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## PHASE I: DISCOVERY & ANALYSIS

The first phase of work builds towards a Strategic Perspectives Report, which will detail the current state of tourism promotion and management in San Luis Obispo to support effective strategic decision-making.

### KICKOFF MEETING

Our first step is a 90-minute kickoff meeting with the Economic Development & Tourism Manager and other key team members where we will ensure alignment on the scope of work and timeline, discuss project logistics, and identify relevant and available background information.

### BACKGROUND INFORMATION REVIEW

After the Kickoff Meeting, we will gather available documents pertinent to the Visit San Luis Obispo Strategic Plan such as any prior strategic plans, marketing plans or other planning documents and any performance data that Visit San Luis Obispo collects.

### STAKEHOLDER SURVEY

Parallel to the review of background information, we will gather information from your community stakeholders through an online survey. The survey will go to as broad a selection of tourism stakeholders as possible and will gather their impressions of the current state of your visitor economy, their opinions about your tourism assets, where they see opportunities for shaping visitation to the destination, their hopes for the future of the visitor economy, and the primary obstacles they see related to your strategic direction.

## STAKEHOLDER INTERVIEWS

Hearing directly from your stakeholders is an important input to a Strategic Plan that has buy-in from the local tourism industry. We will conduct up to 10 individual video interviews with key stakeholders, city government officials, local tourism businesses, and others with a vested interest in the success of the San Luis Obispo visitor economy. We will begin scheduling these interviews once the survey has been open for at least a week, so that we can use the interview conversations to drill down and build more nuanced understanding of some of the early survey results.

## STRATEGIC PERSPECTIVES REPORT

The Strategic Perspectives Report is the foundation for the Strategic Planning process, as it provides crucial thematic considerations. We will analyze and synthesize all the information gathered from available data and stakeholder outreach and draw conclusions about where the strategic planning process should focus. The report will include:

- » Introduction/Methodology
- » Strategic Perspectives
  - » Thematic Summary
  - » Data Points
  - » Quotes
  - » Conclusions
- » Appendices
  - » Survey Results

The Strategic Perspectives will highlight strengths and weaknesses of Visit San Luis Obispo, identify gap areas, identify new opportunities, and recommend specific strategies to ensure Visit San Luis Obispo is in the best position possible to execute its Mission.



## PHASE II: STRATEGY DEVELOPMENT

In the second phase, we will take what we learned in the first phase and work with you and your stakeholders to turn insights into actionable strategies. To best facilitate this work, we propose forming a Planning Team of 8-12 members made up of Visit San Luis Obispo staff and Board members, contractors, and other key stakeholders as appropriate. This Team will be asked to participate in a day-long planning retreat.

### STRATEGIC DEVELOPMENT WORKSHOP

We will convene your Planning Team for this full-day workshop and begin with a review of the Strategic Perspectives Report, as the insights and strategic recommendations contained in the report will set the stage for a focused and effective planning process. We will share what we've learned and what we think it means strategically for Visit San Luis Obispo.

The second part of this workshop will focus on reaffirming the North Star for your organization: your Vision, Mission, Values, and Position statements. Combined, these statements set the course for the organization and guide all other decision-making, answering the questions of what the organization exists to do, how its team and Board members go about that work, and what unique value the organization provides to the community. We will center your existing Vision, Mission, Values, and Position statements in this conversation, ensuring that they are clearly articulated and endorsed by the staff and Board alike.

We will then facilitate the team through exercises to draft an initial set of Objectives, the 3-5 main bodies of work that the organization will undertake in the next three years. This conversation will be heavily informed by what we collectively learned from the Strategic Perspectives Report, and therefore will be both data-informed and an expression of stakeholder perspectives.

For each Objective, we'll identify a set of Strategies and Indicators to monitor progress and success. The result of this work will be 3-5 Objectives, whose success can be judged by 2-3 Indicators, and whose strategic aims will be furthered by the execution of 3-6 Strategies. This will constitute the first draft

of the plan, and although it will still need some refinement, we will be able to see the contours of the strategic direction and—more importantly—the Planning Team will begin to see the future direction of the organization.

### STAKEHOLDER CHECK-IN

We'll pause at this point in the process to check in with the community again—connecting back to what we learned from your stakeholders in the survey and showing them where their ideas got included in the draft plan. In a two-hour meeting, we'll share insights from the Strategic Perspectives Report and the draft of the Strategic Plan, then we'll give the community a chance to weigh in on what they think might be missing, or where they enthusiastically support the direction of the plan. The facilitation of this meeting will be important, as we'll need to ensure that your stakeholders feel heard and contribute useful input, but also help them to understand that they are only offering suggestions, and that the final planning decisions rest with the Board and staff of Visit San Luis Obispo. We'll leverage our experience to design a workshop that is engaging and informative without giving too much of a platform to anybody who has an axe to grind.

