

AN ORDINANCE 2012-05-17-0362

AUTHORIZING A PROFESSIONAL SERVICES AGREEMENT BETWEEN THE CITY OF SAN ANTONIO AND MICKEY SCHAEFER & ASSOCIATES, LLC, IN AN AMOUNT NOT TO EXCEED \$47,000.00, WITH AN ANNUAL \$10,000.00 LICENSING FEE, FOR THE DEVELOPMENT OF THE SAN ANTONIO TOURISM AMBASSADOR PROGRAM.

* * * * *

WHEREAS, annually, San Antonio's hospitality industry has an economic impact of \$11 billion, brings in 26 million visitors, employs over 106,000 workers and has a \$1.99 billion payroll and the Convention and Visitors Bureau ("CVB") is the entity primarily charged with promoting and marketing San Antonio as a premier convention and meetings destination and a domestic and international visitor destination, for the purpose of positively affecting the City's economy; and

WHEREAS, the Tourism Ambassador Program is designed to enhance the San Antonio visitor experience and through this proposed agreement Mickey Schaefer & Associates LLC will assist the CVB in the development and implementation of a frontline training program for hospitality workers and volunteers; **NOW THEREFORE:**

BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF SAN ANTONIO:

SECTION 1. The terms and conditions of a Professional Services Agreement with Mickey Schaefer & Associates, LLC are authorized and approved. The City Manager or her designee is authorized to execute the Agreement attached to this Ordinance as **Exhibit I**, which has previously been executed by Mickey Schaefer & Associates, LLC.

SECTION 2. Funding in the amount of \$47,000.00 for this Ordinance is available in Fund 29006000, Cost Center 4308010003 and General Ledger 5201040, as part of the Fiscal Year 2012 Budget and payment is authorized to Mickey Schaefer & Associates, LLC. Payment is limited to the amounts budgeted in the operating budget funding sources identified and should be encumbered with a purchase order. Payments for future fiscal years are contingent upon City Council approval of the City's operating budget and the availability of funds. All expenditures will comply with the approved operating budget for current and future fiscal years.

SECTION 3. The financial allocations in this Ordinance are subject to approval by the Director of Finance, City of San Antonio. The Director of Finance may, subject to concurrence by the City Manager or the City Manager's designee, correct allocations to specific Cost Centers, WBS Elements, Internal Orders, General Ledger Accounts, and Fund Numbers as necessary to carry out the purpose of this Ordinance.

LB
5/17/12
Item #17

SECTION 4. This Ordinance shall take effect immediately upon the receipt of eight affirmative votes; otherwise it shall be effective ten days after its passage.

PASSED AND APPROVED this 17th day of May, 2012.



M A Y O R

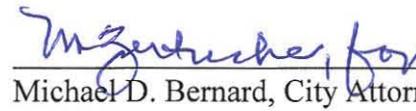
Julián Castro

ATTEST:



Leticia M. Vacek, City Clerk

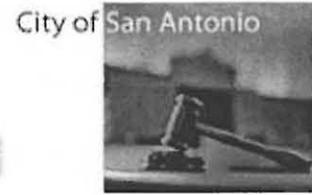
APPROVED AS TO FORM:



Michael D. Bernard, City Attorney



Request for
**COUNCIL
ACTION**



Agenda Voting Results - 17

| | | | | | | | |
|---------------------|--|--------------------|------------|------------|----------------|---------------|---------------|
| Name: | 5, 6A, 6B, 8A, 8B, 9, 12A, 12B, 15, 16, 17, 18, 19, 20, 21, 22, 24, 25A, 25B | | | | | | |
| Date: | 05/17/2012 | | | | | | |
| Time: | 10:47:57 AM | | | | | | |
| Vote Type: | Motion to Approve | | | | | | |
| Description: | An Ordinance authorizing a professional services agreement between the City of San Antonio and Mickey Schaefer & Associates, LLC, in an amount not to exceed \$47,000.00, with an annual \$10,000.00 licensing fee, for the development of the San Antonio Tourism Ambassadors Program.[Ed Belmares, Assistant City Manager; Casandra Matej, Director, Convention & Visitors Bureau] | | | | | | |
| Result: | Passed | | | | | | |
| Voter | Group | Not Present | Yea | Nay | Abstain | Motion | Second |
| Julián Castro | Mayor | | x | | | | |
| Diego Bernal | District 1 | | x | | | | |
| Ivy R. Taylor | District 2 | | x | | | | x |
| Leticia Ozuna | District 3 | | x | | | | |
| Rey Saldaña | District 4 | | x | | | | |
| David Medina Jr. | District 5 | | x | | | | |
| Ray Lopez | District 6 | x | | | | | |
| Cris Medina | District 7 | | x | | | | |
| W. Reed Williams | District 8 | | x | | | | |
| Elisa Chan | District 9 | | x | | | x | |
| Carlton Soules | District 10 | | x | | | | |

Exhibit I

**PROFESSIONAL SERVICES AGREEMENT
FOR
TOURISM AMBASSADOR PROGRAM DEVELOPMENT**

STATE OF TEXAS §
 §
COUNTY OF BEXAR §

This Agreement is entered into by and between the City of San Antonio, a Texas Municipal Corporation (hereinafter referred to as "City") acting by and through its Deputy City Manager and Mickey Schaefer & Associates, L.L.C. (hereinafter referred to as "Contractor"), both of which may be referred to herein collectively as the "Parties".

The Parties hereto severally and collectively agree, and by the execution hereof are bound, to the mutual obligations herein contained and to the performance and accomplishment of the tasks hereinafter described.

I. DEFINITIONS

As used in this Agreement, the following terms shall have meanings as set out below:

"City" is defined in the preamble of this Agreement and includes its successors and assigns.

"Contractor" is defined in the preamble of this Agreement and includes its successors.

"Director" shall mean the Executive Director of City's Convention and Visitors Bureau.

II. TERM

2.1 The initial term ("Initial Term") of this Agreement shall commence upon execution ("Commencement Date") shall terminate on November 30, 2015, unless earlier terminated in accordance with the terms of this Agreement. Upon the expiration of the Initial Term, the Parties may extend the term of this Agreement for one additional two-year renewal period upon the mutual written agreement of City and Contractor ("Extension Term"), subject to the approval of City Council, if required.. The Initial Term and the Extension Terms (if any) are collectively referred to as the "Term."

III. SCOPE OF SERVICES

3.1 Contractor agrees to provide the services set forth in Exhibit I, which is attached hereto and incorporated herein for all purposes ("Project") in exchange for the compensation described in Article IV. Compensation. City agrees to perform all responsibilities assigned to it in Exhibit I. Contractor's Proposal is attached to this Agreement as Exhibit II and is incorporated herein for all purposes.

3.2 Contractor shall complete all work on the Project and make all required submissions to City by the dates set forth in Exhibit I.

3.3 All work performed by Contractor hereunder shall be performed to the satisfaction of Director. The determination made by Director shall be final, binding and conclusive on all Parties hereto. City shall be under no obligation to pay for any work performed by Contractor which is not satisfactory to Director. City shall have the right to terminate this Agreement, in accordance with Article VII. Termination, in whole or in part, should Contractor's work not be satisfactory to Director; however, City shall have no obligation to terminate and may withhold payment for any unsatisfactory work, as stated herein, even should City elect not to terminate. Approval by the Director shall not be unreasonably withheld.

IV. COMPENSATION TO CONTRACTOR

4.1 In consideration of Contractor's performance in a satisfactory and efficient manner, as determined solely by Director, of all services and activities set forth in this Agreement, City agrees to pay Contractor an amount not to exceed Forty-seven thousand dollars (\$47,000.00) as total compensation, including travel costs. These funds shall be paid to Contractor as follows:

A. Contractor shall invoice City for thirty thousand dollars (\$30,000.00) upon final execution of this Agreement.

B. Contractor shall invoice City for ten thousand dollars (\$10,000.00) upon completion of Certification Program Development.

C. Contractor shall invoice City for five thousand dollars (\$5,000) upon completion of all work on the Project.

D. Contractor shall invoice City for all Project travel expenses provided that such expenses are pre-approved by City in writing and the total of such costs do not exceed two thousand dollars (\$2,000.00). Contractor will be available to travel to San Antonio, upon request of City, in order to ensure Project success.

E. City shall pay Contractor within thirty (30) days of the receipt of such invoices, subject to the provisions of Sections 3.3 and 4.6. If payment is not received by the due date, a late charge will be added at the rate of three-quarters of one percent (.075%) per month.

4.2 City shall pay Contractor an annual licensing fee in the amount of ten thousand dollars (\$10,000.00). This fee shall be due to Contractor beginning on November 30, 2013 and every November 30 thereafter for the preceding year. Each year for which the licensing fee is paid shall be known as a Licensing Year.

4.3 City shall pay Contractor an annual 'Per CTA' fee of \$10 per "Current" CTA¹ on record, beginning November 30, 2013 and annually thereafter from program fees collected in the preceding licensing year.

4.4 No additional fees or expenses of Contractor shall be charged by Contractor nor be payable by City. The Parties hereby agree that all compensable expenses of Contractor have been provided for in the payments to Contractor specified in Sections 4.1, 4.2 and 4.3 above. Total payments to Contractor cannot exceed that amount set forth in Sections 4.1, 4.2 and 4.3 above, without prior approval and agreement of all Parties, evidenced in writing in accordance with Article XIV. Amendments.

4.5 Contractor and City agree to make maximum use of available means of business communications technologies, including conference calls, emails and faxes, in order to keep travel costs to a minimum.

4.6 Final acceptance of work products and services require written approval by City. The approval official shall be Director. Final payment will be made to Contractor following written approval of the final work products and services by Director. City shall not be obligated or liable under this Agreement to any party, other than Contractor, for the payment of any monies or the provision of any goods or services.

V. OWNERSHIP OF DOCUMENTS AND NON COMPETE

5.1 Any and all writings, documents or information in whatsoever form and character produced by Contractor pursuant to the provisions of this Agreement are the exclusive property of Contractor and Contractor shall be solely responsible for registering and protecting all such intellectual property.

5.2 Contractor retains all right, title and interest in all existing trademarks, including but not limited to "CTA" and "Certified Tourism Ambassador" and to all existing copyrights, including but not limited to "Enhancing the Visitor Experience" owned by Contractor. City has no right, title or interest in any of these existing works.

5.3 For so long as City maintains Accredited Provider status as set forth in Exhibit I, Contractor grants City a license to use all materials provided by Contractor under this Agreement and all Contractor's logos, marks and copyrights associated with the Tourism Ambassador Institute and the Certified Tourism Ambassador program for use in City's Certified Tourism Ambassador program. This license includes the right to present the Certified Tourism Ambassador designation, on behalf of the Tourism Ambassador Institute, to those individuals who satisfactorily complete all program requirements.

5.4 City agrees not to use any of the Intellectual Property used or created under this Agreement to replicate the components of the CTA program and/or to compete with Contractor

¹ The Current CTA shall be taken annually on the anniversary of the launch date.

directly or indirectly irrespective of geographic location without the express written permission of Contractor.

5.5 It is the understanding of the Parties that termination of this Agreement will result in the loss of licensing rights & Accredited Provider status and in order not to infringe upon Contractor's copyright and trademark rights, City will be responsible for further protection of intellectual property and program materials which would be clarified in a closing Letter of Understanding and signed by both Contractor and City. For informational purposes, these understandings are outlined below and include but are not limited to: (a) discontinuing the use of the local program name and logo, the Certified Tourism Ambassador name and logo, and formal reference to the Certified Tourism Ambassador program in all manner and means, for all purposes and on all forms of communications; (b) forfeiting access to the CTANetwork.com web site portal; (c) forfeiting access to the Certified Tourism Ambassador administrative software/database; and (d) communicating the program's upcoming discontinuation to all of City's certified tourism ambassadors on record, with Contractor's prior approval of the communication's content.

5.6 Contractor shall protect and keep confidential all City's non-public information as identified by City ("Confidential Information"). The obligations of confidentiality shall not apply to any information which: (i) was previously known to Contractor; (ii) is or becomes publicly available, through no fault of Contractor; (iii) is disclosed to Contractor by a third party having obligation of confidentiality to City; (iv) is independently developed by Contractor; or (v) is required to be disclosed as a matter of law.

VI. RECORDS RETENTION

6.1 Contractor and its subcontractors, if any, shall properly, accurately and completely maintain all documents, papers, and records, and other evidence pertaining to the services rendered hereunder (hereafter referred to as "documents"), and shall make such materials available to the City at their respective offices, at all reasonable times and as often as City may deem necessary during the Agreement period, including any extension or renewal hereof, and the record retention period established herein, for purposes of audit, inspection, examination, and making excerpts or copies of same by City and any of its authorized representatives.

6.2 Contractor shall retain any and all documents produced as a result of services provided hereunder for a period of four (4) years (hereafter referred to as "retention period") from the date of termination of the Agreement. If, at the end of the retention period, there is litigation or other questions arising from, involving or concerning this documentation or the services provided hereunder, Contractor shall retain the records until the resolution of such litigation or other such questions. Contractor acknowledges and agrees that City shall have access to any and all such documents at any and all times, as deemed necessary by City, during said retention period. City may, at its election, require Contractor to return said documents to City prior to or at the conclusion of said retention.

6.3 Contractor shall notify City, immediately, in the event Contractor receives any requests for information from a third party, which pertain to the documentation and records

referenced herein. Contractor understands and agrees that City will process and handle all such requests.

VII. TERMINATION

7.1 For purposes of this Agreement, "termination" of this Agreement shall mean termination by expiration of the Agreement term as stated in Article II. Term, or earlier termination pursuant to any of the provisions hereof.

7.2 Termination Without Cause. This Agreement may be terminated by either party upon sixty (60) calendar days written notice, which notice shall be provided in accordance with Article VIII. Notice.

7.3 Termination For Cause. Upon written notice, which notice shall be provided in accordance with Article VIII. Notice, City may terminate this Agreement as of the date provided in the notice, in whole or in part, upon the occurrence of one (1) or more of the following events, each of which shall constitute an Event for Cause under this Agreement:

7.3.1 The sale, transfer, pledge, conveyance or assignment of this Agreement without prior approval, as provided in Article XI. Assignment and Subcontracting.

7.4 Defaults With Opportunity for Cure. Should Contractor default in the performance of this Agreement in a manner stated in this Section 7.4 below, same shall be considered an event of default. City shall deliver written notice of said default specifying such matter(s) in default. Contractor shall have fifteen (15) calendar days after receipt of the written notice, in accordance with Article VIII. Notice, to cure such default. If Contractor fails to cure the default within such fifteen-day cure period, City shall have the right, without further notice, to terminate this Agreement in whole or in part as City deems appropriate, and to contract with another contractor to complete the work required in this Agreement. City shall also have the right to offset the cost of said new Agreement with a new contractor against Contractor's future or unpaid invoice(s), subject to the duty on the part of City to mitigate its losses to the extent required by law.

7.4.1 Bankruptcy or selling substantially all of company's assets

7.4.2 Failing to perform or failing to comply with any covenant herein required

7.4.3 Performing unsatisfactorily

7.5 Termination By Law. If any state or federal law or regulation is enacted or promulgated which prohibits the performance of any of the duties herein, or, if any law is interpreted to prohibit such performance, this Agreement shall automatically terminate as of the effective date of such prohibition.

7.6 Regardless of how this Agreement is terminated, Contractor shall affect an orderly transfer to City or to such person(s) or firm(s) as the City may designate, at no additional cost to City, all completed or partially completed documents, papers, records, charts, reports, and

any other materials or information produced as a result of or pertaining to the services rendered by Contractor, or provided to Contractor, hereunder, regardless of storage medium, if so requested by City, or shall otherwise be retained by Contractor in accordance with Article VI. Records Retention. Any record transfer shall be completed within thirty (30) calendar days of a written request by City and shall be completed at Contractor's sole cost and expense. Payment of compensation due or to become due to Contractor is conditioned upon delivery of all such documents, if requested.

