



PROPOSAL



*Submitted to*  
**Snohomish County**

*Submitted by*  
**Otak, Inc.**

September 6, 2022

# Snohomish County Strategic Tourism Plan Update



September 6, 2022

Snohomish County Purchasing Services  
Everett, Washington 98201

*Submitted via email to: [purchasing@snoco.org](mailto:purchasing@snoco.org)*

Re: Qualifications for the Snohomish County Strategic Tourism Plan Update—Otak File No. 20959

Dear Selection Committee Members,

Snohomish County's 2018-2022 celebrates the beneficial impact that tourism has had from overnight and day-trippers, generating approximately \$1 billion of spending, creating 20,000 direct and indirect jobs, and \$100 million of state and local revenue. It sets a clear course for future growth, building on a strong regional economy and significant potential for building new tourism products and attracting new tourism demand. **These are results to be proud of, and the new plan update will build on the initiatives, actions, and outcomes of the previous plan.** The difference will be more of a focus on urban tourism and other context-based opportunities and providing a clear marketing plan and management structure to grow and optimize sustainable tourism within Snohomish County.

Otak and RRC Associates bring a strong background in market research, developing visitor profiles and assessing visitor needs and gaps, and creating actionable and measurable marketing plans for Destination Marketing/Management Organizations (DMOs), visitor and tourism organizations and bureaus, non-profit organizations, and agency clients. We also are experts in sustainable tourism and developing recommendations for destination stewardship. In addition, we've facilitated dozens of public and community engagement programs, focus group sessions, visitor and public surveys, and other interactions with key interests in tourism planning.

We have been at the forefront of visitation and tourism research and planning during and following the pandemic and recognize there has been a sea of change in several sectors, along with new trends that appear to be holding in how people vacation and visit destinations. **We bring recent, relevant experience to the table from destination communities across the West to support development of the new plan.**

We look forward to forging a successful path forward with you as we create the new 2023-2027 Strategic Tourism Plan. We look forward to the opportunity to present our qualifications and approach to you in an interview, if requested.

With my warmest regards,  
Otak, Incorporated

A handwritten signature in black ink, appearing to read "Mandi Roberts", followed by a long, sweeping horizontal line that extends to the right.

Mandi Roberts, AICP, PLA  
Principal and Senior Project Manager

**ATTACHMENT A  
SUBMITTAL PACKET  
RFP-22-047TB**

**Snohomish County**




Purchasing Services  
[purchasing@snoco.org](mailto:purchasing@snoco.org)

Proposers shall complete and submit the entire Submittal Packet  
Text boxes may be expanded to allow sufficient space to respond to questions.

**12A. Transmittal Section & Original or Digital Signature**

**BIDDERS SHALL COMPLETE AND SIGN THE FORM BELOW**

We acknowledge that all Addenda ( 1 through 1 ) have been examined as part of the Proposal documents.

Company Name: <b>Otak, Inc.</b>			
Address: 2828 Colby Avenue	City/State Zip Code: Everett, Washington 98201		
Original/Digital Signature: 	Authorized Representative's Name / Title:  Mandi Roberts, AICP, PLA / Principal and Senior Project Manager		
Phone: (206) 949-2741	Email: mandi.roberts@otak.com		

**Please complete the following information:** N/A

Is your firm a:

Women Business Enterprise (WBE)? Yes ☐

Small Business Enterprise (SBE)? Yes ☐

Minority Business Enterprise (MBE)? Yes ☐

Veteran Owned Business (VOB)? Yes ☐

Disadvantaged Business Enterprise (DBE)? Yes ☐

Do you have a certification number? Yes ☐

If yes, please provide certification number and state or entity who issued the number below:

Certification No.:

State or Entity Issued:

**12B. Experience/Qualifications:**

**12B.1 Please describe your experiences writing Strategic Tourism plans for Destination Marketing/Management Organizations?**

Since 1981, **Otak** ([www.otak.com](http://www.otak.com)) has built a reputation based on integrity, skill, and creativity, and the energy and passion of our professional staff has produced an award-winning firm committed to collaborative success with our clients. We provide planning, design, management, and other consulting services from offices throughout the West, including multiple offices in Washington (including our Everett office in Snohomish County), Colorado, New Hampshire, and our headquarters in Portland, Oregon. We bring over 40 years of experience in a well-established, successful practice, with more than 360 in-house, interdisciplinary professionals with expertise in planning, public and community engagement, landscape architecture, surveying, GIS mapping and analysis, and various others.

**Our firm is a recognized leader in planning for tourism and recreational destinations, scenic byways, national parks, state parks, resorts, and gateway communities.** We have prepared many recreation, visitor, and tourism master plans and strategic plans for major regional destinations in the Pacific Northwest—the Lewis and Clark National Historic Trail, Cascade Loop, San Juan Islands, Columbia River Gorge National Scenic Area, Coulee Corridor National Scenic Byway, Okanogan Trails Scenic Byway, Mount Rainier National Park and Chinook Byway, Lake Roosevelt National Recreation Area, and various other extraordinary places.



Our work in tourism destination areas and gateway communities has included engagement of a broad diversity of groups: community representatives, business and tourism industry representatives, Native American tribal representatives and other people of diverse cultures and ethnicities, local, state, regional, and federal agencies; and the public. We are experts at facilitating public and community involvement, surveys, focus group sessions, and other interactions to inform destination and recreation master planning and design projects. We also bring extensive experience in tourism marketing, advertising, and promotional plans, and balancing the needs of a broad diversity of recreational and tourism interests. **We have served hundreds of clients and worked in hundreds of communities and settings over the years—with work for the public and private sectors, as well as non-profit and non-governmental organizations and foundations.**

Our key partner on this project will be **RRC Associates**, based in Boulder, Colorado ([www.rrcassociates.com/where-we-work/dmo-tourism/](http://www.rrcassociates.com/where-we-work/dmo-tourism/)). RRC offers an extensive background in market and tourism-related research, creating segmented geo/socio demographic profiles of visitor bases, and identifying and mapping areas with like profiles that are underserved by the destination. RRC also brings strong expertise in understanding visitation patterns and the social science behind visitor interests, mobile location data, market research, strategic analysis, economic impact, and data visualization. The company is composed of professionals with extensive experience addressing the needs and challenges of various tourism, recreation, and planning departments. The motivation of their principals and staff, and their active involvement in professional organizations at the state and national level, ensure a high degree of professional skill and creativity. One of their core areas of expertise is conducting primary market research to assess economic impacts of tourism in destination communities. Generally, the research techniques they use are designed to collect visitor demographics, geographic residence, satisfaction with attributes of the experience, strengths and weaknesses, length of trip, expenditure patterns, intent to return, and various visitor loyalty components.

## **12B.2 Describe firm's capacity and experience addressing the services outlined in the Scope of Services.**

**Be assured of our team's capacity to complete this work within the required timeframe (through September 2023).** We evaluate our teams' workloads on an ongoing basis to be sure that we can offer clients the full attention and high-quality level of service they deserve. Between Otak and RRC, we have staffs of nearly 400 professionals, and our assigned team to this project brings a broad spectrum of capability and experience to successfully complete the required tasks within the next year.

