

FWPDA Marketing Committee Meeting
September 9, 2015, 3 pm • Jean Dunbar Room
Fort Worden State Park

A. Meeting called to order, introductions

Scott and Herb are co-chairs

Members: George, Randels, Rob Birman, Christina Pivarnik, Forrest Rambo, Kevin Alexander

Staff: Dave, Megan, Gerda, Todd, Diane

Business Development discussion

Herb asks about the Business Development Committee. Dave says that under PDA organization there were two standing committees — Executive Committee and Capital Projects Committee. We had ad hoc transition committees including Marketing, IT, Business Development. Some transition committees met frequently, others barely at all. Some did not meet much because of staff constraints. Business Development was deferred; instead Norm started program development plan. New board will grapple with committee structure in October and will consider whether or not a Marketing Committee is even needed.

Dave said we should focus on the following today:

- 1 What we have gotten done so far on Marketing
- 2 Impact of LTAC support
- 3 What other marketing efforts should be funded out of general operations, toward 2016 budget.
- 4 What oversight does board want to have, re success/implementation of Strategic Marketing Plan?

Marketing budget discussion

Rob: If there's no money, it's a bunch of hot air

Marketing budget report by Dave: \$37,500 via LTAC.

- Marketing Contract \$10k
- Marketing budget \$25k (it was \$50k, Todd cut it to make budget) including collateral materials.

In 2015, including Christina efforts, there's over \$80,000 for marketing.

Todd: We have about \$10,000 left; we need to use remaining funds for more collateral material.

Christina: City contract expanded to include some marketing for FW. Christina is doing all the media; tour operators, meetings & conference, social media.

George: FWPDA needs a Marketing budget! Should be advocated at the board level.

Dave: With increased revenues, we should have more money for marketing in 2016.

Christina: Lodging and Sales tax reports came in today; we're 65 percent up on Lodging tax and Sales tax over same period last year. (Based on end of June).

George: We should make a proposal to the City Manager in terms of our LTAC request.

LTAC request for 2015 came from Dave and Christina to David Timmons. We are thinking about requesting another \$45,000. Not everything in the FWPDA Strategic Marketing Plan is eligible for LTAC funds.

Forrest: We can determine the level of LTAC money that came from Fort Worden.

Todd: Remember lodging product is still pretty rough, still making improvements. Don't want people to come and have a bad stay. Need to manage expectations.

Rob: Incentive through low pricing.

George: Target the market

Christina: Right now its Europeans who love this stuff — an authentic "American" experience

Forrest: Do we have a customer service or feedback system?

Todd: We don't but some Partners do, like Centrum. We get group feedback.

Dave: We don't have a survey for every visitor; looking at Survey Monkey to track visitor comments.

George: We could do hard copy surveys in rooms.

Todd: We get those piecemeal; already in every room in the guestbook.

Marketing in the shoulder season discussion

Scott: independent travelers are the target of FWPDA marketing, as

opposed to summer programs by Centrum.

Dave: One of the things we have learned is that the Fort is not well-set up for independent travelers; we don't have the housing stock for singles or couples. We are trying to grow the single and couple housing options.

Instead we focus on small groups which can use the housing stock.

Todd: Programs and groups must be our top goal. Independent travelers are gravy.

Christina: Who comes for programs? Who comes for independent travel?

Todd: Property serves 4 markets:

1 Group housing – dorms (203 & 225), Madrona, Centrum programs.

2 NCO housing - next spot, at attractive price point or independent traveler.

3 Cottages - Upper end, compete with standard hotel rooms, luxury

4 Historic experience - Officers Row housing – groups and vacation rentals

All of these serve a program need.

Herb: Should be cross-selling — people who come here for programs should be invited back for a family reunion.

B. Committee Chairmanship

Scott Wilson is leaving the FWPDA board; Committee Co-Chair Herb Cook has been nominated to join the board. Herb became chair of the Marketing Committee and the gavel was passed.

C. Review of FWPDA Strategic Marketing Plan

Discussion with staff regarding what has been accomplished to date and plans for 2016. Dave and staff members walked through the updated Strategic Marketing Plan, attached, and highlighted items were discussed.

D. Review of website: fortworden.org

E. Committee work plan and meeting schedule

Herb asks, looking ahead, what the role of the committee should be. Dave said this should be discussed by the board. Herb said there is a role for the Marketing Committee to continue; the next substantive task might be to assist with an LTAC request and follow-up on the same. George suggests that Herb and Dave propose an LTAC budget number to David Timmons.

George says Marketing should remain a committee focus. A lot of topics came up today but couldn't cover everything in 2 hours; many items remains for future discussion. Forrest agrees that the Marketing Committee should be sustained; the board can clarify the role of the Marketing Committee.

F. Adjourn

Meeting adjourned by Herb at 5:10 pm

FORT WORDEN STRATEGIC MARKETING PLAN



Location and Facilities

FORT WORDEN STATE PARK

Fort Worden is a 434-acre state park in Port Townsend, Washington, on the northeast coast of the Olympic Peninsula, two hours from Seattle via auto and ferry. It was an army fort at the turn of the 20th century, when most of the 70-plus now historic buildings were built. At the center of the Fort is the campus-like setting of a parade ground surrounded by white-washed buildings used for housing and meeting spaces. The property consists of 90 acres, with the remaining 344 acres devoted to upland and beachfront campgrounds, a wooded hill laced with trails and old bunkers, sand beaches on the Puget Sound, and a large lagoon. After the army base was decommissioned it served as a juvenile detention center and then, in 1973, became a state park and conference center with a special focus on arts education. Fort Worden has become Washington's iconic state park and is listed on the National Register of Historic Places.

Today Fort Worden is a comprehensive multiple-use facility. The campus has a variety of accommodations in historic buildings both large and small. Included are military housing (one-, two- and three-bedroom units), larger semi-private Officer's Row housing options (four-, five-, six- and 11-bedroom units), former military barracks that provide dozens of single-room dormitories (with shared bathrooms), and more open barracks (bunk-style) for large groups. The accommodations comprise 456 beds in 393 rentable units. Food services feature a state-of-the-art dining hall with many room variations and a large commercial kitchen that can serve up to 500 guests. Guest services include a laundromat, maintenance and janitorial essentials, and grounds-keeping.

Many buildings are leased to 15 tenants (known as "partners"), most of whom are non-profits that provide classes, workshops and performances in a variety of arts, education and trades. The campus also houses a variety of meeting rooms, classrooms and performance halls, including a chapel used for weddings and meetings, a 300-seat theater and a renovated blimp hangar transformed into a 1,200-seat performance hall. More than 56,000 square feet of meeting room facilities is available on the campus.

PORT TOWNSEND

Fort Worden occupies a dramatically beautiful coastal corner of the Victorian seaport city of Port Townsend. Port Townsend is known worldwide as a place of living history; its Victorian-style commercial district and uptown housing district were constructed primarily in the late 1880s and 1890s in anticipation of becoming the western terminal of cross-country railroads. Although the railroad did not come, the city's buildings in both the downtown and uptown districts have been preserved and the two commercial districts are listed as a National Historic Landmark District. (Fort

Worden also houses significant historic structures and is listed as a separate National Landmark Historic District.)

Today Port Townsend's thriving commercial district is occupied by locally-owned businesses devoted to high quality, eclectic and household items, artwork, soft goods and professional services. The uptown Victorian homes are private residences; some have been converted to bed and breakfast inns.

Thanks in part to its permanent link to Fort Worden, Port Townsend has become known in recent decades as a magnet for artists, for performances and performers, and as a vibrant small seaside city. The city's personality is completed by a devotion to wooden boats and the marine trades, two large marinas, an industrial base built on the manufacture of paper (primarily using recycled materials), a strong tourism economy and the arrival of small technology companies that have located in Port Townsend for quality-of-life reasons. Significant investment in agricultural protection has sparked a renaissance in small family farming, leading to increased demand for farmers markets, organic foods, ciders and culinary skills.

Situation Overview

From 1973 until May 1, 2014, Fort Worden has been managed by the Washington State Parks and Recreation Commission as a state park and cultural center. The non-profit organization Centrum was established in conjunction with Fort Worden, also in 1973 (by the Parks Commission, the Washington State Arts Commission and the Office of the Superintendent of Public Instruction), to independently develop the Fort's art and cultural programming. Other similar sites (such as Fort Baker and Fort Mason in California, Jekyll Island in Georgia, and Fort Vancouver in Washington) operate under somewhat different management models.

FORT WORDEN PUBLIC DEVELOPMENT AUTHORITY (FWPDA)

In 2008 the Parks Commission began implementing the recommendations included in a comprehensive Fort Worden business and operating plan. These recommendations focused on establishing the Fort as a center of lifelong learning for arts, culture and education. The funding required to achieve this goal was reliant upon an annual state subsidy, and as the 2008 recession continued to deepen, this resource was repeatedly cut back. In 2011 the Commission began exploring the idea of a management partnership, and late that year the Fort Worden Public Development Authority (FWPDA) was created by the City of Port Townsend.

In 2012 another business and management plan was completed, this one designed to evaluate "the financial viability of a management partnership between the Washington State Parks and Recreation Commission and the Fort Worden Public Development Authority." Based on the plan's findings and recommendations, in August 2013 the Commission approved a lease agreement turning over management of the 75-building Fort Worden campus area to the FWPDA, effective May 1, 2014. The Parks Commission retained management of the park's campgrounds and nature trails.

PARTNERS AND STAKEHOLDERS

There are 15 nonprofits and businesses located on the Fort Worden campus that support the mission of lifelong learning by providing a broad array of arts, education and heritage programs and services. The programming offered by these partners distinguishes the Fort from other state parks and plays a significant role in drawing visitors (especially in the summer months), many of whom book overnight lodgings. Analysis has shown that partner organizations contribute more than \$850,000 annually to Fort Worden (these are revenues paid by partners to State Parks, not revenues received directly by partners).

As the Fort's oldest and largest partner, Centrum is the anchor tenant offering a year-round calendar of arts and culture-based events. In June and July each year Centrum offers a series of festivals (Port Townsend Music Festival, Festival of American Fiddle Tunes, Jazz Port Townsend, Port Townsend Acoustic Blues Festival) and conferences (Voice Works, Port Townsend Writers' Conference) that attracts thousands of people. Other partners such as Peninsula College and Goddard College, the School of Woodworking, Madrona MindBody Institute and the Marine Science Center have workshops and classes that bring in students and smaller groups.

In addition to onsite partners, a number of government agencies are also important stakeholders involved in Fort Worden's ultimate success. First and foremost is the critical and innovative partnership between Washington State Parks and the FWPDA. The Washington state legislature and the governor's office are closely monitoring this partnership as a potential model for other state agencies. The City of Port Townsend considers the Fort an integral part of the community, and provides public relations, media and marketing support through the city's website (EnjoyPT.com), access to the city's marketing director, and financial support for this plan. Jefferson County values the influx of visitors – and their positive impact on local businesses – that occurs due to events at Fort Worden. The Port of Port Townsend and Northwest Maritime Center are focused on strengthening the city's maritime industries through increased vocational offerings, and consider accommodations at the Fort critical to supporting their educational and training needs.

MANAGEMENT GOALS

As the entity responsible for managing Fort Worden's campus area, the FWPDA must meet specific terms and conditions of its 50-year master lease agreement with Washington State Parks. These goals define annual revenue requirements, including ongoing sale of the Discover Pass. The FWPDA is also expected to significantly expand the Fort's reputation as a place of lifelong learning in arts, culture and education. Increasing the number of partners housed on the grounds of the Fort and implementing compelling marketing strategies will assist in meeting this expectation.

Plan Purpose

The purpose of any strategic marketing plan is to provide a roadmap for achieving clearly defined goals, strengthening an organization's mission, addressing current or upcoming issues, or even identifying those goals and issues. The plan for Fort Worden is both goals-based and issues-based. This integrated approach aims to help Fort Worden achieve goals of increased revenue from overnight stays, a stronger brand identity, and expanded arts, culture and educational programming. It also examines issues that may impede the achievement of these goals and offers solutions to overcome such challenges.

The strategic plan for Fort Worden addresses two distinct needs:

1. **Short-term need.** Increase use of the Fort by (a) groups holding meetings and conferences during shoulder seasons and (b) independent travelers who come to the Fort year-round.
2. **Long-term need.** Fulfill the vision of Fort Worden as a center of lifelong learning by (a) expanding the programming of existing partners into shoulder seasons, and (b) securing new partner organizations that bring additional programs to these same low-volume months.

