Quality of Life.
Quality of Experiences.
Stakeholders • Visitors • Residents

COMMUNITY

CERTIFIED TOURISM AMBASSADOR™

Mickey Schaefer & Associates LLC

Proposal

Mendocino County Convention and Visitors Bureau

**Mendocino
Tourism Ambassador Program**

[working title]

*Turning Your Frontline into
Certified Tourism Ambassadors™*

CTANetwork.com

September 7, 2023

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Quality of Life.
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COMMUNITY
CERTIFIED TOURISM AMBASSADOR™

Imagine the Possibilities…
of a product knowledgeable frontline and passionate residents – that understand the value of tourism – that have a renewed sense of pride – that feel connected and work together as a team to deliver your community's Brand Promise!

Certified Tourism Ambassador™

- An international, industry-recognized certification program for your front-line workers, stakeholders and volunteers. Accredited and licensed through the **Tourism Ambassador Institute®**, the **Certified Tourism Ambassador™ (CTA) program** is a Ph.D.-designed certification program that goes well beyond basic customer service training. It is designed as a lasting program that creates a destination culture that mobilizes a destination's workforce to turn every visitor and resident encounter into a positive experience.

- Over 60,000 frontline staff, residents and destination stakeholders have been certified since 2006, receiving the industry-recognized designation Certified Tourism Ambassador™ (e.g., John Smith, CTA).

- **Current Destinations** that have made the commitment to their front-line and their stakeholders:

Anaheim/Orange County, CA	Ann Arbor Area, MI	Ashland, KY
Battle Creek/Calhoun County, MI	Bellevue, WA	Billings, MT
Casper, WY	Cheyenne, WY	Cincinnati, OH
Columbia, MO	Dover/Kent County, DE	Dutchess County, NY
Flint & Genesee County, MI	Fort Collins, CO	Franklin County, PA
Greenville, SC	Iron Range Tourism, MN	Lake County, CA
Lake Havasu City, AZ	Lansing, MI	Brighton Howell Area, MI
Little Rock, AR	Loudoun County, VA	Northern Kentucky, KY
Olympia/Thurston Co, WA	The Palm Beaches, FL	Quad Cities, IA IL
Rapid City, SD	San Antonio, TX	Sweetwater, WY
Tucson, AZ		

- The Program is **Highly Customized** through six important phases – engendering Key Stakeholder buy-in:
  Phase One – Research & Planning (Focus Groups, Subject Matter Expert Panel, Survey of Management and Frontline)
  Phase Two – Customized Body of Knowledge (History, Culture, Attractions, Resources, and more)
  Phase Three – Field Testing
  Phase Four – Train the Trainer (Facilitator Guide, Facilitator Training)
  Phase Five – Program Launch
  Phase Six – Ongoing Program Management (Database software and web site – CTANetwork.com

- **Proven Behavior Change at the Front-Line:**
  88% — More Aware of the Power of Tourism & Their Role
  85% — More Pride & Passion for Our Destination
  89% — Pay More Attention to Things Visitors May Ask About
  83% — Make an Effort to Explore the Destination – First-Hand Experience
  87% — Have More Confidence in Serving Visitors
  91% — Have Gained More Knowledge About the Destination Product

- **CTANetwork.com – The CTA Online Community:** Each Accredited Provider is provided with specially-designed database software and a special CTANetwork.com micro-site, to facilitate program administration and information-sharing with the frontline. The result? Program sustainability over time.

Top-Line Benefits
CTA is not a class. It's a culture.

Here is what the *Certified Tourism Ambassador™* program offers that sets it apart:

- **Recognized Certification** – Your frontline will be part of an international, industry-recognized certification program – with annual renewal – proudly using the *Certified Tourism Ambassador™* designation behind their name (John Smith, CTA) and proudly wearing their CTA lapel pin. As with other certification programs, the CTA designation is recognized industry-wide as a valued part of the visitor experience by your frontline, their employers, and, most importantly, your visitors.

- **Workforce Development / Higher Education / Ongoing Learning** – Your destination can leverage CTA as the initial foundation upon which to build important educational opportunities. CTA exclusive 'behind the scenes' and other local tourism-related activities reinforce learning. Higher education institutions and high schools have embraced CTA as an extension of their degree programs, fueling the next generation of tourism.

- **Workforce Product Knowledge** – Through the initial certification, this program teaches the workforce why tourism is important and gives valuable destination product knowledge to your frontline. The learning objectives and highly customized curriculum focus on giving your frontline employees and volunteers the tools and confidence they need to create memorable experiences and exceed customer expectations. And the annual renewal requirements ensure that your ambassador corps is forever building upon their product knowledge base.

- **Proven Community Alignment & Engagement** – CTA destinations have been amazed at how this program aligns all stakeholders in their area. From the beginning Research Phase to Program Launch, they are engaged in shaping the program and, thus, take ownership in its ongoing success. It gives your destination a common, collaborative project that will help reinforce the importance of working together, instead of apart, to enhance regional tourism.

- **Competitive Advantage** – Meeting professionals and other decision-makers have indicated that they would select a "CTA City" over a non CTA city. By committing to the program, they believe a destination shows its commitment to working together as a community and, most importantly, to ensuring the best possible experience for their group. Meeting planners and tour operators are now asking in their RFP's, *"Are you a CTA Destination?"*

- **Branding & Consistent Messaging** – Through CTANetwork.com – the CTA Online Community – and through CTA networking events, you can push frequent messages to your CTAs – in good times and bad – providing important reminders and updates to build upon their knowledge base. As a result, your CTAs will develop a close-knit network that allows them to connect with one another to further their knowledge and fuel their motivation to serve the customer. By keeping your frontline engaged and connected to your destination's attributes and vision, your ambassador corps will be at-the-ready, ensuring that groups and visitors hear a consistent story about your destination…powerful branding and marketing at the frontline.