**Our team brings an exceptionally strong knowledge of the Snohomish County tourism context with extensive project experience in the County, as well as experience in many destination environments across the Western US.** We have a strong understanding of current and anticipated future trends in tourism and how to develop strategic plans to support these. **Otak and RRC each have four decades of experience in planning and tourism research, analysis, and marketing.** RRC's team started working in tourism when their founders were asked by decision makers in Vail and Aspen to help them understand skier profiles and behaviors. Since then, they have expanded their scope and expertise to include DMOs and communities nationwide to develop data-driven strategies to both promote tourism and understand its impacts. **We are experienced in developing strategies to effectively promote your destination to high-value visitors.** An accurate profile of your visitor base is a critical first step in creating a powerful marketing strategy to drive new travelers to your destination, and in this step we collect data and information to understand:

- Who are your current visitors (demographics, psychographics)?
- Where are they coming from and where are they staying?
- What factors influence their travel choices?
- What are they doing when they arrive and what are their likes and dislikes?
- How much are they spending and on what?

We understand that the visitor economy is important to many communities and regions as a source of jobs and tax revenues.

**Our team brings extensive experience documenting the economic impact of tourism and the return on investment of public money invested to increase visitation.** We conduct primary research to document spending patterns of visitors and generate an economic impact model using IMPLAN software. The results address both direct and secondary economic impacts of tourism, as measured by output as well as estimates for the total employment and total labor income attributable to tourism.

**When it comes to developing effective and actionable plans, our team has worked across many tourism destination geographies to develop context-based plans with strategic marketing and branding recommendations and well defined actions that can be measured and monitored to ensure alignment over time with plan goals and KPIs.** These plans are data driven as well as informed through effective engagement of a wide range of interests, communities, and the public—we are experts in engagement that is tailored to fit each project location. Our firms bring all of the expertise needed to complete this important plan update to guide Snohomish County tourism actions into the next five years and beyond.

## 12C. References/Samples:

Provide at least three references from local or similarly sized customers. Briefly describe each of the three projects, note the similarities and provide up-to-date contact information including name, title, e-mail address, and phone number. Provide information on the contract length and whether the contract is currently active.

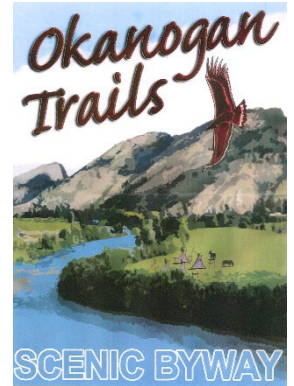
12C.1 References			
Our team's references can attest to our successful past performance including our quality of service, quality of production, technical competence, responsiveness to clients, and dependability. Most of our clients are repeat clients, and we work hard to maintain a high-level of client satisfaction. <b>We believe that we can only be successful when our work helps make our clients successful.</b>			
Otak	Reference 1	Reference 2	Reference 3
Project	Okanogan County Tourism Destination Master Plan	Thurston Bountiful Byway Plan	Socioeconomic Research and Analysis Nationwide Contract with the National Park Service
Similarities	Marketing and outreach planning; development of a specific action plan; engagement of diverse interests, communities, Native American Tribal representatives, and agencies; countywide context	Included public and community engagement and facilitating focus group sessions and interviews with internal and external partners and development of measurable marketing goals and strategies	Creating geo/socio demographic profiles of visitor bases, and identifying unique characteristics, gaps, and needs within various geographics (including urban tourism areas)
Company	Okanogan County Economic Alliance	Experience Olympia and Beyond	National Park Service, Social Science Program
Contact	Carolyn Davis	Annette Pitts <i>(also worked w/ Otak on the Cascade Loop Scenic Byway Plan)</i>	Dave Pettebone, PhD
Title	Administrative Assistant	CEO	Applied Research Coordinator
Email	cdavis@economic-alliance.com	annette@experienceolympia.com	David_Pettebone@nps.gov
Phone	(509) 826-5107	(360) 704-7544	(970) 225-3524
Size	\$137,000	\$45,000	Task order assignments vary in size from \$25,000 to \$2.5 million
Length	18 months	12 months	Ongoing five-year on-call contract
Active?	No. <a href="https://okanogancountry.com/2021-destination-marketing-plan">https://okanogancountry.com/2021-destination-marketing-plan</a>	Yes. <a href="https://issuu.com/checalaroni/docs/cmp_part1">https://issuu.com/checalaroni/docs/cmp_part1</a> <a href="https://issuu.com/checalaroni/docs/cmp_part2">https://issuu.com/checalaroni/docs/cmp_part2</a>	Yes.
RRC	Reference 1	Reference 2	Reference 3
Project	Visit Denver Resident Sentiment Research 2022	Boulder Visitor and Resident Research	Special Events and Visitor Profile Research
Similarities	Resident sentiment survey on impacts of tourism and marketing strategies for Denver tourists	Multiple projects aimed to assist the CVB in monitoring tourism and resident sentiment	Long-term monitoring of Bend's visitors and development of tourism strategies through research
Company	Visit Denver	Boulder Convention and Visitors Bureau	Visit Bend
Contact	Richard Scharf	Charlene Hoffman	Valerie Wilson
Title	President & CEO	CEO	VP Operations + Policy
Email	rscharf@visitdenver.com	Charlene.hoffman@bouldercvb.com	valerie@visitbend.com
Phone	(303) 571-9415	(303) 938-4203	(541) 323-8864
Size	\$41,000	\$30,000	\$17,500
Length	3 months	8 months	Biennially since 2008/09
Active?	Yes.	Yes.	Yes.

**12C.2** Please provide three project examples that demonstrate expertise related to destination planning, including work highlighting community, industry and audience engagement. Include perspectives on destination development, brand management, inclusive engagement, audience direction destination management and marketing KPIs.

**Otak** is known for our collaborative work developing context-based tourism plans that are tailored to the interests and needs of diverse visitors. We also are advocates for **VISION TO REALITY** plans that are created to immediately move forward into implementation. We have selected three relevant projects below, which are followed by brief descriptions of other related work of our team, as well as a relevant experience matrix on page 7.

**Okanogan County Tourism Destination Master Plan | Okanogan Valley, Washington**

Otak worked with a diverse spectrum of tourism and recreation stakeholders to develop a context-based ten-year county-wide tourism destination master plan for Okanogan County—encompassing the diverse tourism destinations and visitors of Okanogan County. Under the leadership of Okanogan County Tourism Council and various partners, the Okanogan County Destination Master Plan focuses on identifying strategic implementation actions and infrastructure improvements needed to serve the diverse interests of visitors. This strategic plan is a blueprint that provides direction and focus for the regional tourism industry, as well as communities within the region, local businesses, government agencies, and various specialized entities involved in outdoor recreation, trails, agritourism, wine, culture, and other sectors. The project included data collection, analysis of existing conditions and tourism infrastructure; geo/socio demographic visitor analysis; development of a vision, mission, and goals; recommendations for marketing, branding, and messaging; countywide GIS mapping of tourism assets; planning and identification of specific improvements, as well as design concepts; recommendations for how to maximize shoulder season and overnight visitation; engagement and outreach to involve a wide variety of interests, including Native American tribal representatives, various tourism and recreational groups, and the general public stakeholders; and recommendations for ongoing monitoring and evaluation of the plan's effectiveness.



