

February 2, 2011

Mr. Frank Whittaker
Senior Buyer
State of West Virginia Department of Administration
Purchasing Division
2019 Washington Street, East
P.O. Box 50130
Charleston, West Virginia 25305-0130

Dear Mr. Whittaker,

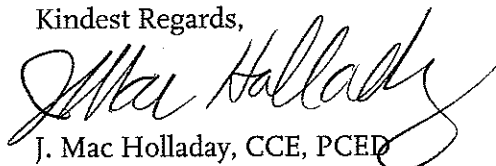
It is with great pleasure that I submit our response to your Request for Proposals (RFP) for comprehensive West Virginia Tourism Strategy. Our team has discussed the needs as outlined in the RFP, and is very interested in once again working with West Virginia.

Since 1997, *Market Street* has worked in over 125 communities in 28 states. Our clients are diverse and cities, counties, states, and leaders in the business community. One of *Market Street's* strengths is our ability to bring together the public and private sector leadership that is needed to both create and implement holistic strategies that have a lasting impact. Our current and previous state level strategic planning experience has taken us to six states, including West Virginia, and we bring substantial expertise and practical experience in the tourism sector of economic development to this process.

Our team includes experienced researchers and analysts, skilled facilitators, and a senior staff with expertise in creating clear strategies and implementation plans. As you will see in our proposal, in addition to working with the State of West Virginia's Department of Commerce, we have also worked in many communities throughout the state. We are currently working on an *Action Agenda* for the RED region surrounding Wheeling, and in 2008 I facilitated a retreat of the West Virginia Tourism Commission. While these experiences provide us with valuable insight into West Virginia's opportunities and challenges, we do believe that this process must start with a blank slate and no pre-assumed outcomes.

We look forward to the opportunity to further elaborate on our experience and proposed approach.

Kindest Regards,


J. Mac Holladay, CCE, PCED
CEO

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PURCHASING DIVISION
STATE OF WV

MARKET ST

**West Virginia Tourism Strategy
Submitted to the State of West Virginia
RFQ#: TOR4089**

Contact person: Kathy Young
KYoung@marketstreetservices.com

Signature provided in cover letter

Submitted by:
MARKET STREET SERVICES, INC.
www.marketstreetservices.com

February 2, 2011

LIVE WORK GROW

730 PEACHTREE STREET SUITE 540 ATLANTA GEORGIA 30308 404 880-7242 FAX 404 880-7246

MARKET ST

LIVE WORK GROW

Market Street brings original insights and clarity to the evaluation and revitalization of the places where people live, work, and grow. Through honest and informed assessments, *Market Street* can equip you with the tools to create meaningful change. Our solutions merge our experience and expertise with the economic and social realities of our clients.

Market Street's community partners are successful at creating stronger programs, increasing operational budgets, and creating new jobs with competitive wages that improve the quality of life in their communities.

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ATTACHMENT A: VENDOR RESPONSE

Market Street's history with the State of West Virginia is long and varied. The *Market Street* team has worked with the State multiple times since 2000, has worked directly with several regional communities to develop strategies, and most recently was the keynote speaker for the 2010 Annual Winter Work Meeting of Generation West Virginia.

Perhaps one of the most notable West Virginia experience the firm has had was the facilitation of the 2008 West Virginia Tourism Commission retreat and advisement on Senate Resolution 31. Our insight into the needs of the Division of Tourism and the state as a whole are strengthened dramatically by our first hand knowledge of issues, concerns, and opportunities that have never previously been publicly discussed. At the same time, the *Market Street* team brings an objective perspective and 14 years of strategic planning experience to this process. Our approach brings together expert research with tourism and economic development practitioner experience. Above all, our approach emphasizes the importance of listening to stakeholders and leaders throughout the state.

The Division of Tourism does not need more studies or a substantial amount of new research – much of the information is already available and the issues are known. The critical need at this point is to develop a comprehensive strategy to ensure that the tourism sector of West Virginia's economy is poised for strong, sustainable growth.

To date, the Division of Tourism has done a very good job of driving the Department of Commerce's efforts to expand the tourism sector of the state's economy. The state's "Wild and Wonderful" marketing slogan continues to resonate with West Virginia's target markets. From the international success of the recent reopening of The Greenbrier to the ever-increasing appeal of Charleston, Lewisburg, and many other communities throughout the state, West Virginia is blessed with amenities not found in many other states.

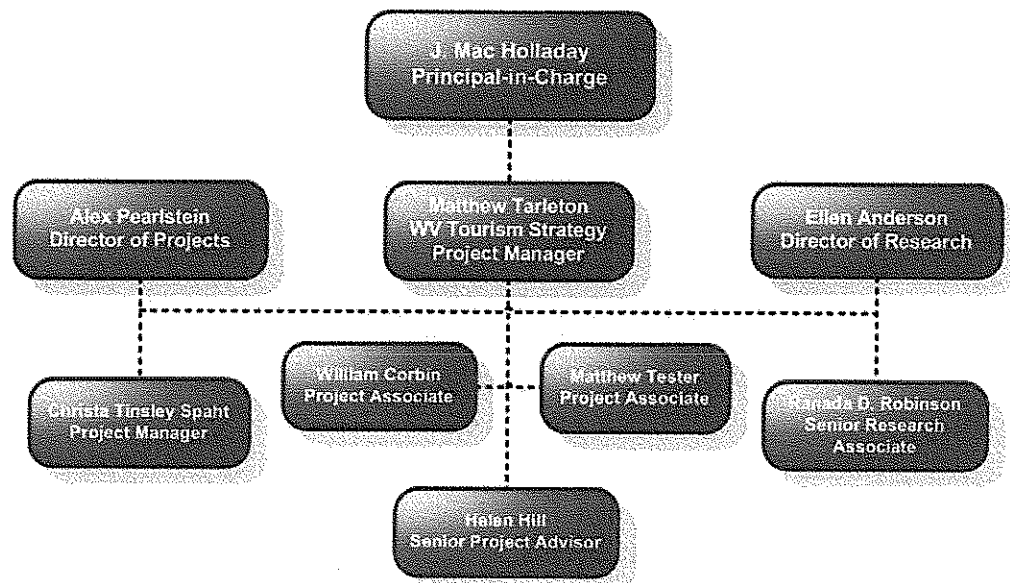
However, the State of West Virginia is now at a critical point. The years that will follow the Great Recession provide an excellent opportunity for West Virginia to do the unexpected and embrace a comprehensive plan to "put it all together." What are the growth opportunities? Where can public/private partnerships be more fully leveraged? How can the challenges of a shrinking pool of state and federal funding be mitigated? These questions and others will be answered during this process.

Led by the firm's CEO (and West Virginia homeowner) J. Mac Holladay, the *Market Street* team has partnered with a highly respected tourism practitioner, Helen Hill, currently the executive director of the Charleston (South Carolina) Area Convention and Visitor's Bureau. Together, the team will work with leaders in West Virginia to develop an action-oriented, measurable course of action for the Division of Tourism.

2.3 Firm and Staff Qualifications

Market Street Services, Inc. was founded in 1997 as an alternative to the traditional community and economic development consulting firm. The company’s experience and perspective is firmly rooted in the knowledge gained from being practitioners in the field, rather than looking “from the outside in.” The firm’s founder and CEO, J. Mac Holladay has more than 30 years of experience in community and economic development, both as a Chamber professional and as state economic development director. *Market Street’s* staff has worked with clients throughout the country to not only devise measurable, achievable strategies, but also have first-hand experience in clarifying what is needed from an organizational standpoint to successfully implement those strategies. The team’s experience in West Virginia is coupled with experience in devising tourism driven strategies, and will be further strengthened by the inclusion of a practicing tourism professional.

The entire staff of *Market Street* will contribute to the development of a comprehensive *Tourism Strategy* for West Virginia. The core of the team will consist of J. Mac Holladay, Matthew Tarleton, Alex Pearlstein, Ellen Anderson, William Corbin, Matthew Tester, and Senior Project Advisor Helen Hill. Ellen Anderson will lead the team’s research efforts, supported by Ranada Robinson. Ms. Anderson was the lead author for *Market Street’s* 2008 *Competitive Assessment* of West Virginia, conducted for A Vision Shared, Inc., while Ms. Robinson most recently served as the lead researcher for the development of an *Action Plan* for the Cobb County (Georgia) Convention and Visitor’s Bureau. Christa Tinsley is currently leading the development of an *Action Agenda* for West Virginia’s RED region surrounding Wheeling and is supported by three other members of the *Market Street* team. Ms. Hill, the Executive Director of the Charleston Area Convention and Visitor’s Bureau, will serve as the team’s Senior Project Advisor, bringing her 24 years of experience and expertise as a tourism practitioner to this process.



STAFF CERTIFICATIONS AND PROFESSIONAL QUALIFICATIONS

In 2009, *Market Street* founder and CEO J. Mac Holladay received the American Chamber of Commerce Executives' (ACCE) Life Member award, the pinnacle award granted by the organization for professionals with lifetime success in chamber careers, demonstrated through measurable success in building communities and organizations, significant contributions to the profession, and mentorship of their own staffs and others seeking growth in the profession. Mr. Holladay is also the recipient of ACCE's Certified Chamber Executive (CCE) credential, the highest designation in the chamber management profession.