7.7 Within forty-five (45) calendar days of the effective date of completion, or termination or expiration of this Agreement, Contractor shall submit to City its claims, in detail, for the monies owed by City for services performed under this Agreement through the effective date of termination, subject to the provisions of Sections 3.3 and 4.6. Failure by Contractor to submit its claims within said forty-five (45) calendar days shall negate any liability on the part of City and constitute a **Waiver** by Contractor of any and all right or claims to collect moneys that Contractor may rightfully be otherwise entitled to for services performed pursuant to this Agreement.

7.8 Upon the effective date of expiration or termination of this Agreement, Contractor shall cease all operations of work being performed by Contractor or any of its subcontractors pursuant to this Agreement.

7.9 Termination not sole remedy. In no event shall City's action of terminating this Agreement, whether for cause or otherwise, be deemed an election of City's remedies, nor shall such termination limit, in any way, at law or at equity, City's right to seek damages from or otherwise pursue Contractor for any default hereunder or other action.

7.10 If the program were to be discontinued for any reason, all Certified Tourism Ambassadors who achieved their designation will be placed into the "At Large" category within the Tourism Ambassador Institute structure unless, or until, they move to an area where another Certified Tourism Ambassador program exists.

7.11 If this Agreement is terminated prior to the completion of all services set forth in Exhibit I, any unearned portion of the payment made pursuant to Subsection 4.1(a) shall be returned to City within thirty (30) days of the date of termination.

VIII. NOTICE

8.1 Except where the terms of this Agreement expressly provide otherwise, any election, notice or communication required or permitted to be given under this Agreement shall be in writing and deemed to have been duly given if and when delivered personally (with receipt acknowledged), or three (3) days after depositing same in the U.S. mail, first class, with proper postage prepaid, or upon receipt if sending the same by certified mail, return receipt requested, or upon receipt when sent by a commercial courier service (such as Federal Express or DHL Worldwide Express) for expedited delivery to be confirmed in writing by such courier, at the addresses set forth below or to such other address as either party may from time to time designate in writing.

If intended for City, to:

Cassandra Matej, Executive Director
San Antonio Convention and Visitors Bureau
203 S. St. Mary's, Suite 200
San Antonio, Texas 78205

If intended for Contractor, to:

Mickey Schaefer, President
Mickey Schaefer & Associates, L.L.C.
238 E. Allthorn Place
Tucson, Arizona 85755

IX. INSURANCE

9.1 Prior to the commencement of any work under this Agreement, Contractor shall furnish copies of all required endorsements and completed Certificate(s) of Insurance to the City's Convention and Visitor's Bureau, which shall be clearly labeled "Tourism Ambassador Program" in the Description of Operations block of the Certificate. The Certificate(s) shall be completed by an agent and signed by a person authorized by that insurer to bind coverage on its behalf. The City will not accept a Memorandum of Insurance or Binder as proof of insurance. The certificate(s) must have the agent's signature and phone number, and be mailed, with copies of all applicable endorsements, directly from the insurer's authorized representative to the City. The City shall have no duty to pay or perform under this Agreement until such certificate and endorsements have been received and approved by the City's Convention and Visitor's Bureau. No officer or employee, other than the City's Risk Manager, shall have authority to waive this requirement.

9.2 The City reserves the right to review the insurance requirements of this Article during the effective period of this Agreement and any extension or renewal hereof and to modify insurance coverages and their limits when deemed necessary and prudent by City's Risk Manager based upon changes in statutory law, court decisions, or circumstances surrounding this Agreement. In no instance will City allow modification whereby City may incur increased risk.

9.3 A Contractor's financial integrity is of interest to the City; therefore, subject to Contractor's right to maintain reasonable deductibles in such amounts as are approved by the City, Contractor shall obtain and maintain in full force and effect for the duration of this Agreement, and any extension hereof, at Contractor's sole expense, insurance coverage written on an occurrence basis, unless otherwise indicated, by companies authorized to do business in the State of Texas and with an A.M Best's rating of no less than A- (VII), in the following types and for an amount not less than the amount listed below:

| TYPE | AMOUNTS |
|---|--|
| | |
| Broad form Commercial General Liability Insurance to include coverage for the following: <ul style="list-style-type: none"> a. Premises/Operations b. Independent Contractors c. Products/Completed Operations (Professional Liability) d. Personal Injury e. Contractual Liability f. Damage to property rented by you | For <u>Bodily Injury</u> and <u>Property Damage</u> of \$1,000,000 per occurrence; \$2,000,000 General Aggregate, or its equivalent in Umbrella or Excess Liability Coverage f. \$100,000 |
| | |

9.4 Contractor agrees to provide a certificate of insurance and endorsement that includes its subcontractors in its coverage and names the CITY as an additional insured. Respondent shall provide the CITY with said certificate and endorsement prior to the commencement of any work by the subcontractor. This provision may be modified by City's Risk Manager, without subsequent City Council approval, when deemed necessary and prudent, based upon changes in statutory law, court decisions, or circumstances surrounding this agreement. Such modification may be enacted by letter signed by City's Risk Manager, which shall become a part of the contract for all purposes.

9.5 As they apply to the limits required by the City, the City shall be entitled, upon request and without expense, to receive copies of the policies, declaration page, and all endorsements thereto and may require the deletion, revision, or modification of particular policy terms, conditions, limitations, or exclusions (except where policy provisions are established by law or regulation binding upon either of the parties hereto or the underwriter of any such policies). Contractor shall be required to comply with any such requests and shall submit a copy of the replacement certificate of insurance to City at the address provided below within 10 days of the requested change. Contractor shall pay any costs incurred resulting from said changes.

City of San Antonio
 Attn: Convention and Visitors Bureau
 P.O. Box 839966
 San Antonio, Texas 78283-3966

9.6 Contractor agrees that with respect to the above required insurance, all insurance policies are to contain or be endorsed to contain the following provisions:

- Name the City, its officers, officials, employees, volunteers, and elected representatives as additional insureds by endorsement, as respects operations and activities of, or on behalf of, the named insured performed under contract with the

City, with the exception of the workers' compensation and professional liability policies;

- Provide for an endorsement that the "other insurance" clause shall not apply to the City of San Antonio where the City is an additional insured shown on the policy;
- General liability policy will provide a waiver of subrogation in favor of the City.
- Provide advance written notice directly to City of any suspension, cancellation, non-renewal or material change in coverage, and not less than ten (10) calendar days advance notice for nonpayment of premium.

9.7 Within five (5) calendar days of a suspension, cancellation or non-renewal of coverage, Contractor shall provide a replacement Certificate of Insurance and applicable endorsements to City. City shall have the option to suspend Contractor's performance should there be a lapse in coverage at any time during this contract. Failure to provide and to maintain the required insurance shall constitute a material breach of this Agreement.

9.8 In addition to any other remedies the City may have upon Contractor's failure to provide and maintain any insurance or policy endorsements to the extent and within the time herein required, the City shall have the right to order Contractor to stop work hereunder, and/or withhold any payment(s) which become due to Contractor hereunder until Contractor demonstrates compliance with the requirements hereof.

9.9 Nothing herein contained shall be construed as limiting in any way the extent to which Contractor may be held responsible for payments of damages to persons or property resulting from Contractor's or its subcontractors' performance of the work covered under this Agreement.

9.10 It is agreed that Contractor's insurance shall be deemed primary and non-contributory with respect to any insurance or self insurance carried by the City of San Antonio for liability arising out of operations under this Agreement.

9.11 It is understood and agreed that the insurance required is in addition to and separate from any other obligation contained in this Agreement and that no claim or action by or on behalf of the City shall be limited to insurance coverage provided..

9.12 Contractor and any Subcontractors are responsible for all damage to their own equipment and/or property.

X. INDEMNIFICATION

10.1 CONTRACTOR covenants and agrees to FULLY INDEMNIFY and HOLD HARMLESS, the CITY and the elected officials, employees, officers, directors, volunteers and representatives of the CITY, individually and collectively, from and against any and all costs, claims, liens, damages, losses, expenses, fees, fines, penalties, proceedings, actions, demands, causes of action, liability and suits of any kind and nature, including but not limited to, personal or bodily injury, death and property damage, made upon the CITY directly or indirectly arising out of, resulting from or related to CONTRACTOR'S activities under this AGREEMENT, including any acts or omissions of CONTRACTOR, any agent, officer, director, representative, employee, contractor or subcontractor of CONTRACTOR, and their respective officers, agents employees, directors and representatives while in the exercise of performance of the rights or duties under this Agreement. The indemnity provided for in this paragraph shall not apply to any liability resulting from the negligence of CITY, its officers or employees, in instances where such negligence causes personal injury, death, or property damage. IN THE EVENT CONTRACTOR AND CITY ARE FOUND JOINTLY LIABLE BY A COURT OF COMPETENT JURISDICTION, LIABILITY SHALL BE APPORTIONED COMPARATIVELY IN ACCORDANCE WITH THE LAWS FOR THE STATE OF TEXAS, WITHOUT, HOWEVER, WAIVING ANY GOVERNMENTAL IMMUNITY AVAILABLE TO THE CITY UNDER TEXAS LAW AND WITHOUT WAIVING ANY DEFENSES OF THE PARTIES UNDER TEXAS LAW.

The provisions of this INDEMNITY are solely for the benefit of the Parties hereto and not intended to create or grant any rights, contractual or otherwise, to any other person or entity. CONTRACTOR shall advise the CITY in writing within 24 hours of any claim or demand against the CITY or CONTRACTOR known to CONTRACTOR related to or arising out of CONTRACTOR'S activities under this AGREEMENT and shall see to the investigation and defense of such claim or demand at CONTRACTOR's cost. The CITY shall have the right, at its option and at its own expense, to participate in such defense without relieving CONTRACTOR of any of its obligations under this paragraph.

10.2 Defense Counsel - City shall have the right to approve defense counsel to be retained by Contractor in fulfilling its obligation hereunder to defend and indemnify City, unless such right is expressly waived by City in writing. Contractor shall retain City approved defense counsel within seven (7) business days of City's written notice that City is invoking its right to indemnification under this Agreement. If Contractor fails to retain Counsel within such time period, City shall have the right to retain defense counsel on its own behalf, and Contractor shall be liable for all costs incurred by City. City shall also have the right, at its option, to be represented by advisory counsel of its own selection and at its own expense, without waiving the foregoing.

10.3 Employee Litigation - In any and all claims against any party indemnified hereunder by any employee of Contractor, any subcontractor, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, the indemnification obligation

herein provided shall not be limited in any way by any limitation on the amount or type of damages, compensation or benefits payable by or for Contractor or any subcontractor under worker's compensation or other employee benefit acts.

10.4 Trademarked and Copyrighted Usage Contractor agrees to obtain all necessary licenses and take all other necessary steps to insure that all its uses of trademarked and/or copyrighted materials in the Project comply with United States and any other applicable trademark and copyright law.

10.5 Trademark and Copyright Indemnification Contractor agrees to indemnify and defend at its own expense City of San Antonio, their officials, agents and employees from any and all liability arising from copyright infringement and/or consequential damages that others may suffer as a result of the use by Contractor or its designee of trademarked and/or copyrighted materials in the Project.

10.6 Contractor may rely upon and is hereby released of liability for information, content, trademarks, or other materials provided by City to Contractor for use in the Project.

XI. ASSIGNMENT AND SUBCONTRACTING

11.1 Contractor shall supply qualified personnel as may be necessary to complete the work to be performed under this Agreement. Persons retained to perform work pursuant to this Agreement shall be the employees or subcontractors of Contractor. Contractor, its employees or its subcontractors shall perform all necessary work.

11.2 Contractor may not sell, assign, pledge, transfer or convey any interest in this Agreement, nor delegate the performance of any duties hereunder, by transfer, by subcontracting or any other means, without the prior written consent of Director. As a condition of such consent, if such consent is granted, Contractor shall remain liable for completion of the services outlined in this Agreement in the event of default by the successor Contractor, assignee, transferee or subcontractor.

11.3 Any attempt to transfer, pledge or otherwise assign this Agreement without said written approval, shall be void ab initio and shall confer no rights upon any third person. Should Contractor assign, transfer, convey, delegate, or otherwise dispose of any part of all or any part of its right, title or interest in this Agreement, City may, at its option, cancel this Agreement and all rights, titles and interest of Contractor shall thereupon cease and terminate, in accordance with Article VII. Termination, notwithstanding any other remedy available to City under this Agreement. The violation of this provision by Contractor shall in no event release Contractor from any obligation under the terms of this Agreement, nor shall it relieve or release Contractor from the payment of any damages to City, which City sustains as a result of such violation.

XII. INDEPENDENT CONTRACTOR

12.1 Contractor covenants and agrees that he or she is an independent contractor and not an officer, agent, servant or employee of City; that Contractor shall have exclusive control of and exclusive right to control the details of the work performed hereunder and all persons performing same, and shall be responsible for the acts and omissions of its officers, agents, employees, contractors, subcontractors and consultants; that the doctrine of respondent superior shall not apply as between City and Contractor, its officers, agents, employees, contractors, subcontractors and consultants, and nothing herein shall be construed as creating the relationship of employer-employee, principal-agent, partners or joint venturers between City and Contractor. The Parties hereto understand and agree that the City shall not be liable for any claims which may be asserted by any third party occurring in connection with the services to be performed by the Contractor under this Agreement and that the Contractor has no authority to bind the City.

XIII. CONFLICT OF INTEREST

13.1 Contractor acknowledges that it is informed that the Charter of the City of San Antonio and its Ethics Code prohibit a City officer or employee, as those terms are defined in Section 2-52 of the Ethics Code, from having a financial interest in any contract with the City or any City agency such as city owned utilities. An officer or employee has a "prohibited financial interest" in a contract with the City or in the sale to the City of land, materials, supplies or service, if any of the following individual(s) or entities is a party to the contract or sale: a City officer or employee; his parent, child or spouse; a business entity in which the officer or employee, or his parent, child or spouse owns ten (10) percent or more of the voting stock or shares of the business entity, or ten (10) percent or more of the fair market value of the business entity; a business entity in which any individual or entity above listed is a subcontractor on a City contract, a partner or a parent or subsidiary business entity.

13.2 Pursuant to the subsection above, Contractor warrants and certifies, and this Agreement is made in reliance thereon, that it, its officers, employees and agents are neither officers nor employees of the City. Contractor further warrants and certifies that it has tendered to the City a Discretionary Contracts Disclosure Statement in compliance with the City's Ethics Code.

XIV. AMENDMENTS

14.1 Except where the terms of this Agreement expressly provide otherwise, any alterations, additions, or deletions to the terms hereof, shall be effected by amendment, in writing, executed by both City and Contractor, subject to the approval of City Council when required.

XV. SEVERABILITY

15.1 If any clause or provision of this Agreement is held invalid, illegal or unenforceable under present or future federal, state or local laws, including but not limited to the City Charter, City Code, or ordinances of the City of San Antonio, Texas, then and in that event it is the intention of the Parties hereto that such invalidity, illegality or unenforceability shall not affect any other clause or provision hereof and that the remainder of this Agreement shall be construed as if such invalid, illegal or unenforceable clause or provision was never contained herein; it is also the intention of the Parties hereto that in lieu of each clause or provision of this Agreement that is invalid, illegal, or unenforceable, there be added as a part of the Agreement a clause or provision as similar in terms to such invalid, illegal or unenforceable clause or provision as may be possible, legal, valid and enforceable.

XVI. LICENSES/CERTIFICATIONS

16.1 Contractor warrants and certifies that Contractor and any other person designated to provide services hereunder has the requisite training, license and/or certification to provide said services, and meets all competence standards promulgated by all other authoritative bodies, as applicable to the services provided herein.

XVII. COMPLIANCE

17.1 Contractor shall provide and perform all services required under this Agreement in compliance with all applicable federal, state and local laws, rules and regulations.

