



(Draft Revision 10/06; Work In Progress)

PETALUMA 150TH CELEBRATION BUSINESS - MARKETING PLAN

I. TABLE OF CONTENTS

A. EXECUTIVE SUMMARY:

This business and marketing plan for the Petaluma's Sesquicentennial Celebration is intended to inform, engage and encourage members of our community to plan, produce and implement a comprehensive schedule of events that is entertaining, educational and inspiring to residents and visitors alike.

The 150th Celebration Year will be a community-based and community-implemented effort, one that is highly inclusive that builds upon and promotes existing annual and major events produced independently.

II. ORGANIZATIONAL OBJECTIVES

A. Goals and Objectives

1. Create a 150th Celebration Year Theme, Brand Identity, and Logo to promote and unify all activities.
2. Develop an enabling community forum and financial structure to support, coordinate and provide guidance for producing events and activities.
3. Work in partnership with community members to develop and promote a 'master calendar' of events and activities for the 150th Celebration Year.
4. Encourage all-inclusive community input, participation, and sponsorship. (See the attached roster of 150th participants.)
5. Provide a financial plan and procedure with periodic fiduciary reporting.
6. Provide a plan for evaluating and implementing insurance requirements.
7. Maximize opportunities to share and leverage resources, products and services for all participants.
8. Encourage sponsorship and investments in sustainable resources that will remain available to and within the community.

B. Mission Statement:

To provide leadership, facilitate and make recommendations for the implementation of events and activities for the City of Petaluma's 150th (Sesquicentennial) Celebration in 2008. These activities are intended to be entertaining, educational and inspiring and will provide opportunities to honor Petaluma's rich heritage, present community and promising future.

C. Target Markets

1. Internal

In order to encourage activities that will be entertaining, educational and inspiring for the community, the 150th Committees will communicate with the following local interests:

- ◆ **Residents in the Petaluma Area**
- ◆ **Non-Profit Clubs, Service and Community Organizations**
- ◆ **Arts & Cultural Art Organizations, Museums**
- ◆ **Petaluma 150th Celebration Information Booth at Annual Events in Petaluma**
- ◆ **Business Associations and Affiliations**
- ◆ **Individual Businesses; all sectors: agri-business; retail; high-tech; hospitality; and service industries**
- ◆ **City of Petaluma; City Commissions**
- ◆ **Non-Resident Employees**
- ◆ **Public and Private Schools and Educational Facilities**
- ◆ **Visitors and Potential Visitors to Petaluma**
- ◆ **Local Media: *Press Democrat, Argus-Courier, Petaluma Post, Petaluma Community Access Television, Regional TV stations, and Web (Internet) TV***

2. External

In order to garner greater sponsorship, attendance and revenue, the promotion, advertising and marketing of the activities of the 150th Celebration Year will be externally directed to the following:

- ◆ **Media Relations**
 - a. **Press & Travel Writers**
 - b. **Consumer Publications & TV Shows**
 - c. **Advertising**
 - d. **Event Publicity**
 - e. **Special Promotions**

2. External (cont.)

◆ Leisure Individual Travelers

- a. Public Relations & Marketing via above Media**
- b. Visitor Services and direct communication with visitors**

◆ Travel Professionals

- a. Tour Operators**
- b. Travel Agents**
- c. Senior Tour Groups**

◆ Film / TV / Video

- a. Production of Community Access TV Filming**
- b. Production/Direction/ Airing of “Visit Petaluma” TV Commercial**
- c. Video - film clip library including community sponsored films**
- d. Digital video or still photo libraries for use on the Internet**
- e. Movie Industry Film Festival Contacts**
- f. Films series or events at the new Boulevard Cinemas**

◆ Individual Markets

- a. Boaters & Yacht Clubs Visiting Petaluma**
- b. Individual Business Travelers**
- c. Inns, Hotels and Resorts with Statewide, National and International reach**
- d. Cultural Events, Artist Events & Patrons**
- e. Celebrity Appearance and Endorsements, Famous Residents**
- f. Shoppers & Antique Hunters**
- g. Ag Industry**
- h. Ethnic & Affinity Groups**