The plan may be viewed and downloaded here: <https://okanogancountry.com/2021-destination-marketing-plan>

*"I've had the pleasure of working with Otak on two scenic byway corridor management projects in Kittitas and Okanogan counties. The Otak staff is a great resource, very personable and creative. They listen well to your goals and work to help you to see the possibilities. The process they use to outreach to your community is very helpful in tapping local resources to help you find those hidden gems—people with wonderful stories, insights, and vision for your area. This outreach helps to build local capacity and a solid foundation and shared vision for your project and future related projects."*

*- Deborah Kelly, Public Affairs Specialist, Okanogan-Wenatchee National Forest*

**Cascade Loop Scenic Byway Plan | Northwest/North Central Washington**

Otak prepared a scenic byway Corridor Management Plan (CMP) for the Cascade Loop Scenic Highway, a 440-mile system of state highway routes that provide access to some of the most spectacular scenic places in the world, as well as unique recreational, cultural, agritourism, and historical experiences. Extending from the Puget Sound lowlands, Whidbey Island, and the farmlands of Skagit Valley, through the North Cascades pass to the plains of the Methow Valley and on to Lake Chelan, Wenatchee, Leavenworth, and Stevens Pass, byway travelers can experience a diversity of landscapes, scenery, and activities at every turn. Key elements of this plan included:

- Inventory and mapping of intrinsic qualities—unique places and experiences
- Visitor profile analysis, along with identification of visitor needs and gaps
- Expanding and telling stories through interpretation along the byway
- Marketing and promotional strategies





- Branding, wayfinding, signing, and wayshowing recommendations
- Action plan—recommended priorities and implementation and monitoring actions
- Recommendations for ongoing engagement and outreach
- Potential funding sources to support implementation

Our team also worked closely with the steering committee to define and develop design guidelines so that byway signing and infrastructure would be cohesive with the look and feel of the byway and sensitive to the context and setting. During the process, we recognized the unique qualities of the byway's nine regions, while also strengthening the identity and bringing continuity to the overall Cascade Loop experience. Design elements recognize the three distinct byways that the Cascade Loop encompasses—Stevens Pass, North Cascades, and Whidbey Scenic Isle Way—while also reinforcing the overall Cascade Loop theme.

To view a copy of the CMP, visit: [https://issuu.com/checalaroni/docs/cmp\\_part1](https://issuu.com/checalaroni/docs/cmp_part1) and [https://issuu.com/checalaroni/docs/cmp\\_part2](https://issuu.com/checalaroni/docs/cmp_part2)

### **Thurston Bountiful Byway Plan | Thurston County, Washington**

Otak is currently working across Thurston County to develop the Thurston Bountiful Byway Plan—a plan that will guide and facilitate future byway activities and implementation, addressing a diversity of visitor needs related to signing and wayshowing concepts, interpretation, marketing, and transportation improvements. The Thurston Bountiful Byway is uniquely positioned to offer visitors a bounty of experiences—farm to table culinary stops, authentic cultural experiences, opportunities to experience nature and outdoor recreation, outdoor art and makers establishments, and much more. The Otak team is uniquely qualified to develop this plan given our context driven approach to tourism planning and the interdisciplinary composition of our firm. We recently completed a traveling workshop across the county to gather input from diverse interests, and we developed an online GIS portal using the experience builder platform. The portal allows interests to go in and identify tourism assets as well as key locations for needed improvements countywide. We are currently in the process of developing the draft plan, which will be completed by Fall 2022, and the plan will include a variety of recommendations for marketing, promotions, signing and wayfinding, improvements at key sites, interpretive waysides, gateway kiosks, and other actions.

The online portal may be viewed here: <https://bit.ly/thurstonbyway>

**RRC**, our subconsultant partner for this project also has significant relevant experience, including the following projects.

### **Special Events and Visitor Profile Research | Bend, Oregon**

RRC has conducted a visitor research program for Visit Bend for many years starting in 2008-09 and continuing through the summer of 2022 on a biennial basis. The survey-based program measured a variety of visitor and trip characteristics and has provided the opportunity for Bend to track and understand visitors over time. In addition to general visitor research, RRC conducted intercept surveys during and immediately following the USA Cycling Masters Road National Championships in 2012 and utilized survey data to measure the economic impact of that event, profile events visitors and generate insights into how to improve the event. RRC also conducted visitor and economic impact research on Bend's summer concert series in 2010.



### **Visit Denver Resident Sentiment Research 2022 | Denver, Colorado**

Visit Denver and key partners (Downtown Denver Partnership, City of Denver, Denver Chamber) are interested in gauging the perceptions and priorities of Denver residents regarding tourism impacts, special events, key attractions, and downtown Denver. The overall goal is gauge alignment of current perceptions as well as a future vision for the tourism industry in the city and surrounding region. RRC launched a citywide statistically valid survey that gathered input from nearly 1,600 residents across Denver's 11 City Council Districts. The research revealed deep frustration with the challenges facing the downtown district but also showed strong satisfaction and enthusiasm for larger events including festivals, sports, concerts, etc. in the city. Research results served to guide discussions at Visit Denver's annual board retreat in August 2022 and will have a major impact on updates to the DMO's strategic planning for 2023 and beyond.



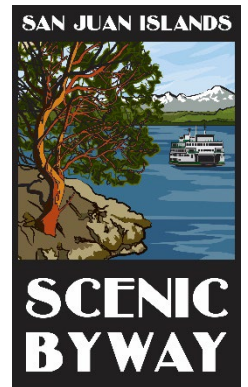
## Visitor and Resident Research | Boulder, Colorado

RRC has worked with the Boulder Convention and Visitors Bureau for years on research projects of residents and nonresidents to the city. In 2016 they conducted a visitor profile survey to measure demographics, expenditures, length of stay and other factors. This primary data was then combined with numerous secondary sources. Economic impact analysis revealed that tourism generates \$515 million in economic impact for Boulder. RRC also conducted a Resident Sentiment of Tourism study in 2019, a growing topic in the industry. Most recently, RRC worked with the Boulder CVB to develop dashboards using mobility research to monitor visitor movement patterns, geographic origins, event profiles, and more.