XVIII. NONWAIVER OF PERFORMANCE

18.1 Unless otherwise specifically provided for in this Agreement, a waiver by either Party of a breach of any of the terms, conditions, covenants or guarantees of this Agreement shall not be construed or held to be a waiver of any succeeding or preceding breach of the same or any other term, condition, covenant or guarantee herein contained. Further, any failure of either Party to insist in any one or more cases upon the strict performance of any of the covenants of this Agreement, or to exercise any option herein contained, shall in no event be construed as a waiver or relinquishment for the future of such covenant or option. In fact, no waiver, change, modification or discharge by either party hereto of any provision of this Agreement shall be deemed to have been made or shall be effective unless expressed in writing and signed by the Parties in accordance with Article XIV. Amendments. No act or omission by a Party shall in any manner impair or prejudice any right, power, privilege, or remedy available to that Party hereunder or by law or in equity, such rights, powers, privileges, or remedies to be always specifically preserved hereby.

XIX. DELAYS

19.1 Neither Party shall be liable for delays caused by fire, accident, labor dispute, war, insurrection, riot, act of government, act of God, or any other cause reasonably beyond its control; but each Party shall use all reasonable efforts to minimize the extent of any such delay. Contractor shall not be liable to City (or any of City's customers) for any delay in performance or any failure in performance hereunder caused in whole or in part by reasons beyond the control of Contractor, including, but not limited to, City's failure to furnish necessary information with respect to details known only to, or to be determined by City, or other delays or failures due to City's failure to provide equipment or other materials necessary to perform the Services.

XX. LAW APPLICABLE

20.1 **THIS AGREEMENT SHALL BE CONSTRUED UNDER AND IN ACCORDANCE WITH THE LAWS OF THE STATE OF TEXAS AND ALL OBLIGATIONS OF THE PARTIES CREATED HEREUNDER ARE PERFORMABLE IN BEXAR COUNTY, TEXAS.**

20.2 Any legal action or proceeding brought or maintained, directly or indirectly, as a result of this Agreement shall be heard and determined in the City of San Antonio, Bexar County, Texas.

XXI. LEGAL AUTHORITY

21.1 The signer of this Agreement for Contractor represents, warrants, assures and guarantees that he has full legal authority to execute this Agreement on behalf of Contractor and to bind Contractor to all of the terms, conditions, provisions and obligations herein contained.

XXII. PARTIES BOUND

22.1 This Agreement shall be binding on and inure to the benefit of the Parties hereto and their respective heirs, executors, administrators, legal representatives, and successors and assigns, except as otherwise expressly provided for herein.

XXIII. CAPTIONS

23.1 The captions contained in this Agreement are for convenience of reference only, and in no way limit or enlarge the terms and/or conditions of this Agreement.

XXIV. ENTIRE AGREEMENT

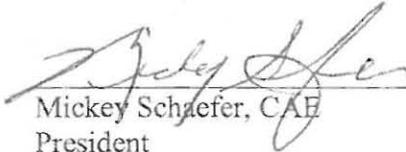
24.1 This Agreement and its Exhibits constitutes the final and entire agreement between the Parties hereto and contain all of the terms and conditions agreed upon. No other agreements, oral or otherwise, regarding the subject matter of this Agreement shall be deemed to exist or to bind the Parties hereto, unless same be in writing, dated subsequent to the date hereto, and duly executed by the Parties, in accordance with Article XIV. Amendments. Should there be any conflict between this Agreement and Exhibits I or II, this Agreement shall control. Should there be a conflict between Exhibit I and Exhibit II, Exhibit I shall control.

EXECUTED and **AGREED** to this the 1st day of May, 2012.

CITY:
CITY OF SAN ANTONIO

CONTRACTOR:
MICKEY SCHAEFER & ASSOCIATES, L.L.C.

Edward Belmares
Assistant City Manager



Mickey Schaefer, CAE
President

Approved as to Form:

City Attorney

Exhibit I—Scope of Services
Exhibit II--Contractor's Proposal

Exhibit I

Scope of Services

The Parties agree to perform the requirements specified below:

1.0 Certification Program Development; June-September 2012

1.1 Customize Curriculum & Protect Intellectual Property

Responsibility: Contractor determines learning modules based upon Front-line research findings conducted under another Agreement. City provides information to assist Contractor in writing a unique, robust curriculum that features unique information about the county (e.g. history, culture, demographics, attractions, etc.) that will be included in the modules. Contractor proposes a methodology for delivering the learning and testing program components. The recommended methodology will complement City's technological and staff infrastructure. City is responsible for printing and production. Minor changes to the pre-classroom reading document (e.g. minor changes in web site addresses, phone numbers, etc.) will be made to documents on an annual basis on the anniversary date; additional document changes, additions or other significant amendments will be charged a per hour fee as delineated annually by Contractor to every Accredited Provider ("AP") participating in the Certified Tourism Ambassador ("CTA") program.

City agrees to not use the customized curriculum in any other way, e.g. web site content, visitor guide content, etc. In the event the City desires to repurpose any portion of the content for other purposes, Contractor will explore the objectives with the Director and provide a proposal for the costs associated with modifying the content to fit your needs. This is in order to protect the curriculum, your local program's reputation, and the overall integrity of the nationwide certification program.

1.2 Develop Customized Facilitator Guide and Materials for Training the Trainers

Responsibility: Contractor develops the facilitator's/training guide content. City responsible for printing and production.

1.3 Develop Student Learning Materials. This involves the creation of customized teaching resources that help students achieve specified learning objectives.

Responsibility: Contractor develops content and provides camera-ready originals. City responsible for printing and production.

1.4 Develop Promotion and Marketing Strategies

Responsibility: City staff determines best strategies for promoting and marketing the program with Contractor input, where desired. City integrates CTA program promotion into existing outreach and communication efforts.

- 1.5 Develop Promotional Flyer Targeted to Prospective CTAs**
Responsibility: Contractor provides City communications staff with draft flyer. City edits as desired, produces original, and reproduces with updates as necessary.
- 1.6 Develop Promotional Flyer Targeted to Employers**
Responsibility: Contractor provides City communications staff with draft flyer. City edits as desired, produces original, and reproduces with updates as necessary.
- 1.7 Develop a “Most Frequented” List of Attractions/Features that front-line employees and volunteers need to know and can refer to when assisting a visitor.**
Responsibility: City develops using existing materials, City and other web sites, and other resources, as available.
- 1.8 Solicit Incentives and Rewards to Entice Participation (i.e., tickets to attractions, free tickets, discounts on dinner, etc.) These incentives are critical to encourage front-line participation and to enhance the ambassadors’ first-hand knowledge of your product by experiencing a wide variety of venues.**
Responsibility: City solicits in-kind incentives from key partners throughout San Antonio and offers these “Freebies/Discounts” to their CTAs via www.CTANetwork.com; continuously promotes to stakeholders and CTAs to drive experiential learning to enhance the visitor experience.

2.0 Field Testing September-October 2012 (Simultaneously with Train the Trainer)

- 2.1 Field Test curriculum and learning materials with Front Line Employees and Volunteers. This involves utilizing selected trainers from the trainer cadre to deliver the initial (field test) program.**
Responsibility: Contractor and City determine the best target group for the field test (hotel, restaurant, etc.). Contractor assists with preparation for the field test, observes class, and assesses implementation. City is responsible for extending invitations to participants, managing registrations, and handling all meeting logistics, including media, food & beverage, etc. City key staff attend to help shape the program curriculum and delivery. Additionally, any prospective trainers would be invited to attend this class to observe the classroom experience. See 3.1 and 3.3 below.
- 2.2. Evaluate and Modify Support Materials and Training as Necessary**
Responsibility: Contractor reviews field test findings and talks with trainers and ambassadors to determine their level of satisfaction with the training (was it easy to teach, was it fun to participate, what can be improved, etc.). Contractor

consults with City and makes any necessary changes to the curriculum and teaching methods to meet participants' needs.

2.3. Prepare for Program Roll Out

Responsibility: Contractor and City determine launch date. City coordinates dissemination of materials. Contractor provides sample templates as desired by City.

**3.0 Train the Trainer; September-October 2012
(Simultaneously with Field Testing)**

3.1 Identify and select a potential cadre of facilitators. (Est. up to 20 Facilitators)

These local individuals would be experienced and reputable volunteer facilitators that can capture the essence of the curriculum and facilitate the four-hour classroom session (as teams of two) in ways that inspire and motivate the ambassadors. City staff may wish to participate as facilitators for some topics, particularly for the field test of the program.

Contractor will recommend a strategy for expanding the cadre of qualified facilitators based on the size, scope, and timetable for full scale program implementation specified by City.

Responsibility: City with input from Contractor

3.2 Train the Field Test Facilitators

Responsibility: Contractor provides one consultant to train the field test facilitators on the curriculum and its delivery, in one remote session.

3.3 Train the Cadre of Facilitators (Est. up to 20 Facilitators)

Train the cadre of facilitators in a two-hour training session which utilizes some of the field test facilitators, where applicable, to reinforce facilitator buy-in and enthusiasm. Conduct a post-training evaluation by surveying the facilitators to obtain their input and changes. This session is usually held the afternoon of the Field Test. See 2.1 above.

Responsibility: Contractor facilitates one two-hour training session, utilizing some of the field test facilitators, and conducts the post-training evaluation. City coordinates invitations, registration, and meeting logistics and offers key City staff to help train the facilitators on topics that are City centric. Additional facilitator training sessions, if desired, are \$1,500 per session, plus expenses.

3.4 (Optional) Conduct City/County Tours with Facilitators (full-day tour including: destination districts; hotels, restaurants, convention center; new construction; etc.)

Responsibility: City handles all logistics and costs based upon the curriculum requirements.

4.0 Program Roll Out; November 2012 – Ongoing

4.1 Develop Calendar of Classroom Sessions and Ambassador Events and Promote Heavily

Responsibility: City coordinates a Master Calendar of the four-hour classroom sessions which are designed to be offered by the City throughout the county at various times of day and on varying days of the week, in order to fit the work/personal schedules of Front Line. Contractor will provide City with a Request to Host form for larger organizations that choose to host in-house sessions.

4.2 Orient Hospitality Executives, Area Hospitality Organizations, HR Departments and In-House Training Staff on Benefits of the Ambassador Program to the Area and to their CVB/Organization

Responsibility: City handles ongoing program promotion and marketing.

4.3 Educate Area Partners and Staff on the Program and Its Benefits to City

Responsibility: City handles ongoing program promotion and marketing.

5.0 Ongoing Program Management; November 2012 and Beyond

5.1 Administer the Certification and Renewal of Certification Program

Responsibility: Contractor assists in identifying the key information that is needed for successful program administration. City administers the program without the services of Contractor (if Contractor services are desired, a separate contract would be negotiated based upon identified needs). With regard to ongoing program revenues and expenses, upon request, Contractor will provide a budget template to help City prepare a program budget. City will establish the per person enrollment fee and annual renewal fee, if any, at any amount it desires, as long as the fees are \$49 or less, in order to maximize participation.

To facilitate administration, Contractor will provide a software program that has been designed to manage all aspects of the CTA program – CTANetwork.com. APs are encouraged to use this software for ongoing program management. The CTANetwork.com site is currently being used by all of the Tourism Ambassador Institute APs to drive program administration. Contractor's team is available for initial training and ongoing support.

Administrative Software

This "back end", administrative software is free to all Accredited Providers to enable them to:

- Manage their local database of CTAs
- Set up and manage online or manual enrollment to CTA events
- Control the "front end", front facing web portal for the local CTA "micro-site"
- A robust search feature allows you to search your database by Industry Sector (e.g. send an email to all transportation CTAs, or all restaurant CTAs, etc.) or by Company (e.g. Marriott, Westin, etc.) or by Title (e.g. human resources, general manager, front desk, etc.).
- Generate Reports (e.g. numbers of CTAs 'graduated'; number applying; number renewing, etc. The *Report* feature is continually updated by MSA with new reports constantly being developed.

CTA PROGRAM ADMINISTRATIVE SOFTWARE

Customized Software: Software allows you to manage your database of CTAs, plan classes & events, manage certification renewal and more!



Michigan State Police
Michigan State Police

Michigan State Police

Quick Search: All Ambassadors Currently 407 in view

| ID | Company Name | Address | City | State | Zip | Phone | Mobile |
|------|--------------|-----------------------|---------|-------|-------|--------------|--------------|
| 5851 | Class 1 Cat | Michigan State Police | Lansing | MI | 48206 | 313.321.1234 | 313.321.1234 |
| 5852 | Class 1 Cat | Michigan State Police | Lansing | MI | 48206 | 313.321.1234 | 313.321.1234 |
| 5853 | Class 1 Cat | Michigan State Police | Lansing | MI | 48206 | 313.321.1234 | 313.321.1234 |
| 5854 | Class 1 Cat | Michigan State Police | Lansing | MI | 48206 | 313.321.1234 | 313.321.1234 |
| 5855 | Class 1 Cat | Michigan State Police | Lansing | MI | 48206 | 313.321.1234 | 313.321.1234 |
| 5856 | Class 1 Cat | Michigan State Police | Lansing | MI | 48206 | 313.321.1234 | 313.321.1234 |
| 5857 | Class 1 Cat | Michigan State Police | Lansing | MI | 48206 | 313.321.1234 | 313.321.1234 |
| 5858 | Class 1 Cat | Michigan State Police | Lansing | MI | 48206 | 313.321.1234 | 313.321.1234 |
| 5859 | Class 1 Cat | Michigan State Police | Lansing | MI | 48206 | 313.321.1234 | 313.321.1234 |
| 5860 | Class 1 Cat | Michigan State Police | Lansing | MI | 48206 | 313.321.1234 | 313.321.1234 |

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

Each destination has the flexibility of building out their own micro site, within the CTANetwork.com site, giving the CTA a robust variety of web pages and experiences at the destination level, while keeping everyone excited about being part of a recognized CTA program.

CTA Network.com – the CTA Online Community – Logged In View:

The screenshot shows the CTANetwork.com website interface. The main navigation bar includes 'MyCTA', 'CERTIFIED TOURISM AMBASSADOR', and 'MyCTA'. The main content area is divided into several sections: 'MyCTA' (user profile), 'WELCOME' (community message), 'HEARTLAND TOURISM' (destination-specific content), 'Featured Attractions', 'Local Links', 'CTA Connect', 'Featured Article', 'Industry Highlights', and 'CTA Photo Gallery'. Callout boxes provide detailed descriptions for each of these sections.

- MyCTA:**
 - Manage Your Profile
 - Manage Your Events
 - Give Us Feedback
 - Upload Your Photo
 - Access Your Personal Social Networking Accounts
- Certification Renewal:** Manage/Record Your Renewal Points
- Featured Attraction/Visit Attractions:** Build your knowledge: detailed attraction information at your fingertips to help visitors
- Local Links:** Connect easily to important links & visitor information
- CTA Connect:**
 - Find A Fellow CTA using the CTA Directory
 - Refer A Friend
 - Connect Locally & Nationally through Facebook & Twitter
 - Check out Upcoming CTA Events
- Education & Career Tips:** Check often for helpful grammar, etiquette & service tips
- Earn Renewal Points:** Exploring the Website! Log on, go to Stay Professional/Using The Site for details.
- Freebies & Discounts:** Gain first-hand knowledge of attractions, restaurants & more
- Upcoming Events:** Keeps you up-to-date, link to area event calendars, submit events, and access upcoming CTA events
- Timely Info:** Stay up-to-date on the latest local happenings & submit Timely Info, too
- Industry Highlights:** Stay current on national & local industry news & trends
- CTA Photo Gallery:** Check out photos of recent CTA events and CTAs in action.

The software also features database management; eventual report generation (e.g. satisfaction ratings, number of CTAs); online renewal of certification; and many other administrative features. General features of the software are provided free; any special software program enhancements desired by City may result in additional cost, which would be quoted to and approved by City prior to the commencement of any work performed. The software and website have been specially designed for the CTA program through a special strategic partnership with *simpleview, inc.*

5.2 Accreditation and Quality Assurance Standards & Annual Licensing Renewal

City agrees to continuously monitor measures of quality for the CTA designation by applying for and maintaining its status as an AP of the Tourism Ambassador Institute (“TAI”), a subsidiary of Contractor. The TAI grants City the licensing rights to present, on behalf of the TAI, the CTA designation to those individuals who satisfactorily complete all program requirements. In order to maintain its accreditation status, City must adhere to TAI established accreditation criteria, pay an annual accreditation and licensing fee and any other requirements for program quality established annually by the TAI.