The best marketing plans strike a balance between strategies and tactics that are both aspirational and realistic. Stretching to allocate the resources and energy required to implement a specific tactic can strengthen an organization. However, struggling and failing to deliver on an unrealistic or impractical strategy is inefficient and disheartening; pursuing such a course can sap vital momentum. Fort Worden's strategic marketing plan has been designed to maximize the possible and minimize the unattainable.

Fort Worden's strategic marketing plan will also build greater collaboration among partner organizations and stakeholders, creating a stronger sense of team. The Fort's partners and stakeholders span a broad range of creative disciplines. This type of diversity often brings a rich variety of ideas that generate new, inventive thinking. It may also present challenges related to prioritization and resource allocation. For this reason, the strategic marketing plan's ability to foster teamwork is especially important.

As a cohesive team, Fort Worden will achieve far more than the sum total of efforts by individual partners and/or stakeholders. A strong brand and key messages that support it are examples of how the marketing plan will help unify the diverse group involved in Fort Worden's success. The group has recognized the need for such tools to promote higher awareness that leads to increased revenue and a stronger connection to the greater Port Townsend community. The plan addresses these needs.

Market Overview

CITY OF PORT TOWNSEND

Established in 1851, the City of Port Townsend sits on the northeast tip of the Olympic Peninsula – a 19th century seaport surrounded on three sides by the waters of Discovery Bay, the Strait of Juan de Fuca and Port Townsend Bay. The only incorporated city in Jefferson County, Port Townsend has a population of around 10,000. Economic drivers include the local paper mill, Port Townsend Paper, and small to mid-sized businesses based in maritime, timber and manufacturing. Substantial public sector employers (Jefferson Healthcare, Jefferson County, the City of Port Townsend, four school districts, etc.) provide a hedge against recessionary times. The city’s thriving arts scene and collection of architecturally-significant Victorian buildings help support a healthy tourism trade. Port Townsend is a tight-knit community with both year-round and seasonal residents who take pride in the city’s history and cultural heritage.

Because of its location, Port Townsend is considered a destination. There is little chance for the city to capitalize on drive-through traffic (limited opportunities with ferry traffic passing through Port Townsend en route to Olympic National Park, Port Angeles, Victoria, etc.). While the location is not a huge obstacle for leisure travelers, meeting and group planners see the city as difficult to access. They regard the logistics of moving large numbers of people from SeaTac Airport (or other points in the Seattle metro area) to Port Townsend as a significant barrier. This, along with limited lodging options for groups, is a challenge faced by both the city and Fort Worden. A detailed report examining Port Townsend’s ability to capture and retain group/meeting business was produced in May 2013. Fort Worden must deal with the same perception of limited access identified in this report as one of Port Townsend’s primary challenges.

PORT TOWNSEND’S PERCEPTION OF FORT WORDEN

The HVS 2013 group/meeting report recognized the city’s opportunity to increase conference business through improved accommodations. Port Townsend does not currently have any hotels with more than 63 rooms. City leaders see Fort Worden as the solution, since the Fort has plans to upgrade and greatly expand guestroom product in the near future.

People who live in Port Townsend have mixed feelings about the Fort. They consider it their own park, and are proud of its rich history. The annual Centrum events have helped put Port Townsend on the map (the city has done an equally fine job with its yearly Wooden Boat Festival, et al), and there is satisfaction in the lingering fame from the filming of *An Officer and a Gentleman*. Residents sometimes grumble about traffic congestion when hundreds of people descend on the city for summer festivals. Businesses would like more consistent advance warning about large groups and meetings so they can staff and market themselves accordingly. Although those who live in Port Townsend and those who work at Fort Worden seem genuinely respectful of one another, there is an undertone of the “town” and “gown” distinction often found in university communities where non-academics (town) consider themselves separate from the academic population (gown).

Many of Port Townsend's community leaders consider Fort Worden an integral part of the city. The city has identified it as one of three anchor areas for growth and development in its economic development strategy. The city is consistently described as historic and well-known for Victorian buildings, arts and cultural events and its maritime roots. The City updated its EnjoyPT.com website in April 2014 and created a new section on Fort Worden, and provided a Fort Worden link to the Enjoy Port Townsend Facebook and Pinterest pages. For Port Townsend and Fort Worden to maximize the strengths each brings to the table, there is a huge potential for enhanced collaborative marketing. Creating a new brand for Fort Worden is an important first step.

Industry Analysis

Fort Worden has been operated as a state park since 1973. Beginning on May 1, 2014, the FWPDA will be responsible for the management and operation of the 90-acre campus portion of the park. State Parks will continue to manage the other 240 acres of trails, beaches, campgrounds and natural areas. Under management by the FWPDA the property will focus on improving hospitality customer service and developing and coordinating new programs, events and activities. This is a significant change that requires an equally significant shift in the way all stakeholders think about and position the Fort. The expectations target audiences have when they visit a park are vastly different from what they anticipate when attending a conference or booking weekend lodging. Understanding these differences will be an important step in establishing Fort Worden as a viable competitor in the Northwest and carving out a unique tourism niche.

Enhancing Fort Worden's position as a multi-faceted destination requires the development of updated lodgings and amenities, and a structured customer service system. These issues are being addressed by the FWPDA's newly established hospitality division. The strategies presented in this marketing plan focus primarily on Fort Worden's opportunities within the events industry. Events are typically broken into three sectors, based on content: (1) meetings/conferences/expos, (2) cultural/arts/music, (3) weddings, and (4) sports and recreation. Because most revenue-producing sports events don't align well with the Fort's grounds, the sector is only briefly touched on in this analysis.

MEETINGS AND CONFERENCES

The 2012 PROS business and management plan shows conference attendance at the Fort has declined steadily for the last 10 years. In 2011, conference attendance was 31 percent lower than in 2002. Part of this can be explained by significant cutbacks in state hospitality staffing and virtually no marketing of the Fort's facilities and lodging. Another factor may be the recession and weak travel industry. The lack of technology and Internet connectivity at the Fort may also be contributing, as virtually all business or business-related meeting attendees expect Internet access. Even non-business event planners may think twice about the lack of online access.

Fort Worden's meeting/group business has been largely dependent upon the SMERFE (sport, military, education, religious, fraternal, ethnic) category. SMERFEs tend to be less reactive to changes in the economy, hosting meetings and conferences in good times and bad. Because their members have other commitments, meetings are generally planned for weekends and during shoulder seasons. SMERFE groups can be small (fewer than 100 attendees) to quite large (thousands). A family-friendly destination is often appealing, as many members combine meetings with family vacations. SMERFEs are, however, very price sensitive, as their members generally pay their own expenses instead of having these costs covered by an employer. Competition for SMERFE business has become quite fierce. There are numerous SMERFE organizations within the Seattle metro area (Fort Worden's primary feeder market), although many may be unaware of the Fort's ability to host meetings.

Professional associations, government agencies and corporations/businesses also significantly contribute to the events industry. Professional associations in particular have chosen Port Townsend as a location for meetings. The improved economy will open opportunities for increased meetings and conferences by professional associations as more companies renew or expand their memberships. Most government agencies continue to deal with reduced budgets and funding for off-site meetings will likely be limited in the immediate future. Although corporate/business meeting demand will ramp up due to economic growth, the needs of this group don't align well with Fort Worden's current lodging product offerings, i.e., large vacation homes which currently cater to SMERFE groups where people know one another.

ARTS AND EDUCATIONAL GATHERINGS

Festivals, concerts and cultural gatherings are a category of events that primarily market to individuals, including the leisure traveler. The Centrum-produced arts events held at Fort Worden have delivered large numbers of visitors for many years. The Fort has a great opportunity to capitalize on this momentum. Industry-wide, the number of festivals has continued to grow throughout the United States, with attendance showing little impact from the recession. Every state in the union now offers at least one annual festival. The City of Seattle lists almost 100 annual arts-related festivals occurring in the city alone. The Seattle metro area is home to dozens of nonprofits devoted to a broad range of arts and cultural interests: theaters, museums, symphonies, operas, film, dance, literature, poetry, woodworking, glass-blowing and many other disciplines. As a feeder market for Fort Worden, the abiding passion for the arts demonstrated by Seattle residents (and tourists) is a clear indication of untapped revenue.

The 2008 long-range development plan prepared for Fort Worden by PROS Consulting and BCRA found that "there is substantial opportunity for growth of the kinds of programs and associated revenues envisioned by the Lifelong Learning Center, with the bulk of the participation to be drawn from the Pacific Northwest." Nationwide there are many signs of growing interest in and demand for arts and culture education programming. Increased use of creative placemaking is one key indicator.

Like many communities across the country (including Ashland, Oregon; Branson, Missouri; Arnaudville, Louisiana; and Asheville, North Carolina), Fort Worden is using a creative placemaking strategy to build a lifelong learning center for art, culture and education. The National Endowment for the Arts released the report "Creative Placemaking" by Ann Markusen and Anne Gadwa, revealing that developing these rich and diverse centers has been very successful in attracting regional, national and even international visitors: "a place without a distinctive cultural aura is much less apt to land on visitors' itineraries than those with such amenities."

Arts and culture are also benefiting from a renewed emphasis on arts education and empirical evidence of the arts' economic impact. An article in *The Washington Post* reported that many arts organizations are allocating larger percentages of their budget to arts education, based on a growing belief in the power of the arts to motivate and engage. And in December 2013 the U.S. Bureau of Economic Analysis and the National Endowment for the Arts released estimates showing the arts and culture sector's contributions to the 2011 gross domestic product was 3.2 percent – greater than the

estimated value of the travel and tourism industry (2.8 percent). Of note: arts education contributed the second largest share at \$104 billion.

WEDDINGS

Weddings are another category in the events industry. Destination weddings are on the rise (a recent study by TheKnot.com and TheWeddingChannel.com revealed that one in four couples choose a destination wedding, up from one in five), special and intimate locations are desirable, and weddings of this type generally last several days. Weddings represent a viable revenue source, especially with a combined effort by Fort Worden and Port Townsend. As with SMERFE meetings, companies, organizations and communities of many kinds compete for wedding business.

SPORTS AND RECREATION

Sports is the third category comprising the events industry. Although the youth sports market has experienced rapid growth in recent years (research by ESPN and Don Sabo, a youth sports researcher, reveals that 21 to 28 million kids between the ages of six and 17 play on competitive sports teams), the grounds at Fort Worden are not well-suited for soccer, football and other popular games. There may be opportunities with less traditional sports such as ultimate Frisbee, la crosse, petanque, etc., but the revenue potential with these activities is unknown.

Mission and Vision

MISSION STATEMENT

Fort Worden's mission statement defines its purpose and reason for existence. It's important to note that the mission of the Fort is not the same as that of the FWPDA.

*(Two versions of both mission and vision statement are presented below for review/discussion with the marketing committee. **The committee still needs to work on both statements.**)*

Option 1

Fort Worden's mission is to enrich the lives of all who visit, whether for hours or days, through singular experiences with assets that include, but are not limited to, arts and culture, education, history and the natural environment.

or

Option 2

Fort Worden is unique in the Northwest as a gathering place for independent travelers and groups who benefit from a mix of its historical setting, nature and cultural enrichment.

VISION STATEMENT

The vision statement for Fort Worden is an aspirational description of how the Fort will be perceived in the future.

(Marketing committee still needs to work on this.)

Option 1

Fort Worden is recognized as Washington state's greatest source of exciting arts, culture and education events and programming. The Fort's rich history and stunning natural beauty propel its reputation as an inspirational gathering place beyond state boundaries to attract visitors from across the nation.

or

Option 2

Fort Worden is an historic gathering place in a singularly sublime natural setting of beaches, forests and century-old military buildings. All who come will be enriched and renewed by the place, the arts and cultural offerings, the welcoming and professional hospitality services.

Audiences

Fort Worden's target audiences fall into two broad categories: (1) individual leisure travelers and (2) groups seeking a location to hold meetings, conferences or events.