I. Program Overview

This Statement of Work identifies those consulting services that Mickey Schaefer & Associates LLC (MSA) will provide to the Mendocino County Convention and Visitors Bureau hereinafter referred to as Destination Marketing Organization (DMO), in the development of the *Mendocino Tourism Ambassador Program* (formal name TBD). If MSA is selected, this Statement of Work will become part of the agreement between the parties, providing further details regarding the services, deliverables, fee arrangements, and billing procedures.

One of the critically important distinctions between the *Certified Tourism Ambassador™* program offered by MSA and other training programs is that the CTA Program will lead to full certification. Upon completion of all program requirements, front-line employees and volunteers will be awarded the *Certified Tourism Ambassador™ (CTA)* designation to be presented by a tourism-related entity (usually the local convention and visitors bureau or destination marketing organization) as a licensed, Accredited Provider of the *Tourism Ambassador Institute®,* a subsidiary of MSA. MSA has considerable experience with the CTA program, having administered the program since its launch in 2006. Background materials on MSA and its personnel are attached for informational purposes.

The *Certified Tourism Ambassador™* program was designed based upon considerable research and information obtained through years of experience in the industry and grounded in adult learning theory. The program is highly customized to meet the strategic and educational needs of each destination, with the destination creating the local program name/logo and MSA working closely with the destination to customize a robust local program curriculum to meet the destination's overall educational outcomes and objectives.

II. Project Phases and Deliverables

Proposed Development Plan

1.0 Phase One – Research and Planning; January - February 2024

1.1 During this phase, MSA and DMO will develop specific objectives for the CTA program to be adopted by DMO and determine the critical success factors that will ensure the program's success over time. MSA and DMO will together develop an outline of the objectives. DMO will implement and provide suggestions for how it believes it can best involve key stakeholders of DMO. DMO will actively promote program and involvement by key stakeholders.

1.2 Two, 60-minute modified focus group sessions are conducted of front-line employees, volunteers, and managers/owners/GMs to determine how to best shape the program to fit their needs. The modified focus group sessions are conducted by MSA on a single day. DMO identifies and invites participants (up to 20 participants in each session; both front-line and management), makes arrangements for and pays for costs of meeting space and audio recording of the sessions. Once group of participants is identified, MSA reviews and recommends group composition, and develops the materials for and facilitates each session. Following the sessions, MSA transcribes the audio recording of the sessions and prepares an Executive Summary of the findings. The Summary is used to facilitate future promotion and marketing. Held same day as 1.3 below.

1.3 Front-line individuals are identified to serve on a panel of Subject Matter Experts (SME) to assist with development of the curriculum. MSA and DMO together select members of SME panel; 9-12 individuals who know your area well and know what visitors ask. DMO invites SME panel members, makes arrangements for and pays for costs of meeting space for the 75 to 90-minute session. MSA facilitates the session and prepares an Executive Summary of the findings. The Summary is used to customize the curriculum for DMO. The SME Panel is held immediately following the focus groups in 1.2 above.

1.4 One standardized survey is conducted of (a) front-line employees and volunteers; and (b) management – CEOs/Owners/Managers/Stakeholders. Using a standard format for all CTA destinations, the standardized, online survey is designed to elicit information about all aspects of the program including: attitudes about the proposed program; how their organization would support the program; incentives to participate; what visitors ask most frequently; what is needed to ensure success; what incentives they would offer to drive participation, and more. MSA personalizes survey to DMO name/name of area. DMO reviews for accuracy and sends it via email throughout the DMO's geographic

region. DMO sends any required follow up emails encouraging completion of surveys.

MSA tallies survey responses and prepares a summary report. Write-in comments from the survey are used by the DMO to facilitate promotion and marketing.

1.5   **Work during Phase One also includes establishing benchmarks and metrics to determine success of the program over time.** This includes DMO communicating with key partners to determine what measures currently exist (especially with regard to customer satisfaction) and what measures may need to be developed. Together, MSA and DMO identify any necessary additional measures (quantitative or qualitative) that are an important part of the program, including but not limited to number of CTAs, number of CTA Companies/Employers, renewal statistics, anecdotal comments from businesses / owners, etc.

2.0   Phase Two – Certification Program Development; March – April 2024

2.1   **Customized curriculum and procedures to ensure that all intellectual property is protected during Phase Two.** MSA identifies learning modules based upon Phase One research findings. DMO provides information to assist MSA in writing a unique, robust curriculum that features unique information about the county (e.g. history, culture, demographics, attractions, etc.) that will be included in the modules. MSA proposes a methodology for delivering the learning and testing program components.   The recommended methodology will complement the DMO's technological and staff infrastructure. DMO is responsible for labor and costs of printing and production. On an annual basis on or shortly after the anniversary of program launch, MSA will ensure that updating of minor changes to the facilitator guide and pre-classroom reading document (e.g. changes in web site addresses, phone numbers, etc.) will be made to all documents, with content/graphics provided by DMO. MSA agrees to complete more significant and/or substantive changes to the document, as requested by DMO, at the then applicable hourly fee.

In order to protect the certification program content and overall program integrity, all documents and customized materials developed for the CTA program are protected through a strict document protection policy. On behalf of the *Tourism Ambassador Institute®* (TAI), MSA administers the storage and use of the documents for all local Accredited Providers (AP); no paper or electronic copies can be provided to outside entities, without the prior written approval of MSA. Any document or program material changes desired by the DMO must be made solely by MSA associates, and not by the DMO, in order to ensure compliance with laws of trademark and copyright.