Our team's additional experience includes:

- **San Juan Islands Scenic Byway Tourism and Marketing Plan.** Otak developed a multifaceted strategic plan through a process that brought together residents, businesses, organizations, and local, state, and federal government agencies.
- **Lewis and Clark Trail Tourism, Marketing, and Interpretation Plan.** Otak's work included development of a marketing and outreach program and various marketing and promotional products for the Lewis and Clark Bicentennial Commemoration (logo concepts, brochures, map guides [including the successful *End of Our Voyage Guide*], posters, newsletters [electronic and print versions], media kits, speakers' programs, traveling displays, interpretive exhibits, visitor surveys, and various web-based programs).
- **Whidbey Scenic Isle Way Tourism and Marketing Plan.** With public involvement being a key component in this project, Otak coordinated a Call for Inspiration in which the public was asked to submit ideas for the gateway and logo designs to provide a sense of community ownership and pride.
- **Volcanic Legacy Corridor Management Plan and Economic Feasibility Analysis.** Otak engaged a broad spectrum of local, state, and federal agencies, and private and public sector representatives from towns and communities located along the 360-mile corridor.
- **National Park Service Socioeconomic IDIQ, Nationwide Contract.** Otak is leading an interdisciplinary team hired to provide visitor surveys, visitor use management and transportation studies, and other socioeconomic research task orders to assist the NPS with ongoing planning and management to serve visitors' needs and protect park resources nationwide (with RRC).
- **Snohomish County On-Calls.** Otak has held consecutive on-call consulting contracts with Snohomish County since 2000 and recently competed for and was selected for the 2023-2025 period under several categories. Through this experience, we have an in-depth understanding of the Snohomish County context and related tourism and recreational opportunities.



Market Analysis and Master Planning Services, Snohomish County





- **Tourism Research; Breckenridge, CO.** RRC has worked for over 20 years with the Breckenridge Tourism Office to measure and evaluate visitor profiles, experiential data, customer satisfaction (including NPS and other satisfaction metrics), as well as economic impacts.
- **Branding Initiative 2022; Lafayette, CO.** RRC conducted research in support of a City of Lafayette branding initiative in 2022. The research involved focus group interviews and surveys of residents, visitors, and businesses.

*“Otak successfully developed the comprehensive Lewis and Clark Trail Tourism, Marketing, and Interpretation Plan through an extensive statewide community and tribal involvement process. By developing the plan, which prioritized projects for the bicentennial anniversary of the Lewis and Clark Expedition, we were later able to leverage millions of dollars for implementation. Their work is a lasting legacy for travelers along the Lewis & Clark trail in Washington.”*

*- Dave Nicandri, Washington State Historical Society*

## PROJECT EXPERIENCE MATRIX

PROJECT	RELEVANT PROJECT ELEMENTS								
	Tourism strategies, marketing plans, strategic tourism plans	Public engagement/outreach, interviews w/ focus groups, surveys of internal and external partners	Geo/socio demographic profile analysis and development, analysis of existing visitor base	Branding and identity development	Sustainable tourism/stewardship considerations	Tourism across multiple contexts; urban, suburban, rural, natural areas	Tracking economic value and business impact of visitation	Work plans/action plans with KPIs and metrics for monitoring and evaluation	Attractive graphics and design of presentations and documents
Okanogan County Destination Tourism Master Plan	✓	✓	✓	✓	✓	✓	✓	✓	✓
Cascade Loop Scenic Byway Plan	✓	✓	✓	✓	✓	✓		✓	✓
Thurston Bountiful Byway Plan	✓	✓	✓		✓	✓	✓	✓	✓
San Juan Islands Scenic Byway Tourism and Marketing Plan	✓	✓	✓	✓	✓	✓		✓	✓
Lewis and Clark Trail Tourism and Marketing Plan	✓	✓	✓	✓	✓	✓	✓	✓	✓
Whidbey Scenic Isle Way Tourism and Market Plan	✓	✓	✓	✓	✓	✓		✓	✓
Volcanic Legacy CMP and All American Road Application	✓	✓	✓			✓		✓	✓
National Park Service Socioeconomic IDIQ—Nationwide Contract		✓	✓		✓	✓	✓	✓	✓
Snohomish County Real Property On-Call		✓							✓
Tourism Research, Breckenridge, CO	✓	✓	✓		✓	✓	✓		
Visitor and Resident Research, Boulder, CO	✓	✓	✓		✓	✓	✓		
Special Events and Visitor Profile Research, Bend, OR	✓	✓	✓		✓	✓	✓		
Branding Initiative 2022, Lafayette, CO		✓	✓	✓		✓			✓
Visit Denver Resident Sentiment Research, Denver, CO	✓	✓	✓		✓	✓	✓		

## 12D. Key Personnel/Availability

### 12D.1 Please provide an overview of your organization and specialties related to the tourism sector and strategic planning.

**Otak and RRC have extensive experience working with organizations in the tourism sectors to develop strategic plans and provide recommendations for improving organizational operations. Specialty areas of this work include:**

- Working in a wide range of tourism contexts—urban, suburban, rural, and natural areas
- Visioning and development of strategic goals and policies
- Facilitating engagement activities including workshops, focus group interviews, surveys, online interactive programs, steering committee meetings, and other methods to gather input and guide development of strategic plans