INDIVIDUAL LEISURE TRAVELERS

The 2008 long range development plan prepared for Fort Worden by PROS Consulting and BCRA described the individual leisure travelers audience as follows:

- Individuals and families
- Adults age 35-plus
- Household incomes of \$56,000-plus (adjusting for inflation puts this at approximately \$63,000 in 2014)
- Interested in arts and cultural events
- Interested in classes/courses/ongoing education
- Interested in historic and cultural preservation
- Enjoy outdoor activities
- Support environmental advocacy

Arts and Culture

Within the leisure traveler audience is the subset of people who have an interest in arts and culture. A 2012 survey by the National Endowment for the Arts reveals these findings about participation in the arts:

- Parks and open-air facilities are the most common venues for music, dance and theater performances
- More than one-third of all adults (39 percent) attend at least one arts event or visit a museum or gallery each year
- Literary reading – of novels, poetry and plays – is enjoyed by 47 percent of adults

Education

Another subset of the leisure traveler audience are those interested in education through lifelong learning. The model developed by Bernard Osher (the Osher Foundation and Osher Lifelong Learning Institute) provides this very simple description of target audience members:

- Adults age 50 and older
- Interested in learning for the joy of learning

GROUPS

SMERFE

This audience is comprised of sports, military, education, religious, fraternal and ethnic organizations. SMERFE groups are typically characterized by the following:

- Non-profit status
- Highly rate (cost) sensitive
- Tend to book in low or shoulder seasons, and/or on weekends
- Are comfortable in second and third tier accommodations
- Often include spouses or children, as meeting attendance is frequently combined with family vacations and/or family reunions
- Large programs or events are typically handled by a meeting planner
- Participants are motivated by personal reasons to attend, versus being required to attend for business purposes

Professional Associations, Government Agencies, Corporations

Examples of professional associations include the American Marketing Association, Washington State Bar Association, Washington Society of Certified Public Accountants, etc. Government agencies and corporations cover a broad range of audience segments. These groups tend to share the following:

- Somewhat less rate-sensitive (especially corporations)
- Want easy access to the meeting location
- More likely to schedule meetings/events during weekdays in low or shoulder seasons
- Prefer and/or expect top-tier accommodations
- Require reliable technology, high-speed Internet and audio/visual equipment
- Place a high value on quality food and beverage service

Weddings

As a target audience, brides can be demanding and have sometimes unrealistic expectations about this very important life-changing event. Descriptors include:

- Often want all-in-one locations that include a site for the ceremony and for the reception
- Place a high value on personal attention
- Look for scenic backdrops and sites that support appealing wedding photography
- Tend to be cost-conscious

Competitive Analysis

LEISURE TRAVELER COMPETITION

Washington state is rife with places the leisure traveler can head to for a day, a weekend or longer. Within Fort Worden's feeder market – the Seattle metro area – are many parks, towns and communities that essentially compete for overnight business of the leisure traveler.

- **Crystal Mountain:** Skiing and snow sports during winter and spring months, hiking and horseback riding when temperatures climb. A number of hotels, lodges and dining options.
- **San Juan Islands:** Beaches and hiking trails, biking, kayaking, whale-watching, birding, shops featuring the work of many local artisans. Community events include a variety of theater and musical performances, as well as outdoor festivals. Many hotels, bed and breakfasts, and inns, along with restaurants.
- **Whidbey Island/Camano Island:** Year-round arts and heritage, beach and waterfront, outdoor, parks, and food, wine and boutique shopping opportunities. Seasonal events include arts and outdoor festivals. Many cottages and bed and breakfasts, some chain hotels (primarily in Oak Harbor), independent hotels, plenty of local restaurants.
- **Port Angeles:** Hiking and other outdoor recreation tied to Hurricane Ridge/Olympic National Park, coastal activities, seasonal events and festivals. Large selection of lodging options (chain and independent) and restaurants.

GROUPS FOR MEETINGS AND CONFERENCES

The 2013 HVS study completed for the City of Port Townsend included an overview of three peer markets as a competitive assessment. It should be noted that the three markets were selected, at least in part, at the direction of City of Port Townsend staff that identified these jurisdictions as competitors. The study was conducted to evaluate regional meeting and group demand.

Leavenworth

Located in Chelan County, Leavenworth is 2.5 hours east of Seattle. The town is readily accessible by car except during snowy winter months when either of the two mountain passes leading to the city can become hazardous. Leavenworth has long marketed itself as a Bavarian town, and buildings, shops, products and events reflect this theme. Sleeping Lady Resort offers reasonable meeting facilities, and the town has a number of chain and independent hotels. Leavenworth is probably the most competitive with Fort Worden, especially for meetings and conferences, of the three markets reviewed.

Gig Harbor

Gig Harbor sits on the shores of Puget Sound, a suburban neighbor of Tacoma located across the Tacoma Narrows Bridge. The city's historic waterfront – for many years home to commercial fishermen

and boat builders – is a popular tourist destination. Tourism is an economic driver in Gig Harbor. Limited lodging constrains the city’s ability to grow meeting/conference business, although two of the three hotels in town do offer modest meeting facilities that are frequently booked. Gig Harbor is also an attractive wedding destination and the local chamber of commerce actively promotes this use.

La Conner

The third peer market included in the 2013 Port Townsend study is La Conner. Best known for the annual Skagit Valley tulip Festival that happens every spring, La Conner is a waterfront town of just 900 residents, located on the Salish Sea and almost 70 miles north of Seattle. Getting to La Conner is easy by car, not as easy by bus due to limited schedule options. The city promotes itself as “*the* Washington state weekend getaway destination” with a thriving arts community and endless boating opportunities. La Conner has just a few small inns that offer little to no meeting space.

Ocean Shores

Not included in the 2013 HVS study was the City of Ocean Shores. Ocean Shores is farther from Seattle than the other three markets (133 miles, about a two-and-a-half-hour drive), located in Grays Harbor County on the Point Brown Peninsula. Since 2006 the city has offered a 29,900 square foot conference center with state-of-the-art communications and audio visual equipment, capable of handling groups of 30 to 1,000. Lodging options are plentiful: more than 40 hotels and motels, including chains such as Best Western, Comfort Inn, Days Inn, and independent properties as well, together providing an estimated 1,200 rooms. Attractions in Ocean Shores are the miles of beaches, golf, casino gambling, canoeing and kayaking, and other beach/water activities. In spite of its slightly greater distance from the Seattle, the conference facility and lodging capacity make Ocean Shores a legitimate competitor in the destination meetings/conferences sector.

Port Angeles

A group looking to hold a meeting or a bride planning a wedding might well consider Port Angeles, located 47 miles west of Fort Worden on the northern edge of the Olympic Peninsula along the shore of the Strait of Juan de Fuca. Visitors come to Port Angeles to enjoy the natural beauty of Olympic National Park and waterfront beaches with regular sightings of passing whales. The Red Lion Hotel provides accommodations as well as meeting space for up to 220, and is a popular venue for destination weddings. Getting to Port Angeles is done primarily by car, an 82 mile drive. Lodging is available at Lake Quinault Lodge (rooms; open year-round), Sol Duc Hot Springs Resort (cabins; open April through mid-October), Lake Crescent Lodge (rooms, cabins, cottages; open May through December), and Log Cabin Resort (rooms, chalets, cabins; open May through September).

Victoria, B.C.

Victoria, B.C. markets itself as a place of outdoor adventure, world-class culinary experiences and a vibrant arts and culture scene. A coastal city, the metropolitan area of Greater Victoria has a population of more than 344,500. Heritage architecture, beautiful gardens and traditions like afternoon tea are popular visitor attractions. From Seattle, the Victoria Clipper ferry takes passengers daily to Victoria (passengers with cars can take a ferry departing from Port Angeles). The organization Tourism Victoria

actively promotes the city as a meeting location. There are dozens of hotels and event centers that accommodate meetings and conferences of every size: from the Victoria Conference Center with space to handle up to 1,500 guests to international chains and independent properties catering to groups of 15 to 500. Victoria is also a popular choice for destination weddings, capitalizing on the romance imparted by historic buildings and horse-drawn carriages.

FORT WORDEN'S COMPETITIVE ADVANTAGE

Much of what Fort Worden offers – whether to target audiences in the meetings/groups sector or to independent leisure travelers – is available at other locations in the Puget Sound region. For example, many communities promote local artists and the chance to meet with and learn from these people. There are plenty of towns and buildings with fascinating histories. The region has a plethora of beautiful, naturally maintained parks and varied outdoor recreation opportunities. None of these things, taken individually, differentiates Fort Worden in the marketplace.

Rather, it is the confluence of these and other elements in one magnificent natural and historic setting that constitutes Fort Worden's key competitive advantage as an historic gathering place.

With high bluffs, stunning views and coastal beaches on three sides, this 434-acre sanctuary is laced with forest trails, wildlife, campgrounds and historic buildings and structures. Fort Worden's rich history and singular arts, culture and educational offerings reside in these serenely beautiful surroundings. Visitors enjoy well-appointed rooms with cutting edge technology, an attentive staff, and local sustainable foods. Just minutes away the fine dining opportunities, unique shopping and arts galleries found in Port Townsend add to an experience found only at Fort Worden.

SWOT Analysis

<p style="text-align: center;">STRENGTHS</p> <ul style="list-style-type: none"> • Location – water on three sides • Historic buildings • Program partners • Trails, beaches, mountains • Relationship with Port Townsend • Vacation rentals • Meeting facilities • The Commons • Bon Appetit (local, organic foods) • Wildlife • Art and culture • Programs • National Historic Landmark • Military history • Weather • Pet-friendly • No Discover Pass needed in the campus area • Customer service focus, 24/7 coverage • Local responsiveness 	<p style="text-align: center;">WEAKNESSES</p> <ul style="list-style-type: none"> • Customer service • Lack of awareness • Lack of marketing • Deferred maintenance • Discover Pass • Not enough staff • Inefficient reservation system • Poor Internet connectivity • Housing quality, quantity • Transportation to/from Port Townsend • No brand identity • Limited on-site food • Lack of accommodations for single travelers • State park signage • Newness of the PDA management
<p style="text-align: center;">OPPORTUNITIES</p> <ul style="list-style-type: none"> • New restaurant and pub • New partners/programs • Proximity to Olympic National Park • Brunch, holiday meal packages • Other packages (spa, yoga etc) • Use of seasonal rates • New opportunities to market • Untapped lodging capacity • Economic development • New brand and logo • Integrated partner marketing • Dive park • Tour providers – bikes, kayaks • Partners’ passion • Theater • Chapel • McCurdy Pavilion 	<p style="text-align: center;">THREATS</p> <ul style="list-style-type: none"> • Politics and funding • Utility costs • Overall economy • Newness of the FWPDA • Revenue loss to capital expenses • Premature decisions of PDA • Failure to implement • Incorrect brand • Increased competition • Myth of remoteness • Traffic congestion • Staff tension • Weather (wind)

Key Messages

1. FORT WORDEN IS A HUB FOR ARTS, CULTURE AND EDUCATION IN THE NORTHWEST

- The 15 resident organizations (i.e., partners) at Fort Worden offer a variety of programs, events, workshops and classes throughout the year.
- Two accredited colleges offer graduate and two-year degrees and certificate programs.
- Other year-round programming includes music festivals, dance workshops, woodworking classes and kids camps.
- People of all ages attend events at Fort Worden: from the fifth and sixth graders who come each year for Water World at the Marine Science Center to fiddlers in their 80s and 90s who come for the multi-generational, world-renowned Fiddle Tunes festival.
- The Fort has two historic performance venues: the 1,200-seat McCurdy Pavilion and 275-seat Wheeler Theater.

2. FORT WORDEN OFFERS YEAR-ROUND ACCOMMODATIONS FOR CONFERENCE ATTENDEES AND LEISURE TRAVELERS

- Fort Worden is equipped with 456 bedrooms, ranging from former officer housing that comfortably sleeps up to 12, to dorm-style accommodations that can house a variety of groups from 10 to 500 people. For individual travelers, the Castle and Bliss House offer one-of-a-kind accommodations with tremendous, bluff-top views of the Cascades, Whidbey Island and Puget Sound
- Fort Worden is a perfect year-round destination for family reunions, destination weddings, vacation rentals and other group getaways. The 35 buildings with available housing range up to six bedrooms and each has a kitchen, dining room and living room.
- Several upgraded and new one- and two-bedroom units have been added for the leisure traveler.

