



**TOURISM BURLINGTON**

**STRATEGIC PLAN**



**F.J. GALLOWAY ASSOCIATES INC.**  
*Management and Planning Consultants*

*Approved October, 2006*  
*Final*

**In Association with Cameron Hawkins & Associates**

# TABLE OF CONTENTS

## TOURISM BURLINGTON STRATEGIC PLAN

<b>1.0</b>	<b>INTRODUCTION.....</b>	<b>1-1</b>
<b>2.0</b>	<b>VISION .....</b>	<b>2-2</b>
<b>3.0</b>	<b>MISSION STATEMENT .....</b>	<b>3-3</b>
<b>4.0</b>	<b>PRINCIPLES AND VALUES.....</b>	<b>4-5</b>
<b>5.0</b>	<b>AREAS OF EFFORT .....</b>	<b>5-7</b>
<b>6.0</b>	<b>IMPLEMENTATION .....</b>	<b>6-1</b>
6.1	Implementation Plan .....	6-1
6.2	Strategic Plan Review .....	6-1

## **1.0 INTRODUCTION**

Over the last three years, the City of Burlington, in conjunction with key tourism industry stakeholders, has been actively working to evolve a new organization to give leadership to and to undertake marketing and related tourism industry initiatives within the City of Burlington. In 2005, a partner-based Tourism Burlington Destination Marketing Organization was incorporated with an inaugural Board of Directors.

During the first year of the organization's activities, the focus was on developing all the necessary incorporation requirements, recruitment of the Board of Directors, development of an initial business plan and other formation activities, along with the ongoing tourism programs and services that had previously been undertaken. These involved information and visitor services; event and activity support; marketing and promotion initiatives; industry development participation, both locally and regionally; and related services.

As part of the Business Plan, the need for a Strategic Plan was identified as a 2006 objective. In the spring of 2006, the Board of Directors authorized the preparation of a Strategic Plan for the organization. Fred Galloway of F. J. Galloway Associates Inc. of London, Ontario, in conjunction with Cam Hawkins of Cameron Hawkins & Associates of Toronto, Ontario were retained to facilitate the development of Tourism Burlington's first Strategic Plan.

In preparation for the strategic planning workshop, a SWOT analysis was completed by Board of Director members and staff of Tourism Burlington. Each member was invited to identify strengths, weaknesses, opportunities and threats and forward them to the consultant. The material was developed on the basis of a SWOT analysis for both Tourism Burlington as an organization, and tourism as a business sector within the City of Burlington. The results of the SWOT analysis are available under separate cover. Appendix 1 contains the highlights from the SWOT analysis. They were used as an important resource in the development of a draft Strategic Plan.

On Tuesday, June 20, 2006, fifteen members of the Board of Directors of Tourism Burlington and staff met with the facilitators to develop a Vision, Mission, Values and Areas of Effort. This document represents the draft Strategic Plan that emerged from the workshop. It will be reviewed by workshop participants and further developed. A focus group of ten Marketing Committee and other stakeholders of Tourism Burlington met on Tuesday, August 29, 2006 to review the draft Strategic Plan and provide further input and perspectives. From this session, another draft of the Strategic Plan was prepared and

went before the Board for consideration on Thursday, September 7, 2006. The Board of Directors reviewed the draft Strategic Plan and focus group comments. From this session, the final draft of the Strategic Plan for Tourism Burlington was developed.

## 2.0 VISION

A Vision is a statement that defines the horizon of an organization. That is, a point in the future that all the stakeholders of the organization can move towards with a collective focus and purpose, thus galvanizing the energy and buy-in of all the stakeholders to achieve a common outcome. However, like a horizon, which moves as one approaches it, a Vision can also move as events unfold in the operating environment, organizational needs change and differing perspectives emerge. However, the common perspective and purpose remains constant.

The following Vision has been developed for Tourism Burlington.