DMO agrees and acknowledges that MSA, either through TAI or in its own name, holds all rights to all materials, agreements, templates and processes provided to or created for DMO under the Agreement. The terms and conditions of DMO's license to use the

materials during the term of the Agreement, as well as its obligations upon any termination of the Agreement, are as described in the Agreement.

Additionally, DMO agrees that the customized curriculum and all other materials created pursuant to the Agreement shall be used solely for the purposes permitted in this Agreement and no other use is permitted. In the event DMO desires to repurpose any portion of the content for other purposes, MSA will explore the objectives with DMO and provide a proposal for the costs associated with modifying the content to fit your needs. This is in order to protect the curriculum, the local program's reputation, and the overall integrity of the industry-recognized certification program.

2.2 **Develop Customized Facilitator Guide and Materials for Training the Trainers.** MSA develops all content for the facilitator's/training guide. DMO is responsible for labor and costs for printing and production.

2.3 **Develop Student Learning Materials.** MSA develops all content for customized teaching resources that help students achieve specified learning objectives. MSA provides camera-ready originals of the materials. DMO is responsible for labor and costs of printing and production.

2.4 **Develop Promotion and Marketing Strategies.** DMO staff develops best strategies for promoting and marketing the program with MSA input, where desired. DMO integrates program promotion into existing outreach and communication efforts.

2.5 **Develop Promotional Brochure Targeted to Prospective CTAs and Employers.** MSA provides DMO with promotional brochure template, with pre-defined content targeted to prospective CTAs and employers. DMO reviews template and adds local testimonials and photos, as desired, produces original, and distributes. Due to copyright laws and program integrity, any edits or changes to the template, or subsequent versions of the local brochure, must be approved in advance by MSA.

2.6 **Develop a "Most Frequented" List of Attractions/Features that front-line employees and volunteers need to know and can refer to when assisting a visitor.** DMO assists MSA in identifying a list of the 'most frequented' local attractions and features using existing materials obtained from DMO and other resources.

2.7 **Solicit Incentives and Rewards to Entice Participation (i.e. tickets to attractions, free tickets, discounts on dinner, etc.)** MSA has determined that creating incentives is critical to encourage front-line participation and to enhance the ambassadors' first-hand knowledge of your destination 'product' by experiencing a wide variety of venues. DMO will solicit in-kind incentives from key partners throughout DMO's geographic region. The incentives will be promoted as "Freebies/Discounts" to local CTAs via www.CTANetwork.com. DMO will be responsible for continuously promoting the program to stakeholders and CTAs to drive experiential learning to enhance the visitor experience.

3.0   Phase Three – Field Testing; May - June 2024
        (Simultaneously with Phase Four)

   3.1   Field Test curriculum and learning materials with Front-line Employees and Volunteers. This involves utilizing selected trainers from the trainer cadre to deliver the initial (field test) program. MSA and DMO mutually determine the best target group for the field test (hotel, restaurant, etc.). MSA assists with preparation for the field test, trains two local facilitators in an online session (see 4.2 below), coaches/observes two local individuals facilitating the class, and assesses implementation. DMO is responsible for extending invitations to participants, managing registrations, facilitating the class, and handling all meeting logistics, including media, food and beverage, etc. DMO key staff must attend the field test sessions to help shape the program curriculum and delivery. Additionally, any prospective trainers would be invited to attend the field test class to observe the classroom experience. See 4.1 and 4.3 below.

   3.2.   Evaluate and Modify Support Materials and Training as Necessary. MSA reviews field test findings and solicits input from trainers and field test participants to determine their level of satisfaction with the training (was it easy to teach, was it fun to participate, what can be improved, etc.). MSA and DMO review the input to make any necessary changes to the curriculum/documents and teaching methods to meet participants' needs.

   3.3.   Prepare for Program Roll Out
        MSA and DMO mutually determine program launch date, approximately one month following the field test. DMO coordinates distribution of advance reading materials to reach classroom participants at least two weeks in advance.

4.0   Phase Four – "Train the Trainer"; May - June 2024
        (Simultaneously with Phase Three)

   4.1   Identify and select a potential cadre of facilitators. (Est. up to 10 Facilitators). DMO will identify staff and, if desired, local experienced and reputable volunteer facilitators that can capture the essence of the curriculum and facilitate the four-hour classroom session (as teams of two) in ways that inspire and motivate the ambassadors. MSA will provide input, and assistance as needed, regarding individuals identified by DMO. Note: DMO staff may wish to participate as facilitators for some topics, particularly for the field test of the program.   MSA will recommend a strategy for expanding the cadre of qualified facilitators based on the size, scope, and timetable for full-scale program implementation specified by DMO.   See 3.1 above and 4.3 below; where possible, several future facilitators should attend the field test to ensure that enough facilitators are trained for a successful program launch.

4.2 **Train the Field Test Facilitators.** MSA will coordinate and conduct a two-hour web conference session to remotely train the two field test facilitators on the curriculum and its delivery.

4.3 **Train the Cadre of Facilitators (Est. up to 10 Facilitators).** MSA will coordinate and conduct a two-hour session to train the cadre of facilitators. Session will utilize the two field test facilitators, where applicable, to reinforce facilitator buy-in and enthusiasm. DMO will coordinate invitations, registration, and meeting logistics and provide key DMO staff to help train the facilitators on topics that are DMO-centric. This session is usually held the afternoon of the Field Test. See 3.1 above. MSA will conduct additional facilitator training sessions, if desired, at a cost of $1,500 per session, plus expenses.