3. FORT WORDEN IS A MAJOR NORTHWEST CONFERENCE CENTER

- Fort Worden offers a spectacular and historic setting featuring year-round full-service meeting and event facilities.
- Over 56,000 square-feet of meeting rooms can be tailored to accommodate any group.
- On-site local, organic and sustainable food service is offered by Bon Appétit Management Company.
- Fort Worden offers a multitude of outdoor spaces, breakout rooms and performance venues.

4. FORT WORDEN OFFERS VISITORS A CONFLUENCE OF HISTORY, NATURE AND IDEAS

- The site of Fort Worden has long been used as a gathering place—first among Native Americans, then by the U.S. Army and now by resident organizations and visitors.
- Today, leaders in the arts, music, literature, dance, woodworking and many other disciplines regularly come to Fort Worden.

- Fort Worden is home to four museums, including the Coast Artillery Museum, which was established to preserve and interpret coast artillery history with special emphasis on the harbor defenses of Puget Sound.
- The Port Townsend Marine Science Center has a natural history museum with a rare orca whale skeleton, exhibits, aquariums and touch tanks for all.

5. FORT WORDEN IS WITHIN THE CITY LIMITS OF PORT TOWNSEND, A POPULAR TOURIST DESTINATION FOR REGIONAL, NATIONAL AND INTERNATIONAL TRAVELERS

- Port Townsend hosts the world-renowned wooden boat festival, and the Northwest Maritime Center is a hub for maritime education, sailing, and small boat building and traditional maritime crafts. Port Townsend's historic Victorian downtown, uptown and Fort Worden are all listed as a National Historic Landmark District.
- National Geographic Traveler named Port Townsend as the *world's* 24th most authentic destination.
- Named one of the "Coolest Small Towns in America" by Budget Travel, Port Townsend hosts numerous annual, monthly and weekly events, including the Port Townsend Wooden Boat Festival, Jazz Port Townsend, the Port Townsend Acoustic Blues Festival, the Port Townsend Film Festival, Arts Walks on the first Saturday of each month and weekly boat races.

6. FORT WORDEN IS A WASHINGTON STATE PARK AND SO MUCH MORE

- Fort Worden is a 434-acre Washington state park with 12 miles of forested hiking trails (five miles are ADA accessible) and more than two miles of walkable beaches.
- The Fort provides many recreational facilities: tennis and volleyball courts, baseball and soccer fields, biking trails, horseshoes, croquet and much more.
- The Fort is a playground of hidden treasures for youth of all ages: exploring the historic batteries, monuments, and art installations is a favorite pastime.
- Fort Worden offers 80 full-service camp sites (water, electricity, restrooms and showers) that can be reserved up to one year in advance. Most of the 50 beach camp sites have magnificent views of the Cascades Mountain Range and Puget Sound.
- Fort Worden's 434 acres and adjoining waters are home to a broad variety of wildlife, from eagles and herons to deer and raccoons to passing orcas.
- Fort Worden offers a boat launch, dock space and moorage as well as kayak and rowboat rentals.

Goal and Objectives

GOAL #1

Establish Fort Worden as Washington's lifelong learning center for arts, culture, education and history.

OBJECTIVES

- A. Build "Fort Worden, a historic gathering place" into a powerful brand that effectively communicates with target audiences.
- B. Increase participation in shoulder season events and programs.
- C. Secure additional partners that share the Fort's values and support its mission and vision.
- D. Experience website traffic of 100 hits per day by June 2015.
- E. Increase awareness of the Fort's unique arts, culture and education programming among local residents and Port Townsend visitors.

GOAL #2

Support and develop revenue-generating operations and programming that allow Fort Worden to be financially self-sustaining.

OBJECTIVES

- A. Secure new partners to bring additional programming (September through May) that requires overnight stays.
 - a) Market to target audience segments (such as the individual leisure traveler subsets interested in education opportunities, and arts and culture workshops/classes) that will put "more heads in beds" based on the type and quality of accommodations.
- B. Increase 2014-2015 meeting/conference revenues from September through May by at least three percent.
 - a) Focus on target audience segments that will put "more butts in seats" based on the type and quality of meeting rooms and conference facilities.
 - b) Review the list of groups that have visited the Fort in the last five years. Have the direct sales team contact all about returning to the Fort. Offer reduced rates or other incentives if necessary.
- C. Work with existing partners and similarly aligned nonprofits to add programming (September through May) that requires overnight stays.

- D. Plan and implement revenue-generating events that do not compete with existing partners programming. Work with concert promoters to host shows at Fort Worden.
- E. Achieve annual Discover Pass sales of at least \$250,000. Enlist partners support in selling passes to their members and customers. Likewise, persuade the chamber of commerce and other public entities to sell the Discover Pass (e.g., at the county auditor's office). Conduct annual marketing/awareness campaign to buy the pass locally.

GOAL #3

Strengthen the bond between Fort Worden, its resident partners, and Port Townsend community stakeholders.

OBJECTIVES

- A. Conduct formal presentations of the Fort Worden brand and the strategic marketing plan to individual groups of partners and stakeholders during summer of 2014.
- B. Launch a proactive monthly system of communication with Fort Worden partners and key stakeholders (e.g., City of Port Townsend, Main Street, Chamber of Commerce, etc.) by July 2014.
- C. Engage partners and stakeholders in tailored cross promotions throughout the year.
- D. Convene an annual meeting of partners and stakeholders each October to discuss issues and plans for the upcoming year.
- E. Host fam tours for chamber of commerce members, LTAC members and other tourist-related businesses to learn more about the Fort's facilities and programs.
- F. Coordinate conference sales and marketing efforts with the chamber of commerce, City of Port Townsend and Northwest Maritime Center (NWMC) to better utilize city and NWMC meeting rooms and spaces.

Strategies and Tactics

Strategy 1: Brand Development

Develop an inspiring brand that embodies what Fort Worden is, does and stands for, and helps the Fort establish a lasting identity as a lifelong learning center for arts, culture and education.

Tactics

(Note: Tactics 1 through 3 were completed simultaneously with development of this strategic marketing plan. Tactic 4 has been implemented with ads during the month of May and the rediscover Fort Worden celebration held on May 31.)

1. Create a name and tagline for Fort Worden. (Lead: Frause & Marketing Committee)
2. Design a logo that visually reflects Fort Worden's desired identity. Build a color palette. (Lead: Frause)
3. Prepare a brand standards guide with instructions for internal and external use of Fort Worden's brand (logo, fonts, colors, etc.). (Lead: Frause)
4. Host a celebratory event to welcome the community back to Fort Worden and unveil Fort Worden's new brand. Hold the event at The Commons, and invite all partners, business and public agency stakeholders and community leaders. Provide handouts with brand messaging, unified voice and brand use guidelines. (Lead: PDA contractor, board members & executive director)

The new brand, logo and key messages were presented in various capacities as opposed to one celebratory event. Presentations were made to campus partners, the JC Chamber of Commerce, LTAC, Port Townsend City Council and Washington State Parks commission on the brand and key messages in the context of a larger update/PowerPoint presentation.

PARTICIPANTS

FWPDA staff (Sales team—Director of Sales, Executive Director, Conference Services Coordinator)
Consultant (local)
Frause
PT Marketing Director

TIMELINE

Complete

BUDGET

Complete

FUNDING

\$2,500 First Federal donation

PDA marketing budget

Strategy 2: Partner Development and Programs

Strengthen and expand Fort Worden's arts, culture, education and heritage programming by proactively engaging with existing partner organizations and cultivating new partners.

Tactics

1. Work with onsite partners to increase programming options supporting overnight stays. This might include offering a workshop or class that spans two days instead of just one, or several partners collaborating on consecutive programs. Host regular brainstorming sessions to generate discussion of new ideas and opportunities. (Lead: *Director of Sales./Executive Director*)

Tactic 1 has yet to be implemented and should be the subject of a future partner's meeting.

2. Develop an annual Fort Worden open house event in May, with each partner providing some way for visitors to engage with their services. For example, Corvidae Press might invite guests to participate in a simple printmaking process, Goddard College could offer student readings, and the Coast Artillery Museum might place archived photos or other interesting items on display exclusively during the open house event. Invite businesses from Port Townsend to set up stations offering food and beverages. Charge a reasonable flat fee for access to all open house events. (Lead: *Executive Director/ Consultant, Board support*)

In collaboration with Fort Worden's partner and community organizations, the Fort Worden Open House has become a free annual event that promotes the Lifelong Learning Center, provides participants the opportunity to engage visitors about their programs and events, allows visitors to rediscover the natural beauty and rich history of the Fort, highlights Fort Worden's accommodations, conference and meeting spaces, and strengthens relationships between the FWPDA, campus partners and the local community. Attendance each year (2014 and 2015) has averaged 1,000 people. Food and beverages were offered at cost by Fort Worden food services.

3. Support efforts to secure additional on-site partners by developing a list of organizations that provide programs or services in the arts, culture, education, heritage (and possibly science) fields. Begin by asking existing Fort Worden partners for their recommendations, then extend the ask to key leaders within the industry. Focus on organizations that do not duplicate the offerings of existing partners. (Lead: *Executive Director/Partners, Sales Team*)

On June 12, 2015, the FWPDA entered into a six month lease agreement with ArtX (*The Port Townsend School of Art) to operate arts education programs out of Building 306. Classes are beginning this fall with the long-term visions of year-round offerings that employ a variety of local

and regional artists. The Draft Program Development Plan (“Draft Plan”) identifies other potential partners and will be part of the PDA’s business recruitment later this fall.

4. Prepare an introductory letter from the FWPDA executive director and create a FAQ sheet outlining the Fort Worden partner opportunity. Publish an RFP to solicit applications for a limited number of new partner sites. (Lead: *Executive Director/Consultant*)

The Draft Plan also identifies an RFP process for selecting new partners. Draft recruitment criteria have been identified.

5. Convert park office into a shared service center (e.g., copying, bookkeeping services, IT support, meeting space, etc.). (Lead: *Executive Director/Capital Projects Committee*)

The park office currently works this way for the PDA, Friends, State Parks, PTMSC and PTWWS. The Plan looks at bringing on-line another shared service center in the future.

TIMELINE

January-December 2015

BUDGET

\$5,800-\$6,800

FUNDING

TBD

Strategy 3: FWPDA Original Programming

Advance Fort Worden's identity as a lifelong learning center for arts, culture and education by implementing FWPDA-developed programming that does not compete with the offerings of partner organizations.

Tactics

Create an organic programming plan to ensure new events are effectively developed. The plan should (1) identify gaps in the types of events currently offered at Fort Worden, (2) consider potential conflicts with the City of Port Townsend, and (3) lay out strategies for program development. The FWPDA should consider acquiring an in-house event coordinator, and contracting with an event planning specialist to manage implementation. **This tactic was not included in 2015 operational budget. There were some concerns raised by Board members whether the FWPDA should take on original programming at this time. Instead, the focus has been for the FWPDA to support and enable others to strengthen existing and offer new programs at Fort Worden.**

Examples of events the FWPDA might produce are as follows.

- a. A two-day photography workshop led by renowned wildlife/nature photography Art Wolfe or photographers from National Geographic Traveler. Participation package options to include accommodations, meals and instruction. Participants will be able to select up to 20 of their own photos taken during the workshop for compilation in a personal Blurb book, mailed to each person several weeks after the event. (Lead: Director of Sales./Consultant)
- b. A Tom Douglas culinary arts course where people learn cooking techniques and food preparation ideas directly from Tom (and perhaps another well-known guest chef or two). Scheduled over two days. Registration package options to include accommodations, meals and instruction. (Lead: Food Services Concession/Director of Sales, Consultant)
- c. An ongoing overnight field trip program for children approved by school districts in western Washington. Learning opportunities might include hands-on arts activities through partner organizations, trips to the Marine Science Center, a walking history tour of the batteries and Coastal Artillery Museum, a park ranger-guided nature walk on the beach and trails. Registration package options to include accommodations in the dormitories and meals. . (Lead: Conference Services Coordinator/Partners, Executive Director)
- d. Implement lifelong learning programs similar to the Osher Lifelong Learning Institute (OLLI) model. Work with local colleges and universities (such as OLLI-UW) to expand and offer lifelong learning courses and programs for adults age 50 and older at Fort Worden. Include opportunities through the Maritime Center, and low residency courses similar to Goddard

College's model. Explore possibilities with Road Scholar (programs offered by Elderhostel).
(Lead: *Executive Director/Director of Sales, Board Support*)

- e. Develop strategic relationships with other program providers to host conferences, workshops or seminars with content tailored to:
- international high school exchange students
 - small farms
 - historic preservation
 - sustainability
 - other
- (Lead: *Executive Director/ Sales Team, Board Support*)

TIMELINE

March-April 2015

BUDGET

\$6,000-\$9,000

FUNDING

TBD

Strategy 4: Broad Market Awareness/Earned Media

Use earned media tactics to build a strong identity for the Fort Worden brand while supporting direct revenue-generating efforts (i.e., lodging).