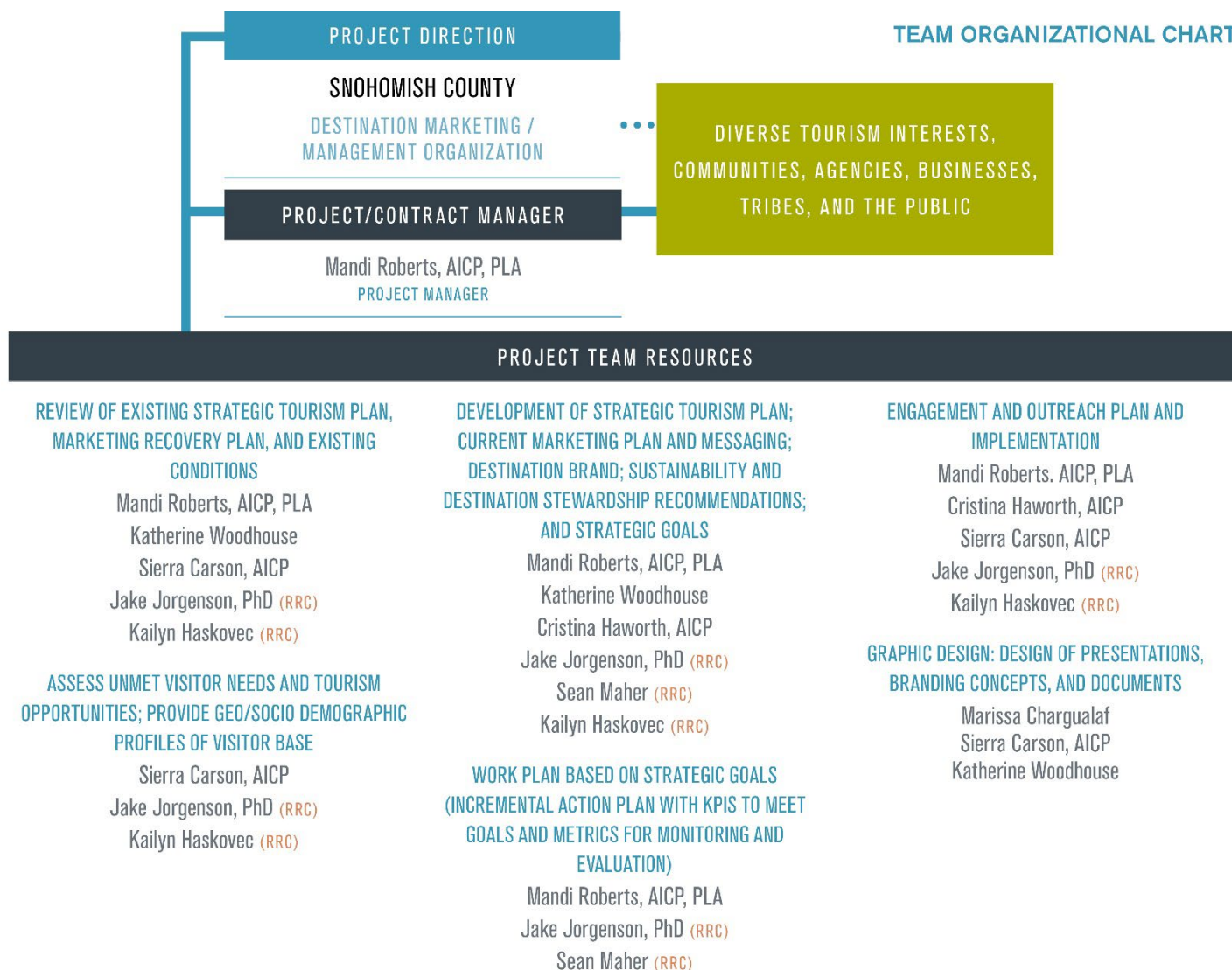
- Identifying geo/socio demographic profile of existing and potential visitor bases; creating segmented profiles and mapping to like profiles and areas currently underserved by destinations
- Assessment of visitor needs and gaps across countywide and regional geographies
- Sustainable tourism—strategies and recommendations to encourage and implement destination stewardship
- Measuring and tracking of economic impact related to spending, business, and leisure activities
- Development of marketing, promotions, and messaging recommendations and strategic marketing plans
- Development of detailed, prioritized work plans and action plans based on strategic goals
- Recommendations for benchmarks and metrics for monitoring and evaluation of plan effectiveness

Please refer to our response to Section 12B for additional information.

## 12D.2 Please provide a list and resumes of team members that would be working on this project.

**We have assembled a highly knowledgeable and skilled team with extensive experience in tourism, recreation, and destination master planning.** We have experience on large-scale, countywide, and regional destination plans such as the Okanogan County Tourism Destination Master Plan, Cascade Loop Scenic Byway Plan, Lewis and Clark Tourism, Marketing, and Interpretation Plan and statewide waysides improvement project, Lake Roosevelt National Recreation Area Visitor Use Master Plan, Thurston Bountiful Byway Plan, and other notable projects. Below we have included a team organizational chart that illustrates the structure of our team and indicates lines of reporting. The chart is followed by brief resumes for our team members.

TEAM ORGANIZATIONAL CHART



### **Mandi Roberts, AICP, PLA**

With more than 34 years of experience, Mandi frequently leads the development of tourism destination and scenic byway related plans, including facilitating engagement of broad interests and the public in plan development. She also has experience in interpretive planning and design and design of tourism facilities. As one of Otak's principals and senior level project managers, she has been responsible for management, coordination, and design on a wide variety of complex and multi-faceted public and private projects. She is an excellent communicator and facilitator, and her strong expertise in coordinating with multiple governmental agencies at the federal, state, regional, and local levels, as well as with tribes, technical experts, regulatory decision makers, and other diverse project stakeholders has benefited the many planning and design projects she has been involved in. Mandi enjoys working closely with communities, special interest groups, and the public-at-large on visioning and plan development. She has developed and successfully implemented a range of engagement tools, including interactive workshop series, web-based activities, and various outreach media. Select project experience:

- Okanogan County Destination Tourism Master Plan; Okanogan Valley, WA
- Cascade Loop Scenic Byway Plan; WA
- Thurston Bountiful Byway Plan; Thurston County, WA
- San Juan Islands Scenic Byway Tourism and Marketing Plan; San Juan County, WA
- Lewis and Clark Trail Tourism, Marketing, and Interpretation Plan; WA
- Whidbey Scenic Isle Way Tourism and Marketing Plan; Island County, WA
- Lake Roosevelt National Recreation Area Visitor Use Master Plan; Multiple Counties, WA
- Snohomish Shops Property Market Analysis and Master Planning; Snohomish County, WA
- Cathcart Properties Evaluation and Disposition Strategy; Snohomish County, WA
- On-Call Land Use, Architecture, and Site Planning; Snohomish County, WA
- National Park Service Socioeconomic IDIQ; Nationwide

### **Katherine Woodhouse**

Katherine has a background in planning and landscape architecture and supports Otak's work on tourism destination plans. She has expertise in geographic information systems (GIS) planning and mapping and developing interactive portals to gather public input, as well as facilitating other methods to engage the public and a broad diversity of project interests.

- Okanogan County Destination Tourism Master Plan; Okanogan Valley, WA
- Thurston Bountiful Byway Plan; Thurston County, WA
- National Park Service Socioeconomic IDIQ; Nationwide
- On-Call Land Use, Architecture, and Site Planning; Snohomish County, WA

### **Sierra Carson, AICP**

Sierra is a land use planner who brings solid knowledge of the regional and state planning framework, along with projects in Snohomish County, as well as strong expertise in data collection, GIS mapping and analysis, and long range and current planning tasks. She has experience working in urban tourism context and has a strong background and is experienced with the visual and graphic representation of data. Select project experience:

- *Swift* BRT Orange Line; Snohomish County, WA
- Mill Creek Boulevard Subarea Plan; Mill Creek, WA
- Town Center Subarea Plan; Lake Forest Park, WA
- On-Call Land Use, Architecture, and Site Planning; Snohomish County, WA

### **Marissa Chargualaf**

Marissa is a graphic designer with 15 years of experience in graphic design and print production. She has creating branding and marketing products through graphic design on many of Otak's regional tourism, scenic byways, and national parks projects. She has created extensive products and tools for public and community engagement. Marissa has created specific designs for wayfinding signs and elements as part of interpretive and recreation projects. Select project experience:

- Okanogan County Destination Tourism Master Plan; Okanogan Valley, WA
- Cascade Loop Scenic Byway Plan; WA
- Thurston Bountiful Byway Plan; Thurston County, WA
- National Park Service Socioeconomic IDIQ; Nationwide
- On-Call Land Use, Architecture, and Site Planning; Snohomish County, WA
- San Juan Islands Scenic Byway Tourism and Marketing Plan; San Juan County, WA
- *Swift* BRT Green and Orange Lines; Snohomish County, WA