Unless City discontinues the program pursuant to the terms of Article VII of the Agreement, City agrees to re-apply annually for licensing rights and accreditation (or renewal of accreditation) by completing a *CTA Accredited Provider Quality Assurance Agreement & Checklist* that documents the program’s adherence with TAI established criteria. The criteria will be outlined annually in the TAI document entitled, *The Accreditation and Quality Assurance Process for CTA Accredited Providers*. City is required to re-apply for annual renewal of its licensing rights and accreditation status on its program anniversary unless this Agreement has been terminated pursuant to Article VII.

Maintaining Accredited Provider status includes adherence to TAI established criteria including assessment in the following core areas:

- A. Management & Administration**
- B. Data Collection & Integrity**
- C. Marketing & Communications**
- D. Education Program [Pre-Certification]**
- E. Education Program [Certification Renewal]**

The TAI will review the *CTA Accredited Provider Quality Assurance Questionnaire* and accompanying documentation to determine if City is adhering to agreed-upon criteria. TAI representatives may also request additional information from City, and may, on occasion, complete a site visit to meet with key stakeholders in San Antonio or the surrounding area. If it is deemed that established quality standards have been satisfied, City will be granted accreditation for another full year. If the standards have not been met, City will be placed in Provisional status and given the opportunity to remedy its compliance. If, after a specified period of time, the program is not brought into compliance with established CTA program standards, City will lose its accreditation status and licensing rights to present the CTA designation on behalf of the TAI or to renew the designation for its existing designees. If this discontinuance of accreditation were to occur for this or any other reason, all CTAs who achieved their designation through City would be placed into the “At Large” category

within the *Tourism Ambassador Institute™* structure unless, or until, they move to an area where another CTA program exists.

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

Through this process, City agrees to certain standards of practice to ensure a high level of program quality nationwide.

6.0 Program Evaluation and Modification; November 2013

6.1 Monitor Benchmark Measures and Metrics to Determine Success of the Program Over the Last Year and Over Time

Responsibility: At the end of the first full year after launch, City monitors metrics to determine program success.

6.2 Conduct Annual Evaluation of the Program Effectiveness

Responsibility: Once per year, Contractor provides a remote evaluation of the program; discusses the program with City during the annual accreditation process, and develops evaluation criteria for an online survey to obtain feedback on the program. Survey is conducted in the aggregate with other CTA programs; with specific results extracted for each local program.

6.3 Determine Program Changes, Where Necessary

Responsibility: Contractor reviews survey information with City and provides recommendations for any program modifications, as necessary; City carries out program modifications.

Exhibit
II



***MICKEY SCHAEFER &
ASSOCIATES LLC***

***Proposal for Management
Consulting Services - Exhibit II***

San Antonio Convention & Visitors Bureau

San Antonio Tourism Ambassadors Program
[working title]

*“Turning Your Frontline into
Certified Tourism Ambassadors”*

May 1, 2012



Contents

San Antonio Tourism Ambassadors Program Proposed Scope of Work

May 1, 2012

| | Pages |
|--|-------|
| EXECUTIVE SUMMARY..... | 3 |
| <i>Sections:</i> | |
| I. Program Overview..... | 4-5 |
| II. Investing in Your 'People Infrastructure'..... | 6 |
| III. Background & Objectives..... | 7-8 |
| IV. Customizing Your Program Curriculum | 9-10 |
| V. Additional Ideas..... | 11-12 |
| VI. Project Phases and Deliverables..... | 13-21 |
| VII. Timing and Resources..... | 22-25 |
| VIII. Qualifications..... | 26-34 |
| IX. Partial Client List | 35 |
| X. Closing | 36 |
| CITY OF SAN ANTONIO ATTACHMENTS: | |
| Attachment A: Respondent Questionnaire | 37-38 |
| Attachment B: Respondent Background & Qualifications Questionnaire | 39-44 |
| Attachment C: Pricing Schedule..... | 45-46 |

Executive Summary

Introduction

Mickey Schaefer & Associates LLC (hereinafter referred to as **MSA**) is pleased to offer this proposal to assist the City of San Antonio in the development of a Front-Line Customer Service Training Program for the San Antonio Convention & Visitors Bureau and the stakeholders it serves. MSA has closely read the RFP and applauds your efforts to achieve hospitality excellence throughout your destination.

The MSA Advantage

The broad range of services offered by the experienced **MSA** team can help San Antonio implement its objectives and give you a lasting frontline program – not a one-time program – upon which to achieve your destination vision for memorable experiences for your visitors.

What separates **MSA** apart from other frontline education providers is not only our extensive knowledge of tourism and the dynamics of delivering a positive visitor experience across a destination, but also our proven track record in producing customized training programs for the industry.

Over 100 Destination Marketing Organizations (DMOs) have selected **MSA** to customize and launch a frontline training program for their destination – the *Certified Tourism Ambassador™* Program (e.g. John Doe, CTA) – now 8,500 CTAs strong and growing (See *Section IX, Client List*). We have successfully trained and certified thousands of frontline workers and volunteers in destinations of all sizes by customizing each local training program to meet the unique needs of each destination. For example, the Dallas Metro area trained/certified over 1,000 CTAs in one year.

Designed specifically for the tourism/hospitality frontline, after extensive research, CTA program has proven that it leads to an engaged and motivated frontline and a united hospitality/tourism industry that is devoted to building a lasting culture of quality throughout the destination. The CTAs, their employers and the destination are dedicated to *Enhancing the Visitor Experience™* at every visitor 'touchpoint'.



"Our CTAs have a swagger, a smile and a renewed sense of Baltimore City Pride."

John Price, CTA
Director of Training, Yellow Taxi
Baltimore, MD

Their goal is to train 200 drivers!

I. Program Overview

Mickey Schaefer & Associates LLC (MSA) is pleased to offer consulting services to assist the San Antonio Convention & Visitors Bureau (DMO) in the development of the *San Antonio Tourism Ambassadors Program* (formal name TBD). This document embodies a “Statement of Work” and governs the scope of our efforts, deliverables, fee arrangements, and billing procedures for implementing the San Antonio Tourism Ambassadors Program.

Certified Tourism Ambassadors – The New Future of Tourism

The *San Antonio Tourism Ambassadors Program* [working title] will be a certification program that serves to increase tourism by inspiring front-line hospitality employees and volunteers to work together to turn every visitor encounter into a positive experience.

The premise is simple: If front-line employees and volunteers (those who come into immediate contact with the visitor) provide quality service to visitors (convention attendees, visitors, business travelers, etc.), the visitor is more likely to have a positive experience. Visitors who have a positive experience are more likely to return at some point in the future. They will share their perceptions with their friends. Everyone benefits – visitors, hospitality workers and their employers, and the local and area economies.

Training vs. Certification

The concept of tourism ambassadors is not new to the industry. Several cities in the U.S. and Canada have implemented some form of an ambassadors program. These current and past programs range from downtown ambassador programs that answer visitor queries and monitor safety and cleanliness, to programs for cab drivers where licenses to operate are contingent upon completing formal customer service training.

One of the critically important distinctions between the *Certified Tourism Ambassador*[™] program offered by Mickey Schaefer & Associates (MSA) and these other training programs is that our program will lead to full certification. Upon completion of all program requirements, front line employees and volunteers will be awarded the *Certified Tourism Ambassador*[™] (CTA) designation to be presented by a tourism-related entity (usually the local convention & visitors bureau) as an Accredited Provider of the *Tourism Ambassador Institute*[™], a subsidiary of Mickey Schaefer & Associates LLC. Certification strengthens the program in the eyes of the front-line workers and their employers and, as such, has lasting value over time to Greater San Antonio.

Current CTA Destinations

Over 8,500 CTAs have been certified to date. Thirteen programs have launched with great success involving over 90 DMOs in 14 states: Anaheim; Baltimore; Corpus Christi, Door County (WI); North Texas/Greater Dallas/Fort Worth (42 CVBs; 30 counties); Kalamazoo (MI); Kansas City Area (24 CVBs); Lansing (MI); Lexington; Greater Phoenix (7 CVBs), Rochester MN (CVB & Mayo Clinic); Spokane (WA), and the Journey Through Hallowed Ground (a four-state tourism heritage area partnership encompassing numerous CVBs/Chambers of Commerce from Gettysburg to Monticello); Sonoma County and Oklahoma City will launch mid 2012. Over 30 destinations have expressed recent interest to drive their strategic marketing direction, while educating and engaging their Front Line, including New Orleans, Grand Rapids, Salt Lake City, Boston & more.

Top-Line Benefits to a Destination

Here is what the *Certified Tourism Ambassadors*TM Program offers that sets it apart from other similar programs:

- **Nationwide Certification** – Your Front Line will be part of a nationwide certification program – with annual renewal – proudly using the *Certified Tourism Ambassador*TM designation behind their name (John Smith, CTA) and proudly wearing their CTA gold lapel pin. As with other certification programs, the CTA designation will be recognized nationwide as a valued part of the visitor experience by your Front Line, their employers, and, most importantly, your visitors.
- **Product Knowledge** – Through the initial certification, this program not only teaches the basics of exceeding customer expectations, it also teaches why tourism is important and gives valuable product knowledge to your Front Line. The learning objectives and customized curriculum teaches the history and special attributes of your destination, giving your Front Line employees or volunteers the tools and confidence they need to create memorable experiences. And, the annual renewal requirements ensure that your ambassador corps is forever building upon their product knowledge base.
- **Stakeholder Alignment** – Our current clients have been amazed at how this program aligns all stakeholders in the area. From the beginning Research Phase to Program Roll Out, they are engaged in shaping the program and, thus, take ownership in its ongoing success.
- **Competitive Advantage** – Meeting professionals and other decision-makers have indicated that they would select a “CTA City” over a non-CTA city. By committing to the program, they believe a destination shows its commitment to working together as a community and, most importantly, to ensuring the best possible experience for their attendees.
- **Consistent Messaging** – Through CTANetwork.com and CTA networking events you can push frequent messages to your CTA corps – important reminders and updates to build upon their knowledge base. As a result, your CTAs will develop a close-knit network that allows them to connect with one another to further their knowledge and fuel their motivation to serve the customer. By keeping your Front Line engaged and connected to your destination’s attributes and vision, your ambassador corps will be at-the-ready, ensuring that groups and visitors hear a consistent story about your destination...branding and marketing at the Front Line!

II. Investing in Your 'People Infrastructure'



All over the world, destinations are spending millions of dollars in enhancing their 'product' and luring visitors to their area. Very few are investing in their *people infrastructure* to ensure that visitors have a pleasant, memorable experience.

"We spend hundreds of thousands of dollars in advertising and marketing to entice visitors to come to our area, and it only makes sense to take care of them while they are here. In our industry, customer service is paramount. Unfortunately, in today's hectic world, customer service has become a lost art. This certification program allows the tourism industry to change that reality and exceed customer expectations in the process. The CTA program is a perfect way to prepare for major events and gives us a program of lasting value for many years to come."

David Lord, [then] President
Lexington Convention & Visitors Bureau, Lexington, KY, USA

Host of 2010 World Equestrian Games

III. Background & Objectives

Program Objective

“To increase area tourism by inspiring front-line hospitality employees and volunteers to turn every visitor encounter into a positive experience.”

Making the Case for the Ambassadors Program

The CVB is clearly in a position to make a difference throughout San Antonio through the development of the San Antonio Tourism Ambassadors Program.

The CTA designation provides front-line employees and volunteers with critical training that helps improve their attitudes *and* their performance. It gives them a chance to meet one another, learn from each others’ experiences, and celebrate together. All of this strengthens the program over time as the program matures.

The benefits are numerous and build on each other, which creates a Benefits Cycle, as follows:

Ambassadors Program Benefits Cycle©



Aligning to the Broader Vision:

A natural fit to bring together a myriad of objectives, the ambassadors program...

- **Increases CVB Visibility and Strengthens Relationships with Key Partners** – Offers a visible ROI to key partners. Strengthens relationships by pushing more business to various parts of the city, resulting in enhanced value to CVB partners and other stakeholders.
- **Builds Upon Destination-wide Collaboration** – Gives Greater San Antonio a common, collaborative project which will help reinforce the importance of working together to enhance tourism.
- **Builds a Positive Brand and Overall Destination Image** – If every experience is a good experience, the city will continue to shine in the eyes of the public making it easier to sell San Antonio to decision makers, such as meeting planners, tour operators, and boards of directors. In short, it strengthens brand awareness and top-of-mind perceptions.
- **Unites Front-Line Employees and Volunteers** – Brings front-line ambassadors together to achieve a common, shared goal of enhancing the visitor experience.
- **Increases Overall Convention & Tourism Business** – An enhanced visitor experience leads to more frequent visits and better word-of-mouth marketing about the county's attributes, which can lead to additional convention and tourism business.
- **Maximizes the Total Economic Impact of Tourism** – Not only will additional tourism result, but visitors may spend more on each visit if they are easily directed by the ambassadors to amenities that match their interests (food, attractions, shopping, entertainment, etc.).
- **Supports Public and Private Partnerships** – Brings key corporations and hospitality companies together to support a program of critical importance to the future of tourism. Corporate recruitment and retention efforts are also enhanced.
- **Enhances the Current "Product", While Building the Future** – Telling visitors about what exciting things are to come will help drive future business and will give the ambassadors something to be continually excited about. It also ensures ambassadors tell a consistent story about the attributes of Greater San Antonio.

In short, the program has many features that translate into a wide variety of benefits that permeate, and elevate, the entire hospitality and business community.

"People choose where they want to spend their travel dollars and we want them to spend them with us. We have the power to work as a team to influence that decision. We are all stars and we shine by working together!"

*Missy Geppi-Bowersox, CTA, Executive Vice President
Geppi's Entertainment Museum, Baltimore Maryland, USA*

IV. Customizing Your Program Curriculum

Through extensive research conducted in the initial development of the CTA program in 2005-2006, MSA studied the frontline training programs of 25 destinations. The research revealed that after three years, only 3 of the 25 frontline programs were still in existence, due to two main factors – the program was dependent upon one company to deliver the ongoing training AND the frontline (and their employers) were hungry for *more* than customer service training – they wanted "product" education and networking to help them better serve the visitor, with specific emphasis on the following frontline needs:

- **Customized Curriculum: History, Culture, Attractions & Points of Interest**
- **Access to and Familiarity with Resources to Help Them Serve Visitors**
- **Refresher on Customer Service**
- **Ways to Network/Connect with Frontline Workers in Other Industry Sectors**

As a result of this research, MSA designed the *Certified Tourism Ambassador*[™] program to be highly customized to meet the strategic and educational needs of each destination – with the destination creating its local program name/logo and our working closely with the destination to customize a robust local program curriculum to meet the destination's overall educational outcomes and objectives. Additionally, each destination establishes their own per person enrollment fee and annual renewal fee, which must be \$49 or under to ensure affordability among the frontline ranks.

The requirement for *Annual Renewal of Certification* further strengthens the program in the eyes of the CTA, their employer, and the visitor. To maintain their CTA designation (which can be used on business cards correspondence, etc.), CTAs are required to obtain 50 points per year for visiting attractions, volunteering, reading educational materials, attending CTA Networking events, or participating in tourism-related educational events. This has resulted in a constant "pool" of well-trained, passionate volunteers for local festivals and other events.

The CTA program is currently delivered via a *Pre-Classroom Reading & Resource Materials* document/notebook (Pre-Read, for short), including specially-designed pre-class exercises, followed later by a 4-hour classroom experience (or four one-hour sessions), with an open book test at the end to watch them the use available resources (e.g. regional and local visitor guides, maps, etc.).