Tactics

1. Conduct ongoing media relations to reach the (1) leisure traveler market and (2) meeting and conference planners.
 - a. Develop media lists for each market, encompassing both local/regional/statewide outlets serving the two audiences, and national outlets used by meeting planners. (Lead: *Consultant/Director of Sales*) **List development is in progress. Strong relationships have been established with local media. Relationships with regional and national media are in the process of being established.**
 - b. Create a basic media kit, including backgrounder/history, fact sheets on all partners, FAQ, calendar of events, lodging overview, meetings/conferences fact sheet. Post on website. (Note: Media kit materials can be repurposed as a donor packet on an as-needed basis.) (Lead: *Consultant/Director of Sales*) **Media Kit development in progress.**
 - c. Develop a meeting planners' guide and kit. Work with Bon Appetit and other partners to include support materials (menu, yearly calendar of events, etc) to include in kit. (Lead: *Director of Sales/Sales Team*) **Meeting planners' guide and kit development in progress.**
 - d. Build and maintain a photo library that includes shots of people participating in events as well as meeting facilities. (Lead: *Consultant/Executive Assistant*) **Development is ongoing. Consultant has sought out wedding and event photographers to establish "In Kind" donations of images to update the library, as well as, photographing events and collecting images from partners. An allocation should be included in the 2016 budget for professional photography services in regards to staged accommodations and events.**
 - e. Prepare and coordinate an editorial calendar with the City of Port Townsend based on seasonal events and schedules of key outlets. (Starred publications are first priority; others to be addressed as resources allow.) (Lead: *Consultant/Sales Team*)
Leisure traveler:
 - Seattle Magazine*
 - South Sound*
 - Seattle Times*
 - Seattle Weekly*
 - The Stranger*
 - City Arts*
 - Tacoma News Tribune*
 - Seattle Metropolitan
 - Sunset
 - Pacific Northwest
 - 425 Magazine

- Washington Journey
 - North Sound Life
 - The Olympian
 - The Herald
 - Conde Nast Traveler
 - National Geographic Traveler
- Meeting planners:
- Meetings & Conventions Magazine*
 - BizBash *
- Special Events Magazine*
 - Association Conventions & Facilities*
 - Small Market Meetings*
- Weddings:
- Seattle Bride*
 - Seattle Met Bride and Groom*
 - Alternative wedding publications*

The City of Port Townsend and FWPDA have developed a joint marketing strategy to advertise in a variety of key publications and to develop relationships aimed at earned media features.

- f. Develop a list of story ideas, showcasing the Fort’s assets (using the SWOT analysis as a starting point), likely to appeal to the media. Work these into the editorial calendar.
(Lead: *Consultant/Sales Team*) **Development in progress.**
2. Develop a separate approach for bloggers, targeting those interested in travel, arts and culture, history and outdoor recreation. Explore ways to engage more personally with this audience, perhaps by sharing exclusive photos or anecdotes about happenings at the Fort. (Lead: *Consultant*)
Incorporated into social media strategy below.
 3. Work with the City of Port Townsend to expand fam trips at Fort Worden. Focus on travel media in Washington, Oregon and British Columbia. Develop a two-day itinerary to ensure overnight stays at the Fort, and schedule the trip during a time when high-interest programming will occur. Cover the cost of accommodations, and at the end of the event, present each participant with a media kit that includes suggested story ideas about Fort Worden as a lifelong center for learning in arts, culture, education and history. (Lead: *PT Marketing Director/Sales Team*) **City of Port Townsend Marketing Director has hosted several fam trips at Fort Worden. Need further development of collateral materials for these uses.**
 4. Set up one-on-one desk side briefings with media who did not participate in the fam trip. Create a “road show” presentation that showcases the Fort’s unique assets, including plenty of visuals. Schedule the road show over a three- or four-day period as necessary to connect with all influential journalists. (Lead: *PT Marketing Director/Sales Team*) **Not yet initiated.**
 5. Build a news section on the Fort Worden website to post news releases, photos, FAQ and other information pertinent to journalists. (Lead: *Consultant/Sales Team*) **Present and maintained.**

TIMELINE

June 2014-December 2016

BUDGET

See budget, page 50

FUNDING

TBD

Strategy 5: Broad Market Awareness/Digital Media

Use owned and managed digital channels and platforms to extend the reach of Fort Worden's brand and direct revenue-generating efforts (i.e., lodging).

Tactics

1. WEBSITE (OWNED)

Prepare a launch plan for the new Fort Worden website.

- a. Send an email announcement about the site's launch, from the FWPDA executive director to all partners and stakeholders. (Lead: *Consultant/Executive Director*) **July 2014, via MailChimp**
- b. Announce the new site through a news release to all local, regional, statewide and national media outlets. (Lead: *Consultant*) **July 2014, via press release**
- c. Prepare a hyperlinked button and secure placement on all partner and stakeholder websites (City of Port Townsend, Jefferson County, Washington State Parks, Port Townsend Main Street, PTGuide.com, others). (Lead: *Consultant/Frause*) **All partners and key community stakeholders are linked in the Main Menu of the fortworden.org website.**

2. BLOG (OWNED)

Develop a Fort Worden blog that stands alone but is linked to the Fort's website. Content will focus on all things happening at Fort Worden, with entries posted at least twice each week. Cultivate the participation of partner organizations as guest bloggers. As funding allows, hire communications staff person or board member lead. (Lead: *Consultant*) **Fort Worden Vista (MailChimp E-news campaign) is distributed bimonthly to campus partners, local leaders and community stakeholders and includes blog-style articles regarding campus operations, visiting groups, partner programs and special events in Port Townsend and Jefferson County.**

3. SOCIAL MEDIA (MANAGED)

Build Fort Worden's social media presence to facilitate ongoing conversations about happenings at the Fort. Start by creating a social media plan that identifies the platforms most suited to Fort Worden's needs. Include a management matrix/editorial calendar with content ideas by platform and month. Develop a voice and style guide for use by those who post on any/every platform. Upon launch of each platform, notify past Fort Worden guests and visitors of the new site and invite their participation. Place platform icons on the Fort's website. (Lead: *PT Marketing Director/support from Consultant for all tactics a.-e.*) **See below.**

Preliminary ideas about Fort Worden's social media approach include the following:

- a. Consolidate the two existing Fort Worden Facebook pages, and revise to format as an organization, not an individual (currently set up as an individual). Employ design elements

consistent with the Fort Worden brand. Access any existing database of visitors or guests to invite individuals to like the page; build this audience by placing the Facebook icon on the Fort Worden website and on all marketing tools and materials. Develop an editorial calendar for posts to maximize opportunities to engage fans with programming updates. [See below.](#)

- b. Establish a Fort Worden Twitter account. Whenever events occur, send regular update tweets. Integrate key messages and demonstrate that something is always happening at the Fort to generate excitement and interest. Create and encourage people to use a Fort Worden hashtag (#fortworden) on Twitter. [See below.](#)
- c. Establish an Instagram account for Fort Worden to take advantage of the unlimited photo opportunities during events and activities (weddings!). Post photos to Instagram and other social media platforms. Create and encourage people to use a Fort Worden hashtag (#fortworden) on Instagram. [See below.](#)
- d. Set Fort Worden up on Pinterest as a resource for interesting trips and arts, culture, heritage and education learning opportunities. Build boards devoted to Fort Worden-centric disciplines such as historic buildings and sites, music, poetry and writing, maritime, woodworking, etc. [See below.](#)
- e. Add Google+ Plus/Google Places to website and claim listing. Make sure all icons for Facebook, Twitter and Instagram are easy to locate on website. [Completed.](#)

[All Facebook pages related to Fort Worden have been consolidated into one account managed by the FWPDA and the Marketing Director City of Port Townsend. More than 3,500 individuals have “Liked” the page and the average user rating is 4.5 out of 5 stars.](#)

[Additional Social Media for Fort Worden includes:](#)

- [- Instagram](#)
- [- Twitter](#)
- [- Pinterest](#)

[*All accounts are managed in partnership by the City of Port Townsend.](#)

[A management matrix/editorial calendar with content ideas by platform and month is developed in collaboration by FWPDA staff and consultant, and the Marketing Director City of Port Townsend.](#)

[A voice and style guide for use by those who post on any/every platform has been developed by the FWPDA staff Marketing group and executed in collaboration by the FWPDA consultant and the Marketing Director City of Port Townsend. The guide is reviewed regularly to reflect the specific themes and marketing goals for the upcoming quarter.](#)

4. VIDEOS (OWNED)

Create a series of five short, compelling videos that present behind-the-scenes looks at the Fort's programming. For example, Diana Krall reading the thank-you letter she sent Centrum after her first appearance many years ago. Or several young children fascinated by an octopus or another mysterious sea creature at the Marine Science Center. Create a Fort Worden You Tube channel and post the videos at pre-planned intervals, and integrate them into the Fort's and City of Port Townsend's website. (Lead: *Independent Contractor, 2015—dependent on funding*)

The FWPDA has engaged Champion Video Productions and are in the process of developing a script and filming schedule for a variety of promotional videos, which is funded through LTAC support.

TIMELINE

August 2014-December 2016

BUDGET

See budget, page 50

FUNDING

TBD

Strategy 6: Broad Market Awareness/Paid Media

Develop and implement a paid media campaign that (a) builds awareness of Fort Worden as a center of lifelong learning for arts, culture and education and (b) supports revenue-generating efforts (i.e., lodging).

Tactics

1. CREATIVE APPROACH/MEDIA PLAN

Develop the overarching creative approach that will guide formation of all campaign/social media/print materials/tools. Prepare a preliminary media plan to identify the most effective vehicles and outlets. (Lead: *Consultant/Sales Team*) *Not yet developed.*

2. ONLINE ADVERTISING/MARKETING

Use Google AdWords (a search engine marketing – SEM – tactic) and Facebook advertising to reach people looking for things to do and places to visit in the Puget Sound region. Identify key words (possibilities include arts and culture events, music festivals, weekend events, art workshops, etc.). Click-throughs will take visitors to the Fort Worden website, perhaps to campaign-specific pages. (Lead: *Consultant--HVS /Sales Team*) *Not yet developed.*

a. Schedule display advertising on sites with popular events/entertainment pages, such as the Seattle Times, The Stranger, Seattle Weekly, Tacoma News Tribune, The Herald, etc. Create ad copy that reinforces key messaging related to Fort Worden as a hub for arts, culture and education by featuring partner programming such as workshops, events, etc. . (Lead: *Consultant/Sales Team/Partners/PT Marketing Director*) *Digital advertising occurs in conjunction with print advertising, when and when the cost/benefit analysis is positive. \$6,500 in LTAC joint advertising was earmarked and utilized in full in 2015. Additional funding for joint and independent marketing could be a key directive of 2016 LTAC proposal.*

b. Penetrate the lodgings market with online ads on sites such as TripAdvisor, VRBO and Airbnb. Geotarget with placements for Fort Worden, Port Townsend, Port Angeles, Olympic Peninsula, etc. (Lead: *Sales Team/Consultant*) *Fort Worden has established and maintained a profile on TripAdvisor, Yelp and WeddingWire for accommodations and meeting spaces. Analytics are positive. Review average in the 4 out of 5 stars range and a variety of reservation and weddings “leads” have been generated on these sites. In 2014 and 2015, Fort Worden earned a Trip Advisor “Excellence Award” . With the new reservation system in place the development of advertising and promotions specific to these user-review websites are in development.*

3. PRINT ADVERTISING

Design print ads for placement in publications that reach specific target audiences: meeting planners (Meetings & Conventions Magazine, BizBash, Special Events Magazine), brides and wedding planners (Seattle Bride), SMERFE groups (Association Conventions & Facilities, Small

Market Meetings). Schedule media buys based on seasonality and Fort Worden's need for revenue during shoulder seasons. (Lead: Consultant/Sales Team) FWPDA staff, consultant and City of Port Townsend Marketing Director meet bimonthly to discuss the placement of print advertising in key publications, both local and regional, according to quarterly goals and themes. Strategies specific to departments/key audiences have been executed with advertising in publications target at brides/weddings, conference & meetings, and leisure travelers.