Director of Research Ellen Anderson is certified through the American Planning Association as an American Institute of Certified Planner (AICP), while other *Market Street* staff are currently pursuing AICP and other relevant professional certifications.

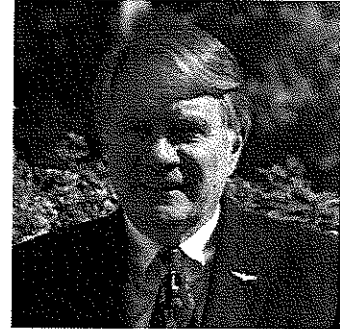
Mr. Holladay, Ms. Anderson, and Director of Projects Alex Pearlstein teach at the IEDC's Basic Economic Development Course and other professional development training courses and conferences throughout the year around the country. Mr. Holladay has been named the outstanding instructor at seven different universities' courses, including Georgia Tech's Basic Course in Economic Development on March 27 of this year, where his presentation, "A New Beginning – Economic Development 2010 and Beyond," closed the course.



Market Street's staff during 2010 retreat at Mr. Holladay's home in Asbury, West Virginia.

J. Mac Holladay, CCE, PCED, CEO

J. Mac Holladay is the founder and CEO of *Market Street* in Atlanta, Georgia. Mr. Holladay has been in the community and economic development field since 1972. He served three Chambers of Commerce over a 13 year period and is the only individual to head state level economic development organizations in three different states.



Mr. Holladay served as Chief Operating Officer for the Governor's Development Council of Georgia from June 1993 to July 1997. Prior to 1993, Mr. Holladay served as the State Director for both the Mississippi Department of Economic and Community Development (1988-1992) and the South Carolina Development Board (1985-1988).

His professional career began in his hometown of Memphis, Tennessee, following five years as a U.S. Naval Aviator, three of which were spent in the Far East including service in Vietnam. During his four years at the Memphis Area Chamber of Commerce, Mr. Holladay served as Director of Special Projects, Associate Vice President of the Convention Bureau, and Vice President of Member Relations. He then served as President of the Columbus Area Chamber of Commerce in Indiana and from 1979 to 1985 he was the President of the Charleston Trident Chamber of Commerce in Charleston, South Carolina.

His professional honors include being named a Certified Chamber Executive (CCE) in 1982 and serving as president of both the Indiana and South Carolina Chamber of Commerce Executives. Mr. Holladay was a member of the Commission of the Future of the South from 1986 to 1992 and was the Chairman of the Board of Regents of Leadership South Carolina from 1984 to 1988. He was selected as a member of the 1986 class of the International Business Fellows and has served on the Board and Executive Committee of the Society of International Business Fellows. He was Co-Chairman of the Southern Technology Council of the Southern Growth Policies Board in 1991. He was named a Professional Community and Economic Developer (PCED) in 2006 and a Life Member of the American Chamber of Commerce Executives association in 2009.

Mr. Holladay now serves on the board of the Alliance for Regional Stewardship; Southern Growth Policies Board's Council on the Southern Community; the Boards of the Georgia Chamber of Commerce, the Atlanta Educational Telecommunications Collaborative (AETC), and the Atlanta Regional Civic League; the National Advisory Board for the William Winter Institute for Racial Reconciliation at the University of Mississippi; the Advisory Board of Washington and Lee Alumni College; and the editorial board of the *Journal of Multistate Taxation and Incentives*. Mr. Holladay speaks across the country on the topics of community and economic development and has been quoted in a wide variety of publications including *BusinessWeek*,

Fortune, The Wall Street Journal, The New York Times, The Atlanta Journal-Constitution and many other newspapers.

Mr. Holladay is a graduate of Washington and Lee University. He holds an honorary doctorate in business administration from Johnson & Wales University. Mr. Holladay has been named the outstanding faculty presenter at the Basic Economic Development Courses at Georgia Institute of Technology, Auburn University, Louisiana State University, and the Universities of North Carolina, Kentucky, Arkansas-Little Rock, Tennessee, and Southern Mississippi. He also teaches annually at Leadership South Carolina.

Alex Pearlstein, Director of Projects

Alex Pearlstein has long been active in economic development, both as a professional and a student and fan of cities large and small. While at *Market Street*, he has managed economic, community, workforce and organizational development projects in 15 states. While he resides in Des Moines, Iowa, he currently is project manager for strategic planning processes in the State of Missouri and Greater Des Moines, Iowa. During his time at *Market Street*, he also managed strategic processes for Nashville, Tennessee; Springfield, Missouri; Sioux Falls, South Dakota; Murray County, Georgia; Hopkinsville, Kentucky; St. Louis, Missouri; Coachella Valley, California; Mandan, North Dakota; Palm Beach County, Florida; Halifax County, Virginia; Tulsa, Oklahoma; Austin, Texas; Albany-Dougherty County, Georgia; Rome-Floyd County, Georgia; Gwinnett County, Georgia; Waco, Texas; Hampton Roads, Virginia; Dothan, Alabama; Arlington, Texas; Martinsville, Virginia; Round Rock, Texas; and Memphis-Shelby County, Tennessee. As Director of Projects, he serves as an advisor on all of *Market Street's* active projects.



Mr. Pearlstein was *Market Street's* managing representative on a team developing a *Regional Growth Management Plan* for the Columbus region in Georgia in advance of growth at the Fort Benning military base. He has also managed a workforce development strategic process for the nine-county region of Coastal Georgia and an organizational development process for the 10-county Upstate Alliance region in South Carolina.

Prior to joining *Market Street* in 2003, Mr. Pearlstein was an associate at Central Atlanta Progress, Inc. (CAP), a downtown Atlanta planning and development organization. While at CAP, Mr. Pearlstein assisted with district rezoning and

wayfinding projects, numerous transportation initiatives, and was lead writer on CAP's successful funding application to redevelop a key transportation corridor in the central city.

While a Master's student, Mr. Pearlstein was lead researcher and contributing writer on Dr. Nancey Green Leigh's Brookings Institution study, "The State Role in Urban Land Redevelopment," and conducted stakeholder input for Dr. Leigh's report on bioprocess manufacturing workforce training. Previously, Mr. Pearlstein served as downtown bureau chief for a Long Beach, California newspaper covering numerous large-scale downtown redevelopment projects.

Mr. Pearlstein has been a presenter at the Basic Economic Development Course at the University of Arkansas. He holds a Master's degree in City and Regional Planning with a specialization in Economic Development from the Georgia Institute of Technology, and a Bachelor's degree in Communications from the University of California, San Diego.

Ellen Anderson, AICP, Director of Research

Ellen Anderson joined *Market Street* in 2005. As Director of Research for *Market Street*, Ms. Anderson directs its research systems, trains employees and clients on the latest data products and methodologies, and provides an advisory role in all company projects. She is currently working on projects for the State of Missouri; Greater Des Moines; Springfield, Illinois; and Alpharetta, Georgia.



Ms. Anderson has performed economic and demographic research for many clients, including work for economic development strategies for Austin, Texas; Arlington, Texas; Waco, Texas; Greenville, South Carolina; Gwinnett County, Georgia; Mandan, North Dakota; Montgomery, Alabama; Decatur, Alabama; Sioux Falls, South Dakota; Coachella Valley, California; Johnson City, Tennessee; Nashville, Tennessee; and Springfield, Missouri. Ms. Anderson has also contributed work to a SWOT Analysis for the North Carolina Research Campus in Kannapolis, North Carolina; a tax analysis for the Jacksonville Regional Chamber of Commerce; and was the lead researcher updating statewide community and economic development priorities for State of West Virginia and Vision Shared.

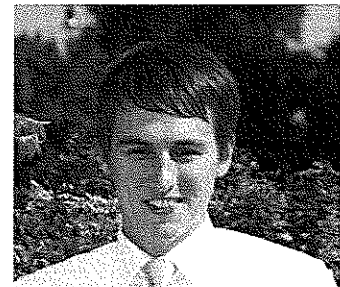
Ms. Anderson telecommutes from Orange City, Iowa. She recently contributed work to an exhibition at the Chicago History Museum exploring the linkages between

Daniel Burnham's 1909 Plan of Chicago and a proposed regional high-speed rail network. Before joining *Market Street*, Ms. Anderson worked as an AmeriCorps volunteer with Resource Assistance for Rural Environments (RARE), a community development initiative sponsored by the University of Oregon, the State of Oregon's Economic and Community Development Department, and the United States Department of Agriculture. While serving as the special project manager for a port district in rural Oregon, Ms. Anderson managed the redevelopment of a local marine park, wrote and administered grants from state and federal agencies, facilitated the port's strategic planning process, and worked to revitalize the community's downtown area. While pursuing her undergraduate degree in Chicago, Ms. Anderson contributed research to the Center for Urban Research and Learning on housing market discrimination. Ms. Anderson also actively volunteered at the Nathalie Salomon House, a Chicago Housing Authority residence for the elderly.