The Pre-Read document/notebook is designed to also serve as a reference tool – all of the local points of interest, attractions, historical sites, and more include full descriptions, contact info and 'tourist tips' and are alphabetized in the back of a pre-class reading notebook, along with a robust Index. This customized resource and the classroom instruction have proven – time and again – to increase confidence and pride of the frontline ranks. Our clients constantly receive accolades from the frontline on the thoroughness of the document/resource (approx. 150-200 pages of detailed information within four modules including history, culture, attractions, why tourism is important, ten rules for exceeding customer expectations, 'living' the destination brand, and more). Our writers spend 6-8 weeks researching and customizing your content.

When an airport Information Desk worker at the Phoenix, Arizona, USA, Sky Harbor Airport (PHX) was asked what she liked best about the CTA program. She looked down at her CTA notebook, put both of her hands on it and said,

"This book. There's rarely a question I can't answer now. I can easily give visitors web sites, phone numbers or other resources to find the information they need."

MSA has also discovered that managers will often participate in the front line program first, *before* deciding whether to send their frontline team. Therefore, a robust curriculum and educational experience are key to success – it results in three important management/employer behaviors:

- **Management "buy in" to the frontline program and its objectives**
- **Positive word-of-mouth among employers about the program**
- **Ongoing support of the program over time.**

"You can immediately identify someone that's been through the CTA program and who hasn't. As cities become more competitive, it is going to make a real difference for Baltimore."

Shauntee Daniels, CTA, Education & Outreach Administrator
City of Baltimore, Mayor's Office, Baltimore, MD, USA



Shauntee Daniels , CTA



Hotel CTAs proudly wear their CTA pin to show their pride as local ambassadors

V. Additional Ideas from MSA:

Our clients are finding that there are many exciting “legs” or extensions to this program that could benefit the hospitality industry in the area. Some of them are as follows:

1. **Expands Opportunities for Grant Funding** through solicitation of area corporations, state agencies, etc. which could lead to additional CVB funding for this program and for future projects. Shows a commitment to a tourism infrastructure that has lasting value for San Antonio. *Note: Other CTA destinations have been successful at receiving grants from a variety of sources, including: heritage grants; National Park Service; private corporations; local hotel and restaurant associations; local governments; airports; and more.*
2. **Provides Visible Recognition to Ambassadors and Their Employers** through a variety of means. Possible recognition ideas (which could easily be sponsored) include:
 - a. Special Annual Celebration Recognition Rally for All Ambassadors and Their Employers
 - b. Special Recognition by their Employer in the Workplace
 - c. Hotel Association/Restaurant Association Annual Meeting
 - d. Press Coverage listing participating employers and ambassadors.
 - e. Special Activities During National Tourism Week
 - f. Etc.
3. **Uses the CTAs to develop a “host community” infrastructure** which has been a successful model in other cities in bidding on and hosting prestigious meetings and events. The existence of a formal *San Antonio Tourism Ambassadors Program* gives your city an extra sales pitch in promoting the area to organizations such as the NBA, NCAA and more. It has been proven that an active civic hospitality infrastructure is a positive influence in bidding on these events, which is why our clients see this program as a way to engage and motivate their frontline continuously, instead of “gearing up” to host special events.
4. **Promotes San Antonio to Meeting Planners at Hotel and Convention Center Pre-Con Meetings and in Sales Calls** that San Antonio is a “CTA Destination”; familiarizes them with the program, reiterates the program’s benefits to their convention attendees, and reflects upon the civic pride behind the program.
5. **Builds Upon Word-of-Mouth Excitement for Future Development** by giving front-line employees and volunteers timely updates on the progress of various projects underway in building a new, exciting future.
6. **Encourages Front-Line Employees and Volunteers to Seek Certification** through participation in the Tourism Ambassadors Program and realizing the benefits which derive from their commitment to their jobs and to the destination. Ambassadors will feel pride in wearing their pin and name badge with the CTA designation and will be able to tell others of their accomplishment. Additionally, the CTAs will develop a close-knit network that allows them to connect with one another to further their knowledge and fuel their motivation to serve the customer.
7. **Encourages Certified Tourism Ambassadors to Seek Renewal of Certification**, which involves a continuation of their learning about Greater San Antonio. Ongoing recognition could possibly be awarded through a special CTA pin that attaches “hang down” metal banners that depict the succeeding years of CTA certification (5 year, 10 year, etc.). The pin could be a “badge of honor” in the hospitality community over time as the ambassadors stay within the industry and

renew their certification. This could be a conversation starter all over your city with, say, ten years of service being shown on the ambassador's CTA pin.

8. **Facilitates Use of Intra-CVB Communication Vehicles** such as staff intranets, newsletters, etc. as a means of imparting answers to most frequently asked visitor questions and to recognize the achievements of the Certified Tourism Ambassadors. As a result, enthusiasm for county-wide tourism grows as more and more employees learn of the value of tourism.
9. **Fuels Momentum for the Program Through Web Site Enhancements.** Some enhancements that could be incorporated into your CVB web site and CTANetwork.com are as follows:
 - a. **Listing of County Attractions** – Enhancing the web site's current list of attractions by organizing it in a fashion that is user-friendly to the ambassador as well as the visitor.
 - b. **Your History** – Adding additional information on the rich history of your county, tying the history to current historical attractions and points of interest.
 - c. **Ambassador Networking** – Providing the Ambassadors with a place where they can post questions and information that will help them better serve the visitor.
 - d. **Listing of Upcoming "Discover San Antonio" Ambassador Events** – Provides the Ambassadors a list of upcoming events so they can plan their work and personal schedules.
 - e. **First-Hand Experience** – Provides a list of "Freebies/Discounts" being offered by companies, attractions, and restaurants around the area. This can include free or discounted meals, drinks, or admission. It encourages the ambassadors to "Discover San Antonio" by seeing the venue first-hand.
10. **Provides an Ongoing CTA Database, CTANetwork.com** that can be used to ensure consistency of messaging throughout the ambassador corps. And, if the ambassador approves, their email or mailing address would be listed so other CTAs can get in touch with them to network and share ideas.
11. **Enhances CVB Web Site and Print Materials.** Ambassadors provide ongoing feedback to the CVB about the usefulness of the various CVB resources, such as the visitors guide, maps and other publications and offer input on what tools they need to better serve the visitor/customer.
12. **Enhances Membership Marketing & Promotion** through learning of new venues from the Ambassador corps that are not members or partners of the CVB.
13. **Encourages a Tourism Culture of Quality.** Ambassadors are trained to look for process improvements to provide better customer service. Employers seek CTAs in the hiring process as a sign of quality employees. A cycle of continuous improvement continues that has lasting benefits.

VI. Project Phases and Deliverables

Phases of San Antonio Program Implementation

In the Phases that follow, an outline of the resources needed is provided. This should give the CVB a realistic picture of the staffing and resources needed to administer the program in its developmental stages, as well as over time once the program has been developed and is underway. Care has been taken to delineate the services that will be provided by MSA and those provided by the CVB, with MSA fees specified in the Timing and Resources section. Keep in mind that we can amend the proposed six-month timeline and fee payment schedule to meet your workload and budget parameters.

1.0 Phase One – Research & Planning; Completed Oct. 2011 (not included in this proposal)

Completed in Research Phase: Focus Group facilitation & summary report; Management/Front-line Survey & summary report; Subject Matter Expert (SME) Panel (to define the Body of Knowledge) & summary report

2.0 Phase Two – Certification Program Development; June-September 2012

2.1 Customize Curriculum & Protect Intellectual Property

Responsibility: MSA determines learning modules based upon Phase One research findings. CVB provides information to assist MSA in writing a unique, robust curriculum that features unique information about the county (e.g. history, culture, demographics, attractions, etc.) that will be included in the modules. MSA proposes a methodology for delivering the learning and testing program components. The recommended methodology will complement the CVB's technological and staff infrastructure. CVB is responsible for printing and production. Minor changes to the pre-classroom reading document (e.g. minor changes in web site addresses, phone numbers, etc.) will be made to your documents on an annual basis on your anniversary date; additional document changes, additions or other significant amendments will be charged a per hour fee as delineated annually by MSA to all Accredited Providers.

NOTE: In order to protect the certification program content and overall program integrity, all documents and customized materials developed for the CTA Program are protected through a strict document protection policy. The TAI controls the storage and use of the documents for all Accredited Providers (AP); no paper or electronic copies can be provided to outside entities, without the prior written approval of the TAI. Any document or program material changes desired by the AP must be made solely by TAI associates, and not by the AP, in order to ensure compliance with laws of trademark and copyright. With regard to copyrighting, the CTA program involves double copyrights by both the Accredited Provider (AP) and MSA. The AP is responsible for protecting all documents and for filing its own copyright paperwork with the federal government.

The AP agrees to protect all intellectual property associated with the CTA certification program and the locally-licensed program, including but not limited to: the Pre-Class Reading & Reference Materials document and all other copyrighted/trademarked files,

documents, classroom/training materials and agreements, templates, and processes created for the AP. In the event of local program discontinuation for any reason and attendant forfeiture of licensing rights, the AP shall destroy, delete and/or return any copies (either print or electronic) of all local program materials and intellectual property associated with the CTA program and provide an affidavit or affidavits verifying that any remaining materials stored electronically or in hard copy have been destroyed or deleted to the best of the AP's ability and that the continued use of this collective intellectual property by the AP or its agents or assigns, in any manner or form, is prohibited. This protection would be further clarified in a Letter of Understanding to be signed by both parties at the time of program discontinuation.

Additionally, the AP agrees to not use the customized curriculum in any other way, e.g. web site content, visitor guide content, etc. In the event the AP desires to repurpose any portion of the content for other purposes, MSA will explore the objectives with the AP and provide a proposal for the costs associated with modifying the content to fit your needs. This is in order to protect the curriculum, your local program's reputation, and the overall integrity of the nationwide certification program.

- 2.2 Develop Customized Facilitator Guide and Materials for Training the Trainers**
Responsibility: MSA develops the facilitator's/training guide content. CVB responsible for printing and production.
- 2.3 Develop Student Learning Materials. This involves the creation of customized teaching resources that help students achieve specified learning objectives.**
Responsibility: MSA develops content and provides camera-ready originals. CVB responsible for printing and production.
- 2.4 Develop Promotion and Marketing Strategies**
Responsibility: CVB staff determines best strategies for promoting and marketing the program with MSA input, where desired. CVB integrates Ambassador Program promotion into existing outreach and communication efforts.
- 2.5 Develop Promotional Flyer Targeted to Prospective CTAs**
Responsibility: MSA provides CVB communications staff with draft flyer. CVB edits as desired, produces original, and reproduces with updates as necessary.
- 2.6 Develop Promotional Flyer Targeted to Employers**
Responsibility: MSA provides CVB communications staff with draft flyer. CVB edits as desired, produces original, and reproduces with updates as necessary.
- 2.7 Develop a "Most Frequented" List of Attractions/Features that front-line employees and volunteers need to know and can refer to when assisting a visitor.**
Responsibility: CVB develops using existing materials, CVB and other web sites, and other resources, as available.

- 2.8 **Solicit Incentives and Rewards to Entice Participation (i.e., tickets to attractions, free tickets, discounts on dinner, etc.)** These incentives are critical to encourage front-line participation and to enhance the ambassadors' first-hand knowledge of your product by experiencing a wide variety of venues.

Responsibility: CVB solicits in-kind incentives from key partners throughout San Antonio. Offers these "Freebies/Discounts" to their CTAs via www.CTANetwork.com. Continuously promotes to stakeholders and CTAs to drive experiential learning to enhance the visitor experience.

3.0 **Phase Three – Field Testing; September-October 2012** (Simultaneously with Phase Four)

- 3.1 **Field Test curriculum and learning materials with Front Line Employees and Volunteers. This involves utilizing selected trainers from the trainer cadre to deliver the initial (field test) program.**

Responsibility: MSA and CVB determine the best target group for the field test (hotel, restaurant, etc.). MSA assists with preparation for the field test, observes class, and assesses implementation. CVB is responsible for extending invitations to participants, managing registrations, and handling all meeting logistics, including media, food & beverage, etc. CVB key staff attend to help shape the program curriculum and delivery. Additionally, any prospective trainers would be invited to attend this class to observe the classroom experience. See 4.1 and 4.3 below.

- 3.2. **Evaluate and Modify Support Materials and Training as Necessary**

Responsibility: MSA reviews field test findings and talks with trainers and ambassadors to determine their level of satisfaction with the training (was it easy to teach, was it fun to participate, what can be improved, etc.). MSA consults with CVB and makes any necessary changes to the curriculum and teaching methods to meet participants' needs.

- 3.3. **Prepare for Program Roll Out**

Responsibility: MSA and CVB determine launch date. CVB coordinates dissemination of materials. MSA provides sample templates as desired by CVB.

4.0 **Phase Four – "Train the Trainer"; September-October 2012** (Simultaneously with Phase Three)

- 4.1 **Identify and select a potential cadre of facilitators. (Est. up to 20 Facilitators)** These local individuals would be experienced and reputable volunteer facilitators that can capture the essence of the curriculum and facilitate the four-hour classroom session (as teams of two) in ways that inspire and motivate the ambassadors. Note: CVB staff may wish to participate as facilitators for some topics, particularly for the field test of the program. MSA will recommend a strategy for expanding the cadre of qualified facilitators based on the size, scope, and timetable for full scale program implementation specified by CVB. Responsibility: CVB with input from MSA

4.2 Train the Field Test Facilitators

Responsibility: MSA provides one consultant to train the field test facilitators on the curriculum and its delivery, in one remote session.

4.3 Train the Cadre of Facilitators (Est. up to 20 Facilitators)

Train the cadre of facilitators in a two-hour training session which utilizes some of the field test facilitators, where applicable, to reinforce facilitator buy-in and enthusiasm. Conduct a post-training evaluation by surveying the facilitators to obtain their input and changes. This session is usually held the afternoon of the Field Test. See 3.1 above. Responsibility: MSA facilitates one two-hour training session, utilizing some of the field test facilitators, and conducts the post-training evaluation. CVB coordinates invitations, registration, and meeting logistics and offers key CVB staff to help train the facilitators on topics that are CVB centric. Additional facilitator training sessions, if desired, are \$1,500 per session, plus expenses; however, most CVBs have not needed this additional service.

4.4 (Optional) Conduct City/County Tours with Facilitators (full-day tour including: destination districts; hotels, restaurants, convention center; new construction; etc.)

Responsibility: CVB handles all logistics and costs based upon the curriculum requirements.

5.0 Phase Five– Program Roll Out; November 2012 – Ongoing

5.1 Develop Calendar of Classroom Sessions and Ambassador Events and Promote Heavily

Responsibility: CVB coordinates a Master Calendar of the four-hour classroom sessions which are designed to be offered by the CVB throughout the county at various times of day and on varying days of the week, in order to fit the work/personal schedules of your Front Line. MSA will provide the CVB with a Request to Host form for larger organizations that choose to host in-house sessions.

5.2 Orient Hospitality Executives, Area Hospitality Organizations, HR Departments and In-House Training Staff on Benefits of the Ambassador Program to the Area and to their CVB/Organization

Responsibility: CVB handles ongoing program promotion and marketing.

5.3 Educate Area Partners and Staff on the Program and Its Benefits to the City

Responsibility: CVB handles ongoing program promotion and marketing.

6.0 Phase Six – Ongoing Program Management; November 2012 and Beyond

6.1 Administer the Certification and Renewal of Certification Program

Responsibility: MSA assists in identifying the key information that is needed for successful program administration. CVB administers the program without the services of MSA (if MSA services are desired, a separate contract would be negotiated based upon identified needs). With regard to ongoing program revenues and expenses, MSA can provide a budget template to help you prepare a program budget. You may establish the per person enrollment fee and annual renewal fee at any amount you desire, as long as the fee is \$49 or less, in order to maximize participation by the frontline.

To facilitate administration, MSA will provide a software program that has been designed to manage all aspects of the program – CTANetwork.com. Accredited Providers are encouraged to use this software for ongoing program management. The CTANetwork.com site is currently being used by all of the TAI Accredited Providers to drive program administration. The MSA team is available for initial training and ongoing support.