4.4 **(Optional) Conduct City/County Tours with Facilitators (full-day tour including: destination districts; hotels, restaurants, convention center; new construction; etc.)** DMO handles all logistics and costs based upon the curriculum requirements.

5.0 Phase Five – Program Roll Out; July 2024 - Ongoing

5.1 **Maintain 6-Month Rolling Calendar of Future Classroom Sessions and Ambassador Events and Promote Heavily.** DMO coordinates a Master Calendar of the four-hour classroom sessions, which are designed to be offered by the DMO throughout the county at various times of day and on varying days of the week, in order to fit the work/personal schedules of the local front-line. DMO enters upcoming classes into the CTANetwork administrative system for easy access by prospects and CTAs; a six-month rolling calendar/advance schedule facilitates the enrollment process. MSA will provide the DMO with a *Request to Host* form for larger organizations that choose to host in-house sessions. DMO also coordinates regular CTA networking events and enters upcoming events into the CTANetwork administrative system for each access by CTAs.

5.2 **Orient Hospitality Executives, County Hospitality Organizations, HR Departments and In-House Training Staff on Benefits of the Ambassador Program to the County and to their Organization.** DMO is responsible for ongoing program promotion and marketing.

5.3 **Educate Partners and Staff on the Program and Its Benefits to the Destination** DMO is responsible for ongoing program promotion and marketing.

6.0   Phase Six – Ongoing Program Management; July 2024 and Beyond

6.1   Administer the Certification and Renewal of Certification Program

MSA communicates to DMO the key information needed for successful program administration. See 6.2 below for expectations of DMOs.

DMO administers the program without the services of MSA (if MSA services are desired, a separate contract would be negotiated based upon identified needs). With regard to ongoing program revenues and expenses, MSA can provide a budget template to help you prepare a program budget. The per person enrollment fee and annual renewal fee can be set at any amount, as long as the fee is $49 or less, in order to maximize participation by the front-line.
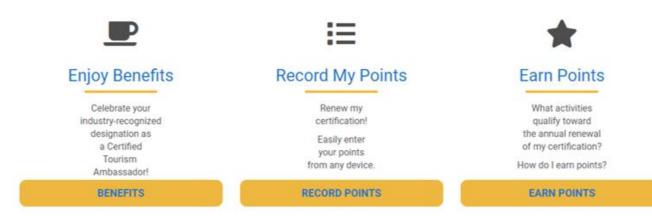
During the term of the Agreement and as long as DMO remains an Accredited Provider, DMO shall have use of CTANetwork.com program management software program designed to manage all aspects of the program. DMOs are required to use this software for ongoing program management. This administrative software is made available to DMOs to manage the local CTA database, set up and manage online or manual registration for CTA events, control the "front end", front-facing web portal for the local CTA "micro-site", search and communicate with database contacts by industry sector (e.*g.* send email to all transportation CTAs, restaurant CTAs, etc.), by company/employer, or by title (e.g. all human resources, general managers, etc.), review data and generate related reports to track various activities (e.g. number CTAs; number applying; number renewing; etc.). The MSA team is available for initial training and ongoing support in use of both the administrative software and the CTANetwork.com site.

CTANetwork.com will be the main way the frontline will enroll in the program, manage their annual renewal, keep up on networking events, stay "in-the-know", obtain industry updates, etc.

CTANetwork.com site provides the flexibility for a destination to add local information to its own micro site. The software also features database management; report generation (e.g. number of CTAs, number renewed); online renewal of certification; and many other administrative features. General features of the software are included in the accreditation fee. Any special software program enhancements desired by DMO may result in additional cost, which would be quoted to and approved by DMO prior to the commencement of any work performed.

CTA Network.com

CTA Online Community **– CTA's Logged In View:**

Enjoy Benefits

Celebrate your industry-recognized designation as a Certified Tourism Ambassador!

BENEFITS

Record My Points

Renew my certification!

Easily enter your points from any device.

RECORD POINTS

Earn Points

What activities qualify toward the annual renewal of my certification?

How do I earn points?

EARN POINTS

Get the Most from Your Certification

LOCAL CALENDAR	**CTA STORE**
CTA LOCAL SOCIAL	**CTA DIRECTORY**
TIMELY INFO & MESSAGING	**CTA IN THE NEWS**
FREEBIES & DISCOUNTS	**MY INDUSTRY**
UPCOMING CTA EVENTS	**CONTACT LOCAL ADMINISTRATOR**

6.2 **Accreditation and Quality Assurance Standards and Annual Licensing Renewal.** Since the CTA program's founding in 2006, the best practices that have proven to be most effective in growing and sustaining a successful local program are: (a) continuous and visible involvement of high-level local leaders from all sectors; (b) a majority of the DMO board of directors as CTAs; (c) regular CTA networking events; (d) regular CTA e-newsletters; (e) securing & posting Freebies & Discounts; (f) recognizing CTAs at industry events, and (g) providing ongoing educational opportunities to further their destination knowledge. Therefore, these and other activities are included in the program standards, which are part of the annual review process, described below.

MSA, on its behalf and on behalf of the *Tourism Ambassador Institute®* (TAI), grants Accredited Providers the licensing rights to present, on behalf of the TAI, the CTA designation to those individuals who satisfactorily complete all program requirements. This is a revocable, non-exclusive, non-transferrable, royalty-free license to administer the CTA program at the local level. Therefore, the DMO shall routinely and consistently monitor measures of quality for the CTA designation by applying for and maintaining its status as a TAI Accredited Provider (AP). As a term and condition of AP status, DMO agrees that it must adhere to TAI established accreditation criteria, pay all applicable annual accreditation and licensing fees, and comply with all other requirements for program quality that may be established from time to time by TAI.