She holds a masters degree in City and Regional Planning from the Georgia Institute of Technology, specializing in economic development and land use, and bachelors of science from Loyola University Chicago. Ms. Anderson was certified by the American Institute of Certified Planners (AICP) in 2009.

Matthew Tarleton, Project Manager

Matthew Tarleton brings professional experience with industry and occupational cluster analysis, research design, and business development to *Market Street*. He carries a detailed understanding of various data series that are used by *Market Street* on a daily basis. Mr. Tarleton enjoyed a blend of undergraduate and graduate education in economics and urban planning, with extensive training in econometrics and research methods.



Mr. Tarleton is currently managing strategic planning processes for the City of Alpharetta, Georgia and the Greater Springfield, Illinois metropolitan area. He has recently completed work on an *Economic Development Strategy* for Greater Birmingham, Alabama and a *Regional Development Strategy* for Northwest Arkansas. Mr. Tarleton has also worked on a variety of other projects in his years with *Market Street*, including strategic planning and community visioning processes in St. Louis, MO; Tulsa, Oklahoma; Little Rock, Arkansas; Murray County, Georgia; and Gwinnett County, Georgia. Mr. Tarleton's background in international economics and housing markets supported analyses of agricultural export opportunities for the State of Georgia and a *Housing Market Analysis* for the Columbus, Georgia region in advance of growth at the Fort Benning military base.

Prior to joining *Market Street*, Mr. Tarleton was employed as an Economic Development Analyst with the Aelera Corporation in Alpharetta, Georgia where he developed various economic indices, authored white papers, and conducted studies of regional economic conditions, including industry and occupational cluster analyses. He previously served as a research assistant at the Center for Business and Economic Research at the University of North Carolina at Greensboro, where he contributed to a number of projects including a study of the emerging transportation, shipping, and logistics cluster in the Triad region. Mr. Tarleton also worked as a research assistant at the Triad Real Estate and Building Industry Coalition, where he examined residential and commercial growth patterns in the region.

Mr. Tarleton holds a Masters degree in Applied Economics from the University of North Carolina at Greensboro, and a Bachelors degree in Economics with Urban Planning as a second major. For his accomplishments inside and outside of the classroom, he was presented with the Bryan Outstanding Achievement and Leadership Award at Commencement. Mr. Tarleton also spent time studying abroad at the London School of Economics.

Helen Hill, Senior Project Advisor

Helen Hill is the Executive Director of the Charleston Area Convention & Visitors Bureau (CACVB), the organization that unifies and leads the local travel industry in marketing the Charleston, South Carolina area as an internationally known destination. Ms. Hill, a 1985 graduate of Clemson University's Parks, Recreation and Tourism Management program, began at the CACVB in 1986 and was named Executive Director in 1989.



When Ms. Hill began with the Bureau, there were approximately 1 million visitors a year. Today, there are more than 4 million visitors with an economic impact of \$2.8 billion. Ms. Hill has grown the Bureau from a staff of three people to 52 full-time employees, with a budget of \$8 million. Known for her extensive knowledge of the industry and the tenacity to make things happen, Ms. Hill has created and nurtured new market segments including golf marketing, culinary, heritage, destination weddings and the recruitment of major sporting events, including the Family Circle Cup, Davis Cup, World Cup of Golf and Senior PGA Championship. Of recent note, Ms. Hill worked in cooperation with the Charleston County Aviation Authority, Charleston Metro Chamber and Charleston Regional Development Alliance to spearhead 42 months of strategic efforts that resulted in attracting Southwest Airlines to the Charleston International Airport, a coup for both the local travel industry and business community.

The CACVB consists of five departments that each play a key role in promoting the Charleston area as a destination. The Executive Department works to unite the private sector while joining together to work with the nine funding municipal governments. The Marketing Department focuses on generating increased visitation from visitors and groups with the greatest potential to positively impact occupancy and the area's average daily rate. The Sales Department seeks to bring the most qualified leads to the local travel industry for group and convention business. The Media Relations Department promotes travel to the Charleston area by soliciting and supporting members of the print and broadcast media to create positive editorial coverage. The Visitor Services department welcomes all area visitors at the five area welcome centers and provides assistance with tours, dining and lodging.

Hill serves on the Committee for the 2012 PGA Championship, Board Member for the Southeastern Wildlife Exposition, Wachovia Bank Advisory Board and the South Carolina Tourism Alliance. She also served as the Chairman of South Carolina Association of Tourism Regions, Southeast Tourism Society and the Vice-Chairman of the Cruising America Coalition. In 2004, Ms. Hill was the 4th person and the 1st woman to receive the Fred Brinkman Award for Outstanding Tourism Leadership in the State of South Carolina. In 2006, Hill received the Order of the Palmetto, the state's highest honor for a private citizen.

Christa Tinsley Spaht, Project Manager

Christa Tinsley Spaht brings to *Market Street Services* her knowledge of strategic planning, program evaluation, and community organizing. Ms. Tinsley Spaht began at *Market Street* as a Graduate Research Assistant, assisting the project teams for a *Consensus Community Strategy* in Little Rock, Arkansas; a *Workforce and Education Plan* in Cabarrus and Rowan Counties, North Carolina; and an *Economic Blueprint Strategy* in Coachella Valley, California.



As a Project Associate, she worked on a *Vision Plan* for Mandan, North Dakota; economic development strategies in San Marcos, Texas and Sioux Falls, South Dakota; organizational analyses for Conway, Arkansas and Longview, Texas; an *Action Plan* update for Hopkinsville-Christian County, Kentucky; and a *Strategic Action Plan* for Springfield, Missouri. As Project Manager, she led an *Organizational Analysis and Implementation Plan* for the Development Authority of DeKalb County, Georgia.

She is currently managing an update for Montgomery, Alabama's regional economic development strategy, *Imagine a Greater Montgomery II*; a *Five-Year Action Agenda* for

the Regional Economic Development Partnership in Wheeling, West Virginia; and a *Target Cluster Analysis* for Greater Richmond, Virginia.

Previously, Ms. Tinsley Spaht worked for three years in the non-profit sector where she managed the volunteer program and coordinated performance and quality improvement for a large social services organization, guiding the quality assurance activities through both national accreditation standards and agency-wide strategic planning. She also has experience in fine arts grant writing and development at the Georgia Museum of Art in Athens.

Ms. Tinsley Spaht has a Master of Public Administration with a specialization in economic development from the Andrew Young School of Policy Studies at Georgia State University. While a graduate student, she performed research for Dr. Yoon Jik Cho for forthcoming publications on aging trends in state government workforce and trustworthiness in federal agencies. Ms. Tinsley Spaht also served as a research assistant to the Program for Rehabilitation Leadership at the Andrew Young School's Public Performance and Management Group, evaluating effective practices in vocational rehabilitation technical assistance and school-to-work transitional programs for youth with disabilities. Ms. Tinsley Spaht completed the IEDC Basic Economic Development Course in 2010. She earned her bachelor's degree in English from the University of Georgia.

Ranada D. Robinson, Senior Research Associate

Ranada Robinson brings an integrated background of math, computer science, risk management and insurance, and urban policy to *Market Street*. Her professional experience includes qualitative and quantitative research, econometrics, and data collection and analysis. While at *Market Street*, Ms. Robinson has performed as well as led economic and demographic research for a wide variety of clients, including work for the State of West Virginia; Palm Beach County, Florida; Gwinnett County, Georgia; Coachella Valley, California; Decatur, Alabama; St. Louis, Missouri;



Montgomery, Alabama; Southwest Louisiana; Waco, Texas; Nashville, Tennessee; and Tulsa, Oklahoma. She recently completed a tax competitiveness analysis for Jacksonville, Florida; and she is currently the lead researcher on projects for the State of Missouri, Cobb County, Georgia Convention and Visitors Bureau, and Des Moines, Iowa.

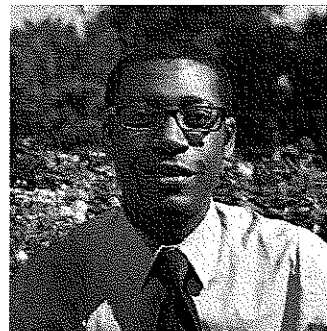
Before joining *Market Street* in June of 2008, Ms. Robinson worked as an Economist with the U.S. Department of Labor/Bureau of Labor Statistics, conducting surveys and analyzing compensation data to be used in national indices and publications, such as the Employment Cost Index.

Ms. Robinson is very active in her community and serves as an officer and board member of several organizations, including president of the Atlanta chapter of the Tougaloo College National Alumni Association (TCNAA). As a volunteer, Ms. Robinson has gained experience in event planning, project management, and volunteer management. In 2007, she was recognized by the Apex Society as an Atlanta Power 30 Under 30 Finalist. In 2008, she was awarded the Margaret Davis Bowen Outstanding Alumna Award by the South Atlantic Region of Alpha Kappa Alpha Sorority, Inc., for her community and civic involvement. Most recently, Ms. Robinson was named the 2009 Young Alumnus of the Year by TCNAA, and she received the United Negro College Fund (UNCF) Outstanding Young Alumnus Award in February 2010 at the UNCF National Conference.