Administrative Software

This "back end", administrative software is free to all Accredited Providers to enable them to:

- Manage their local database of CTAs
- Set up and manage online or manual enrollment to CTA events
- Control the "front end", front facing web portal for the local CTA "micro-site"
- A robust search feature allows you to search your database by Industry Sector (e.g. send an email to all transportation CTAs, or all restaurant CTAs, etc.) or by Company (e.g. Marriott, Westin, etc.) or by Title (e.g. human resources, general manager, front desk, etc.).
- Generate Reports (e.g. numbers of CTAs 'graduated'; number applying; number renewing, etc. The *Report* feature is continually updated by MSA with new reports constantly being developed.
- More!

CTA Network.com – the CTA Online Community – Logged In View:

CTANetwork.com – Your Online Community

MyCTA:

- Manage Your Profile
- Manage Your Events
- Give Us Feedback
- Upload Your Photo
- Access Your Personal Social Networking Accounts

Certification Renewal:
Manage/Record Your Renewal Points

Featured Attraction/Visit Attractions: Build your knowledge; detailed attraction information at your fingertips to help visitors

Local Links: Connect easily to important links & visitor information

CTA Connect:

- Find A Fellow CTA using the CTA Directory
- Refer A Friend
- Connect Locally & Nationally through Facebook & Twitter
- Check out Upcoming CTA Events

Education & Career Tips: Check often for helpful grammar, etiquette & service tips.

Earn Renewal Points for Exploring the Website: Log on, go to Stay Professional/Using This Site for details.

Freebies & Discounts: Gain first-hand knowledge of attractions, restaurants & more

Upcoming Events: Keeps you up-to-date; link to area event calendars; submit events; and access upcoming CTA events

Timely Info: Stay up-to-date on the latest local happenings & submit Timely Info, too

Industry Highlights: Stay current on national & local industry news & trends

CTA Photo Gallery: Check out photos of recent CTA events and CTAs in action.

The software also features database management; eventual report generation (e.g. satisfaction ratings, number of CTAs); online renewal of certification; and many other administrative features. General features of the software are provided free; any special software program enhancements desired by the CVB may result in additional cost, which would be quoted to and approved by the CVB prior to the commencement of any work performed. The software and website have been specially designed for the CTA program through a special strategic partnership with *simpleview, inc.*

6.2 Accreditation and Quality Assurance Standards & Annual Licensing Renewal

The CVB agrees to continuously monitor measures of quality for the CTA designation by applying for and maintaining its status as an Accredited Provider (AP) of the *Tourism Ambassador Institute™* (TAI), a subsidiary of MSA. The *Tourism Ambassador Institute™* (TAI) grants Accredited Providers the licensing rights to present, on behalf of the TAI, the CTA designation to those individuals who satisfactorily complete all program requirements. In order to maintain their accreditation status, Accredited Providers must adhere to TAI established accreditation criteria, pay an annual accreditation and licensing

fee, pay an annual fee per individual CTA, and any other requirements for program quality established annually by the TAI.

The primary objective of the *Accreditation & Quality Assurance Process* is to maintain uniform standards of quality for the CTA designation nationwide. Adherence to quality standards ensures that the CTA designation holds a prestigious position within the convention and tourism industry and remains meaningful and valid in the eyes of front-line employees and volunteers as well as their employers.

Unless the AP discontinues the program pursuant to the terms of Section 6.3 below the CVB agrees to re-apply annually for licensing rights and accreditation (or renewal of accreditation) by completing a *CTA Accredited Provider Quality Assurance Agreement & Checklist* that documents the program's adherence with TAI established criteria. The criteria will be outlined annually in the TAI document entitled, *The Accreditation and Quality Assurance Process for CTA Accredited Providers*.

Maintaining Accredited Provider status includes adherence to TAI established criteria including assessment in the following core areas:

- A. Management & Administration**
- B. Data Collection & Integrity**
- C. Marketing & Communications**
- D. Education Program [Pre-Certification]**
- E. Education Program [Certification Renewal]**

The TAI will review the *CTA Accredited Provider Quality Assurance Questionnaire* and accompanying documentation to determine if the Accredited Provider is adhering to agreed-upon criteria. TAI representatives may also request additional information from the Accredited Provider, and may, on occasion, complete a site visit to meet with key stakeholders in the Accredited Provider's city or area. If it is deemed that established quality standards have been satisfied, the Accredited Provider will be granted accreditation for another full year. If the standards have not been met, the Accredited Provider will be placed in Provisional status and given the opportunity to remedy its compliance. If, after a specified period of time, the program is not brought into compliance with established CTA program standards, the Accredited Provider will lose its accreditation status and licensing rights to present the CTA designation on behalf of the TAI or to renew the designation for its existing designees. If this discontinuance of accreditation were to occur for this or any other reason, all CTAs who achieved their designation through this Accredited Provider would be placed into the "At Large" category within the *Tourism Ambassador Institute™* structure unless, or until, they move to an area where another CTA program exists.

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

Through this process, as an Accredited Provider, the CVB would agree to certain standards of practice to ensure a high level of program quality nationwide.

6.3 Program Discontinuation

As stated above, the AP is required to re-apply for annual renewal of its licensing rights and accreditation status on its program anniversary, subject to the provisions of the formal Consulting Agreement, Section 3. Term and Termination, unless sixty (60) days prior written notice has been given.

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

Upon program discontinuation and loss of licensing rights & Accredited Provider status and in order not to infringe upon CTA copyright and trademark rights, the AP would be responsible for further protection of intellectual property and program materials which would be clarified in a closing Letter of Understanding and signed by both MSA and the AP. For informational purposes, these understandings are outlined below and include but are not limited to: (a) discontinuing the use of the local program name and logo, the CTA name and logo, and formal reference to the CTA program in all manner and means, for all purposes and on all forms of communications; (b) forfeiting access to the CTANetwork.com web site portal; (c) forfeiting access to the CTA administrative software/database; and (d) communicating the program's upcoming discontinuation to all AP CTAs on record, with MSA's prior approval of the communication's content.

7.0 Phase Seven – Program Evaluation and Modification; November 2013

7.1 Monitor Benchmark Measures and Metrics to Determine Success of the Program Over the Last Year and Over Time

Responsibility: At the end of the first full year after launch, CVB monitors metrics to determine program success.

7.2 Conduct Annual Evaluation of the Program Effectiveness

Responsibility: Once per year, MSA provides a remote evaluation of the program; discusses the program with the Accredited Provider during the annual accreditation process, and develops evaluation criteria for an online survey to obtain feedback on the program. Survey is conducted in the aggregate with other CTA programs; with specific results extracted for each local program.

7.3 Determine Program Changes, Where Necessary

Responsibility: MSA reviews survey information with CVB and provides recommendations for any program modifications, as necessary; CVB carries out program modifications.

VII. Timing and Resources

Once started, it is critical to maintain the momentum of this important initiative. Therefore, the timeframe outlined in this proposal provides for a roll-out of the program that allows for learning and evaluation within the Field Testing Phase, as well as learning and evaluation within the initial training phase.

An essential factor in projects of this nature is the availability of key CVB staff for meetings and conference calls in order to keep the program on track.

Professional Fees

The professional management consulting fee for the proposed scope of work in this proposal is based upon the amount of consulting time, as shown below. The proposed schedule of payments is as follows, which can be amended to fit your budget parameters:

2012 Fee Structure

One-Time Fee for Ambassadors Program Development, Roll-Out & Evaluation

| | |
|-----------------|---|
| \$30,000 | Due May 2012 |
| \$10,000 | Due October 2012 |
| <u>\$ 5,000</u> | Due November 2012 |
| \$45,000 | TOTAL |
| \$2,000 | Actual Travel Costs (not to exceed \$2,000; documentation will be provided) |

The above one-time fee includes Phases 1-7 deliverables: 6-8 weeks' writing customized curriculum and Pre-Classroom Reading & Reference Materials document; customized classroom materials; customized Facilitator Guide & facilitator training; Field Test observation; CTA 'back-end' software/database administrative system set-up & training; CTANetwork.com 'micro-site' set up and training; promotional brochure content; best practices for program launch marketing & PR, and more.

Annual Fees: Accreditation/Licensing Fee Paid on Anniversary Date

\$10,000 Payable November 2013 and annually thereafter for the preceding licensing year*

Annual 'Per CTA' Fee Paid on Anniversary Date

\$10 Per CTA on record, beginning November 2013 and annually thereafter from program fees collected in the preceding licensing year **

The above annual fees cover: (a) licensing rights for program content and materials; (b) specialized 'back-end' CTA software/database administrative system access and ongoing training & customer support; (c) CTANetwork.com 'micro-site' customized to the destination including programming functions that drive online renewals, Freebies & Discounts coupons, updated attractions, calendar of events, local/national CTA directory, CTA social networking, local photos, Spirit Photo Contest, Refer-A-Friend feature, social media, local Timely Info, ongoing education--grammar & etiquette tips, periodic overall website redesign, and ongoing 'micro-site' system training & customer support; (d) coordination of annual CTA Accredited Provider Summit; (e) annual CTA survey with local and aggregate comparison data; (f) annual updates to program/classroom materials; (g) interface assistance with universities, civic agencies, etc.; (h) grant-writing ideas; (i) quarterly Accredited Provider conference calls; (j) CTA logo usage approval; (k) Employer interface & CTA program support ideas; and more.

* The licensing fee will be reviewed by the TAI on an annual basis and may experience slight changes, as necessary, for ongoing program sustainability and quality.

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

Contract fee payments are based on the dates listed above as tied to Phase One through Phase Six deliverables. Both CVB and MSA agree to make every effort to schedule key meetings and work sessions within the time frame allowed. Payment terms are net thirty (30) from date of invoice. If payment is not received by the due date, a late charge will be added at the rate of three-quarters of one percent (.075%) per month to unpaid invoices from the due date thereof.

Travel costs incurred by all associates of Mickey Schaefer & Associates LLC will be kept to a minimum and invoiced, as applicable, at the end of each trip and are not included in the fees outlined above.

MSA and CVB agree to make maximum use of available means of business communications technologies; i.e., conference calls, email, fax, etc. to keep travel costs to a minimum. MSA associates will be available to travel to San Antonio as needed, to ensure program success.

Other Resources Necessary for Successful Project Completion

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

Project Critical Success Factors

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

- CVB senior management and organizational leaders must actively support and be involved in the effort to assure the program's objectives and to impart a sense of urgency and importance to the rest of the organization, the CVB Board of Directors, and the hospitality community at large.
- Success is predicated on the fact that development and implementation of this important program rely upon ongoing processes that require continuous improvement and refinement. Therefore, MSA welcomes changes and modifications to the plan proposed, as deemed necessary by the CVB, providing they are not substantially adding to the overall scope of work outlined in this proposal. The goal of MSA is to ensure that the CVB has met its goals and objectives and that this program is destined for continued success initially and in the years to come.
- The speed and effectiveness of implementation is proportional to the number of people involved (mobilized) by the process and the depth and breadth of connectivity and learning created. In short, the more involved the stakeholders are at the outset, the better planned and executed the program will be.

You will know you have succeeded when you begin to see the community embrace the Ambassadors concept and feed into its ongoing success.

Expectations for staffing include the commitment of MSA to ensure successful program development and launch. MSA will provide suitable consulting staff for this engagement, subject to the following guidelines, objectives, and caveats:

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

- MSA and CVB recognize that scheduling may be adversely impacted by such factors as travel delays, illness, family and business emergencies, and other prior commitments, and that such impacts may unavoidably extend the estimated project duration. MSA and CVB agree to work closely together and exercise good faith efforts to minimize the likelihood and adverse consequences of such factors.
- **IMPORTANT:** The CVB agrees to adhere to the jointly developed timeline for program development and roll out. If it does not meet deadlines or provide information for the curriculum development or other key information in a timely fashion, MSA cannot guarantee the on-time launch of the program, per timeline. If MSA incurs additional expense due to avoidable delays on the part of the CVB, these costs may be passed along to the CVB.

VIII. Qualifications



Why Use Mickey Schaefer & Associates?

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

- **Industry leader with high visibility and respect within the industry.** Inducted 2006 into the Convention Industry Council's Hall of Leaders, the highest honor in the industry, which includes past recipients such as Conrad Hilton and Bill Marriott, Jr. Frequently named to the "25 Most Influential in the Meetings Industry" by *Meeting News* magazine, most frequently in 2005. Past Chairman of the Board of PCMA (Professional Convention Management Association) and 2002 PCMA Professional Achievement Award dinner honoree.
- **Extensive understanding of the meetings, conventions, and exhibitions industries** and frequent speaker on industry issues and trends. Managed large trade shows and over 200 meetings per year of varying sizes from 25 to 20,000 attendees for both state and national associations.
- **Direct work and leadership experience with DMOs and Destination Marketing** – Served as National Sales Manager (selling to medical associations) and later on the Board of Directors of the Kansas City Convention & Visitors Bureau. Currently consult with DMOs across the U.S. and Canada on Customer Advisory Boards, destination marketing, strategic planning & visioning, strategic board governance, and aligning front-line workers to drive the destination's brand.

- **Proven innovator and driver of change.** Championed industry standardization as Chair of the APEX Commission (APEX = Accepted Practices Exchange) of the Convention Industry Council (CIC), a council comprised of the 32 organizations within the meetings, conventions and exhibitions industries. Worked for ten years with major stakeholders throughout the U.S. and Canada to shape the future of the industry through the development of industry process and technology standards, similar to past standardization efforts of the real estate and banking industries. And, recently developed a means to drive a destination's brand to the front-line via creating a nationwide certification and hospitality training program for front-line hospitality workers—*Certified Tourism Ambassadors Program*[™]—leading to the designation CTA[™] (John Smith, CTA) with annual re-certification. MSA is currently conducting extensive industry research to determine the best practices of the '*Visitor-Focused*' Destination, which encompasses research and extensive analysis of visitor experience dynamics.
- **Certified Association Executive (CAE)** with over 30 years' direct experience in both state and national associations. One of five selected in 2003 to become an ASAE Fellow—a prestigious “think tank” of top association leaders within the American Society of Association Executives (ASAE). Served as Vice President for the American Academy of Family Physicians (AAFP; the second-largest medical association in the U.S.; 480 staff; \$75 million budget); one of seven top-level professionals; directly responsible for meetings, conventions, marketing, and leading AAFP's strategic planning and visioning to define the future direction of the organization.
- **Facilitates strategic planning & visioning sessions**, with the MSA team of expert consultants, for DMOs, tourism entities, and associations helping them create strategic alignment to achieve organizational objectives.
- **Practical experience in carrying out strategic plans**, Strategic Board Governance, and resource allocation to do the “right things, right” to achieve the strategic vision. MSA associates' combined direct work experience offers a wealth of ideas and practical advice.
- **Graduate degree (M.A.) with emphasis in marketing and organization development;** extensive marketing background in all aspects of market research, including over 200+ focus groups and competitive market analysis; direct experience in shaping organizational culture and structure.

Mickey Schaefer, CAE
President
Mickey Schaefer & Associates LLC



Mickey Schaefer has been involved with association management and the meetings industry for over 30 years. She began her career with ten years of service as Executive Director of the Missouri Academy of Family Physicians, and then branched into the supplier side of the industry as National Sales Manager for the Convention & Visitors Bureau of Greater Kansas City. She received her designation as a Certified Association Executive (CAE) in 1981 from the American Society of Association Executives (ASAE).

In 1984 she joined the staff of the American Academy of Family Physicians (AAFP -- \$75 million total budget; 360 staff) serving as Director of the Membership Division, where she served until 1992 before transferring to Director of the Meetings & Conventions Division. She served as Convention Manager for the AAFP's Annual Scientific Assembly (\$9 million budget; 20,000 attendees; 600,000 g.s.f. exhibit space) before being promoted. From 1996 to 2005 she served as Vice President over five AAFP divisions, including Administration, Meetings & Conventions, Membership, and Strategic Planning & Marketing, where she was responsible for 110 staff and a budget of \$45 million. She served as one of seven top-level professionals in leading the strategic direction of the organization.