### Jake Jorgenson, PhD (RRC)

Jake possesses extensive experience in recreation and tourism research, visitor behaviors, and visitor management. His personal philosophy is grounded in providing practical solutions through research using both traditional and innovative methodologies. Since 2020, Jake has served as the lead social scientist for the National Park Service's nationwide socioeconomic research contract. Further, he has extensive experience assessing resident opinions on development of municipal and county parks and recreation plans and visitor monitoring strategies for multiple tourism organizations. He has first-hand knowledge of the challenges and issues faced by land managers, tourism operators, and local communities and the need to make sound decisions. Jake has led a variety of quantitative and qualitative research studies using methodologies ranging from surveys, experimental design, interviews, and secondary analysis. Select project experience:

- Visit Chattanooga Visitor Profile; Chattanooga, TN
- Boulder CVB Resident Sentiment of Tourism Research; Boulder, CO
- Breckenridge Tourism Office Visitor Research; Breckenridge, CO
- National Park Service Socioeconomic IDIQ; Nationwide

### Sean Maher (RRC)

Sean is a specialist in economic development and tourism, inclusive of urban areas, resorts, the ski industry, parks and recreation, and gateway communities. Prior to joining RRC, Sean was CEO of the Downtown Boulder Partnership (DBP) and Downtown Business Improvement District where he oversaw marketing, operations, special events and tenant recruitment for the 49-square block downtown district. Before joining DBP, Sean headed up private and public economic development effort in Boulder as head of the Boulder Economic Council (BEC) and ran the Small Business Development Center. Before the BEC, Sean started and owned multiple Ben & Jerry's stores in Boulder and Denver and worked as a marketing consultant for the Sterling Rice Group. He built up and eventually sold a successful multi-store retail business in Taos, New Mexico focused on outdoor gear and footwear. Sean holds an MBA from the University of Colorado. Select project experience:

- Boulder CVB Resident Sentiment of Tourism Research; Boulder, CO
- Visit Denver Research on Tourism Impacts, Downtown Denver & Events; Denver, CO
- Breckenridge Tourism Office Ongoing Visitor Profile and Impact Research; Breckenridge, CO
- Ongoing Visitor Profile and Impact Research; Vail, CO
- National Park Service Socioeconomic IDIQ; Nationwide

### Kailyn Haskovec (RRC)

Kailyn brings a unique perspective to the RRC Associates team with a background in state and local government, parks and recreation, transportation, and social research. With a Bachelor of Arts degree in Sociology and a Masters of the Environment degree, Kailyn can interpret qualitative and quantitative data to provide strategic recommendations and policy direction. She has assisted with a variety of parks and recreation studies, community surveys, market analyses, and is a part of RRC's national parks project team. Kailyn also provides creative insight to RRC's marketing and communication efforts by designing, formatting, and editing reports and proposals. Select project experience:

- Visit Walla Walla Visitor Profile Study; Walla Walla, WA
- Beaver Creek Summer Intercept 2022; Beaver Creek, CO
- Upper Colorado River User Intercept Survey; Grand County, CO
- Beaver Creek Conquesting Research; Beaver Creek, CO
- National Park Service Socioeconomic IDIQ; Nationwide

## 12E. Project Plan/Approach

### 12E.1 Please outline your firm's approach to the project and the process the organization will follow, specify the research, actions and stages to be addressed.

We would be excited to have the opportunity to work with the County, tourism interests, and the public to develop the Strategic Tourism Plan Update. Our team brings a context-based approach that will be tailored to the specific existing and potential future visitor characteristics, needs, and interests in Snohomish County. With your vision to grow and optimize sustainable tourism in the County, we see abundant opportunities related to more urban experiences, agritourism and authentic cultural experiences, culinary, wine, craft brewing and distillery experiences, interactions with the arts, makers, and collectors, and of course, abundant outdoor recreation opportunities as a gateway to the North Cascades and Puget Sound.

**Our team has developed more than 20 unique tourism and visitor and interpretive plans for destinations across the West** (see examples in 12C). For each planning assignment we customize our approach so that it is collaborative and

inclusive of a full diversity of interests. We go through a series of exercises with the project steering committee focus groups to ensure that the plan reflects the needs and interests of the destination's visitor base and geography. Our team is uniquely qualified for this project given our long history and deep knowledge of Snohomish County, coupled with our experience working with tourism destination groups across the West. **Work on this project will be based from Otak's offices in Redmond and Everett, Washington.**

### **Scope of Work and Deliverables**

The following draft scope of work, with specific tasks and list of deliverables should be considered preliminary, until such time we have the opportunity to collaborate with you and refine this approach as needed. We propose to work with a steering committee in a series of five meetings (could be virtual or in-person), with each meeting focused on specific plan development activities. We will conduct focus group interviews and surveys of internal and external interests to inform the plan update. We also will set up an online interactive portal and facilitate other activities to gather input for the plan.

#### **1.0 Initiate Planning Process and Complete Review of Background Information, Gather New Data as Needed, and Prepare Tourism Assets Database/Inventory**

##### **Tasks**

- Finalize the project work plan (scope, schedule, assignments) and hold kick-off meeting with the DMO key representatives/steering committee.
- Gather and review all pertinent information including existing plan and supporting documents and existing available tourism and visitation data.
- Conduct site tours and document tourism assets through GIS basemapping (setting up the online portal), include urban tourism and sustainable tourism opportunities (existing and potential new/future).
- Gather new data on visitors from available sources.
- Develop a specific plan for engagement and outreach during the planning process, as well as for ongoing engagement and outreach after the plan is updated.

##### **Deliverables**

- Final work plan (scope, schedule, assignments)
- Kick-off meeting agenda and notes for first meeting with DMO/steering committee
- Tourism assets inventory (basemapping/GIS set up) and online public-facing portal
- Draft mission, vision, and goals document (with group exercise to refine mission and vision) and other organizational recommendations for updating goals in the existing tourism strategy (retaining or revising existing goals, adding new goals, etc.); proposed process for acknowledgment and tracking of economic impacts to business and leisure segments
- Site tours itinerary
- Tourism assets database/inventory in GIS
- Summary of existing available data and information to inform development of the plan
- Engagement and outreach plan for planning process and after plan is updated

#### **2.0 Engagement Efforts, Analysis, and Development of Early Draft Recommendations**

##### **Tasks**

We will work collaboratively with the DMO/steering committee to conduct engagement efforts across the county to gather additional input develop preliminary draft plan elements. These efforts will include:

- Holding a second steering committee meeting to gather input on the draft, mission, vision, and goals and to discuss needs, interests, and trends.
- Conducting focus group sessions and conducting surveys of internal and external partners to gather information related to visitor characteristics, needs, interests, and trends.
- Create segmented geo/socio demographic profiles of existing and potential visitor bases and identify and map like areas with like profiles, while identifying marketing areas currently underserved by the destination.
- Develop early draft recommendations for tourism activities, marketing and promotional strategies, and other actions needed to address underserved areas.
- Integrate and filter recommendations to prioritize sustainable tourism and stewardship building actions; expand/enhance and integrate urban tourism opportunities.
- Hold third steering committee meeting to review results/outcomes and discuss related potential strategies.