Ms. Robinson holds a Master of Science in Urban Policy Studies with specializations in policy analysis and economic development and planning and a Master of Science in Risk Management and Insurance from Georgia State University. She has completed the IEDC Basic Economic Development Course, sponsored by the Georgia Institute of Technology. Ms. Robinson earned a Bachelor of Science in Mathematics and a Bachelor of Science in Math with emphasis in Computer Science from Tougaloo College, which is located near Jackson, Mississippi. She currently resides in Atlanta, Georgia.

William Corbin, Project Associate

William Corbin brings a variety of professional experience in economic and community development to *Market Street*, ranging from strategic industry research and analysis to marketing and business recruitment, retention and expansion.



Mr. Corbin is currently *Market Street's* lead researcher for the latest economic development strategy process in Springfield, Illinois and Hancock County, Mississippi. He recently finished assisting DeKalb County, Georgia with an *Organizational Analysis & Implementation Plan*, and was also a key team member in the creation of a *Regional Economic Development Strategy* for Greater Birmingham, Alabama. In addition, Mr. Corbin helped lead research for Springfield, Missouri's economic development strategy process and performed an update and review of Hopkinsville-Christian County, Kentucky's strategic *Vision Plan*.

Prior to joining *Market Street*, Mr. Corbin worked as an Assistant Project Manager at the DeKalb County Office of Economic Development, conducting various research, marketing, and analysis projects. Previously, he served as a Project Associate for the Gwinnett County Chamber of Commerce in their Economic Development

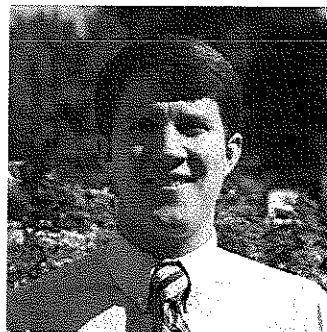
Department, and played an integral role in developing Partnership Gwinnett, the county's extremely successful initiative for economic growth and prosperity.

Mr. Corbin holds a Master of Public Administration degree with a concentration in Management and International Policy from the Andrew Young School of Policy Studies at Georgia State University, and a Bachelor of Arts degree in Political Science with a co-major in Journalism from Emory University.

Mr. Corbin is an Eagle Scout, and is active in his community. He is a member of several civic and volunteer organizations, including Alpha Phi Alpha Fraternity, Incorporated and Big Brothers Big Sisters of America. Mr. Corbin spent a semester abroad at Northumbria University in Newcastle, UK, where he studied International Policy Analysis.

Matthew Tester, Project Associate

Matthew Tester contributes to *Market Street* a strong set of analytical and communication skills, as well as experience in community development, comprehensive planning, and geographic information systems (GIS). He has a keen interest in applying geospatial and data-based analyses at the convergence of today's economic, land use, transportation, and ecological challenges in order to help create healthy, vibrant communities. At *Market Street*, Mr. Tester is currently the lead researcher for a strategic planning process for Alpharetta, Georgia. He recently worked on a *Regional Development Strategy* for Northwest Arkansas and an *Economic Development Strategy* update for Nashville, Tennessee.



Prior to joining *Market Street*, Mr. Tester worked as an urban planner at EDAA AECOM, where he honed research and analytical skills and became experienced in project design, management, and delivery. During his time there, he helped to develop community revitalization strategies for a coalition of North Charleston, South Carolina neighborhoods, create a planning framework for a naval air station, and prepare community assessment reports by utilizing GIS mapping, field research, and local plans. As a graduate research assistant at the Georgia Institute of Technology, he researched the role of university development in community and economic development. He also conducted independent research on the effect of various property tax regimes on urban growth and morphology.

Mr. Tester holds a master's degree in City and Regional Planning from the Georgia Institute of Technology and a Bachelor's degree from the University of North Carolina at Chapel Hill, where he studied Political Science and Spanish.

CLIENT REFERENCES AND FIRM EXPERIENCE

Since *Market Street's* founding in 1997, our work in 28 states and more than 125 communities has included:

- **Five state-level strategies** (West Virginia, Georgia, Indiana, North Carolina, Wyoming)
 - *Market Street* conducted an update of the 2000 West Virginia strategy in 2008 and presented the findings at the annual Business Summit
 - *Market Street* is also currently facilitating the State of Missouri's *Strategic Initiative for Economic Growth*
- **Facilitation of the 2008 West Virginia Tourism Commission retreat**
- Strategies for **Bluefield, West Virginia** and the **Capital Region** in West Virginia, and was the keynote speaker for the 2010 Annual Winter Work Meeting of **Generation West Virginia**
- The development of nearly a dozen **Target Cluster Analyses** that included tourism as a target business sector and featured strategic recommendations related to growing the client's tourism sector
- *Market Street* is also currently developing a five year *Action Agenda* for the RED region surrounding **Wheeling West Virginia**

Client references

The following client references can speak to the *Market Street* team's ability to provide in-depth industry research and develop complex strategies that enable organizations and their partners to successfully implement visionary, comprehensive action-oriented plans.

- **West Virginia: A Vision Shared Economic Development Strategy Update**
Kelley Goes, State Director for Senator Joe Manchin
(304) 342-5855
- **State of Indiana Department of Commerce Reorganization**
Tom McKenna, former Executive Director of the Indiana Department of Commerce
(317)362-6483
- **Opportunity Austin (Texas)**
Michael Rollins, President, Greater Austin Chamber of Commerce
(512) 322-5615

- **Partnership 2020 (Nashville, Tennessee)**
Janet Miller, Chief Economic Development & Marketing Officer
Nashville Area Chamber of Commerce
(615) 743-3031
- **St. Louis, Missouri: Target Cluster Analysis and Action Plan**
Steve Johnson, Executive Vice President – Economic Development
St. Louis Regional Chamber & Growth Association (RCGA)
(314) 444-1140

Recent projects for government agencies (previous five years)

The project experience provided below and on the following pages includes both public sector agencies and private entities that either have been contracted by local public agencies to run economic development programs or have been the recipient of funding or given the role of strategic process facilitator through community consensus. In all of our projects, including the four referenced below, there is substantial representation, funding, and buy-in from the highest levels of local governments.

It should be noted that *Market Street* is also currently engaged in three projects featuring public sector clients, including a state-level strategy and a tourism-focused action plan.

State of West Virginia

Economic Development Strategy and Analysis of Potential Economic Regions

(2000, 2002)

Competitive Analysis (2008)

The original strategy process for *A Vision Shared (2000–2001)* was comprised of five major tasks – stakeholder input; a *Demographic and Economic Analysis* of the state and its regions; a *Comparative Assessment* which examined West Virginia’s business climate relative to other states; an *Economic Development Strategy* establishing four goal areas for the state to pursue; and the *Implementation Plan*.

Market Street’s 2001–2002 work included a *Statewide Incentive Analysis and Review*, a *Regional Economic Development Delivery System Organization and Implementation Plan* that detailed implementation actions to be performed at the regional level (comparable to the State of Missouri’s six economic development regions), a *Workforce Development Plan and Delivery System*, and an *Organizational Review* of West Virginia’s community and economic development programs.

A Vision Shared: 2008 updated the past strategic process through a *Competitive Assessment, Ratings and Rankings* report, and a *Work Plan* for West Virginia.

A Vision Shared, Inc. was formed to implement the four goal areas of the strategy. The effort brought together a diverse group of public and private interests with four key goal areas.

Generation WV was a result of this initiative. The statewide coalition of local and regional young professional groups aims to attract, cultivate, and retain young talent across the state. The Governor's Council for Young Professionals aims to be the "voice for young talent in West Virginia to the Governor." The council has two members representing each of Generation WV's regional and local groups. So far, two members of the council have been appointed to state boards, committees, and commissions.

One of the findings from the 2008 strategy update was that the state judicial system is perceived as non-competitive. In response, West Virginia Governor Joe Manchin commissioned a study panel which reported its key findings in late 2009. The study panel recommended changes to judicial elections and appointments, which led to state legislators' passage of a judicial nominations bill in March 2010.

In response to the "Improve community health and wellbeing" goal area, Governor Manchin signed Senate Bill 414 in 2009, which requires the development and implementation of a five-year plan to extend affordable, high-quality health care to every West Virginia resident.

The "Create a 21st century workforce" goal led to the state's formation of the 21st Century Jobs Cabinet of West Virginia, creating "innovation zones" and developing a results-based pay system for teachers supported by both state teachers unions.

In pursuit of the "Leverage and support entrepreneurs and researchers" goal, Bucks for Brains was implemented to raise scholarship funds for the state's universities. A Strategic R&D Credit will offset up to 100 percent of corporate net income tax and business franchise tax based on qualified expenditures for R&D.

West Virginia's Department of Commerce expanded the "Come Home to West Virginia" marketing campaign in an effort to "Enhance West Virginia's image" (last goal area).

After being ranked at the very bottom, West Virginia has moved up four spots in *Forbes* magazine's "Best State for Business" and one spot in the Kauffman Foundation's "State New Economy Index."