Mickey completed her Graduate degree with an emphasis in Marketing and Organization Development in 1995 and served in a variety of volunteer and leadership positions while residing in the greater Kansas City area, including the Big XII Conference, the Kansas City Chamber of Commerce, and service on the Board of Directors of the Greater Kansas City Convention & Visitors Bureau.

She has been named among the *25 Most Influential in the Meetings Industry* by *Meeting News* magazine on several occasions, most recently in 2005, and has held numerous national leadership positions within the meetings industry and association community. She has served in several influential leadership positions, including past Chairman of the Board of the Professional Convention Management Association (PCMA) and Director on the PCMA Education Foundation Board of Directors, being honored by PCMA in 2003 with the Foundation's *Professional Achievement*

Award. For ten years (1996-2006), she led the initiative to standardize the meetings, conventions, and exhibitions industries as Chair of the APEX (Accepted Practices Exchange) Commission of the Convention Industry Council (CIC), a council of 31 organizations that comprise the meetings, conventions and exhibitions industry.

In 2003 she was selected by her peers to become an ASAE Fellow—a prestigious group of top association leaders within the American Society of Association Executives (ASAE). And in 2006 she was inducted by the Convention Industry Council into the prestigious *Hall of Leaders*, an honor depicting her industry leadership contributions to the industry.

A seasoned, industry professional, she is currently living in Tucson and is devoting her consulting practice to efforts which have a profound impact on the meetings industry, tourism, and associations.

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R. Michael Lawler, Ph.D., CAE

Lawler & Associates Consulting, Inc.

Following careers in higher education and association management, Dr. Lawler recently established an education and learning-organization consulting firm, *Lawler & Associates Consulting*. He has more than 25 years experience in planning, developing, implementing, and evaluating education, leadership, and professional development programs as a university administrator and faculty member, association executive, and consultant to companies and not for profit organizations. His accomplishments include:

- Developing certification programs for front-line hospitality employees and volunteers, commercial-investment real estate specialists and real estate property appraisers.
- Developing national program standards and benchmarks for community-based, volunteer caregiving programs for the elderly.
- Facilitating strategic planning processes for more than 25 local, state, and national organizations.
- Establishing the body of knowledge for retirement annuity sales professionals for Traveler's Insurance CVB, Inc.
- Developing data-gathering and information management systems to certify adherence to continuing certification requirements for the Joint Commission on Accreditation of Health Care Organizations.
- Serving as administrative liaison to professional associations, accrediting bodies, and regulatory agencies as a Dean at the University of Texas Health Science Center.
- Teaching educational psychology, evaluation, and platform-teaching skills in teacher preparation programs for health professionals.
- Performing applied research to operationally define clinical competence of respiratory therapists and developing evaluation measures keyed to the research and training programs for evaluators.
- Serving as chief staff liaison to state licensing and regulatory commission and the state's academic and research community with respect to education standards and licensure requirements for real estate salespersons.
- Redesigning a credentialing program for real estate professionals based on role delineations and practice research, curriculum development, and instructor training.
- Leading a national effort to create a new certification program for executives of state and local real estate associations.
- Teaching management and leadership courses in an executive MBA program.

Lawler & Associates Consulting specializes in: a) strategic planning; b) facilitating focus group and expert panels; and c) leading the processes of designing and developing education and training programs that meet clear objectives. Lawler earned his doctorate in instructional systems at Florida State University and he is a Certified Association Executive – a designation conferred by the American Society of Association Executives.

A seasoned association executive, educator, and facilitator, Dr. Lawler combines a relaxed, insightful approach that provides Mickey Schaefer & Associates with a uniquely fresh perspective.

~ ~ ~

Patrick A. Tierney

Convention & Tourism Consul

Patrick Tierney is a 45-year veteran of the tourism industry. His career in tourism began in 1960 as a room clerk for St. Louis' Chase Park Plaza Hotel where he quickly learned the value of tourism and customer service. Promoted to sales positions at the hotel and later at the St. Louis Convention & Visitors Bureau, Pat continued his career climb. His passion for the industry culminated in his being named as President of two major CVBs -- the Convention & Visitors Bureau of Greater Kansas City and the Metropolitan Tucson Convention & Visitors Bureau.

During his tenure as President of the two CVBs, growth was dramatic, resulting in increased tourism spending, hotel occupancy, and job creation. Under his direction, funding grew over 100% and the voluntary membership programs grew from 250 companies to nearly 1,000. Both CVBs won many national awards. Throughout his career, Mr. Tierney has also served on many local, regional, national and international organizations' boards of directors.

Since his retirement in 1999 from the Tucson CVB, he has been a partner in The Golfe, a 1,000-member association which promoted golf in the hospitality industry, until the firm was sold to a Washington D.C. company. Mr. Tierney was also a partner in Exhibitor Visibility Worldwide, a well-known industry convention publishing company specializing in the medical meetings market, which was sold in 2004 to a New York publishing firm.

An energetic and knowledgeable industry veteran, Mr. Tierney brings a wealth of experience to Mickey Schaefer & Associates, along with an unwavering passion for the tourism industry.

~ ~ ~

Toby Parks, CTA

Client Development

Toby became fascinated with the tourism world in 1988 working as a concierge at the Sheraton El Conquistador in Tucson, AZ. After graduating from the University of Arizona, she launched her career in tourism at the Doubletree Hotel Tucson as a Sales Manager where she was recognized as top sales producer for two years at the Hotel. In 1996 she took a position at the Metropolitan Tucson Convention & Visitors Bureau as a National Sales Manager and was promoted to Director of Sales after two years. When the JW Marriott Starr Pass Resort & Spa broke ground in Tucson in 2003, Toby was hired as Director of Sales and was the second Marriott International person on board a team of over 600. She recruited and trained a team of 12 managers and was charged with motivating the team in securing advance bookings in excess of 200,000 room nights.

Her love for promoting Southern Arizona took her back to MTCVB as Director of Marketing to assemble an internal marketing team and develop an in-house agency. Here she managed marketing strategies that include print advertising, radio and broadcast, online marketing campaigns, on-and off-line direct mail campaigns, and other related event/niche marketing programs. She was also responsible for creating financial co-op opportunities with MTCVB partners to leverage advertising presence.

Toby's passion for the tourism industry and abilities to have a direct impact on client development, make her an instrumental member of the MSA team.

Michael Letcher, CPA, CISA

Consultant – Research/Analysis/Systems

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

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

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

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

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

Christine Whorton, MHA

Management Consultant

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

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

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

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

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

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

Kimberly Patterson, CTA

Tourism Consultant/Account Manager

Kimberly discovered her love of tourism in 1979 working summer jobs in guest relations at the YMCA of the Rockies in Colorado. While attending the University of Denver, she stayed on the front-line, working at hotels and restaurants and becoming a docent at one of Denver's historic mansions. After college, she spent the next 10 years in Real Estate sales and title escrow, until a part-time job with a meeting planner led to her become a Certified Travel and Tour Director, prompting a move to Hawaii in 1994.

In Hawaii, Kimberly found a job as a tour guide with Pacific Rim Tours and was quickly promoted to Director of Conventions and Tours. While there, she wrote the company's operations and training manuals, managed conventions and meetings, guided tours of the Big Island and planned international tours to Fiji and Samoa. She was offered a position as an Account Manager with the second largest Destination Management company in Hawaii, Panache Destination Management. At Panache, Kimberly managed over 30 meetings and incentive programs annually throughout the state and produced a comprehensive training program for Account Managers and Travel Directors. Following 9/11, she started ExcelEvent, a meeting and event planning company and eventually moved back to the Mainland where she was offered an Operations Manager position with USA Hosts in Las Vegas, NV. There she managed over 80 Travel Directors and coordinated meetings and conventions for 10 to 10,000 attendees.

Her husband's job moved them to Tucson in 2004 and Kimberly became Director of Convention Services for the Metropolitan Tucson Convention & Visitors Bureau. While at the MTCVB, she revamped the services department's website, procedures and merchandise to be more user-friendly for meeting planners. She also served as a facilitator for the Tucson Ambassadors Program, earning her Certified Tourism Ambassador (CTA) designation in May 2007. In late 2007, Kimberly left the MTCVB to start her own company, K Patterson Consulting, and to pursue her passion for the tourism industry.

Kimberly's natural writing ability, coupled with her experience and knowledge of the travel and tourism industry makes her an integral part of the MSA team.

Becky Barndt, CTA

Special Projects/Web Consultant

Becky's love of the outdoors and passion for travel led her to summer positions in Yellowstone, Lake Tahoe and Mt. Rushmore. After graduating from college in 1988 with a degree in Economics, she moved to Phoenix to begin her career in the hotel and resort industry. She held positions in accounting, front office and human resources at resorts in Phoenix and Scottsdale. After conducting hundreds of interviews as Employment Manager for Wyndham Paradise Valley Resort in Scottsdale, she had the desire to train job seekers on successful job searching techniques. She left the industry for several years to work as the Career Development Coordinator for a private business college.

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

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

IX. Client List



Anaheim/Orange County Visitor & Convention Bureau
Arizona Tourism Alliance
Arlington (TX) Convention & Visitors Bureau
Visit Baltimore
Visit Chandler (AZ) Economic Development Div.
Charlottesville Albermale (VA) Conv. & Vis. Bureau
ConferenceDirect®
Convention Industry Council
Corpus Christi Convention & Visitors Bureau
Dallas Convention & Visitors Bureau
Dallas/Fort Worth Area Tourism Council
(30 counties; 46 cities; 42 DMOs)
Detroit Metro Convention & Visitors Bureau
Discover Kalamazoo
Door County (WI) Visitors Bureau
Fayetteville Area Convention & Visitors Bureau
Fort Worth Convention & Visitors Bureau
Fountain Hills (AZ) Chamber of Commerce
Tourism Council of Frederick County (MD)
Frisco (TX) Convention and Visitors Bureau
Gettysburg Convention & Visitors Bureau
Glendale (AZ) Office of Tourism
Greater Houston Convention & Visitors Bureau
Hospitality Sales & Marketing Assn Int'l (HSMIAI)
Indiana Academy of Family Physicians
Indianapolis Convention & Visitors Association
Irving (TX) Convention and Visitors Bureau
Journey Through Hallowed Ground Partnership
(4-state tourism partnership; PA, MD, VA, WV)

Kansas City Convention & Visitors Association
Kansas City Regional Destination Alliance *(24 DMOs)*
K.C. Regional Destination Development Foundation
Lake Havasu City (AZ) Convention & Visitors Bureau
Greater Lansing Convention & Visitors Bureau
Lexington Convention & Visitors Bureau
Loews Hotels
Loudoun County Convention & Visitors Association
Mesa Convention & Visitors Bureau
Mesquite (TX) Convention & Visitors Bureau
VISIT Milwaukee
National Catholic Partnership on Disabilities
Oklahoma City Convention & Visitors Bureau
Pennsylvania Nonprofit Health Association
Peoria (AZ) Chamber of Commerce
Greater Phoenix Convention & Visitors Bureau
Plano (TX) Convention & Visitors Bureau
Prince William County/Manassas VA CVB
Rochester (MN) Convention & Visitors Bureau
Scottsdale Convention & Visitors Bureau
Sioux Valley Hospital & Health System
Sonoma County Tourism Bureau
Southern Arizona Lodging & Resort Association
Spokane Regional Convention & Visitors Bureau
Tempe (AZ) Convention & Visitors Bureau
Metropolitan Tucson Convention & Visitors Bureau
Valley Hotel & Resort Association
Yakima Valley (WA) Visitors & Convention Bureau

X. Closing

Mickey Schaefer & Associates appreciates your interest in developing the *San Antonio Tourism Ambassadors Program* through the *Certified Tourism Ambassador*[™] program. We realize you have a choice of a variety of consultants and, therefore, if selected, pledge our commitment and enthusiasm to you to ensure this program's success initially and over time.

We very much look forward to further discussing this important program with you.

Sincerely,

Mickey Schaefer, CAE
President

Mickey Schaefer & Associates LLC
238 E. Allthorn Place
Tucson, AZ 85755
520-219-0469 Office
913-558-0325 Cell
520-219-0569 Fax
mickey@mickeyandassociates.com

www.MickeyandAssociates.com
www.TourismAmbassadorInstitute.com
www.CTANetwork.com

ATTACHMENT A
RESPONDENT QUESTIONNAIRE

GENERAL INFORMATION:

1. Company Information: Provide the following information regarding your company.

Name/Name of Agency/Company: Mickey Schaefer & Associates LLC
Address: 238 E. Allthorn Place
City: Tucson State: AZ Zip Code: 85755
Telephone No. 520-219-0469 Fax No. 520-219-0569

2. Contact Information: List the person who the City may contact concerning your proposal or setting dates for meetings.

Name: Mickey Schaefer, CAE President
Address: 238 E. Allthorn Place
City: Tucson State: AZ Zip Code: 85755
Telephone No. 520-219-0469 Fax No. 520-219-0569
Email: mickey@mickeyandassociates.com

3. Does your Company anticipate any mergers, transfer of organization ownership, management reorganization, or departure of key personnel within the next twelve (12) months that may affect the organization's ability to carry out its proposal?
Yes _____ No X

4. Is your Company authorized and/or licensed to do business in Texas?
Yes X No _____

5. Where is the Company's corporate headquarters located? Tucson, Arizona

6. Local Operation: Does the Company have an office located in San Antonio, Texas?
Yes _____ No X

a. If the answer to the previous question is "yes", how long has the Company

conducted business from its San Antonio Office?

Years _____ Months _____

b. State the number of full-time employees at the San Antonio office. _____

7. Debarment/Suspension Information: Has the Company or any of its principals been debarred or suspended from contracting with any public entity?

Yes _____ No X

If yes, identify the public entity and the name and current phone number of a representative of the public entity familiar with the debarment or suspension, and state the reason for or circumstances surrounding the debarment or suspension, including but not limited to the period of time for such debarment or suspension.

8. Bankruptcy Information: Have you or the Company ever been declared bankrupt or filed for protection from creditors or federal proceedings?

Yes _____ No X

If yes, state the date, court, jurisdiction, cause number, amount of liabilities and amount of assets.

9. Provide any other names under which your business has operated within the last 10 years.

None

ATTACHMENT B

RESPONDENT BACKGROUND & QUALIFICATIONS QUESTIONNAIRE

1. Provide the names of the individuals whose time and talents would be applied to the Front-Line Customer Service Training Program for the San Antonio Convention & Visitors Bureau and how long they have been employed in your organization. Be as specific as possible regarding their particular backgrounds and qualifications in relation to this account. Also include resumes of each individual identified.

The following eight **MSA Team** members have worked together to customize 13 local CTA programs to date. This professional, high-performance team would be devoted to developing and launching San Antonio's frontline training program and providing ongoing administrative and technical support as outlined below. For individual resumes, see *Section VIII Qualifications*.

Mickey Schaefer, CAE

President

(Company owner and team leader responsible for all oversight aspects of delivering your frontline program; Focus Group attendance/supervision; Field Test attendance/supervision; quality assurance; primary interface with top destination leaders; strategic conversations to achieve results)

Team Member Since: November 2004 Company Founding

R. Michael Lawler, Ph.D., CAE

Learning & Instructional Systems

(Adult learning theory; Instruction Design; Focus Group facilitation; Subject Matter Expert Panel facilitation; Field Test attendance & facilitator training; Curriculum Design; Initial and Ongoing Facilitator Training & Guidance)

Team Member Since: 2005

Michael Letcher, CPA

Consultant – Research/Analysis/Systems

(Surveys; Data Mining; Analysis)

Team Member Since: 2005

Patrick A. Tierney

Convention & Tourism Consul

(Sales & Marketing; and insight to program development from the perspective of a former CVB President & CEO, Tucson & KC)

Team Member Since: 2005

Kimberly Patterson, CTA

Tourism Consultant/Account Manager

(Curriculum Design; Writing/Research & Account Support)

Team Member Since: 2007

Christine Whorton, MHA

Management Consultant/Account Manager

(Operations, Quality Assurance, Software, Database Training & Account Support)

Team Member Since: 2005

Becky Barndt, CTA

Special Projects/Web Consultant

(Web Site Content & Training, E-Newsletters, Special Projects & Account Support)

Team Member Since: 2008

Toby Parks, CTA

Client Development

(CTA Program Marketing & Sales)

Team Member Since: 2009

"We are definitely celebrating excellence in Corpus Christi with the kickoff of our first CTA course and the Pinning Ceremony by our Mayor.