The primary objective of the *Accreditation and Quality Assurance Process* is to maintain uniform standards of quality for the CTA designation industry-wide. DMO acknowledges that adherence to TAI standards is a material part of this Agreement and a condition to DMO continuing to receive the rights and benefits of AP status. In order to maintain AP status, DMO shall comply with all TAI criteria, as the same may change from time to time, including standards set in the management and administration, data collection and integrity, marketing and communications, and pre-certification and certification renewal.

As long as DMO wishes to continue its AP status current and in good standing, DMO shall, on an annual basis, complete and submit a *CTA Accredited Provider Quality Assurance Agreement and Checklist* or such other form or agreement as may be required by MSA/TAI ("QA Agreement"). In the QA Agreement, DMO will attest its adherence with TAI established criteria. The criteria will be outlined annually in the TAI document entitled, *The Accreditation and Quality Assurance Process for CTA Accredited Providers*. TAI will review the *QA Agreement* and accompanying documentation to determine if DMO is adhering to agreed-upon criteria. TAI representatives may also request additional information from DMO, and may, on occasion, complete a site visit to meet with key stakeholders in the Accredited Provider's city or county. If TAI concludes that DMO has satisfied applicable quality standards and all other terms of the Agreement, DMO will be granted accreditation for another full year conditioned upon payment of the Annual Accreditation Fees. If TAI concludes that DMO has not satisfied standards or other conditions, DMO will be placed in Provisional status and given the opportunity to remedy its non-compliance. If, after a specified period of time, DMO still is not in compliance with established CTA program standards, the Accredited Provider will lose its

accreditation status and licensing rights to present the CTA designation on behalf of the TAI or to renew the designation for its existing designees.

A formal appeals process will be made available to an Accredited Provider whose accreditation status has been discontinued and seeks to have it reinstated by bringing their procedures and processes into compliance with the *CTA Accredited Provider Quality Assurance Standards*. The TAI retains the exclusive right, in its discretion, to grant accreditation to its licensed providers.

6.3 **Program Discontinuation.** In the event DMO does not satisfy the requirements of the annual renewal requirements as described at Section 6.2 above or in the event of any other termination of the Agreement, DMO's rights to use the program and intellectual property licensed hereunder shall immediately terminate.

If the program is discontinued for any reason, all CTAs who achieved their designation through this Accredited Provider would be placed into the "At Large" category within the *Tourism Ambassador Institute®* structure unless, or until, they move to an area where a local CTA program exists.

Upon program discontinuation and loss of licensing rights and Accredited Provider status and in order not to infringe upon CTA copyright and trademark rights, DMO shall take all actions necessary to protect intellectual property and program materials as agreed to under the Agreement.

7.0   Phase Seven – Program Evaluation and Modification; July 2025

7.1 **Monitor Benchmark Measures and Metrics to Determine Success of the Program Over the Last Year and Over Time.** At the end of the first full year after launch, DMO monitors metrics to determine program success, e.g. reviewing number of CTAs against their goal, number of participating companies, participation level at CTA events, etc.

7.2 **Conduct Annual Evaluation of the Program Effectiveness.** Annually, MSA provides a remote evaluation of the program, discusses the program with the Accredited Provider during the annual accreditation process, and develops evaluation criteria for separate bi-annual online surveys of CTAs and employers to obtain feedback on the program. Survey is conducted in the aggregate with other CTA programs; with specific results extracted for each local program.

7.3 **Determine Program Changes, Where Necessary.** MSA provides recommendations for any program modifications, as necessary. DMO implements program modifications.

III. Consulting & Accreditation Fees

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Initial Accreditation Fee. MSA's fees for performing the services for program start up and initial accreditation (including the Phase 1-7 deliverables: Focus Group facilitation and summary report; Management/Front-line Survey and summary report; Subject Matter Expert (SME) Panel (to define the Body of Knowledge) and summary report; 6-8 weeks' writing customized curriculum and Pre-Classroom Reading and Reference Materials document; customized classroom materials; customized Facilitator Guide and facilitator training; Field Test observation; CTA 'back-end' software/database administrative system set-up and training; CTANetwork.com 'micro-site' set up and training; promotional brochure content; best practices for program launch marketing and public relations) is a total of $35,000. The fee is due and payable in installments, unless an alternative payment schedule is agreed to in writing, as follows:

$15,000	Due Upon Signing
$10,000	Due March 2024
$ 5,000	Due May 2024
$ 5,000	Due July 2024
$35,000	TOTAL

Annual Accreditation Fees Paid on Anniversary Date. On an annual basis, and assuming that DMO meets all requirements for renewal as described at Paragraph 6.2 above, DMO will pay to MSA fees for the continued accreditation as follows:

$10,000	Payable July 2025 and annually thereafter for the preceding licensing year*
$10	Per 'Current' CTA on record for DMO, beginning July 2025 and annually thereafter from program fees collected in the preceding licensing year **

The above accreditation fees cover: (a) royalty-free licensing rights for program content and materials; (b) specialized 'back-end' CTA software/database administrative system access and ongoing training and customer support; (c) CTANetwork.com 'micro-site' customized to the destination including programming functions that drive online renewals, Freebies and Discounts coupons, calendar of events, local/national CTA directory, CTA social networking, local Timely Info, periodic overall website redesign, and ongoing 'micro-site' system training and customer support; (d) coordination of annual CTA Accredited Provider Summit; (e) bi-annual CTA survey and Employer survey with local and aggregate comparison data; (f) annual updates to program/classroom materials; (g) interface assistance with universities, civic agencies, etc.; (h) grant-writing ideas; (i) regular Accredited Provider conference calls; (j) CTA logo usage approval; (k) Employer interface and CTA program support ideas; and (i) additional services and deliverables as described in this Agreement.