Market Street CEO J. Mac Holladay and Director of Research Ellen Anderson served as the management team for this process and can be reached at 404-880-7242.

Austin, Texas

Economic Development Strategy and Updates (2003, 2006, 2007, 2011)

Market Street's four-month process in 2003 took the Austin community through five key phases: a *Current Demographic and Economic Profile* and a *Comparative Assessment* that were reliant on economic analysis, qualitative stakeholder input, and comparison communities assessment; a *Leadership Input* phase; the *Economic Development Strategy*; and, ultimately, an *Implementation Plan* that prioritized actions, reviewed funding priorities, and developed a communications.

During the summer of 2006, *Market Street* conducted a mid-term review of the Opportunity Austin implementation effort. The review identified adjustments and enhancements in the Opportunity Austin program necessary to keep the region on course for further enhancing its diverse, sustainable economy.

Market Street's work with Greater Austin continued into 2007 to develop the next phase of the Opportunity Austin effort. Launched in 2008, "Opportunity Austin 2.0" is a \$21-million, five-year plan designed to take the region to an even higher degree of success. *Market Street* will return to Austin in 2011 to conduct a mid-term update of Opportunity Austin 2.0.

Opportunity Austin's implementation efforts have had much success, fueled by the nearly \$14 million raised by the community towards plan implementation (\$2 million more than the strategy's overall budget). The Chamber launched Portfolio Austin, a business retention and expansion program; a marketing campaign dubbing Austin the "Human Capital," and in 2004 had 31 firms relocate to Austin (11 more than the 20 identified as the goal for that year).

In August 2004, Austin was chosen by Home Depot as the location for a new, state-of-the-art technology center, an over \$500 million investment that will lead to the creation of 500 high-paying jobs. The Austin data center will generate about \$30 million in annual payroll, with the average job paying \$60,000 a year. Greater Austin's aggressive pursuit of Home Depot was directly influenced by *Market Street's* recommendations. In addition, Freescale Semiconductors announced in April 2005 its intent to keep its headquarters in Austin, invest about \$414 million in its two Austin plants and add another 500 jobs to the region over the next 10 years.

While the region shed 2,300 jobs during 2009, it has fared the economic recession significantly better than most metro areas and Greater Austin's public and private leadership have stayed the course in community, workforce, and economic development. As the national economy ground to a halt in 2009, the Chamber was successful in recruiting 15 firms (creating 542 new jobs) to Greater Austin and ramping up business retention and expansion (BRE) and early stage company support services. The Chamber also took this time of economic recession to continue aggressively promoting its 20,010 by 2010 education and talent attraction initiative.

Through various programs, including volunteer-led FAFSA submission assistance workshops, the proportion of local high school students enrolling directly in college after graduation has increased by 5 percentage points (to 62 percent) between 2005 and 2008, putting the Chamber on track to meet their 2010 goal of a 64 percent. Additionally, the efforts of the Chamber and Austin Partners in Education (APIE) have helped the Austin Independent School District increase its graduates' college/workplace readiness rate — more than 20 percent year over year.

Support for the Greater Austin Chamber of Commerce and Opportunity Austin 2.0 remains strong, and local leaders are working to pursue a state medical school, roadway and transit infrastructure funding, and other economic development priorities now that promising economic momentum is once again on the horizon.

Market Street Director of Projects Alex Pearlstein led the team for this process and can be reached at 404-588-2437.

Nashville, Tennessee

Economic Development Strategy (2005, 2008, 2010)

Dubbed “Music City USA,” Nashville has leveraged its original roots in country music to become a city with a broad range of assets that go beyond the music and entertainment industry. Its success in attracting a number of prominent headquarters, as well as logistics and manufacturing firms, launched Nashville to the top of Expansion Management Magazine’s “America’s 50 Hottest Cities” for business relocation and expansion in early 2005.

In May 2005, the Nashville Area Chamber of Commerce retained *Market Street* to update its *Economic Development Strategy* for the next five years of the Chamber’s economic development initiative, called Partnership 2010. *Market Street* analyzed the Nashville region’s demographic and economic trends as well as business competitiveness, and found that to continue the region’s strong economic growth, education and workforce development, innovation, and certain quality of life elements needed to be addressed.

Market Street also conducted a *Target Business Analysis* to review the Chamber’s economic development targets and revise them to focus on the most promising business sectors. The research phases of the project culminated in an *Economic Development Strategy* that included four goals in these areas:

- Goal 1: Diversified, Sustainable Economy
- Goal 2: Education and Workforce Development
- Goal 3: Innovation and Entrepreneurship
- Goal 4: Infrastructure Development

Under each of the goals were specific objectives that addressed the issue identified in the research and emphasized the key strategies for continued economic development success in the Nashville region. The Steering Committee and the Chamber Board adopted the *Strategy* that is now underway using the *Implementation Plan* framework that *Market Street* prepared. In February 2007, the Chamber hired its first chief education officer to focus on K-12 performance improvement.

The Nashville region has continued to score successes. In July 2005, it was at the top of the list of “The 20 Hot Headquarters Metros for the 21st Century” by Business Facilities, and in January 2006, Nashville was once again named “America’s Hottest City” by Expansion Management. One of the most high-profile recent announcements was Nissan’s decision in November 2005 to move its headquarters to Nashville from the Los Angeles area, resulting in a transfer of 1,300 jobs with average salaries of \$80,000. In May 2006, Gateway, Inc. announced that it would open a computer assembly plant in Nashville, creating 300 jobs. Within weeks afterwards, Dell Computers planned to add 1,000 technical sales and support jobs to its existing call center in Nashville. The region’s economy is moving full steam ahead.

In keeping with the energy and dedication that defined the 2005 effort, the Chamber retained *Market Street* in August 2008 to review its progress on implementation efforts. Through a combination of benchmark analysis and stakeholder interviews conducted by CEO J. Mac Holladay, *Market Street* developed a mid-term update for the Chamber. The update revealed five key focus areas to guide the Chamber’s program of work during the remainder of the five year strategy years.

The mid-course review set the stage for the Chamber’s next five-year strategic process, Partnership 2020. The Chamber again retained *Market Street* in 2009 to guide the process, which built upon the successes of Partnership 2010 while maximizing future opportunities by applying the most current approaches and expertise to existing challenges.

This process produced new research and strategic documents for Nashville, including a *Competitive Assessment*, a *Target Cluster Review*, and an updated *Strategy*. The *Competitive Assessment* confirmed that Nashville’s positive momentum is continuing to build.

The *Target Cluster Review* examined the performance of existing targets and provided a refined set of new targets. These two research phases provided the foundation for the updated *Strategy*, which established four new goal areas for the region’s economic development leaders to pursue:

- Economic Diversity
- Talent Development
- Quality of Place/Livability

- Effective Regionalism

These goal areas encompassed objectives and action steps that address issues identified in the *Competitive Assessment* and provided strategies for growing the region's economy through the targets identified in the *Target Cluster Review*. This *Strategy* contained a multitude of key strategies necessary to enhance the region's competitive position as a place to do business, live, work, and visit. It will serve as the foundation of the Nashville Chamber's Partnership 2020 campaign. Effective implementation can ensure that the region continues to direct its own future and improve the prospects of many generations to come.

Market Street Director of Projects Alex Pearlstein led the team for this process and can be reached at 404-588-2437.

San Marcos, Texas

Comprehensive Economic Development Strategy (2009)

San Marcos, Texas has grown from a college and tourist town to a city brimming with new business activity. Nearly equidistant from the thriving cities of Austin and San Antonio, the area sits in a "garden spot" to take advantage of economic opportunities related to each metro; these are in addition to strengths and resources unique to San Marcos itself. The dynamics of that evolution are exactly what this comprehensive economic development planning process was all about.

Market Street Services partnered with the City of San Marcos and its economic development team, Economic Development San Marcos, to coordinate a plan aimed at elevating economic prosperity for the residents, businesses and elected/appointed leadership of the Greater San Marcos area. At the end of the eight-month project, San Marcos had a clear and unified picture of what type of place it "wants to be" and a prioritized set of action areas to achieve its goals. The resulting *Comprehensive Economic Development Strategy* answered the following important questions:

1. What are the area's competitive strengths and challenges?
2. What development should occur in the San Marcos area?
3. What is the Greater San Marcos Area's unique niche?
4. How can area leaders organize and market to support economic development?
5. What are the core "directions" that San Marcos must move in, and what are the priority actions that will enable the area to achieve its goals?
6. How can success in the Greater San Marcos Area be measured on an ongoing basis?

The *Strategy's* three goal areas are workforce excellence, economic diversification, and quality of place, each including detailed objectives and action steps to be pursued over the next five years. The *Comprehensive Economic Development Strategy* is a working

document that results in tangible benefits and successes. This *Strategy* serves as a tool to unify Greater San Marcos' public and private leadership behind a blueprint for the community's future, including funding the implementation efforts, formation of a non-profit economic development organization under the umbrella of the San Marcos Area Chamber of Commerce, and attraction of a full-service Austin Community College campus to the region.