Your entire team has been the most diligent and professional group I have had the privilege to work with. Thanks for providing Corpus Christi with a wonderful tool to promote our destination which will leave each visitor with a memorable visitor experience in our city."

Michelle Horne, CTA
Vice President, Leisure & Nature Travel
Corpus Christi Convention & Visitors Bureau

2. Describe any specific experience (in one page or less) with any clients and any specific experience with public entity clients, such as large municipalities and/or destination management organizations. From your experience, provide examples of key performance measure results (e.g. number of participants, retention rate, etc.) from the implementation of your program. If Respondent is proposing as a team or joint venture, provide the same information for each member of the team or joint venture.

Experience with public-entity clients, municipalities & DMOs:

We have extensive experience in working with municipalities and Destination Marketing Organizations (DMOs), as follows:

- *MSA Team Direct DMO Experience:* Mickey Schaefer = Direct sales & services experience with Kansas City Convention & Visitors Bureau (KCCVB) (1982-83); KCCVB Board of Directors (2003-2005); and as Vice President, Meetings & Conventions, American Academy of Family Physicians worked with numerous CVBs with 20,000 person annual convention, plus 200 smaller meetings, many of which were held in San Antonio. Pat Tierney = Past CEO of Kansas City and Tucson CVBs; Toby Parks = Past Vice President of Sales & Marketing, Tucson CVB; Kimberly Patterson = Past Director of Convention Services, Tucson CVB.
- *CTA Programs:* Anaheim CVB — City of Anaheim, via City Manager, city paid for the CTA Program for Anaheim/Orange County Visitor & Convention Bureau; Sonoma County Tourism Bureau is a county entity; North Texas Council of Governments (light rail/city buses) provided a grant to support the North Texas multi-county program; Visit Baltimore (DMO) board is appointed by the Mayor.
- *DMO Experience:* MSA has worked with over 100 DMOs with the CTA program and/or other MSA services, including strategic planning, focus groups and customer advisory boards. See *Section IX Client List*.

Key Performance Measures/Results:

Performance varies within each individual CTA program, depending upon the amount of effort and commitment given to the program destination-wide. The following are some highlights of successes achieved by CTA cities:

- There are over 8,500 CTAs within the 'ranks' across 14 states involving over 100 DMOs.
- The North Texas program (30 counties, 46 cities, 42 DMOs) produced over 1,600 CTAs in gearing up for Super Bowl 2010; with class size of 30 each, it's easy to achieve high numbers of 'graduates'
- Retention rate for annual renewals for each DMO program ranges from 30% to 84%, depending upon the amount of effort put into the renewal 'push' by the local leaders/DMO
- Other performance measures are easily pulled from the software system, which is provided complimentary to each local CTA program, such as total number of CTAs, total number of participating companies, retention rate, etc.
- A survey of CTAs is conducted on a regular basis to gauge the overall satisfaction level of CTAs with the program. The results have been extremely high and show proven behavior change, as shown below:

I am more aware of the power of tourism and my role in it = 83%
I have more pride and passion for our destination = 78%
I pay more attention to things that visitors may ask about = 84%
I make more of an effort to get out and explore what our destination offers to gain 'first-hand' experience = 80%
I have more confidence in serving visitors = 76%
I have gained more knowledge about our destination and what it has to offer = 89%

Source: CTA Survey, November 2010, Combined Agree/Strongly Agree Responses

3. Provide samples of work to scope of services within this solicitation.

CTA PROGRAM DELIVERABLES FROM MSA

The following will be developed by MSA for San Antonio's CTA program within the scope of our contract:

- 1. Focus Group Report** – This report will emphasize the key findings as to what will make the program a success; challenges to anticipate; how to measure success; and quotations relative to the program's benefits. The focus group participants represent all segments of the tourism industry, in order to obtain a wide variety of input and expertise. (Completed October 2010)
- 2. Subject Matter Expert (SME) Panel Report** – This report summarizes the input from twelve expert SME panel members who have a broad knowledge of visitor questions and frontline needs. (Completed October 2010)
- 3. Survey of Management and Frontline** – This survey report focuses on input received from an online survey of management and frontline (employees and volunteers). A wide variety of questions are asked to get to the heart of what is needed to ensure the program's success. Quotations and statistics are gathered, which are valuable to use in brochures, web sites and other means of communications in marketing and promoting the program. (Completed October 2010)
- 4. Pre-Classroom Reading & Reference Document** – This embodies the Body of Knowledge and program curriculum and is customized to the San Antonio area, based upon the Focus Group, SME and Survey input described in the three reports above. The document is approximately 200 pages and is to be read before participation in the four-hour classroom session. It consists of four modules: Module 1 – The Power of Tourism; Module 2 – Uniquely San Antonio (heritage, culture, historical significance, attractions, points of interest, economic drivers, sports, food, etc.); Module 3 – Knowing, Finding & Using Resources (referencing web sites, brochures, guides, visitor centers, maps, etc.); and Module 4 – Exceeding Customer Expectations (customer service). The document is designed to be used as an ongoing reference tool, with a compilation of all attractions and points of interest, as well as a comprehensive index.
- 5. Facilitators Guide** – An extensive 90-page guide that matches slides to facilitator notes, being careful to emphasize key learning's that are central to the program's curriculum
- 6. Student Workbook** – The in-class handout that students follow and notate during class.
- 7. Visitors Guide Exercise Answer Sheet** – Within the Pre-Class reading document, an exercise is included that asks the participant to become familiar with San Antonio's visitors guide. This handout provides the answers to that exercise, which consists of answers to frequently asked visitor questions.
- 8. Test** – At the conclusion of the four-hour classroom session, an open-book examination is given. The test is open book on purpose, as the questions are designed to test their ability to find answers in either the Pre-Class Reading document, the visitors guide, or other provided materials.

9. **CTANetwork.com** – Two technologies are provided to each destination. (1) Administrative software is complimentary and helps drive program administration with ability to sort all CTAs by sector (e.g. airport, city, restaurant, hotel, transportation, etc.); (2) CTANetwork.com provides your CTAs with a special log-in area that takes them into your specialized 'micro-site' that is branded to San Antonio. (See *Section VI. Project Phases & Deliverables, paragraphs 6.0* for more information on these technological deliverables)

10. **Ongoing Program Quality Assurance** – The program managers for each CTA city/program participate in quarterly conference calls and an annual CTA Accredited Provider Summit to share ideas and brainstorm ways to enhance successes with their local programs. This ongoing input has helped strengthen the CTA program and its benefits to cities/municipalities, DMOs, local stakeholders, and their CTA corps.

The following will be developed by the CVB utilizing MSA templates:

1. **General Promotional Brochure** – a full-color brochure, with application form, that outlines the program and its benefits to the employer and the frontline worker or volunteer. MSA provides a template with copy; San Antonio CVB determines layout/photos/graphics. This brochure would focus on the benefits to employers and would cite best practices for recognizing those employees/volunteers who take the time and make the effort to become a Certified Tourism Ambassador (CTA).

2. **Classroom Sessions** – Approximately 2 classes per month; 30 participants each; with refreshments, meeting materials (described above), etc. would produce approximately 900 CTAs in your program's first year; includes printing and shipping as outlined in *Section VI. Project Phases & Deliverables*

3. **Networking Events** – Networking events held to bring the CTA corps together to obtain first-hand experience with an attraction/venue, while hearing an update on the facility, any pertinent up-to-date tourism topics, and meeting and networking with one another.

4. **Local CTA Star Awards** – To honor those CTAs who shine above the rest; criteria and prizes will be given to top honorees annually.

4. Provide 3 references from current/historical clients, preferably Destination Management Organizations or CVBs, who have agreed to respond to and provide a reference to the City of San Antonio for the Respondent. The contact person named should be familiar with the day-to-day management of the contract for services from the Respondent and be able to respond to questions regarding the type, level and quality of service provided by the Respondent.

References

1. ORGANIZATION: Anaheim/Orange County Visitor & Convention Bureau (A/OCVCB)

Charles Ahlers, CTA, President; 714-765-8840; cahlers@anaheimoc.org

Christina Dawson, CTA, V.P. of Partnership Development; 714-765-8856; cdawson@anaheimoc.org

800 West Katella Avenue, Anaheim, CA USA 92802 www.anaheimoc.org



Work Duration: September 2008-Present (program customization September 2008-March 2009; provide ongoing technical and program support)

Work Completed: Created the customized curriculum, program materials and technological interface for the **Anaheim/Orange County Tourism Ambassadors Program** - Launched March 2009 Accredited Provider (AP), local administrator = Anaheim/Orange County Visitor & Convention Bureau

- 641 CTAs to date
- City of Anaheim funded program
- Chief of Police and Fire Chief in first class
- Program is currently Anaheim based, with intention to expand throughout all of Orange County to include Newport Beach, Laguna Beach and other tourism destinations.

Press Release: <http://www.anaheimoc.org/press/pressNews.asp?pid=243>

Program Participants: <http://www.anaheimoc.org/Articles/Archive/Webpage10818.asp>

2. ORGANIZATION: Dallas/Fort Worth Area Tourism Council (DFWATC)

Traci Mayer, CTA, Executive Director, 817-329-2438; tmayer@dfwandbeyond.com
701 S. Main Street, Grapevine, TX USA 76051 www.dfwandbeyond.com

Area CVB Head Involved With the CTA Program:

David DuBois, CAE, CTA, President & CEO, Fort Worth Convention & Visitors Bureau, 817-698-7822, daviddubois@fortworth.com (former President & CEO of PCMA, Professional Convention Management Association)
Jay Burress, President & CEO, Arlington Convention & Visitors Bureau, 817-265-7721; jay@arlington.org (location of new Dallas Cowboys Stadium)



Work Duration: November 2008-Present (program customization November 2008-May 2009; provide ongoing technical and program support)

Work Completed: Created the customized curriculum, program materials and technological interface for the **North Texas Tourism Ambassadors Program** (Dallas/Fort Worth metroplex and outlying region) - Launched May 2009 Accredited Provider (AP), local administrator = Dallas/Fort Worth Area Tourism Council, a ten year old marketing organization representing 30 counties, 46 cities and 42 convention & visitors bureaus.

- 1,683 CTAs to date from the DFWATC metroplex/region
- Geared up to host Super Bowl January 2011
- Trained 275 Dallas/Fort Worth (DFW) International Airport Ambassadors and staff; will train all 700 airport volunteers over next two years
- Frisco, TX Mayor is a CTA, he presents pins & certificates to his local CTAs at televised Frisco City Council meetings
- Funding of CTA program garnered from the DFWATC main convention bureaus, in addition to the area hotel association and the North Texas Council of Governments (light rail & metro bus service)

Web site: http://dfwandbeyond.com/site_pages/certified-tourism-ambassador-program

1,000th CTA Press Release: http://dfwandbeyond.com/press_rooms/press-releases/articles/north-texas-tourism-ambassadors-program-certifies-1000th-cta

3. ORGANIZATION: Kansas City Convention & Visitors Association (KCCVA)

Rick Hughes, CDME, President & CEO, 816-691-3879; rhughes@visitkc.com

Susan Blanco, CTA, Director of Special Events & Projects, 816-691-3879

1100 Main Street, Suite 2200, Kansas City, MO, USA 64105 www.visitkc.com

HEARTLAND★TOURISM
Ambassadors

Work Duration: May 2005-Present (program customization May 2005-May 2006; provide ongoing technical and program support)

Work Completed: Created the customized curriculum, program materials and technological interface for the **Heartland Tourism Ambassadors Program** (involving 24 CVBs across a four county region) - Launched May 2006 Accredited Provider (AP), local administrator = Kansas City Convention & Visitors Association, which is aligned with the Kansas City Regional Destination Development Association to drive regional tourism

- 538 CTAs currently
- First CTA program in the nation
- Recently secured the MLB All Star Game for 2012; having a well-trained, engaged frontline was a key decision factor for the MLB

Press Release: http://www.visitkc.com/mediaroom/news_release_detail.aspx?NewsID=220

Program Information: <http://www.visitkc.com/members-and-partners/ambassador-program/index.aspx>

Note: All of the above work was conducted solely by Mickey Schaefer & Associates LLC and was delivered upon a technological platform (CTANetwork software) purchased by MSA and customized for MSA.

Additional References Available Upon Request from:



and more.

ATTACHMENT C

PRICING SCHEDULE

Complete the chart below. If possible, indicate the Proposed Fee for each primary service that has been identified in this solicitation. Proposed Fees shall be inclusive of all time and all expenses, including any travel costs, related to each task. *(Note: Please indicate if costs are one-time costs and/or recurring costs. Additional line items may be added or deleted as needed.)*

See Section VII. Timing & Resources for more details on proposed program costs.

| Description of Service | One-Time | Recurring |
|--|--|--|
| <p>I. Development of Curriculum <i>One Time Fee (See Section VI. Program Phases Deliverables) Included are Phases 2-7 deliverables including: 6-8 weeks' dedicated writing of customized curriculum and Pre-Classroom Reading & Reference Materials document; customized classroom materials; customized Facilitator Guide & facilitator training; Field Test observation; CTA 'back-end' software/database administrative system set-up & training; CTANetwork.com 'micro-site' set up and training; promotional brochure content; best practices for program launch marketing & PR, and more.</i></p> <p><i>Recurring Fee: The recurring annual fees include: (a) accreditation/licensing rights for program content and materials; (b) specialized 'back-end' CTA software/database administrative system access and ongoing training & customer support; (c) CTANetwork.com 'micro-site' customized to the destination including programming functions that drive online renewals, Freebies & Discounts coupons, updated attractions, calendar of events, local/national CTA directory, CTA social networking, local photos, Spirit Photo Contest, Refer-A-Friend feature, social media, local Timely Info, ongoing education--grammar & etiquette tips, periodic overall website redesign, and ongoing 'micro-site' system training & customer support; (d) coordination of annual CTA Accredited Provider Summit; (e) annual CTA survey with local and aggregate comparison data; (f) annual updates to program/classroom materials; (g) interface assistance with universities, civic agencies, etc.; (h) grant-writing ideas; (i) quarterly Accredited Provider conference calls; (j) CTA logo usage approval; (k) Employer interface & CTA program support ideas; and more.</i></p> | <p align="center">\$47,000*</p> <p>\$45,000 program fee; and not to exceed \$2,000 travel expenses</p> | <p>\$10,000 \$10 per 'Current' CTA</p> <p>Accreditation/Licensing Fees, payable annually upon anniversary date of program launch (projected July 2013 and annually thereafter)</p> |

| | | |
|---|---------------------|---------------------|
| | | |
| II. Training Program (See Section VI. Program Phases & Deliverables, paragraphs 4.0) | See Above | See Above |
| III. Administration (See Section VI. Program Phases & Deliverables, paragraphs 6.0) | Administered by CVB | Administered by CVB |
| Total Cost for Project | \$47,000 | \$10,000+ |

Hourly Rate for Additional Services:

Additional Training: The CTA program curriculum is designed as a lasting training program that is administered via a cadre of volunteer trainers at the local level and is not dependent upon consultant delivery in an ongoing capacity. Therefore, you will not incur any additional expense for training facilitators future years, unless you desire to provide augmented training, as outlined in *Section VI. Project Phases & Deliverables, Paragraph 4.3*, at \$1,500 per training session. Note: No CVBs have needed this additional training to date, as the provided Facilitator Guide allows you to train your own trainers, as needed.

Curriculum Enhancements: The customized pre-class reading material is very extensive, resulting in very few changes over time. Should you desire to augment your curriculum with additional sections, over and above the annual edits included in your annual licensing fee, the rate is \$100 per hour or current rate (See *Section VI. Project Phases & Deliverables, Paragraph 2.1*) Note: Our writers/researchers are very efficient; the highest additional fee paid by any CVB to date is \$500.