### ***Deliverables***

- Agenda, presentation materials, and hand-outs for second DMO/steering committee meeting
- Focus group session and survey materials; documentation and analysis of input and results gathered
- Segmented visitor profiles and identification of underserved areas report; assessment of visitor needs currently not being met
- Early draft recommendations matrix highlighting sustainable tourism and stewardship building actions
- Agenda, presentation materials, and hand-outs for third DMO/steering committee meeting

### **3.0 Full Draft Strategic Tourism Plan**

#### ***Tasks***

We will move forward to develop the full draft Strategic Tourism Plan. This work will include compiling:

- Refined draft, mission, vision, and strategic goals.
- Summary of outcomes from data analysis, research, and engagement efforts (focus groups, surveys, etc.) to inform the plan.
- Segmented geo/socio demographic profiles of existing and potential visitor bases, with identified and mapped areas with like profiles, while identifying marketing areas currently underserved by the destination (summary of unmet visitor needs).
- Key foundational values of the plan—sustainable tourism, stewardship, cross-geographic/context tourism opportunities, monitoring progress, and others.
- Draft recommendations and action plan (work plan) based on strategic goals, with:
  - Recommended improvements to current marketing, promotional, and messaging strategies
  - Recommendations for revamping the comprehensive marketing strategy and destination brand
  - Analysis and recommendations for maximizing overnight stays in Snohomish County, as well as other economic development strategies (shoulder season tourism, partnerships, etc.)
  - Alignment of strategies and actions with Snohomish County's marketing recovery plan
  - Ongoing engagement and outreach activities
- Draft metrics (key performance indicators/KPIs) for meeting goals and monitoring and evaluating the plan's performance and effectiveness. This will include an analysis/assessment of potential economic impact in the business and leisure sectors tied to the metrics and KPIs for implementing the plan.
- Hold fourth DMO/steering committee meeting to review draft plan contents and initiate review period; gather input on information to be covered in the Executive Summary.

### ***Deliverables***

- Draft Strategic Tourism Plan (with contents outlined above)
- Agenda, presentation materials, and hand-outs for fourth DMO/steering committee meeting

### **4.0 Final Strategic Tourism Plan and Executive Summary**

#### ***Tasks***

- Based on input received and review comments on the draft plan, we will proceed to finalize the plan and create the Executive Summary for delivery to the DMO and steering committee.
- We will hold a fifth meeting with the DMO/steering committee to kick-off plan implementation and review key aspects of the action plan (work plan) and implementation responsibilities.

### ***Deliverables***

- Final Strategic Tourism Plan
- Executive Summary (Draft and Final)
- Agenda, presentation materials, and hand-outs for fifth DMO/steering committee meeting



## 12E.2 Provide an overview and examples of the process for stakeholder engagement.

We believe that the success of every planning process is firmly rooted in the effectiveness of engagement of key interests and partners, communities, diverse groups, and the public. **Our team brings extensive experience working collaboratively with a diversity of interests on similar types of plans.** Examples of project engagement efforts for similar types of assignments were described in Sections 12B. and 12C.

Our expertise includes a full toolbox of innovative ideas to engage the diverse interests and the public, including workshops, focus group sessions, surveys, open houses, web-based tools, social media outreach, meet and greets at local venues, virtual community bulletin boards, and other techniques (see list of tools below). We will work with the DMO team to build a specific engagement plan for this project that incorporates the best approaches and tools available. We also recommend organizing a specific steering committee to work with our team throughout the planning process (as noted in the proposed scope of work above). The members of the steering committee can include partners and liaisons who will help broaden the reach of the engagement program.

Given that the pandemic caused a sea of change in public and community engagement methods, we have the capability to facilitate online and/or in-person activities, workshops, focus group sessions, and meetings. We continue to monitor health conditions in Snohomish County and related safety and distancing restrictions. **Our proposed engagement process is flexible and adaptable so that we can involve diverse interests with health and safety protocols and/or through remote engagement if needed.**



Otak Project Workshops and Communication Engagement Activities



Otak Visualization for the Mill Creek Corridor Subarea Plan, Mill Creek, WA

**12E.3 Outline your firm's process to incorporate destination management strategies with a focus on community alignment, destination stewardship, regenerative investment and consistent collaboration.**

The following timeline provides a summary of our proposed process (described in detail in the previous response to Section 12E.1) to incorporate destination management strategies that align with the core values of sustainability, stewardship, community building, regenerative investment, and consistent collaboration. **These core values will be foundational to the plan and inter-related to the framework of goals, policies, strategies, and actions of the plan.**

**PROJECT PROCESS / TIMELINE**

TASKS	2022			2023								
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
<b>1.0 INITIATE PLANNING PROCESS AND COMPLETE REVIEW OF BACKGROUND INFORMATION, GATHER NEW DATA AS NEEDED, AND PREPARE TOURISM ASSETS DATABASE/INVENTORY</b>												
Project Kick-Off Meeting (First Meeting with DMO/Steering Committee)	★											
Background Review, Site Tours, and Tourism Assets Mapping/Database												
Engagement and Outreach Plan												
<b>2.0 ENGAGEMENT EFFORTS, ANALYSIS, AND DEVELOPMENT OF EARLY DRAFT RECOMMENDATIONS</b>												
Hold Second DMO/Steering Committee Meeting				★								
Focus Group Sessions, Surveys, and Other Engagement Activities												
Create Segmented Geo/Socio Demographic Profiles/Map Areas of Need												
Early Draft Recommendations for Tourism Activities, Strategies, and Other Actions; Filter for Sustainability; and Stewardship Opportunities												
Hold Third DMO/Steering Committee Meeting								★				
<b>3.0 FULL DRAFT STRATEGIC TOURISM PLAN</b>												
Compile Full Draft Strategic Tourism Plan with Detailed Action Plan and KPIs/Metrics (See Scope of Work)												
Hold Fourth DMO/Steering Committee Meeting											★	
<b>4.0 FINAL STRATEGIC TOURISM PLAN AND EXECUTIVE SUMMARY</b>												
Finalize Strategic Tourism Plan; Develop Draft and Final Executive Summary												
Hold Fifth DMO/Steering Committee Meeting to Kick-Off Implementation												★

*All Work Must be Completed by September 30, 2023*

**12E.4 Provide an outline of the proposed destination assessment and analysis process with relevant examples.**

Please see our prior responses to Sections 12B, 12C, 12E.1, 12E.2, and 12E.3. Our processes for assessment and analysis are described in the scope of work above, and relevant examples where we have implemented similar processes are also described previously in this submittal.

**12F. Adhere to Proposal Requirements**

Follow, complete, and submit all information required by RFP.