One of the first strategic initiatives successfully implemented was the creation of the Greater San Marcos Economic Development Corporation (GSMED), a joint partnership of the City, Economic Development San Marcos, and the Chamber of Commerce. The new organization will focus on the five-year implementation of the three goal areas identified by the *Comprehensive Economic Development Strategy*, as well as recruiting and expanding the target business sectors recommended in the *Target Business Analysis*.

In spring of 2010, GSMED launched its aggressive \$4 million fundraising campaign, with plans to raise \$800,000 annually over the next five years to fund implementation of the *Strategy*. The full public roll-out of the fundraising campaign and the *Strategy* in November 2010 drew over 400 participants.

Market Street CEO J. Mac Holladay led the management team for this process and can be reached at 404-880-7242.

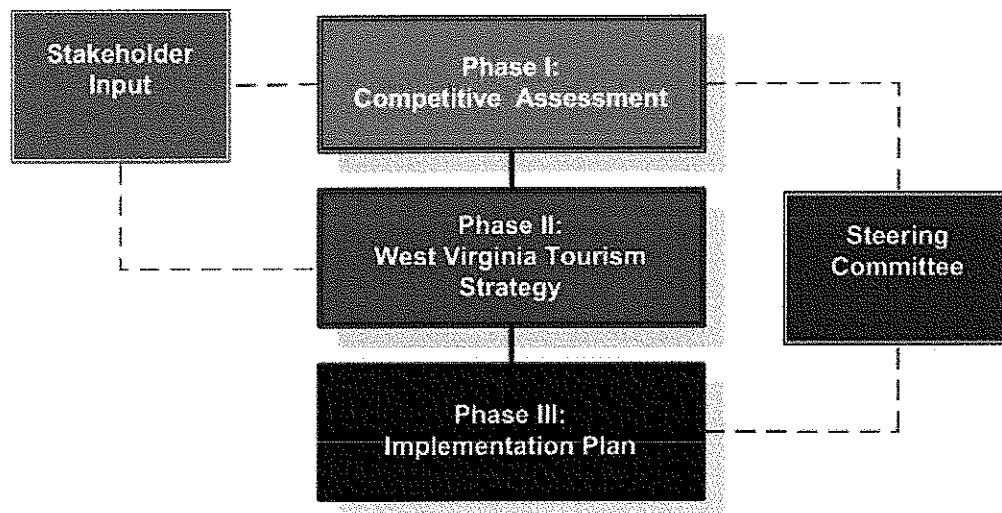
2.4.1; 2.4.2 SCOPE OF WORK

The recommended Scope of Work for this process consists of three phases, a research and existing data compilation phase, a strategic action phase, and an implementation phase. The process is expected to take approximately 8 months and will require the oversight of a dynamic Steering Committee. Each phase is summarized below with further detail about the phases of work, the Steering Committee, and the suggested project timeline provided in the pages that follow (and in section 2.4.4).

Phase I: Competitive Assessment – A three part assessment designed to bring together existing research with a current look at key factors affecting West Virginia’s competitiveness, informed by qualitative feedback from West Virginia leaders and tourism partners using a variety of input tools.

Phase II: West Virginia Tourism Strategy – An action oriented plan that identifies the specific tactics that the Division of Tourism should pursue to sustain and grow the tourism sector.

Phase III: Implementation Plan – The “roadmap” that will identify priorities, partner organizations, policy and funding needs, and benchmarks and performance measures.



CLIENT OVERSIGHT: STEERING COMMITTEE ROLE

At *Market Street*, we believe that our role is to provide the very best research and facilitation that is available, yet key decisions related to the final *Strategy* and its components must be made by the leaders in West Virginia. *Market Street* recommends that the Steering Committee consist of 20–25 individuals and will work with the Division of Tourism to outline a process for identifying potential steering committee members.

Bringing together the right group is key to ensuring early buy-in for this process and is the first step toward ensuring that the process is as inclusive as possible. Potential committee members include:

- West Virginia Tourism Commission members
- Key private sector leaders
- Department of Commerce staff
- Members of the West Virginia legislature – potentially legislators that serve on the Senate Economic Development Committee, the House Energy, Industry & Labor, Economic Development & Small Business Committee, and the Legislative Joint Committee on Government and Finance
- West Virginia Hospitality and Travel Association board members
- Constituents from West Virginia’s regional Convention and Visitors’ Bureaus

The responsibilities of the steering committee will be to:

- Put the needs of the West Virginia ahead of personal and business interests;
- Be a consensus builder;
- Keep the “big picture” in focus;
- Attend and actively participate in meetings over the course of the approximately 8 month process;
- Share knowledge of the state’s strengths and weaknesses with *Market Street*;
- Invest two hours to review each report and be prepared to discuss the deliverables in detail at steering committee meetings;
- Make decisions about the strategic planning process, including the approval of the strategy and implementation plan;
- Be an active proponent of the *Strategy’s* development process; and
- Commit to the successful, timely implementation and tracking of the *Strategy*.

Market Street recommends that the Steering Committee be staffed by key members of the West Virginia Division of Tourism.

Throughout the effort, *Market Street* will consult with the Steering Committee to keep the process on track and verify key issues. The project will include regular Steering Committee meetings, sequenced around the presentation of project deliverables, with *Market Street* facilitating the meetings.

Phase I: Competitive Assessment

The *Competitive Assessment* will consist of a three part assessment designed to bring together existing research with a current look at key factors affecting West Virginia's competitiveness, informed by qualitative feedback from West Virginia leaders and tourism partners using a variety of input tools.

The goal of Phase I is to provide a comprehensive account of the information that will eventually help *Market Street* and the Steering Committee identify 4-6 tourism target areas that the Division of Tourism should focus its efforts on in both marketing and product development efforts. The identification of these target areas will help organize the list of sectors as identified in the RFP (and provided below) into distinct, focused niche areas.

1. Skiing – downhill, cross country, snowboarding, snowmobiling, tubing
2. Whitewater Rafting
3. Golf – instruction, recreational play, competitive play, "trail" excursions
4. Recreational and Extreme sports – ATVs, motorcycle touring, dirt bikes, bicycling, zip line excursions
5. Other outdoor activities – hiking, climbing, swimming, boating
6. Gaming – horse racing, dog racing, gambling (racetrack and casino)
7. Hunting and Fishing
8. Theme Parks
9. Spectator Sports – baseball, hockey, football, golf, soccer plus special event opportunities
10. Motor Sports – track racing, road racing
11. Equine activities – instruction, trail riding, competitive riding, breeding, farming
12. Health and wellness – spas, fitness.
13. State parks, forest system, federal lands
14. Culinary tourism – instruction, demonstration
15. History/culture – land and home tours, museums
16. Historic Tourism – Civil war, cultural,
17. Fairs & Festivals
18. Film/video production
19. Second home market
20. Scouting
21. Camping/ RV
22. Group Tours
23. Entertaining/Meetings;
24. Weddings, conferences, family reunions and other special events

While there is some quantitative data that can inform the development of these niche areas, qualitative input will be very important to the development of the areas and

eventually, the strategic recommendations. It is also anticipated that some niche areas will work particularly well at the state level, and some might be geared specifically to one or more of the state's nine regions.

PART I: KEY FINDINGS FROM EXISTING RESEARCH

As previously noted, there is a great deal of information and effort that has already been invested in studying the current state of the tourism sector in West Virginia, its impact, challenges, and opportunities. The first logical step in this process is to review the existing data and develop a concise summary of the key findings. These key findings will serve as a reference point throughout the process and will inform the remaining two components of Phase I specifically.

- Economic Impact of Travel on West Virginia (2008, Dean Runyan Associates report)
- 2010 Agency Review, Department of Commerce, Division of Tourism
- 2010 Division of Tourism Marketing Report
- *Market Street's 2008 Competitive Assessment* and accompanying reports
- *Market Street's 2008* report from Tourism Commission retreat

Additional data analysis conducted during this process will leverage reputable publically available data sources at the state and federal level including the U.S. Census Bureau and the U.S. Bureau of Labor Statistics (BLS), as well as reputable proprietary data sources.

PART 2: PEOPLE, PLACE, AND PROSPERITY ANALYSIS

People

What are the key findings related to potential visitors and the West Virginia's potential tourism sector workers?

This element of the analysis will seek to answer two specific questions, **What do we know about potential visitors**, and **what are the strengths of West Virginia's existing and potential tourism sector workers?**

This section will be informed by the Division of Tourism's 2010 Marketing Plan and supporting materials/surveys included in the plan and *Market Street's 2008* Rankings and Ratings report for the state of West Virginia.