### WORKSHOP 4: STRATEGIC PLAN REVISION

Working with the Economic Development & Tourism Manager and 1-2 other members of the Planning Team, we'll use this two-hour virtual workshop to reflect on the stakeholder feedback and make adjustments to the draft Strategic Plan, resulting in the content of a final draft that the Economic Development & Tourism Manager can take to the Board for approval.

## **PHASE III: IMPLEMENTATION READINESS**

The final phase of work will set Visit San Luis Obispo up for successful implementation of the Strategic Plan.

### **FINAL PLAN DOCUMENTATION**

The final plan will be documented in the simplest way possible—a single 11” x 17” sheet that has all the plan elements on one side. In our experience, having the plan documented as a “quick start guide” supports implementation by making the content of the plan readily accessible. If desired, we will also produce a short “booklet” version of the plan that goes into more detail about each strategy and memorializes the Planning Team’s decisions.

### **BOARD PRESENTATION**

Whereabout will attend a January Visit San Luis Obispo Board meeting virtually to assist in the presentation of the final draft plan to the Board, and to answer any questions about the process or the greater industry context in which this plan lives.

### **IMPLEMENTATION SUPPORT**

We never want to see our plans “gather dust on a shelf” and neither do you. Although you’ve implemented our plans before, we still believe it’s beneficial to meet with the Economic Development & Tourism Manager once every quarter for the first year following completion of the plan to provide guidance and coaching on getting implementation up and running, and building out a first-year action plan to take on the top-priority strategies. In our experience, these check-ins perform two functions: they provide an accountability deadline to get things started, and they also give destination leaders a forum for problem solving as implementation gets ramped up.

# REFERENCES

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## VISIT PARK CITY, UT

### Jennifer Wesselhoff

President & Economic Development  
& Tourism Manager  
435.658.9617  
jennifer@visitparkcity.com

Services Provided:  
Strategic Planning

## 2022-2027 ORGANIZATIONAL STRATEGIC PLAN

On the heels of the creation of Visit Park City's internationally-recognized Sustainable Tourism Plan, Matthew (under contract to Coraggio Group) and Stacy (under previous employment at Coraggio Group) facilitated a process to create a five-year Strategic Plan for the destination organization.

## CITY OF NAPA TID, CA

### Neal Harrison

Economic Development Manager  
(707) 258-7857  
nharrison@cityofnapa.org

Services provided:  
Strategic Planning

## 2024-2027 STRATEGIC PLAN

Whereabout led a process with the Local Governing Committee of the City of Napa TID to create the organization's first Strategic Plan, supported by stakeholder interviews and a survey. Whereabout's continued engagement with the city of Napa is in support of developing a destination marketing organization with a Marketing Manager to lead the City's tourism promotion.

## EXPLORE BUTTE COUNTY, CA

### Nichole Farley

Executive Director  
916.316.6066  
nichole@explorebuttecounty.com

Services Provided:  
Strategic Planning

## STRATEGIC PLAN 2023-2025

Whereabout performed stakeholder outreach and facilitated a Board retreat and subsequent work sessions to arrive at Explore Butte County's 3-year Strategic Plan.

# PROPOSED TIMELINE

		AUG	SEP	OCT	NOV	DEC	JAN
Phase I	Kickoff Meeting	█					
	Background Information Review	█					
	Stakeholder Survey	█	█				
	Stakeholder Interviews	█	█				
	Strategic Perspectives Report		█				
Phase II	Strategic Development Retreat			█			
	Stakeholder Check-in			█			
	Strategic Plan Revision Workshop				█		
Phase III	Final Plan Documentation				█	█	
	Board Presentation						█
	Implementation Support						>>

# PROPOSED INVESTMENT

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## TOTAL INVESTMENT

Whereabout's proposed costs per phase are detailed below. The total proposed fees for the Visit San Luis Obispo Strategic Plan are **\$30,000**, including hard costs for travel.

<b>PHASE I: DISCOVERY &amp; ANALYSIS</b>	<b>\$10,383</b>
<b>PHASE II: STRATEGY DEVELOPMENT</b>	<b>\$11,333</b>
<b>PHASE III: IMPLEMENTATION READINESS</b>	<b>\$6,284</b>

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<b>ESTIMATED TRAVEL COSTS</b>	<b>\$2,000</b>
<b>TOTAL CONSULTING FEES</b>	<b>\$30,000</b>

## TERMS

Whereabout invoices monthly, including consulting fees as incurred and reimbursable travel costs. Invoices are due Net 30.