II. ORGANIZATIONAL OBJECTIVES (Continued)

D. Keys to Success (Also refer to the “Proposed Timeline” Planning Document at the end of this section.)

1. Planning

- a. Broad-based community support and involvement, with a spirit of inclusion**
- b. Creation of equitable policies that work for all participants**
- c. Participation by Community Organizations**
- d. 150th Business / Marketing Plan completed, endorsed by the City of Petaluma, and District 2 Sonoma County Supervisor (Supervisor Mike Kerns) plus state and congressional representatives**

2. Securing Financial Resources and Partners

- a. Creation and adoption of multi-level sponsorship promotional offers and plans for cooperative programs**
- b. Investigation needed for new legal 150th organizational entity**
- c. Plan, solicit and secure “start up funds” for advance informational materials**
- d. Investigation and procurement of organizational insurance (if required)**
- e. Setting up structure and providing periodic budgetary reports**

3. Implementation of Events and Activities

- a. Coordinated communication and logistical orchestration of all events and activities**
- b. Tracking of attendance, revenues, expenses, participation, sponsorship**
- c. During pre-event phase, tracking of progress towards program objectives**

4. Summary / Progress Reports / Results

- a. Provide periodic progress of outlined goals and financial reports; provide summaries and reports of tracking data**
- b. Provide acknowledgement and appreciation and celebrate successes as appropriate**

Proposed Timeline – 150th Celebration Committee *A Community Celebration in Progress*

2003-2004 - Brainstorming Phase: All Objectives Achieved or Initiated as Planned

Emphasis was placed upon (1) outreach & inclusion; (2) brainstorming potential event ideas; and (3) identifying future organizational issues.

2004-2006 - Developing Phase: Establish a 150th Celebration Committee*

(1) Design an organizational structure and business plan that will enable the community to implement a program of events and activities in 2008. For example: *The Owatonna (MN) Sesquicentennial Committee or the Lawrence (KS) Sesquicentennial Commission.*

(2) Create sub-committees, as needed or designated in the business plan (Please see sub-committee section for details.)

For example ...

- a. Steering Committee – Business & Marketing Plan, Policy, Guidelines
- b. Marketing & Public Relations - Newspapers, Radio, TV, Telecommunications
- c. Sponsorship, Fundraising & Finance
- d. Events & Scheduling– Overall coordination of master calendar
- e. Merchandising of Accessories and Retail Items – Logo, T-shirts, books, etc.
- f. Heritage & History - Historical accuracy and integrity of events
- g. Education & Youth

(3) Coordinate the planning of a signature sesquicentennial event, as well as a series of independently organized activities sponsored and implemented by cooperating community institutions, agencies and organizations.

For example: The 1958 Centennial Celebration had a signature event that lasted one week. The Bicentennial Celebration in Petaluma consisted of a series of events sponsored by various community organizations throughout 1976. More recently, the Petaluma Historical Museum sponsored an independent event that honored the Petaluma Leghorns.

(4) City Council officially establishes the celebration committee.
Completed November 14, 2005

2006-2007 – Planning & Development Phase: Establish Regular Committee Meetings

- (1) Continue to develop “150th Products” such as year long calendar of events, merchandising of books, postcards, calendars, T-Shirts
- (2) Seek “Community Leaders” & “Community Partners” to provide recruitment of sponsorship and participation.

**The greatest resource of any community is the collective
*intellect, wisdom and creativity of its members.***

III. THE PETALUMA 150TH CELEBRATION COMMITTEE

A. History and Background including previous major celebrations such as Petaluma's Centennial and Bi-Centennial celebrations

1. Preliminary Planning Petaluma Sesquicentennial – 2008:

Welcome and thank you for your interest as we discuss the coming Sesquicentennial of the incorporation of the City of Petaluma. Your participation, both individually and collectively, is crucial to the success of any eventual civic celebration. We hope to present to you a general outline of the precedence provided by both the Petaluma Centennial Celebration of 1958 and the Petaluma observance of the United States Bicentennial Celebration of 1976. From these we hope to draw direction as we seek to move forward together in the development of an appropriate civic recognition of our 150th anniversary as a city.