- **Visitors**
 - Population Changes in 6 of the 10 primary markets' populations (at the MSA level)
 - Age Distribution in 6 of the 10 primary markets' populations (at the MSA level)

- Educational Attainment in 6 of the 10 primary markets' populations (at the MSA level)
- Per Capita Income in 6 of the 10 primary markets' populations (at the MSA level)
- Perceptions of West Virginia, using previously gathered surveys, studies, and reputable national rankings and rating lists
- **Tourism sector workers**
 - Population Changes of West Virginia
 - Age Distribution of West Virginia's population
 - Educational Attainment of West Virginia residents
 - Characteristics of workers within tourism-related sectors
 - Skill Quotients (concentration of tourism-related workers in West Virginia relative to the United States)

Place *How competitive is West Virginia in terms of current product, marketing efforts, and investments in key infrastructure components?*

This section will be informed by the 2010 Agency Review of the Department of Commerce, Division of Tourism and will draw heavily upon the Division of Tourism's marketing materials and interviews with staff and representatives from partner organizations and agencies.

- Tourism product inventory – and assessment of primary attractions, destinations, and events
- State level programs and funding impacting tourism capacity
- Degree programs and training resources for Tourism industry
- Marketing activity and tools (websites, social media, materials, signage, etc.)
- Air and passenger rail statistics (passenger capacity, number of non-stop destinations)
- Broadband infrastructure
- Transportation infrastructure, including accessibility of key destinations

Prosperity *How strong is West Virginia's tourism sector currently and what do recent trends tell us about its future potential?*

This section will be informed by the Economic Impact of Travel on West Virginia report and will also leverage national data from the BLS and sources such as the U.S. Travel Association.

- Travel spending, payroll, and tax receipts
- Employment by sector

- Economic structure, including a location quotient analysis to determine the comparative strength of West Virginia's tourism sector by comparing it to the national tourism employment data
- Labor force participation rates (LFPR), which measure the percentage of the potential workforce that is employed or looking for work divided by the total working aged population (ages 18 to 69) to identify the state's "hidden workforce"
- Entrepreneurship (number of firms and receipts by sector)

PART 3: STAKEHOLDER INPUT

The Stakeholder Input phase of the process will include two on the ground trips to West Virginia by a two person *Market Street* team to conduct focus groups, interviews, and stakeholder meetings.

1. First, a two person *Market Street* team will conduct two full days of input sessions in Charleston. J. Mac Holladay, *Market Street* CEO and Founder, will conduct an additional day of input, focusing on elected officials and board chairpersons. Phone interviews can be arranged to follow up with a select group of stakeholders unavailable during the input trip.
2. The second trip will provide an opportunity for the *Market Street* to engage stakeholders from the nine travel regions. The two-person *Market Street* team will hold five two-hour meetings over the course of four days to solicit additional input from regional representatives. Four of the five meetings will combine two regions for the sake of efficiency and cost considerations.

Market Street will also develop an **online survey** to supplement the on the ground interviews and focus groups and inform the regional stakeholder meetings.

This stage of the process will also leverage the availability of **existing studies and surveys**, including but not limited to:

- Survey of Convention and Visitors' Bureaus (included in the July 2010 Division of Tourism Audit Overview)
- Anecdotal studies and information, e.g. academic papers from West Virginia University regarding visitor perception, and other pertinent reports

Possible constituencies for the focus groups, interviews, and regional stakeholder meetings include:

- West Virginia Governor Earl Ray Tomblin
- Former Governor, United States Senator Joe Manchin
- Key West Virginia Senate and House leadership
- West Virginia Secretary of Commerce, Keith Burdette
- Former Secretary of Commerce, Kelley Goes

- Division of Tourism staff leadership
- Tourism Commission board members
- West Virginia Hospitality and Travel Association staff members
- Select representatives from resorts and attractions (Snowshoe, Greenbrier, Oglebay, etc.)
- Convention & Visitors Bureau Association representatives
- Individual CVB staff members and Visitor's center managers
- Workforce and education partners (to provide perspective regarding training opportunities for potential West Virginia tourism sector workers)
- Appalachian Regional Commission, Collaborative Tourism Promotion Board
- Representatives from national associations of meeting and convention planners

Phase II: West Virginia Tourism Strategy

The *West Virginia Tourism Strategy* will provide the State of West Virginia, the Tourism Commission, and affected stakeholders with an action oriented plan that identifies the specific tactics that the Division of Tourism should pursue to sustain and grow the tourism sector.

The overarching goal of the *Strategy* is to identify 4-6 tourism target areas that have risen to the top of the list through the *Competitive Assessment* phase and then provide recommendations for how the Division of Tourism can fully develop these target areas identified in Phase I.

Market Street will begin the facilitation of the *Strategy's* development by revisiting the findings from the 2008 West Virginia Tourism Commission retreat. Though the state's economic reality has changed since the retreat, there is a tremendous amount of value that can be gained by discussing the dialogue of the Commissioners. A full copy of the retreat notes can be found in

While it would be a disservice to the process to attempt to anticipate the sectors or the specific recommendations, it is reasonable to suggest some potential goal and objective areas that might be addressed in the *Strategy*. The *Market Street* team will leverage its considerable experience and expertise in economic development, including state level strategic planning to bring all the pieces together. Possible goal and objective areas may address:

- Relevant legislative initiatives
- Infrastructure needs
- Entrepreneurial and small business development and support opportunities
- Public safety and other "quality of product" challenges to be addressed
- Workforce development and educational priorities

- Additional marketing activities and approaches
- Product development opportunities and public private partnerships to support product development
- The need for additional research and analysis to support specific target/"niche" areas

Specifically this phase of the process will:

- ✓ Identify a 10-year vision for the West Virginia Division of Tourism.
- ✓ Include the delivery of a **draft and final** strategy focused on specific actions that can be accomplished over the next five years, and that will lay the groundwork for years 6-10.
 - *Market Street* will incorporate feedback from the Steering Committee's initial review of the strategy into a final document using tools such as Turning Point, an audience response system that uses response devices to allow for instant feedback and a follow-up online survey specifically for the Steering Committee.
- ✓ Incorporate **best practices**, leveraging *Market Street's* extensive database of national best practices to identify programs, tactics, partnerships, and funding mechanisms that could be a valuable point of reference during implementation. In addition, **Senior Project Advisor Helen Hill** will provide an expert practitioner perspective to the identification and selection of best practices during this stage.
- ✓ Provide **detailed action items** that provide a clear agenda for the West Virginia Division of Tourism and its partners and stakeholders. These action items will be realistic but also innovative, as well as **measurable**.

Phase III: Implementation Plan

The *Implementation Plan* serves as the "roadmap" that will identify priorities, partner organizations, policy and funding needs, and benchmarks and performance measures. While the *Strategy* addresses "what" the Division of Tourism should be doing, the *Implementation Plan* addresses "how" these actions can be accomplished.

It is important to note that no matter how well-crafted the *Strategy* is, without the *Implementation Plan*, the likelihood of its success is completely reliant on working collaboratively to develop a detailed *Implementation Plan*.

Specifically this phase of the process will:

Provide **timelines and prioritization** of recommended actions. Action timelines for year one and years two-five will provide the Division of Tourism with the template for future year action timelines.

- ✓ Address **funding and staffing capacity issues** within the Division of Tourism and relevant partner divisions. Funding recommendations will take into account a number of sources, including:
 - Public-private partnerships for product development
 - Access to capital/seed and venture capital funding and loan opportunities
 - State/federal government matching-grant programs
 - State/federal government loan programs
 - West Virginia's Matching Advertising Partnership Program (MAPP)
 - Local development funding capabilities
 - Tax revenue availability

- ✓ **Identify partner agencies, associations, and organizations** that can be leveraged to co-lead the implementation of specific action items.

- ✓ Provide **activity and performance benchmarks** that can be used to measure the success of the *Strategy* at specific intervals during its implementation.
 - Activity measures might include increased collaboration and partnerships across regions and region and state interactions, product development and marketing initiatives, among others.
 - Performance measures might include direct and indirect revenue, jobs creation, per capita income, tax revenue generated, certificates and degrees in tourism-related careers, and West Virginia's location in national rankings, among others.

2.4.3 CAPACITY AND RECORD OF SUCCESS

Market Street has significant experience in developing state-level comprehensive strategic plans. For this process, our team of 10 full-time professionals will be supported by the expertise of a partner in the tourism field and the skills of a research assistant.

Our capacity and record of success is best demonstrated by our client's ability to:

- 1. Clearly identify their desired outcomes;**
- 2. Implement the strategies that will best position them to achieve their goals; and**
- 3. Measure their success.**

The fruit of our work can be found in community newspapers every day as our clients work diligently in implementation. In Austin, Texas leaders are laying the groundwork for its first medical school, promoting further economic diversification. In Mandan, North Dakota educators established a public schools foundation to give high school students increased access to advanced placement classes and community college courses. In West Virginia, a committee chaired by Sandra Day O'Connor initiated judicial reform to ensure that the state's legal system won't hinder business investment.

More than half of our ongoing work is with repeat clients or is initiated by referrals from current and former clients. The State of West Virginia, the cities of Austin, Texas, Nashville, Tennessee, Waco, Texas, and Rome, Georgia are among the various clients who have sought out *Market Street's* expertise multiple times over the past 14 years. As the following testimonials demonstrate, we are fully committed to ensuring that our clients are successful and bring the highest level of experience and expertise to each and every process.