4. BROCHURE

Design and produce a brochure communicating Fort Worden's key messages and describing the Fort's unique attributes: arts, culture and education offerings from partner organizations; historic buildings; hiking trails, beaches and campgrounds; overnight accommodations; meeting and conference facilities. Distribute brochures to convention and visitors bureaus throughout western Washington and to Port Townsend stakeholders. Establish a system of checking in with various distribution centers to replenish brochure supplies as needed. (Lead: Consultant/Sales Team)

Smaller, more targeted collateral materials such as the Fort Worden Pad Map, accommodations and food services rack cards etc. have been developed and distributed to key audiences.

The design and production of a comprehensive brochure is in progress and is a priority for 2016 as key staff members are now in place to provide consumer feedback and assist with the development of language and images.

5. ADDITIONAL COLLATERAL MATERIALS

Build a comprehensive library of marketing materials designed to sell Fort Worden's attractions, lodgings and meeting facilities. Materials include (but not limited to):

- Ferry rack cards—Map completed in conjunction with Chamber
- Property maps—PAD map completed
- Lodging descriptions/rates—Completed
- Hiking maps—PAD map completed.
- Meeting room descriptions/rates—Revised; not as a hand-out. Posted on website.
- Things to do cards—Maintained on website and social media.
- Where to eat—Utilizing handout from Chamber.

(Lead: Consultant/Sales Team)

TIMELINE

September 2014-December 2016

BUDGET

See budget, page 50

FUNDING

TBD

Strategy 7: Group Facilities Marketing

Develop and implement a group facilities marketing program to establish Fort Worden as a major player in the groups/meetings/conferences sector.

The tactics below were developed with recruiting and having a Director of Sales position in place to lead the marketing team. The Director of Sales position was not fulfilled and most of the tactics identified below have yet to be addressed.

Tactics

SMERFE GROUPS

The tactics below can be applied as is appropriate to each SMERFE audience. Recommendations for the individual groups are also provided.

1. Pull records of groups that have held meetings or conferences at Fort Worden since 2009. Prepare personalized emails announcing the Fort's new management, improvements already in place and those to come, and other exciting news. If the organization has not held a meeting at the Fort recently (within the past two years), consider offering an incentive to re-book. Invite recipients to visit the new website. (Lead: *Director of Sales/Sales Team*) **Not yet in progress. A priority for the fall/winter campaign. Need to designate staff to undertake the development of content and consultant to design digital communications campaign.**
2. Design and produce a direct mail piece specifically for SMERFE audiences, focused on affordability, access by car (important to groups in Washington, Oregon, British Columbia), and flexible lodging options. Include a call to action, such as a discount applied to bookings made by a certain date. (Lead: *Consultant/Intern*) **Not yet in progress. A priority for the fall/winter campaign. Need to designate staff to undertake the development of content and consultant to design digital communications campaign.**
3. To tap the reunions market, send the direct mail piece to college/university alumni associations, and consider online advertising with Facebook, Classmates.com, Reunions.com, Reunionismag.com and others. (Lead: *Sales Team*) **Not yet in progress. A priority for the fall/winter campaign. Need to designate staff to undertake the development of content and consultant to design digital communications campaign.**
4. Host a fam trip for meeting planners, inviting professionals from Washington, Oregon and British Columbia. Develop a two-day itinerary to ensure overnight stays at the Fort, and schedule the event during a shoulder season but when there are activities taking place at both Fort Worden and in Port Townsend. Cover the cost of accommodations, and at the end of the trip, send each participant away with an information kit that includes the Top Ten Reasons to Book Your Meeting

at Fort Worden. (Lead: Director of Sales/PT Marketing Director) **In process. Could identify more fam trips during the shoulder season.**

Social/Sports

Gatherings described as “social” generally refer to family reunions and weddings. Weddings are addressed separately in this plan. Family reunions are most often planned by individual family members. The Travel Industry Association of America estimates that one-third of family travelers travel to attend family reunions, most of which take place during summer months to take advantage of outdoor events and activities and while children are out of school. The location of a family reunion is influenced by proximity to the greatest number of family members and the availability of varied, family-oriented activities. An independent study conducted in 2009 found that more than 60 percent of family reunions take place every two or three years.

Methods of marketing Fort Worden as a destination for family reunions include the following.

- a. Pitch stories to media; both broad market and meeting planner media outlets frequently feature stories on how to plan a successful family reunion. (Lead: Consultant/PT Marketing Director) **Ads were produced by consultant and City of Port Townsend Marketing Director.**
- b. Have Fort Worden included in online family reunion websites such as gatherings.com, family-reunion.com, gatheredagain.com, etc. (Lead: Sales Team/Consultant) **Not complete.**
- c. Include family reunions in marketing collateral materials, with emphasis on outdoor activities at Fort Worden and family-style lodging options. (Lead: Sales Team/Consultant) **Not complete.**

Sports, specifically traveling sports teams, is another SMERFE audience. As previously noted in the Industry Analysis section of this plan, the grounds at Fort Worden are not suitable for many of the most popular team sports events: soccer, baseball, volleyball, football. Opportunities may exist with less traditional sports (ultimate Frisbee, la crosse, etc.). However, because this is a fragmented market with fewer organized teams, marketing to such organizations should be considered a low priority.

Military

The meetings planned for military personnel are almost always reunions for veterans/retirees, occasionally conferences for active duty or reservists. There are an estimated 5,000 active military reunion groups across the U.S., encompassing the Air Force, Army, Coast Guard, Marine Corps, Navy and others. The audience for reunions is primarily male, age 60 and older, some with special medical needs and conditions (there are some newly formed military reunion groups with younger members from the Gulf War and other more recent conflicts). Like most SMERFE organizations, military groups are cost-conscious. Destinations that tend to be popular with them include Branson, MO; Norfolk/Williamsburg/Virginia Beach, VA; San Diego, CA; Washington, DC; Nashville, TN; and San Antonio, TX.

Military groups can be characterized as follows:

- Their reunions most frequently take place in the fall.
- They schedule one to three years in advance.
- Locations are often chosen by the attendees themselves, based on recommendations.
- A hospitality room is an important part of most reunions; groups expect it to be provided at no charge.
- They are interested in locations and venues with military significance.

Tactics to connect with military meeting planners:

- a. Make personal contact with the top military reunion planning firms, included Armed Forces Reunions, Military Reunion Planners, Your Military Reunion Connection, Military Locator and reunion Service, and others. Provide marketing materials related to accommodations, Fort Worden's history, things to do, etc. Build relationships. (Lead: *Director of Sales*) **Not done.**
- b. Join the Alliance of Military Reunions (\$150). This is a nonprofit military reunion groups organization with 600 members. Member benefits include listing in an online directory and access to military reunion decision-makers through direct mail. (Lead: *Director of Sales*) **Not budgeted.**
- c. Consider paid advertising in publications such as Reunions magazine, Military Times, Northwest Guardian, etc. (Lead: *Director of Sales/Consultant*) **Not budgeted.**
- d. In marketing collateral materials, emphasize Fort Worden's military history. Consider including anecdotal information about personnel stationed at the Fort, pictures and interesting factoids. (Lead: *Director of Sales/Consultant/Coast Artillery Museum*) **Needs to be incorporated.**
- e. Develop special packages for military reunions. Offer participants access to archived materials not on display, custom tours of the Fort's various attractions, etc. (Lead: *Director of Sales/Coast Artillery Museum*) **Not done. Needs to be coordinated with CAM.**

Educational

The educational group is comprised of those who work in schools, colleges and universities, and trade schools. In the area that includes Clallam, Island, Jefferson, King, Kitsap, Pierce and Snohomish counties there are 74 school districts and 40 to 50 colleges, universities and trade schools. As with other SMERFE markets, educational meeting planners are cost conscious and seek value-added products and services. Educational meeting planners organize conferences and training seminars. Channels to reach this audience include the schools/institutions themselves as well as professional associations such as the Washington Education Association. **Needs to be incorporated.**

Religious

Across the U.S., the religious market is a mainstay in the meetings and conferences industry. Although price-sensitive because most participants pay their own way, religious groups tend to be recession-proof, holding their meetings even during weak economic periods. Research conducted by the Religious Conference management Association shows that

- sixty-five (65) percent of the groups use fewer than 500 rooms (17 percent use 100 to 200 rooms),
- the average meeting/convention duration is 3.5 days,
- because children are often involved, there is less need for single or double rooms and greater demand for triple/quadruple rooms and pull-out beds,
- more than 80 percent use both catering and audio-visual services, and
- top areas for religious meetings are the Midwest, Southeast, and Northeast.

The Northwest is not a leader when it comes to hosting religious meetings due in large part to low interest in organized religion (just 35 percent of Seattleites identify with any specific religion, as compared to 74 percent in Salt Lake City). This, coupled with the fact that summer is the season of choice for many religious meeting planners (when school is not in session), is a sign that religious meetings and conventions may have less potential for Fort Worden. Several tactics to reach this audience are presented below.

- a. Contact the largest churches in the Puget Sound region to introduce them to Fort Worden's meeting capabilities. Mail or email relevant marketing materials. Churches to connect with include Overlake Christian, Mars Hill, St. James Cathedral, Tacoma First Baptist, Christian Faith Center, University Presbyterian, and others. (Lead: *Director of Sales/Consultant*) **Not done.**
- b. Consider hosting a lunch and tour of the Fort for church decision-makers. (Lead: *Director of Sales/Conference Services Coordinator*) **Not done.**
- c. Tailor messaging to this audience to focus on family-friendly accommodations at the Fort. . (Lead: *Director of Sales/Consultant*) **Not done.**
- d. When appropriate, use media outlets such as religionnews.com to pitch stories about Fort Worden. (Lead: *Director of Sales/Consultant*) **Not done.**

Fraternal

Clubs, guilds, sororities and fraternities often hold their meetings or conferences on weekends to accommodate members who work during the week. This is a diverse group, ranging from professional organizations like Boys and Girls Club and Rotary to quilting clubs and pet owners. The unique needs of each organization necessitate a personalized approach, and building relationships with meeting planners is key to repeat business. This may be challenging, as meeting planners are often volunteers who change from year to year. Price-sensitivity is an issue.

The great number and variety of fraternal organizations means marketing by Fort Worden should be broadly based. A first step must be reviewing the Fort's history of meetings/events by such organizations, and reconnecting (phone call, personal email, etc.). Media relations to pitch stories about the Fort as a meeting venue will support reaching this audience, as will paid advertising. Developing a database of large organizations may facilitate a successful direct mail effort, however this is a time-consuming undertaking. **In progress.**

WEDDINGS

1. Exhibit at wedding and bridal shows held in the Puget Sound region with a Fort Worden table/booth offering information about weddings at the Fort. The list below is a sampling of shows held each year. Participation decisions should be based on an assessment of each show's potential to drive revenue for Fort Worden. (Lead: *Director of Sales/Conference Services Coordinator*)

- Everett Bridal Expo
- Everett-Lynnwood Fall Wedding Expo
- Northwest Bridal Showcase
- Seattle Fall Wedding Expo
- Seattle LGBT Wedding Expo
- Seattle Wedding Show
- Skagit Wedding Show
- South Sound Wedding Show
- Tacoma Fall Wedding Expo
- Tacoma Spring Wedding Expo
- West Sound Wedding Show

Due to staffing changes, Fort Worden has not yet exhibited at these bridal expos, however attendance is a high priority in 2016 for staff.

2. Host an annual Fort Worden wedding show in March. Consider including a promotional offer (discounted facility rental fees, special lodging packages) for weddings booked by a specific date. (Lead: *Director of Sales/Conference Services Coordinator*)

Due to staff transitions, the March wedding event was cancelled. A wedding show is scheduled to be held at the Fort in March, 2016.