2. Introduction:

On April 12, 2008 Petaluma will observe the 150th anniversary of its incorporation as a city. This anniversary, or Sesquicentennial, presents a unique opportunity for Petaluma to build upon a rich and extensive history of, commerce, community and agriculture, to present a truly memorable civic event. As has been the case in past celebrations, maximum involvement by interested individuals and organizations is paramount to a broad-based, culturally diverse observance. The Petaluma Sesquicentennial Roundtable (PSR) is an ad-hoc group of interested individuals of various levels of involvement and experience in past and present civic activities and celebrations. These involvements include the planning and presentation of the Petaluma Centennial celebration of 1958, the Petaluma observance of the United States Bicentennial in 1976, and a wide variety of annual or periodic local celebrations unique to the Petaluma area. Drawing upon the lessons learned from the planning and execution of the Centennial of 1958 and the Bicentennial of 1976, it was felt that the growth of the city, the influx of new residents and the perceived scope of the Sesquicentennial celebration dictated an early preliminary assessment of alternatives available in the planning of the Sesquicentennial program. Toward this end the PSR began to hold periodic meetings as of June, 2003, for the purpose of identifying interested individuals and plausible components of a prospective Sesquicentennial observance.

3. Official Authorization:

Because the Sesquicentennial recognizes the anniversary of a governmental entity, a city, it is anticipated that an official endorsement, authorization, or other relevant "permission", conveyed by the city, is appropriate (completed November, 2005). This need not, either implicitly or explicitly, bind the city to any legal or financial obligation in support of the celebration or its legal or financial consequences. It is nonetheless important that the city in its ministerial function, consider and officially recognize a Sesquicentennial Organizing Committee (SOC) to be formed, periodically receive reports from it and recognize its authority to assemble information and identify the prospective resources and programs for a successful civic event.

3. Official Authorization (cont.):

The prospective SOC may or may not contain some or all members of the present ad-hoc PSR and may or may not pursue recommendations and ideas proposed by the PSR. It may seek to form a non-profit corporation for the limited purpose of presenting the Sesquicentennial program or, alternatively, may ally itself with a variety of extant non-profit corporations, in separate arrangements, for the purpose of independently presenting components of the Sesquicentennial celebration. All of the theoretically available options will be subject to the requirements imposed by the authorizing entity in close consultation with the SOC.

4. Objectives:

a. Development of an inventory of program and event ideas

The history and experience of Petaluma's two previous Centennial celebrations has been well documented. There is a relatively clear record of what was considered, what was attempted and what succeeded. Changes over the past fifty years, however, including but not limited to demographic considerations, substantial population increase and a half-century of "additional history" must be accommodated. As may be expected these offer both additional opportunity and additional challenge in identifying appropriate expressions of these in historical context.

b. Development of a master calendar of potential events

Integration of traditional and on-going civic events will seek to be included in the Sesquicentennial year observance as has been done in past Centennial observances. New and innovative program components, unique to the Sesquicentennial, will seek to be identified, developed and presented. In many instances these will include efforts to recruit outside groups and events, and to bring the group or event to Petaluma during the Sesquicentennial year. A typical example would be efforts to bring early railroad rolling stock to Petaluma from the two primary railroad museum facilities in Northern California for display. Should this prove feasible, a variety of ancillary activities might become possible such as the re-enactment of the arrival of President Rutherford B. Hayes, the President's son, Birchard Hayes, General William T. Sherman, Secretary of War, Ramsay and Governor Perkins, in Petaluma on September 10, 1880. Other comparable possibilities could be cited. Substantial lead-times for negotiating and facilitating such events will be essential.