* *The Annual Accreditation Fee will be reviewed by the TAI on an annual basis. In the event of a change to the fee, DMO will be notified of such change in advance of its anniversary date.*

** *The "per CTA" fee is calculated annually on DMO's anniversary date and is based upon those CTAs on record who are classified as "Current" within the CTA database.*

Travel Costs. Travel costs incurred by all associates of Mickey Schaefer & Associates LLC will be kept to a minimum and invoiced, as applicable, at the end of each trip and are not included in the fees outlined above. MSA associates will be available to travel to your destination as needed, to ensure program success. MSA and DMO agree to make maximum use of available means of business communications technologies; i.e., conference calls, email, fax, etc. to keep travel costs to a minimum.

Payment Terms. Payment terms are net thirty (30) from date of invoice

Performance. Contract fee payments are based on the dates listed above as tied to Phase One through Phase Six deliverables. Both DMO and MSA agree to make every effort to schedule key meetings and work sessions within the established timeframe.

IV. Resources & Timing

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Resources Necessary for Successful Project Completion. DMO will provide for and cover the costs of the following resources, which are necessary to ensure successful project completion and ongoing administration, including, but not limited to: program staffing; printing expenses; orientation tour expenses (if scheduled); meeting site costs; meeting logistics; database management; certification program management; testing, etc. Expenses of printing and producing all collateral and training materials will be borne by DMO.

Timing and Staff Resources.

DMO Staff Support. The timeline and program schedule set forth in this Statement of Work has been prepared in reliance on assurances that DMO will commit sufficient number of staff to the success of the program. It is essential that key DMO staff be available for meetings and conference calls in order to keep the program on track. DMO agrees to adhere to the jointly developed timeline for program development and roll out. **DMO acknowledges that meeting the timeline and general success of the program is dependent upon DMO meeting its deadlines, providing information for the curriculum development or other key information in a timely fashion. If such deadlines are not met, MSA cannot guarantee the on-time launch of the program, per timeline.** If MSA incurs additional expense due to avoidable delays on the part of the DMO, these costs may be passed along to the DMO.

Within a project of this scope, MSA has found the following core principles are critical to success and, therefore, are central to the approach:

- DMO senior management and organizational leaders must actively support and be involved in the effort to assure the program's objectives.

- Success is predicated on the fact that development and implementation of this important program rely upon ongoing processes that require continuous improvement and refinement. MSA welcomes changes and modifications to the plan proposed, as deemed necessary by the DMO; provided, however, in the event the changes substantially add to the overall scope of work, DMO and MSA shall agree in writing to all terms, including additional fees, for the additional work.

MSA Staffing.   MSA will provide suitable consulting staff for this engagement, subject to the following guidelines, objectives, and caveats:

- MSA will provide senior level consulting to lead this engagement and be the primary interface with the DMO. These professionals will be supported by additional experienced consulting professionals and administrative staff as appropriate, as part of the MSA team. In addition, it is expected that DMO staff will contribute to deliverables as needed and as outlined in this Statement of Work. MSA will make good faith effort to comply with the objectives outlined in this proposal, and DMO will make good faith effort to schedule focus groups, training sessions and key DMO team meetings to optimize travel schedules and time of the MSA team.

- MSA and DMO recognize that scheduling may be adversely impacted by such factors as travel delays, illness, family and business emergencies, and other prior commitments, and that such impacts may unavoidably extend the estimated project duration. MSA and DMO agree to work closely together and exercise good faith efforts to minimize the likelihood and adverse consequences of such factors.

V. Background Information on Consultant

Why Use Mickey Schaefer & Associates?

Mickey Schaefer offers a wealth of expertise, knowledge and practical experience that is supported by a team of professional associates who are dedicated to our clients and their needs. Here are a few highlights as to what Mickey Schaefer and her MSA team can bring to your organization:

- **Industry leader with high visibility and respect within the industry.** Inducted 2006 into the Convention Industry Council's Hall of Leaders, the highest honor in the industry, which includes past recipients such as Conrad Hilton and Bill Marriott, Jr. Named five times to the "25 Most Influential in the Meetings Industry" by *Meeting News/Successful Meetings* magazine, most recently in 2015 and top six industry leaders by *Smart Meetings* magazine, April 2013. Selected 2013 to HSMAI's Top 25 Most Extraordinary Minds in Sales & Marketing. Past Chairman of the Board of PCMA (Professional Convention Management Association) and 2002 PCMA Professional Achievement Award dinner honoree.
- **Extensive understanding of the meetings, conventions, and exhibitions industries** and frequent speaker on industry issues and trends. Managed large conventions and trade shows and over 200 meetings per year of varying sizes from 25 to 20,000 attendees, as Vice President for the American Academy of Family Physicians; 430 staff, $9 million convention budget.
- **Direct work and leadership experience with DMOs and Destination Marketing** – Served as National Sales Manager (selling to medical associations) and later on the Board of Directors of the Kansas City Convention and Visitors Bureau. Currently consult with DMOs across the U.S. and Canada on Customer Advisory Boards, destination marketing, strategic planning and visioning, strategic board governance, and aligning front-line workers to drive the destination's brand.