<p><b>Elevating Burlington tourism experiences for visitors and the community.</b></p>
--

The following points provide additional perspective on the key themes within the Vision:

- **Elevating** – identifies that Tourism Burlington’s Vision is to grow, enhance, increase and to make more substantial the overall role, benefits and presence of tourism as an economic activity and community benefit within Burlington. As a result, it is going to elevate tourism from a relatively smaller perspective to a meaningful and sustained part of the community’s economic capacities and quality of life opportunities.
- **Burlington Tourism Experiences** – The Vision is focused on supporting quality tourism experiences for visitors to Burlington. They need to be positive, are the focal point of Tourism Burlington’s efforts and create the horizon towards which all stakeholders within and around the organization are working actively towards. Everything Tourism Burlington strives to achieve focuses on realizing tourism experiences in Burlington that are above the norm and have lasting qualities and memories for visitors as the basis for the successful sustainability and ongoing growth of tourism in the community.
- **For Visitors and the Community** – Reflects the two key audiences that Tourism Burlington, as a strategic partnership, focuses on. First, are the past, current and future visitors to Burlington. The

Vision demands that visitation experience within the community be memorable, meaningful and of a quality that ensures that they feel that their commitment of time and expenditures has been worth the value of the experience. Also, they need to become ambassadors to encourage others to visit the community, and that they themselves will revisit, hopefully many times. The second audience is the community, which needs to embrace tourism as an important economic activity within Burlington and as a contributor to their overall quality of life. Every Burlington citizen and business has a stake in tourism's success. Every citizen and business can be a potential ambassador as they meet visitors at events, in arenas, on the streets or at conferences. Therefore, the community also needs to recognize that visitor experiences need to be memorable, and meaningful in order to contribute to an enhanced quality of life within Burlington.

### **3.0 MISSION STATEMENT**

A Mission Statement communicates to a reader the fundamental essence of an organization. That is, what its focus is and what the major activities and outcomes are. In application terms, every strategic and operational decision an organization makes should be consistent with its Mission Statement. If these decisions are not consistent with the Mission Statement, the organization needs to ask why it would make a decision that does not support the Mission Statement or whether it is time to review the context and content of the Mission Statement.

The following Mission Statement has been developed for Tourism Burlington:

**Tourism Burlington Inc. is a strategic partnership dedicated to increasing the community's tourism potential by:**

- **Attracting increased numbers of visitors throughout the year.**
- **Optimizing community and industry economic benefits.**
- **Increasing our tourism industry's capacities.**

The following material provides additional interpretation and understanding of the key themes within the Mission Statement:

- **Strategic Partnership** – Describes the essence of Tourism Burlington Inc., that is, it is a strategic partnership involving the City of Burlington, the community at large, tourism industry operators and other interested parties. They come together within the framework of Tourism Burlington as a basis to work collectively to grow, improve, and enhance the sustainability of tourism as a vibrant and contributing economic component of the community.
- **Increasing the community's tourism potential** – Tourism Burlington's focus is on identifying and activating the untapped and latent potential for tourism investment, marketing, increased visitation and yield that is currently not realized within the community. This will be achieved through brokering strategic partnerships that can work together to realize this potential, especially when an individual entrepreneur, the municipality, Team Burlington partner or other party may not be able to achieve such a result alone.
- **Attracting increased numbers of visitors throughout the year** – the first primary outcome of Tourism Burlington Inc.'s Mission, is that its programs and services will increase visitorship to the community, whether overnight or day trips. Through the strategic partnership and all of its activities, the focus of the organization's efforts is on increasing visitorship. This outcome is fundamental for all Tourism Burlington undertakes over all four seasons.
- **Optimizing community and industry economic benefits** – identifies the second core outcome for Tourism Burlington's activities relative to employment creation opportunities, enhancing the sustainability and financial viability of private sector operators associated with the tourism industry, attracting investment in current and new tourism enterprises and attractions and expanding the economic base and capacity of the community. These outcomes will support the sustainability of the private sector initiatives and the public sector attractions, potentially increasing tax flows to the community and creating increased benefits for community members in terms of employment, enhanced recreational and cultural services and other opportunities.
- **Increasing Our Tourism Industry's Capacities** – states the third core outcome of Tourism Burlington's activities, which is to undertake initiatives, investments and services that respond to the needs of the tourism industry in Burlington to increase its capacities to attract new visitors, to increase net financial yields and sustainability, to support elevating the quality of tourism experiences in the community and related outcomes. Tourism Burlington can undertake this particular activity through the provision directly or facilitating access to staff training, sourcing or undertaking research and data

collection that supports private operator investment and operational decisions, sharing information and networking and through a series of other key tasks that will advance the capacities of the industry.

## **4.0 PRINCIPLES AND VALUES**

Principles and Values have three primary roles within a Strategic Plan. First, they create opportunities to further interpret and define key themes within the Mission Statement. Second, and most importantly, they define the basis of the organization's relationship with partners, people and other interactions. Third, they can create a platform for the development of organizational accountabilities.

The following Principles and Values have been identified for Tourism Burlington, Inc.