3. Pitch Seattle Bride and Seattle Met Bride and Groom magazines on a story about Fort Worden as a destination wedding venue. Emphasize the unique aspects of having a wedding at such a richly historic site (a National Historic Landmark), use the story of Alexander's Castle to capture interest, offer anecdotes about past weddings that may intrigue, etc. Invite the magazine's reporter/editor to the Fort for a personal tour. (Lead: *PT Marketing Director/Director of Sales/Conference Services Coordinator*) **Advertising relationships have been established with these key publications and the development of query letters (pitches) are in progress for fall 2015/spring 2016.**

4. Host a lunch for western Washington wedding planners, photographers, caterers and others involved in the wedding industry. Tour attendees through the chapel, The Commons and other appropriate spaces, as well as to unique photo shoot locations on the grounds. Provide each participant with a wedding packet that includes specifications and wedding FAQs. (Lead: *Director of Sales/Conference Services Coordinator, Food Services Concession*) **Not yet in progress.**

5. Explore opportunities to add Fort Worden to lists of destination wedding venues on sites such as theknot.com, weddingwire.com, mywedding.com and others. (Lead: *Director of Sales/Consultant*) **After a thorough examination of these websites, staff and consultant selected to be featured on WeddingWire.com. Content and images are regularly maintained. User-reviews and online generated leads have been excellent. Additional opportunities to leverage this digital profile are being developed.**

TIMELINE

September 2014-December 2016

BUDGET

\$17,000-\$25,000

FUNDING

TBD

Strategy 8: Community Stakeholder Development

Establish a proactive relationship development effort between Fort Worden staff and community stakeholders (Port Townsend residents and businesses, public agencies and partner organizations) to ensure consistent communication and foster *esprit de corps*.

Tactics

1. Implement a Tuesday morning eblast from the FWPDA executive director to all partners and stakeholders. Using the Fort's new branding, design an email template that presents information in a visually appealing manner. Keep content short, using bulleted text to list all the events and happenings at the Fort for the coming week. Tone should be friendly, upbeat and collaborative. Each update will encourage recipients to provide feedback and/or suggestions, and will include concise messages about the proper use of Fort Worden branding. (Lead: Consultant/*Executive Director*)**The Fort Worden Vista (MailChimp E-News campaign) was implemented in place of this tactic. The PDA could consider a weekly email blast of upcoming events and internal matters to be shared with the Board members, partners and key stakeholders.**
2. Bring together partners and stakeholders for a marketing charrette each fall to update marketing and communications strategies and tactics for the following year. Encourage both groups to share plans specific to their organizations or agencies, and identify opportunities for collaboration and joint promotion. (Lead: *Director of Sales/Executive Director, Partners & Stakeholders*) **This is planned to be done in conjunction (as a follow-up) with the scheduling of the 2017 partners reservation process in October.**
3. Prepare a quarterly report summarizing the status of marketing and communications initiatives. Include quantifiable metrics whenever possible: the number of programs/events that took place, attendance at events, paid media that was placed, editorial coverage resulting from media outreach, social media engagement, etc. Design a user-friendly, brand-consistent presentation format and distribute via email. (Lead: *Consultant/Director of Sales*) **No yet developed.**
4. Prepare an annual report following the same guidelines presented in the preceding tactic. **Development in progress.**
5. When appropriate, support the Port Townsend community by including media buys in the Port Townsend Leader and Peninsula Daily News. (Lead: *Consultant/Director of Sales*) **Support is ongoing. Spending is targeted at quarterly and regionally-distributed publications to advertise the LLC, accommodations and facilities. Food services and special events have been promoted on an event-by-event basis. Promotion of the Discover Pass sales at Fort Worden have also been included.**

6. Maintain high visibility for Fort Worden through participation by the FWPDA executive director and general manager in public meetings, committees (chamber of commerce, LTAC and others), service clubs, meetings with local elected officials, and regular contact with stakeholders at the City of Port Townsend, Port of Port Townsend, Jefferson County, Washington State Parks and others. (Lead: Executive Director, Sales Team and Board Members) Ongoing. In lieu of the Executive Director attending all of these meetings, Tim Caldwell has been designated as the Fort Worden ambassador to reach out to the broader community and attend many service club and community meetings.

TIMELINE

June 2014-December 2016

BUDGET

See budget, page 50

Strategy 9: Add-On Revenue Generation

Support sales of the Discover Pass and use of Fort Worden's campgrounds by including both in appropriate, targeted marketing initiatives.

Tactics

DISCOVER PASS

1. Include Discover Pass branding on all marketing collateral developed for Fort Worden, including the Fort's website. (If possible, the Discover Pass will also be available for purchase on the website.) (Lead: *Consultant/Sales Team*) **Ongoing.**
2. Inventory all points-of-sale at Fort Worden and ensure the Discover Pass is being made available at each one. Prepare a talking points/FAQ sheet for all personnel who interact with the Fort's visitors and guests. (Lead: *Director of Sales/Executive Director*) **Complete. Improvements can be made to ongoing promotions and sales staff training.**
3. In June and July, when festival and event traffic at Fort Worden is very high, set up Discover Pass express stations throughout the grounds. The stations will sell only the Discover Pass, and will be identified with easy-to-spot signage. (Lead: *Director of Sales/volunteers*) **Efforts have been made at Fort Worden Open House, at Free Friday Concerts and at special events at McCurdy Pavilion with limited success.**
4. Encourage partners to sell the Discover Pass to their employees, volunteers, customers and members. (Lead: *Director of Sales/Executive Director*) **Ongoing.**

CAMPGROUNDS

1. Ensure Fort Worden's campgrounds are listed on all Washington state park websites; update or add correct information as necessary. (Lead: *Camping front desk*) **Completed.**
2. Describe camping options in the brochure produced to help market Fort Worden. Provide contact information for making reservations. (Lead: *Consultant/Camping front desk*) **Completed.**
3. Include campground information in eblasts sent to Fort Worden stakeholders in Port Townsend, especially during prime camping months. (Lead: *Consultant/Camping front desk*) **Completed.**

PROMOTIONAL ITEMS

1. Offer Fort Worden-branded merchandise – hats, t-shirts, bags, etc. – for sale only at on-site locations. (Lead: *Executive Assistant/Customer Service Leads*) **In progress..Will be fully implemented in 2016.**

2. Develop promotional/activity-specific packages such as

- spa, dance or yoga
- romance
- wine and cheese
- local food baskets
- sunset cruises
- history tours

(Lead: *Director of Sales/Sales Team*)

Development of visitor packages are in progress.

3. Develop team-building packages (kayak tours, beach walks, ropes course, etc.) for conference and meeting groups. (Lead: Director of Sales/Sales Team) **Not yet developed.**

TIMELINE

June 2014-December 2016

BUDGET

See budget, page 50

FUNDING

TBD

Strategy 10: External Partnerships

Find regional companies and businesses that will see a mutual benefit in joint advertising and promotion with Fort Worden. Develop advertising, sales or other promotional campaigns that cross-sell services, events and programs of the fort, the city and/or partners. Partnership examples are outlined below.

Due to budget and lack of sales team personnel, little work has been done on this strategy.

1. SPA PRODUCTS

Work with companies like Washington Soap Company, Northwest Naturals, Townsend Bay Soap Company, or others that make and sell spa products. Partnerships could include using the fort as the themed backdrop for an ad campaign, offering a Fort Worden vacation as a sweepstakes prize for a product sales promotion, developing a Fort Worden private label line of spa products.

(Lead: Director of Sales/Board support)

2. RECREATIONAL APPAREL

Join forces with companies like REI, Eddie Bauer, Columbia Sportswear, Filson, California Sportswear etc. to develop an ad campaign. Use the park area as a backdrop for catalogs. (Lead: Director of Sales/Board support)

3. RECREATIONAL GEAR

Team up with manufacturers or retailers like REI that provide kayak, hiking, fishing and other outdoor equipment and gear. (Lead: Director of Sales/Board support)

4. BOOKS AND MUSIC

Collaborate with distributors of literary or meditation books and music for joint promotions. Offer these products locally. Potential partners include Sasquatch Books, University of Washington Press, Mountaineers Books. (Lead: Director of Sales/Board support)

5. WINE, CIDER AND CHEESE

Partner with local food producers (Jefferson County). (Lead: Director of Sales/Board support)

TIMELINE

July-December 2015

BUDGET

See budget, page 50

FUNDING

Strategy 11: Visitor Packages

Increase low season weekend and low/high season mid-week revenue at Fort Worden by developing and implementing a minimum of two new visitor packages per season, each featuring brand experiences in the greater Port Townsend area.

Packaging visitor travel is a way to build awareness and generate revenue during low travel periods, such as mid-week and the winter season. Building packages around specific activities or events provides branded experiences at a good value for the visitor. Some lodging establishments in the Northwest have created travel packages that include lodging, spa treatments, meals, and value-add components like complimentary wine. There are many types of packaging that can be targeted to specific markets. The key is to provide a unique, appealing experience that offers an exceptional value and hassle-free booking and delivery.

The following tactics will be a big priority for fall and winter. Staffing and adequate resources are needed to be effective.

Tactics

1. Work with local businesses to create branded getaway packages for the Seattle, Tacoma and British Columbia markets. (Lead: Sales Team/PT Marketing Director, Consultant)
 - Solicit ideas from local businesses (theaters, art galleries, restaurants) and event organizers (Wooden Boat Festival, Film Festival, Rhody Festival) and city marketing director.
 - Meet with local suppliers to develop packages that promote the greater area. Identify a lead business to be responsible for each themed package.
 - Ensure each package promotes a branded experience, is convenient and easy to book, and provides added value.
 - Make packages available during low volume seasons and days of the week.
 - Example: "Fall xx at Fort Worden." Available during weekends in November, targeted to Seattle Metro market, includes two nights at Fort Worden, breakfast in the Commons with Bon Appetit, spa treatment at Madrona, dinner for two at downtown Port Townsend restaurant, tickets to Fort museums, maps, coupons and other.
2. Market visitor packages through:
 - Fort Worden website
 - EnjoyPT website
 - Facebook and Twitter
 - E-blasts to mailing list/Selected print advertising placements

TIMELINE

June 2014-December 2016

BUDGET

See budget, page 50

Strategy 12: Continuing Education, State Agencies, Corporate Retreats

Meetings, seminars, conferences and retreats are held by a range of private and public sector entities, many of whom may consider Fort Worden an appropriate venue.

CONTINUING EDUCATION

Offered by many colleges and universities, as well as professional associations and nonprofits, continuing education includes credit and non-credit courses/classes. Doctors, lawyers and teachers are some of those whose continued accreditation requires regular ongoing education. Many people enroll in non-credit courses for personal enjoyment or to learn new skills.

Tactics

Due to budget and lack of sales team personnel, little work has been done on this strategy and following tactics.

1. Develop and maintain a current database of organizations that offer continuing education. Identify the decision-maker who controls venue selection and include that person as the key contact. Prioritize the organizations that might be especially interested in Fort Worden because they have a connection to the environment or history or the military, etc. (Lead: *Director of Sales*)
2. Write a letter of introduction for distribution to database contacts. Personalize each letter. Consider offering a first-time use incentive to encourage trial of Fort Worden – a cash discount or a service provided at no charge. Send the Fort’s meetings/conferences brochure with the letter. (Lead: *Director of Sales/Consultant*)

STATE AGENCIES

State agencies often hold planning sessions, annual meetings and training sessions. These are price-sensitive groups committed to using public resources wisely, and special packages or rate reductions may be expected. Focus should be limited to Washington state, as most states will make every effort to keep dollars spent on meetings in their own communities.

Tactics

1. Invite members of the Pacific Northwest chapter of the Society of Government Meeting Planners (SGMP) to the Fort for a lunch and tour. Coordinate all details to ensure a seamless experience – from travel to departure. Provide attendees with the Fort’s meeting planner packet. Follow-up with phone calls to foster relationship development. (Lead: *Director of Sales*)
2. Consider becoming a member of SGMP (\$140-\$400 per year). (Lead: *Director of Sales*)

3. Leverage the relationship with Washington State Parks to book any meetings or conferences held by the agency at Fort Worden. (Lead: *Executive Director/Director of Sales*) **Done.**
4. Conduct an online survey of state agency meeting planners to build a calendar of future events (and to identify specific event needs). Plan sales efforts around these upcoming events/meetings. (Lead: *Consultant/Director of Sales*)

CORPORATE RETREATS

Most large companies hold conferences, retreats, shareholder meetings, etc. each year. These can range in size from 10 to 100 attendees or more. Corporate meeting planners generally have specific room amenity and technology (audio/visual) needs. Price is not a significant driver, but high quality and professional, polished accommodations and treatment are. Because of this, Fort Worden should delay any proactive sales efforts with this sector until new systems and updated/refurbished facilities have been firmly established and consistently delivered.