"Market Street Services provided the Austin (TX) community with a very thoughtful, well researched economic development strategy that was both visionary and pragmatic. The multi-phased, systematic process followed by Market Street ensured acceptance of base-line knowledge that caused unity for final strategy development linked to goals with metrics for measuring success."

**Mike Rollins, President
Greater Austin Chamber of Commerce
Austin, Texas**

"The quality of *Market Street's Competitive Assessment* and Mac Holladay's presentation has the community in a stir (and thank heavens for that!) *Market Street's* findings will be transformational for our community."

**Jim Anderson, President
Springfield Area Chamber of Commerce
Springfield, Missouri**

"*Market Street* was by far the most professional economic and community development consultant we've ever worked with. Their knowledge and experience with similar visioning and strategic planning initiatives from around the nation offered clients like us instant credibility and the best chance for success from the start – two factors that no other firm can match. They guided us through the process seamlessly, involving every part of our community, and provided us a strategy and implementation plan that will change Gwinnett's future forever."

**Jim Maran, President and CEO
Gwinnett Chamber of Commerce
Gwinnett County, Georgia**

"Mac Holladay and his team have a vast array of experience that make them an excellent choice for any Metro area embarking on a strategy development process. Their process is great; their ability to listen to and incorporate community feedback is great; and the end product is always exceptional."

**Janet Miller, Chief Economic Development & Marketing Officer
Nashville Area Chamber of Commerce
Nashville, Tennessee**

"We challenged *Market Street* to base their work for the St. Louis RCGA on three primary tenets: 1) what the data is really telling us; 2) the structural changes occurring in our nation's economy; and 3) a recognition of who we are and where are our greatest opportunities are to be found. Mission accomplished. We all need more "truth tellers" like Mac and his team at *Market Street* for the occasional reality check and course correction."

**Steve Johnson, Executive Vice President, Economic Development
St. Louis Regional Chamber & Growth Association
St. Louis, Missouri**

CONCLUSION

As was noted by *Market Street* CEO J. Mac Holladay following the 2008 Tourism Commission retreat, economic development is a “team sport,” and the sum of all parts must be greater than the whole. Tourism cannot operate in a silo; it is clearly part of a greater effort. Regardless of the current reality of the state, national, and global economies, there is always an element of risk involved if the goal is to surpass previous achievements and stay competitive. That positive attitude is what the State needs to focus on. Building on its strong past efforts, every program and effort must be evaluated to ensure that it is as innovative, efficient, and effective as possible.

Our goal is to promote an understanding of comprehensive economic development designed to build a stronger and more diverse economic structure for West Virginia. Tourism can lead the way and leverage many of the assets that are found in West Virginia. Every visitor needs to be viewed as a potential resident, investor, employer, and supporter.

The methods used at *Market Street* are simple and well tested, and our staff is experienced in working with communities, regions, and states on all aspects of economic development and has the expertise required to produce a comprehensive tourism strategy for the State of West Virginia.

**ATTACHMENT B: MANDATORY SPECIFICATION
CHECKLIST**

N/A

ATTACHMENT D: WEST VIRGINIA TOURISM COMMISSION RETREAT NOTES, DECEMBER 2008

I. Magic Wand

Each participant was asked what they would do if they had a “magic wand”. The question was presented related to internal actions of West Virginia and those related to the external perception of the state. The following is the summary:

INSIDE WEST VIRGINIA

- * Convince leadership/the public that tourism is ECONOMIC DEVELOPMENT.
- * Major incentive/stimulus package for tourism projects (rework the Tourism Development Act Legislation).
- * Educate young people about all that West Virginia has to be proud of and sell from a tourism perspective.
- * Recognize the great opportunity of the Eastern and Northern Panhandle related to large nearby urban populations.
- * Enhance and expand the “product” we have through new and expanded events, facilities, evening events, destinations, and attractions.
- * A consistent expansive college level training program for the tourism program and industry. Mountain State can be a key.
- * Our worst problem is our self image. The development of self pride is what we need most.
- * The creation/acceptance of second homes as a vital part of our economic development strategy has great potential.
- * We have to improve and focus on our highway, rail and air access. That investment will payoff.
- * We need a core of “Ambassadors” from West Virginia to always be selling the state.

A second set of “magic wand” comments related to broader internal issues, including:

- * We must have an educated work force - the community colleges are key.
- * Our citizens must have better health and fitness across the board.
- * West Virginia needs to be a “right to work” state.
- * This type of planning process is needed across the state.

OUTSIDE WEST VIRGINIA

- * We have to “drive” a positive image (this topic is discussed in greater detail later).
- * Tell the story of the many choices that West Virginia has to offer to visitors.
- * Change perception of our infrastructure, for example: our roads are better than Virginia and Pennsylvania.
- * We have to market to young people – ex-patriots, college students, young professionals and entrepreneurs.
- * The message to major population centers has to be that we are close by and “undiscovered”.
- * Lifestyle tourists can turn into investors and residents.
- * The family is our best market.
- * We must have the dollars needed to market what we have.
- * We must keep trying to attract the stable federal jobs that can help diversify our economy.

II .The Future

Our second task was related to image, product enhancement, and systems (or methodology). I asked the Commission to think 5 to 10 years down the road.

A. Image

There was a wide-ranging discussion about West Virginia's image related to tourism and in general. Here are a number of the comments:

- * We have NO single image – there are many regions and diverse attractions.
- * “Wild and Wonderful” – Can be inclusive and broad – but only if care is taken to include night life, entertainment, gaming, as well as outdoors.
- * The New West Virginia says it all – it is fresh and different – we can put everything under it.
- * We need to set ourselves apart – everyone has pretty pictures – can we establish ourselves as “cool”?
- * Our “Coal Image” is a big negative in tourism, because it is focused on the past.
- * Can we reframe our “heritage tourism” around our history, the Revolutionary and Civil Wars, settlers, etc.?
- * Gaming is a huge revenue producer and even in tough times is pretty stable – can we show it off? Team it up with entertainment, sports, night life to attract more urban visitors?

B. New Product Development

- * Yes, we need more products on all fronts – attractions, destinations, hotels, events, etc.
- * The development-related tourism projects must be a part of our economic development program.
- * As mentioned earlier, the Tourism Development Act needs to be revisited, strengthened and enhanced.
- * While tourism is one sector of a broad economy, it must have a prominent place in the economic development strategy of the state.
- * Special entities like NASCAR need to be examined carefully as possible projects.

C. New Systems & Methodology

- * The future is the internet and mobile communications.
- * We need to rethink how we package everything.
- * The website is the most important tool.
- * Public relations is a vital and important part of how to change our image. The value of positive public relations can far outweigh advertising.
- * While the Governor works on it everyday and does it well, do we need a fulltime “image maker” who represents West Virginia everyday?

III. CONCLUSION

West Virginia is a true competitor for national and international tourism. The current recession will see many, many states reduce their efforts in economic development and tourism. This downturn is an excellent opportunity for West Virginia to do the unexpected. This report identifies many ideas and avenues for significant and positive change. As someone once said, “The joy of life is the choice.” While much has been accomplished, great potential remains. This retreat of the Commission can be a beginning, not an ending. Here are a few of the “nuggets” that I believe can help reframe the future:

1. Public Relations can be more powerful than advertising.
2. The website is the number #1 sales tool in selling the state. Driving people to a quality site is key.
3. An internal West Virginia educational and training effort related to the tourism industry, the employment skills needed and the value of tourism is mandatory.
4. The image must be changed. It must be inclusive and a “New West Virginia” sold.
5. Young people are the future – and the market to come. Collaboration and cooperation with state and local programs underway is key.

6. The development of more product is vital. The state needs to “enhance the market” and treat these potential projects as a part of their target market.
7. Economic development is a team sport. The sum of parts needs to be greater than the whole. Tourism cannot be in a silo. It has to be part of a greater effort.
8. Demanding benchmarks and measures are required to evaluate the results. Start over and take a longer, deeper view. Look at net employment increase, per capita income, tax revenue generated, certificates and degrees in tourism-related careers, and so on.
9. Risk is necessary to “leapfrog” the competition. Stop marginal programs and placements and try innovative, new ideas created for a specific goal.
10. As has been noted, you only have one chance to make a first impression. Every Welcome Center must be top quality. Mississippi has done it, so can you!

Prepared by:
J. Mac Holladay, CEO
Market Street Services
December 5, 2008

RFQ No. _____

STATE OF WEST VIRGINIA
Purchasing Division
PURCHASING AFFIDAVIT

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, limited liability company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

EXCEPTION: The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

Under penalty of law for false swearing (*West Virginia Code §61-5-3*), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

WITNESS THE FOLLOWING SIGNATURE

Vendor's Name: Market Street Services

Authorized Signature: [Signature] Date: 2-2-11

State of Georgia

County of Fulton, to-wit:

Taken, subscribed, and sworn to before me this 2nd day of February, 2011.

My Commission expires Dec. 20, 2014, 20 .

AFFIX SEAL HERE

NOTARY PUBLIC [Signature]

ACACIA HARRIS
NOTARY PUBLIC
Fulton County - State of Georgia
My Comm. Expires Dec. 20, 2014