### **Visitor First/Customer – Focused**

**We focus first on our visitor's needs and those of our partners. This drives all our decision-making and gives us clarity of purpose.**

### **Celebrate Our Community**

**We will expand tourism in Burlington by celebrating and contributing to our community's uniqueness, values and potential.**

### **Respected and Collaborative**

**We will be a leader in supporting and collaborating with the tourism industry and the community in reaching Burlington's tourism potential. We will earn the community's and our partners' respect through what we contribute and achieve for tourism in Burlington.**

### **Value for Funds Spent**

**We will ensure that all of our investments bring evident value to the community and our partners.**

### **An Inspired Culture**

**We will develop an organizational culture that inspires innovation and creativity within the tourism sector, is responsive to visitor and partner needs and supports progressive initiatives that contribute to the growth of tourism in Burlington.**

### **Growing the Image and Influence of Tourism.**

**We will actively engage with our community partners and others, in increasing the awareness of the importance and benefits of tourism.**

### **Accountability**

**We are accountable to our partners and the community. Our partners also are accountable to the organization for its success. We achieve this by being transparent in all of our decisions and operations, reporting on our performance and ensuring fairness and integrity in all that we do.**

A primary Principle for Tourism Burlington is to be customer-focused, in terms of the partners, the community, industry members and visitors to the community. This is the reason the organization exists and it is the focus of all of its activities. Within this customer focus, the priority is on the visitor, both in terms of ensuring that they have the information that attracts them to Burlington, and that when they are here, they have truly memorable and positive experiences.

A second Principle of the organization is to continually celebrate what is unique about Burlington and the sector's potential in terms of both economic impacts and benefits to the community. Tourism can contribute significantly to the economic and quality of life perspectives of Burlington residents. It is important that this celebration of opportunity and potential motivates the residents of Burlington to embrace each and every visitor who comes to the community. They are often the best ambassadors, and the ones who can make a true difference in visitors achieving a memorable experience.

Tourism Burlington needs to be involved in many dimensions of community life. In order to fulfill this sense of involvement and to make a growing contribution to the community's quality of life, the organization needs to work collaboratively. Working collaboratively is a fundamental Principle of Tourism Burlington. As stated within its Mission, Tourism Burlington is a strategic partnership. Therefore, by definition, it works collaboratively with various groups of people within various environments to bring about the best possible outcomes within the tourism sector. Working together through partnerships, joint ventures and other cooperative initiatives, the organization will achieve much more than acting independently.

Tourism Burlington expends municipal, partner and other funds that it receives. It is a key Principle of the organization that it ensures that the funds it spends brings value to its partners and the community.

Tourism Burlington is driven by an organizational culture that continually inspires innovation and creativity within itself, its partners and the community. This culture also focuses on being a responsive organization in terms of visitor needs, partnering opportunities, community perspectives and industry trends. The organization will be progressive in everything that it pursues and supportive to all those who share its Vision and Mission.

As a collective organization representing both an industry sector and the community, a primary Principle of the organization is to grow the image and influence of tourism in Burlington on behalf of its tourism partners in the industry and the community as a whole. Advocacy reflects part of the Principle, that along with other initiatives, overcomes barriers, creates opportunities and realizes potential.

Accountability is a fundamental Principle of the organization. Tourism Burlington believes that it is accountable to its partners and the community. Accountability will be realized by ensuring that its decisions and activities are transparent, that it actively reports on what it has achieved, what it is working on and by listening to its partners and the community in order to determine what its directions need to be. Also, Tourism Burlington's partners need to be accountable to the organization and supportive of its success. Actively participating in the organization and its initiatives, providing input and data, and other actions are key to this Principle's importance.

Tourism Burlington will also ensure that it acts with fairness and integrity in all that it undertakes. These attributes are central to the organization being valued by the community and being respected by all those it interacts with.

## **5.0 AREAS OF EFFORT**

Areas of Effort represent the first level in operationalizing a Strategic Plan. They identify the key action areas and priorities that the organization feels it must focus on over a three- to five-year period in order to realize its Vision and Mission. In strategic planning, especially in the not-for-profit sector, it is better to have fewer Areas of Effort that have the opportunity to be effectively realized than too many Areas of Effort that overwhelm the resources and capacities of the organization.