- **Proven innovator and driver of change.** Championed industry standardization as Chair of the APEX Commission (APEX = **A**ccepted **P**ractices **Ex**change) of the (then) Convention Industry Council (CIC), a council comprised of the 32 organizations within the meetings, conventions and exhibitions industries. Worked for ten years with major stakeholders throughout the U.S. and Canada to shape the future of the industry through the development of industry process and technology standards, similar to past standardization efforts of the real estate and banking industries. And, developed a means to drive a destination's brand to the front-line via creating a nationwide certification and hospitality training program for front-line hospitality workers—*Certified Tourism Ambassador™ program*—leading to the designation CTA™ (John Smith, CTA) with annual re-certification, now reaching over 60,000 certified.

- **Certified Association Executive (CAE)** with over 30 years' direct experience in both state and national associations. One of five selected in 2003 to become an ASAE Fellow—a prestigious "think tank" of top association leaders within the American Society of Association Executives (ASAE).

- **Facilitates strategic planning and visioning sessions,** with the MSA team of expert consultants, for DMOs, tourism entities, and associations helping them create strategic alignment to achieve organizational objectives.

- **Practical experience in carrying out strategic plans**, Strategic Board Governance, and resource allocation to do the "right things, right" to achieve the strategic vision. MSA associates' combined direct work experience offers a wealth of ideas and practical advice.

- **Graduate degree (M.A.) with emphasis in marketing and organization development**; extensive marketing background in all aspects of market research, including over 200+ focus groups and competitive market analysis; direct experience in shaping organizational culture and structure.

Judy Wood, CTA
Business Development

Judy discovered her natural "people skills" working as a wrangler and trail guide at a historic dude ranch as she attended the University of Arizona. After graduating with a degree in Community & Economic Development, she was recruited to join the Pre-Opening Executive team at Tucson's first luxury golf and tennis resort, the Sheraton El Conquistador.

As Director of Concierge Services, and a unique position in Tucson overall, Judy had the duel task of building an extensive network of resources, while recruiting and training staff to provide superior customer service. She assisted the Director of Public Relations and Marketing with community outreach and special projects and played an integral role in creating a local campaign to increase visitation during the "soft" summer season. Judy also wrote an extensive customer service training manual for front of the house staff and initiated an employee recognition program that acknowledged exceptional customer service. Judy was later promoted to Convention and Event Services where she was recognized numerous times by her peers in Successful Meetings Magazine.

Judy moved to Florida, to start her family and a new career in social services focusing on community development. She was the Vice President of Development for the YWCA of Tampa Bay for 20 years. Her responsibilities included strategic planning, collaboration with local government entities, media liaison, marketing and public relations initiatives, creating campaigns for annual giving, major gifts and estate planning, organizing major special events, volunteer recruitment and retention, and membership development. She played a key leadership role in the growth of the agency's budget from $500,000 to $6.5 million.

With the opportunity to return to her beloved desert, Judy accepted the position of Partnership Sales and Hospitality Education Manager with Visit Tucson. She became a Certified Tourism Ambassador™ and was lead facilitator and CTA Program Manager. Judy also worked in Leisure Sales and took initiative on special short term marketing projects including community outreach to promote local leads for meetings and conventions.

In 2013, Judy returned to Florida to start her own company, J Wood Consulting. Judy's versatility, hotel and DMO experience, coupled with her passion for the tourism industry, make her an integral part of the MSA Team.

Christine Whorton, MHA
Management Consultant

Christine's career in health care began as an admitting clerk at the Ohio State University Hospitals in Columbus, OH as she worked her way to a bachelor's degree from OSU. Later she was Assistant Director of Nursing Administration at the George Washington University Medical Center in Washington, DC. While in that position Christine earned a master's degree in health planning in 1980.

After earning the master's degree, Christine became Director of Professional and Government Affairs for the American Association for Clinical Chemistry, Inc. where she directed the association's membership, professional and government affairs divisions. For her outstanding service she was awarded The Presidential Citation in 1986. Later in 1986 Christine joined the Executive Offices of the American Association of University Women, Inc. and the AAUW Educational Foundation, Inc. in Washington, DC. Her responsibilities included coordination of seven department heads in implementation of association-wide procedures and programs and strategic and long-range planning for the 150,000 member association and foundation.

From 1988 to 1989, Christine was Executive Director of the National Association of Foreign-Trade Zones, a trade association with 300 member organizations, where she was responsible for budgeting and financial management, government relations, lobbying, and membership development.

In 1990 Christine formed Christine Whorton and Associates (CWA) to provide management consulting services to not-for-profit organizations and associations. CWA's clients have included the American Association for Clinical Chemistry, the American Diabetes Association, the American Association for University Women Educational Foundation, the La Reserve Community Association, and The Endocrine Society. In the past fifteen years CWA has provided these clients with professional services such as executive support to association committees, creating and operating an employment exchange and job placement services, developing fund raising and accounting procedures, marketing and organization management services.

Christine is an experienced association manager and through her firm provides consultation in finance and administration, personnel management, membership development and administration, government affairs, publications, meeting planning and education, marketing, public relations, and board and committee management.

Her unique background and management savvy make her a key contributor to the MSA team.

Becky Barndt, CTA
Special Projects/Web Consultant

Becky's love of the outdoors and passion for travel led her to summer positions in Yellowstone, Lake Tahoe and Mt. Rushmore. After graduating from college, she moved to Phoenix to begin her career in the hotel and resort industry. She held positions in accounting, front office and human resources at resorts in Phoenix and Scottsdale. After conducting hundreds of interviews as Employment Manager for Wyndham Paradise Valley Resort in Scottsdale, she had the desire to train job seekers on successful job searching techniques. She left the industry for several years to work as the Career Development Coordinator for a private business college.