Tactics

1. Provide Fort Worden marketing materials (specific to meetings) to CVBs throughout the Northwest: Washington, Oregon, Idaho, British Columbia. (Lead: *PT Marketing Director/Director of Sales*)
2. Develop and host a fam tour for meeting planners in the states mentioned above. **Be prepared to comp rooms and meals.** Prepare an agenda that is professional yet reflects the Fort's historic, outdoors-driven personality. Coordinate with and include Port Townsend. (Lead: *PT Marketing Director/Director of Sales*)
3. Identify a "hot list" of Washington companies most likely to appreciate the Fort's unique assets. Possibilities include REI, Boeing, Filson, Trident Seafoods, PCC, etc. Prioritize marketing efforts to this group. (Lead: *Consultant/PT Marketing Director, Sales Team*)

TIMELINE

September 2014-December 2016

BUDGET

TBD

FUNDING

TBD

Strategy 13: Plan Implementation

Ensure successful implementation of the strategic marketing plan developed for the Fort Worden Public Development Authority.

Tactics

1. The Fort Worden Public Development Authority does not have a staff person dedicated to implementing its strategic marketing plan. The strategy presented here outlines the framework for implementation by an experienced marketing/public relations consultant on behalf of the FWPDA. As noted, many of the tactics in this plan can be completed by internal staff. Other technical services such as website development and materials printing/production can be individually subcontracted. However, to build the enduring, robust foundation needed to execute successful marketing initiatives, a single marketing/public relations lead is required until adequate staffing and funding can be secured by the FWPDA.

The marketing consultant and sales team will carry out implementation of the plan for the FWPDA. Responsibilities include the following.

- Direct brand education efforts
 - Conduct ongoing media outreach
 - Write content for marketing collateral materials
 - Coordinate distribution of marketing collateral materials
 - Oversee website updates and development direction
 - Manage ongoing online relationships
 - Manage mobile application design, development and production
 - Develop still and video photography strategy and manage shoots as needed
 - Handle development and production of destination maps, things to do
 - Manage development and production of Fort Worden "lure" brochure
 - Develop display advertising plan
 - Direct ad production and placement
 - Prepare for and attend trade/consumer travel show(s)
 - Coordinate merchandising program
 - Facilitate external and partner marketing opportunities
 - Serve as liaison to local and regional tourism/hospitality industry
 - Participate in product development, including marketing support for branded packages
 - Measure/evaluate results of marketing strategies and tactics
2. The marketing consultant will demonstrate the following characteristics and experience:
 - Experience and ability to develop and facilitate implementation of marketing and public relations strategies for visitor destinations

- Experience providing marketing and public relations services for tourism and/or hospitality-related businesses
- Strong tourism and hospitality content writing skills
- Strong graphic design capabilities
- Ability to clearly communicate, both orally and in writing
- Expertise dealing and negotiating with small businesses
- Experience working with advisory committees
- Understanding and familiarity with the strategies presented in the FWPDA marketing plan
- Proven ability to organize, schedule and complete multiple work assignments in a timely manner
- Ability to meet deadlines

TIMELINE

July 2014

BUDGET

\$10,000-- July to December 31, 2014

FUNDING

Evaluation

The methods and metrics (both quantitative and qualitative) presented here are designed to measure the effectiveness of the marketing plan. Findings that result will reveal successful strategies that should be supported and continued, and failed or ineffective strategies to be discontinued or revised.

1. TAX REVENUES AND FORT OCCUPANCY RATES

- Review and monitor the quarterly and annual LTAC data on tax collection and hotel occupancy at the Fort.
 - a. Measure lodging taxes against the previous year and month-over-month.
 - b. Measure sales taxes against the previous year and quarter-over-quarter.
 - c. Track occupancy rates by month for accommodations and meeting rooms.

2. AWARENESS AND INTEREST SURVEY

- Conduct an annual statistically valid survey across the 300-mile visitor radius to determine
 - a. changes in consumer awareness of Fort Worden as a resort destination
 - b. changes in consumer interest in visiting
 - c. recent visitation occurrences
 - d. satisfaction levels with the Fort experience
 - e. likelihood of recommending.
 - f. The survey should be designed as an annual tracking study, with questions that remain unchanged to enable accurate measurement of trends and/or change.
- Sample size must deliver a maximum error rate of +/- 5 percent and a minimum confidence level of 95 percent.
- Additional data to be delivered by the survey:
 - a. levels of aided and unaided awareness of Fort Worden as a desirable resort destination
 - b. likelihood of visiting within the next two years
 - c. frequency of trips to Port Townsend during the past 12 months
 - d. purpose of trips to Port Townsend during the past 12 months
 - e. frequency of trips to Fort Worden during the past 12 months
 - f. likelihood of recommending Fort Worden as (1) a resort destination and (2) a destination for music and entertainment, outdoor recreation, family and kid activities, rest and relaxation, romantic getaway
 - g. determine the most important sources of information for vacations and getaways in the Northwest

3. BRAND INTEGRATION ASSESSMENT

- Conduct an assessment of use of the Fort Worden brand and tagline in advertising, marketing and collateral materials produced and disseminated by the Fort. Examine:
 - a. number of collateral pieces delivered

- b. number of visitors and views of web pages with logo or tagline
- c. circulation of ads placed
- d. correct positioning of the brand
- e. change (increase/decrease) in use of brand and tagline over previous year
- f. change (increase/decrease) in number of branded packages offered over previous year
- g. number of external product suppliers or Fort Worden partners cooperatively marketing with the FWPPA

4. PUBLIC RELATIONS EFFECTIVENESS

- Measure the effectiveness of public relations efforts in advancing awareness and coverage of Fort Worden as a branded destination. Review:
 - a. number of newspaper and magazine stories secured and respective circulation (clipping service)
 - b. successful deliver of key messages in newspaper and magazine stories
 - c. number of social media posts and blog articles produced.
 - d. number of press releases distributed and articles provided.
 - e. branded website analytics: pages viewed, time spent on site, downloads, etc.

5. INTERACTIVE ONLINE ANALYTICS

- Measure levels of engagement and interaction on developed, branded Fort Worden social media platforms.
 - a. number of Facebook “likes” and “shares”
 - b. number of Twitter followers
 - c. number of destination reviews on Yelp, TripAdvisor, VRBO, Airbnb
 - d. number of YouTube videos posted and viewers, positive comments
 - e. number of times a mobile app downloadsd

TIMELINE

September 2014-December 2016

BUDGET

See budget, page 50

FUNDING

Budget

	TIMING	RESPONSIBILITY	BUDGET
1. BRAND DEVELOPMENT			
1. Create Name and Tagline	Complete	Consultant	Complete
2. Design Logo	Complete	Consultant	Complete
3. Prepare Brand Standards Guide	Complete	Consultant	Complete
4. Host Brand Unveiling Event	Jun-Aug 2014	FWPDA	Internal food costs
2. PARTNER DEVELOPMENT AND PROGRAMS			
1. Increase Programming Options	Jan-Dec 2015	FWPDA	TBD
2. Develop Open House Event	Apr 2015	FWPDA, Consultant	\$2,500-\$3,500
3. Develop List of Prospective New Partners	Jan 2015	Consultant	\$1,500
4. Prepare Intro Letter for Prospects	Feb 2015	FWPDA, Consultant	\$1,800
5. Convert Park Office into Service Center	Jan 2015	FWPDA	TBD
3. FWPDA ORIGINAL PROGRAMMING			
1. Create an Organic Programming Plan	Mar-Apr 2015	Consultant	\$6,000-\$9,000
4. BROAD MARKET AWARENESS/EARNED MEDIA			
1. Conduct Ongoing Media Relations	Jun 2014 ongoing	Consultant	\$3,000-\$5,000 per month
2. Develop Approach for Bloggers	Jul-Aug 2014	Consultant	\$900
3. Expand Fam Trips with City	Mar 2015 ongoing	Consultant	\$4,000-\$6,000 per fam
4. Desk-side Briefings with Media	Oct 2014-Feb 2015	Consultant	\$1,500 per meeting
5. Build News Section on Website	In process	Consultant	
5. BROAD MARKET AWARENESS/DIGITAL MEDIA			
1. Website	Aug-Sep 2014	Consultant	In process
2. Fort Worden Blog	Sep 2015 ongoing	FWPDA, Consultant	\$5,000
3. Social Media	Feb 2015 ongoing	Consultant	\$1,200-\$1,500 per month
4. Video	Nov 2015-Jan 2016	Consultant	\$20,000-\$35,000
6. BROAD MARKET AWARENESS/PAID MEDIA			
1. Develop Creative Approach and Media Plan	Sep 2014	Consultant	\$6,500
2. Online Advertising	Oct 2014-Dec 2016	Consultant	\$40,000-\$60,000 per year
3. Print Advertising	Oct 2014-Dec 2016	Consultant	\$40,000-\$60,000 per year
4. Brochure	Sep-Oct 2014	Consultant	\$9,000-\$12,000
5. Additional Collateral Materials	Sep-Dec 2014	Consultant	TBD
7. GROUP FACILITIES MARKETING			
1. SMERFE	Jan 2015-ongoing	FWPDA, Consultant	\$12,000-\$15,000
2. Weddings	Sep 2014 ongoing	FWPDA, Consultant	\$5,000-\$10,000

8. COMMUNITY STAKEHOLDER DEVELOPMENT			
1. Weekly Eblast to Stakeholders	Jun 2014	FWPDA	TBD
2. Annual Marketing Charrette	Oct 2014	FWPDA, Consultant	\$2,200 per session
3. Quarterly Marketing and Communications Update	Sep 2014 ongoing	FWPDA	TBD
4. Annual Marketing and Communications Report	Jan 2015 ongoing	FWPDA	TBD
5. Media Buys in Local Dailies	In process	FWPDA	TBD
6. FWPDA Leaders Involved in Community	In process	FWPDA	TBD
9. ADD-ON REVENUE GENERATION			
1. Discover Pass	Jun 2014 ongoing	FWPDA	TBD
2. Campgrounds	Jul-Aug 2014	FWPDA	TBD
3. Promotional Items	Aug 2014 ongoing	FWPDA, Consultant	TBD
10. EXTERNAL PARTNERSHIPS			
1. Spa Products	Jul-Dec 2015	FWPDA, Consultant	TBD
2. Recreational Apparel	Jul-Dec 2015	FWPDA, Consultant	TBD
3. Recreational Gear	Jul-Dec 2015	FWPDA, Consultant	TBD
4. Books and Music	Jul-Dec 2015	FWPDA, Consultant	TBD
5. Wine, Cider, Cheese	Jul-Dec 2015	FWPDA, Consultant	TBD
11. VISITOR PACKAGES			
1. Created Branded Getaway Packages	Jun-Aug 2014	FWPDA	TBD
2. Market Packages	Sep 2014 ongoing	Consultant	\$2,000-\$3,500 per month
12. CONTINUING EDUCATION, STATE AGENCIES, CORPORATE RETREATS			
1. Continuing Education	Jan 2015 ongoing	FWPDA	TBD
2. State Agencies	Sep 2014 ongoing	FWPDA	TBD
3. Corporate Retreats	Jun 2015 ongoing	FWPDA	TBD
13. PLAN IMPLEMENTATION			
1. Establish Single PR/Marketing Lead	Jul 2014	FWPDA	n/a
EVALUATION			
1. Tax Revenue and Fort Occupancy Rates	Sep 2014 ongoing	FWPDA	n/a
2. Awareness and Interest Survey	Oct 2014 ongoing	Consultant	\$30,000 per year
3. Brand Integration Assessment	Dec 2014 ongoing	FWPDA, Consultant	\$4,000-\$7,000 per year
4. Public Relations Effectiveness	Dec 2014 ongoing	Consultant	\$4,000-\$7,000 per year
5. Interactive Online Analysis	Dec 2014 ongoing	FWPDA, Consultant	\$3,000-\$5,000 per year