The following Areas of Effort and their related strategies/objectives have been developed for Tourism Burlington for the 2006-2010 period:

**1. To pursue key tourism marketing initiatives that focus on:**

- Inventorying, profiling and assessing the current and prospective tourism industry resources in Burlington and matching them to the market opportunities that best optimize the community's tourism potential and outcomes.
- Developing performance measures for the marketing services and activities of Tourism Burlington in regards to benchmarks, baselines, measurement tools, etc.
- Investigating, developing and building on strategies that maximize the community's current and evolving tourism opportunities. (Eg: Results of the Halton Region Premiere Ranked Tourism Destination Project, Downtown Burlington Development, the Waterfront, the Performing Arts Centre, Royal Botanical Garden expansion, festivals and events strategy, etc.)
- Pursue over the short-term, as an initial focus, as well as a longer term bid/acquisition strategy for conferences/conventions, sport tourism events, travel trade, and related opportunities, within the staff and volunteer resources available.
- Actively participating in the Team Burlington Branding Strategy, sharing our evident tourism perspectives and linkages.
- Developing a comprehensive marketing plan and implementation strategy to deliver the Destination Marketing Fee Program.

**2. To increase the tourism industry's influence and capacities within Burlington by:**

- Increasing the number and range of partners the organization is involved with
- Pursuing strategic alliances with other communities and tourism organizations
- Fully participating in and finalizing the Premier-Ranked Tourist Destination Project for Halton.

- Facilitating key linkages with specific industry development opportunities.
- Undertaking a product development priority for an increased number of Bed and Breakfast establishments with a focus initially in the downtown area.
- Identifying and pursuing strategic advocacy initiatives that support ongoing industry development.
- Undertaking market readiness assessments as a basis to pursue industry development and funding opportunities.

**3. To pursue visitor services improvement priorities related to:**

- Further development of the Ambassador Training Program.
- Broadening the distribution strategy for information and supports via satellite venues, kiosks, roving teams, etc., both internal and external to the community.
- Completing a service level review relative to the visitor's services activities of the organization, including discussions with neighbouring DMO's.
- Undertaking analysis and database development for the Visitors Survey Program.

**4. To undertake an organizational capacity and development initiative that focuses on:**

- Developing the human resourcing capacities needed to pursue the Area of Effort related to:
  - The appropriate staff complement, qualifications and job descriptions.
  - The use of external service delivery/acquisition strategies.
  - An enhanced volunteer program focusing on increased recruitment, retention and recognition.
- Developing the necessary administrative processes within the organization relative to finalizing a services agreement with the City, communication processes and records management and related

requirements.

- Fully developing and updating a policies and procedures manual for the effective administration of the organization.
- Developing an Executive Limitations Policy for the Executive Director that outlines and clarifies the limits of authority.
- Ensuring clarity of roles and relationships between the Board and the Executive Director, as well as Board evaluation program and other governance requirements.
- Develop and implement directly, or via working with partners, a comprehensive community relations initiative that significantly increases the profile and presence of Tourism Burlington across the community using a range of in-house or via accessing partner resources. (eg., image and story banks, electronic newsletters and other tools.)

The first Area of Effort focuses on one of the primary roles and functions of Tourism Burlington, marketing. A series of strategies/objectives have been identified. These include developing a deeper and more significant understanding of the potential tourism capacities within the community and what markets segment opportunities best relate to Burlington. Developing a fundamental understanding of this potential is key to pursuing promotional, communication and product development initiatives.

Within this Area of Effort, there also needs a focus on developing various performance measures so that the organization can determine if it is having an impact and where best to invest its resources. Another consideration is the need to capitalize on current developments as they evolve and/or become reality related to IKEA, the new Waterfront at Downtown Burlington, the evolving Performing Arts Centre, the Royal Botanical Gardens and Joseph Brant Museum expansions and other initiatives that represent short- and medium-term opportunities. These all are existing or future projects that need to be capitalized on if appropriate and integrated into the overall tourism strategy.

Other key initiatives are fully researching the capacity of Burlington to host and coordinate bids for larger conferences and sport tourism events. Then short- and longer-term bid opportunities for conferences and sport tourism events can be identified. Some of these events represent “getting into the queue” while others may require competitive bids with neighbouring municipalities. The organization needs to identify

opportunities in the short-term that do not absorb significant resources, but reflect a prospect that can be capitalized on. In the longer term, a broader based strategy would evolve around more competitive situations.

Two other key initiatives within this Area of Effort involve being fully integrated and impacting on the evolving Team Burlington branding strategy in order to ensure the strong presence and relevance of tourism, as well as ensuring full connectivity with the Destination Marketing Fee initiative so that there is alignment, collaboration and effective leveraging.