She had the opportunity to return to the tourism industry in 2001, when she was offered the Business Manager position for the Arizona Hotel & Lodging Association. There, she enjoyed managing the association's finances, handling member requests, maintaining the association website and coordinating annual conference registration. In 2007, she became the Program Manager for the Valley Tourism Ambassadors Program. She oversaw the development and launch of the Greater Phoenix CTA Program, which included the involvement of seven local DMOs. In 2008, she formed her own company, Barndt Enterprises, to have the flexibility to continue her career in tourism and "manage" her family at the same time.

Becky's customer service and project management skills, as well as her knowledge of the tourism industry, make her a valuable member of the MSA team.

Michael Letcher, CPA
Consultant – Research/Analysis/Systems

Michael Letcher brings many years of experience to Mickey Schaefer & Associates from the information services, database, and analytical industries.

After completing his accounting and computer education, he combined his credentials as a Certified Public Accountant (CPA) and Certified Information Systems Analyst (CISA) and entered the glamorous world (pun intended) of data process auditing. In search of opportunities to "do the work," instead of critique it, he ended up at Cerner Corporation, a major healthcare information systems company based in Kansas City. While at Cerner he helped build their first information service, which clients used to compare their hospital's financial and clinical performance to their peers. Mike quickly earned a position as Enterprise Managing Director of HealthFacts, an information service subsidiary of Cerner's at the time.

From there, Mike pursued the opportunity to apply his skills and get in on the ground floor of a high-tech startup in the data warehousing, data mining, and analytical software space, called Digital Archaeology. He managed projects to implement the patented technology, creating analytical solutions for many different industries including the areas of finance, database marketing, publication management, media/advertising, and e-commerce. After the high-flying tech days had peaked and the acquiring company closed its doors, Mike focused his efforts on a major turn-around at a local research company as Vice President of Technology before starting his own consulting company.

His experience allows him to offer a wide variety of services, including systems analysis, process review and analysis, database development and management, market research, and systems procurement or conversion analysis.

Mike's technological expertise, combined with his knowledge of research and his passion for quality, make him an important part of the Mickey Schaefer & Associates team.

Visit Anaheim
Destination Ann Arbor
Arizona Tourism Alliance
Arlington (TX) Convention & Visitors Bureau
Visit Ashland KY
Battle Creek / Calhoun County Visitors Bureau
Visit Baltimore
Visit Bellevue WA
Bermuda Tourism Authority
Visit Billings
Blount County (TN)/Smoky Mountain Tourism Dev.
Explore Butte County CA
Visit Casper
Visit Chandler (AZ) Economic Development Div.
Charlottesville Albermale (VA) Conv. & Vis.
Visit Cheyenne
Visit Cincy
Columbia MO Convention & Visitors Bureau
Experience Columbus
ConferenceDirect®
Events Industry Council
Corpus Christi Convention & Visitors Bureau
Dallas Convention & Visitors Bureau
Dallas/Fort Worth Area Tourism Council
 (30 counties; 46 cities; 42 DMOs)
Detroit Metro Convention & Visitors Bureau
Door County (WI) Visitors Bureau
Dutchess Tourism
Edmond Convention & Visitors Bureau
Fayetteville Area Convention & Visitors Bureau
Explore Flint & Genesee
Visit Fort Collins
Fort Worth Convention & Visitors Bureau
Fountain Hills (AZ) Chamber of Commerce
Tourism Council of Frederick (MD)
Franklin County Visitors Bureau
Frisco (TX) Convention and Visitors Bureau
Visit Galveston
Gettysburg Convention & Visitors Bureau
Glendale (AZ) Office of Tourism
Experience Grand Rapids
Greater Houston Convention & Visitors Bureau
Visit Greenville SC
Hospitality Sales & Marketing Assn. Int'l. (HSMAI)

Visit Indy
Iron Range Tourism Bureau
Irving (TX) Convention and Visitors Bureau
Journey Through Hallowed Ground Partnership
Discover Kalamazoo
Kansas City Convention & Visitors Association
Kent County / Delaware's Quaint Villages
Lake County CA Chamber of Commerce
Go Lake Havasu
Greater Lansing Convention & Visitors Bureau
Discover Lehigh Valley
Lexington Convention & Visitors Bureau
Little Rock Convention & Visitors Bureau
Livingston County: Explore Brighton/Howell Area
Loews Hotels
Visit Loudoun
Louisville Tourism
Meet NKY
Mesa Convention & Visitors Bureau
Mesquite (TX) Convention & Visitors Bureau
Visit Milwaukee
Norman Convention & Visitors Bureau
Oklahoma City Convention & Visitors Bureau
Experience Olympia & Beyond / Thurston County
The Palm Beaches FL
Greater Palm Springs CVB
Peoria (AZ) Chamber of Commerce
Greater Phoenix Convention & Visitors Bureau
Plano (TX) Convention & Visitors Bureau
Prince William County/Manassas VA
Professional Convention Management Assn. (PCMA)
Visit Quad Cities
Visit Rapid City
Visit Reno Tahoe
Experience Rochester MN / Mayo Clinic
Visit San Antonio
Scottsdale Convention & Visitors Bureau
Sonoma County Tourism
Southern Arizona Lodging & Resort Association
Spokane Regional Convention & Visitors Bureau
Visit Stockton
Sweetwater County Joint Travel & Tourism Board
Tempe (AZ) Convention & Visitors Bureau
Visit Tucson
Valley Hotel & Resort Association
Yakima Valley (WA) Visitors & Convention Bureau