Within this proposal, we have provided complete information in accordance with the County's RFP.

**12G. Cost/Price**

**Complete Attachment A-1.** Price Proposals shall be saved in a separate file or sealed in a separate smaller envelope and submitted with the Submittal Packet.

Otak's price proposal (Attachment A-1) is included as a separate file. Hourly rates for our team members are also included with the attachment.



## 12H. Pro-Forma Agreement Terms & Conditions (Attachment B)

By reference, the County's Pro-Forma Agreement is made a part of this RFP and will be used as the basis for preparing a final agreement with the successful proposer compliant with applicable law and in the best interests of the County. Proposers are advised to carefully read the Pro Forma Agreement and to indicate general acceptance of the Pro Forma with the submission of their proposals. The proposal should identify any additional contract provisions to be sought by the proposer and should also identify Pro Forma provisions the proposer considers unacceptable and suggest alternate language.

**Please review the proposed agreement carefully. The County will only consider changes to items identified and submitted with the proposal. Changes to contract terms and conditions, including insurance and indemnity, requested after the proposal has been submitted will not be considered.**

Otak has read the Pro-Forma Agreement and **can abide by** the stated terms and conditions.

## 12I. Legal Action

Disclose any current or recent (within past five years) legal action in progress or taken against the firm or individuals.

Below are Otak's current and recent legal actions in progress or taken against the firm or individuals in the past five years. Areas of litigation are focused on design assignments, and **most claims have been dismissed or resolved with finding of no fault or liability**, with the exception of the first claim noted below, filed more recently, which is still in review.

### Current

Skyland Village Association, Inc. vs. Skyland Village, LLC, et al., CO Denver County Case No. 2021CV33501 (2022): A homeowners' association has sued several parties on a project where Otak provided civil engineering services, alleging insufficient grade adjacent to building foundations among other concerns addressed to other parties. Otak is investigating the claim.

### Resolved

Otis vs. Otak, et al., OR Multnomah County Case No. 20CV35204 (2020): The family of a child struck by a truck in a parking lot on a project where Otak provided design services sued the project developer, property manager, and Otak alleging negligence. Otak was dismissed from the lawsuit.

Ware vs. DAY CPM, abn Otak, et al., OR Multnomah County Case No. 20CV26825 (2020): A subcontractor laborer claimed damages against a general contractor and Otak for being struck by a plywood wedge while loading it into a lift on a jobsite where Otak provided program management. The claim was resolved with no finding of fault or liability as to Otak.

Helmken vs. DAY CPM, abn Otak, et al., OR Multnomah County Case No 19CV18636 (2019): A subcontractor laborer claimed damages against a general contractor and Otak for tripping on a rebar pile on a jobsite where Otak was the owners' representative. The claim was resolved with no finding of fault or liability as to Otak.

Irvington Garden Apartments, LLC vs. Otak Architects, et al., OR Multnomah County Case No. 18CV04443 (2018): An apartment owner claimed damages against a structural engineer, general contractor, specialty subcontractors, and Otak Architects, for alleged defects with exterior walkways. The claim was resolved with no finding of fault or liability as to Otak.

Young vs. DAY CPM, abn Otak, et. al., OR Multnomah County Case No 18CV57118 (2018): A security guard claimed damages against a product manufacturer, contractors, design professionals, and Otak for slipping on a floating dock installed on a project where Otak was the owners' representative. The claimant dismissed its claims against Otak.

D.R. Horton, Inc. – Portland vs. Otak, Arbitration Service of Portland No. 180125 (2017): A land developer alleged defects with a final grading plan. The claim was resolved with no finding of fault or liability as to Otak.

## 12J. Disclosure

List all business transactions and relations within the past five years that may create or be perceived to create a conflict of interest. Any business dealings or recommendations of a product or firm that may conflict with this project shall be disclosed. **Please complete Non-Disclosure Request on next page.**

To the best of our knowledge, **Otak is not aware of any business transactions or relations, either by Otak or our subconsultant, that may create or be perceived to create a conflict of interest** with our ability to complete this project.



## 12K. Non-Disclosure Request

If you believe any statements or items you submit to the County as part of this submittal/response are exempt from public disclosure under the Washington Public Records Act (PRA), you must identify and list them below. You must very clearly and specifically identify each statement or item, and the specific exemption that applies. If awarded a County contract, the same exemption request will carry forward to the contract records.

The County will not exempt materials from disclosure simply because you mark them with a document header or footer, page stamp, or a generic statement that a document is non-disclosable, exempt, confidential, proprietary, or protected. You may not identify the entire page, unless the entire page is within the exemption scope.

If the County receives a request under the PRA to inspect or copy the information so identified by you and the County determines that release of the information is required by the PRA or otherwise appropriate, the County's sole obligations shall be to notify you (a) of the request and (b) of the date that such information will be released to the requester unless you obtain a court order to enjoin that disclosure pursuant to RCW 42.56.540. If you fail to timely obtain a court order enjoining disclosure, the County will release the requested information on the date specified.

- ☒ I do not request any information be withheld
- ☐ I request the following specific information be withheld. I understand that all other information will be considered public information.

For each statement or item you intend to withhold, you must fill out every box below. You should not request an entire page withheld; only request the specific portion subject to the exemption.

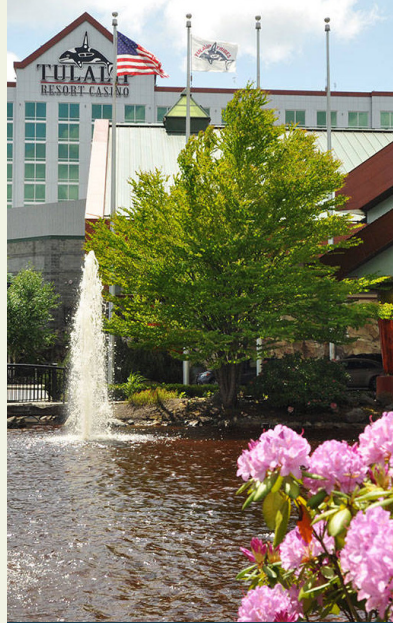
<b>Document Page:</b> Specify the <b>page number</b> on which the material is located within your submittal package	<b>Statement:</b> Repeat the text you request to be held as confidential, or attach a redacted version	<b>RCW Exemption:</b> Specify the RCW exemption including the subheading

For this request to be valid, you must specify the RCW provision or other State or Federal law that designates the document as exempt from disclosure. For example, potential RCW exemptions include the following:

1. RCW 42.56.120.3 - Personal information - Taxpayer
2. RCW 42.56.120.4 - Personal information - Credit card numbers and related
3. RCW 42.56.240 - Investigative, law enforcement and crime victims
4. RCW 42.56.250 - Employment and licensing - specify the applicable subheading
5. RCW 42.56.260 - Real estate appraisals
6. RCW 42.56.270 (Items 1- 17) – specify applicable subheading
7. RCW 42.56.420 - Security



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