The second Area of Effort involves tourism industry development initiatives. These include improving and facilitating greater linkages with current partners, as well as extending the number and range of partners that could engage with the organization.

Another strategy within this Area of Effort is to continue to participate actively in and complete the Premier-Ranked Tourist Destination Project for Halton, in which the organization has been a steering committee member. As well, developing product priorities for the organization to advocate and support is important working with other Team Burlington partners. One of these could be the development of an increased number of Bed and Breakfast establishments focusing initially in the downtown area where only one B&B now exists and accommodation options are limited.

Other initiatives involve developing the advocacy strategy and priorities for the organization so that this work is undertaken on a targeted and meaningful basis relative to the key outcomes the organization wishes to realize, as well as market-readiness initiatives. This latter objective represents ensuring that the organization's investment priorities, related to specific projects and initiatives, are identified and researched so that as funding or third-party partnering opportunities present themselves, these initiatives are ready to be activated on a timely basis.

The third Area of Effort focuses on visitors services. This has been a long-standing area of service within the municipality. As this area evolves, a number of key initiatives have been identified. One of the most important is the further development and training associated with the Ambassadors Program. Another strategy is to extend the information and services reach of the organization by examining the use of satellite opportunities possibly through other organizations, developing roving teams, instituting kiosks and other approaches, both inside Burlington and beyond.

Another initiative involves completing a services review relative to the visitor's services provided by Tourism Burlington. A realignment of these services, in terms of their scope, intensity and purpose, needs to be completed in order to ensure the best results are being achieved for the funds available. Also, implementing the analysis and database development of the Visitor Survey Program will allow for an enhanced data and analysis capability that will support many of the initiatives the organization is undertaking.

The fourth Area of Effort focuses on developing the organizational capacity of Tourism Burlington. A series of initiatives are required, of which the most important is developing the human resources capacity of the organization to be able to pursue its day-to-day activities as well as Strategic Plan initiatives. The human resources perspective involves developing the staff complement and skill set, determining where best to purchase external skills and to fully develop the volunteer potential within Tourism Burlington. Current staff resources are maximized. New marketing initiatives will require additional funding support, such as the DMF.

Other strategies involve finalizing the administrative processes for the organization, particularly the service agreement with the City on financial accounting and related functions. Also within this initiative, is developing and keeping an updated policies and procedures manual.

From a governance perspective, two initiatives have been identified. These involve developing Executive Limitations that define the authority to act of the Executive Director and developing a Board evaluation process to enhance the Board's ongoing development and performance.

This Area of Effort focuses on enhancing Tourism Burlington's community relations. The need to be respected, to engage the community and to create value across the community are important to the sustainability of the organization. City-wide communications, targeted at operators, residents, visitors and Council through an array of communication strategies, also need to be enhanced. Also, increasing the profile and presence of the organization in the community is needed so that people are aware of what Tourism Burlington does, can do and it's importance, both to the tourism sector and the community. The organization needs to become more visible and connected on many fronts. Tourism Burlington needs to get to a point that when new initiatives occur in the community, one of the first questions people ask is we need Tourism Burlington's comments.

## **6.0 IMPLEMENTATION**

### **6.1 Implementation Plan**

Once the Strategic Plan has been finalized and approved, an implementation plan will need to be developed. This plan will develop the following considerations:

- The priority the various strategy/objectives have within each of the Areas of Effort and what years their inauguration and completion will occur.
- The resources required to support the various strategies/objectives in terms of both human and financial requirements.
- The means by which the tasks will be pursued in terms of work programs and interactions with other organizations and within Tourism Burlington.
- The outcomes/measures necessary to determine the impact of each strategy/objective and whether they have been successfully achieved.

The implementation plan can be developed using a charting process. Templates are contained in Appendix II. It also must be realized that implementation plans evolve as events unfold within the operating environment. Therefore, the implementation plan needs to be flexible, continually updated and effectively monitored.

### **6.2 Strategic Plan Review**

The following review of Tourism Burlington's Strategic Plan is proposed for Board consideration:

- Quarterly updates, oral and/or written, by the Executive Director on the progress being made, challenges being experienced, amendments being considered, Board input required, etc.
- A one- to two-hour annual review of the progress being made and the further development of the implementation plan to reflect initiatives that are completed, new information that is coming forth and other considerations that continually shape the implementation plan on a year-to-year basis.
- Every three years, undertake a comprehensive review of the Strategic Plan to ensure its appropriate focus, intent and directions.