4. Objectives cont.:

c. Identification of guidelines for cooperating groups

Existing civic, fraternal and service organizations constitute a ready-made component of a collective, community effort. Once the particular purpose, strength and interest of the individual organization is identified, the organization may readily be integrated into a larger community activity. This was done with great success in the Centennial of 1958 and Bicentennial of 1976. In those instances, particular organizations were asked to assume responsibility for specific events and programs. Since these invariably already had extensive experience in presenting large-scale events, they easily transitioned into their assigned role in the Centennial settings. Less experienced but equally willing organizations will be highly effective also, assuming proper guidance and supervision. The specific parameters and standards of participation can only be identified as the Sesquicentennial program evolves.

B. Assets and Resources (required to implement - pre, during and post event)

- 1. Human**
- 2. Equipment**
- 3. Venues**
- 4. Funding: Draft budget will be presented 11/6/06 to City Council**

IV. DESCRIPTION OF PRODUCTS AND SERVICES

- A. Schedule of Calendar of Events during the 150th Celebration Year – Signature Event(s) Mayor’s Ball, etc.**
- B. Activities**
- C. Educational Programs / 2- year Advance Curriculum/Art Shows, History Curriculum, Essay Writing, Oral Histories**
- D. Contests / Community Participation**

IV. DESCRIPTION OF PRODUCTS AND SERVICES (cont.)

E. Logo, Merchandising of Retail Products

F. Promotional Programs, Posters, and Sponsorship Publications

1. Banners, Event Programs and Coverlet

G. Special use of technology such as live and recorded Internet promos, projections, audio, etc.

**1. Entrance and Exit Signs
2. Website & Phone Number**

H. Multi-level award programs for sponsoring business, service groups, individuals, etc.

V. MARKETING PLAN

A. Sesquicentennial Comparison

1. There are numerous examples to provide a context for comparison of sesquicentennial celebrations and activities, CA's 150th (research others)

B. Distinguishing factors

1. Petaluma is fortunate to have many existing colorful events that celebrate cultural, historical and community based themes. It is likely that several 'signature-themed' events will be newly designed and will allow large numbers of the community to participate. Many existing annual community events should be encouraged and be adaptable to the 150th Celebration Theme. The Brainstorming Phase also generated many new ideas for activities and events that may not be incorporated into existing programs, and might require the creation of new groups to design, sponsor and implement in 2008.

V. MARKETING PLAN (cont.)

C. Themes

- 1. Heritage & Cultural Diversity**
- 2. Overarching Uniqueness**
- 3. Agriculture**
- 4. Technology**
- 5. Arts & Cultural Arts**
- 6. River**
 - a. Commercial and Recreational Importance**
- 7. Environmental Stewardship**
- 8. Future**

D. Target Markets (brand recognition and management should start early in 2007 to begin the process of inspiring involvement and support...e.g. call to action)

E. Market Segments (Complementary to, but more detailed and specific than II.C. <Goals & Objectives> above)

- 1. Internal**
- 2. External**

F. Competitors (Other scheduled events in proximity...e.g. NASCAR)

G. Schedule (avoiding other events)

H. Marketing Strategy, Branding and Merchandising

I. Pricing Strategy

VI. COMMITTEE ORGANIZATION

A. Committees – All are welcome to participate! Please volunteer. Scope of Committee Participation shall be at least one year (July to July), and each participant shall contribute to producing goals and objectives of the committee, as well as act as a spokesperson for the committee activities and recruit new committee members as needed. All committees shall provide regular communications to the Steering Committee and for review on the Petaluma150th @ yahoogroups.com conference board.

1. Steering – Shall produce the Business / Marketing Plan, Policy, Standard Criteria for event participation, Guidelines, Approvals. Also provides communications related to all the 150th committees and to the City of Petaluma. (Bill Hammerman; Vern Piccinotti; Tom Corbett - Chair until 6/30/07; Theresa Haire; Terry Smith, Vangie Pullins; Karen Nau; Jessica Vann Gardner)

2. Marketing and Public Relations – Promotes, advertises and provides positive public relations results for the 150th Celebration Year activities. (Terry Smith, Chair; Theresa Haire; Marie McCusker; Lorna Johnson; Jessica Vann Gardner; Marsha Trent)

3. Sponsorship, Fundraising & Finance – Plan, administer, and report all aspects of the sponsorship plan and financial plan, including revenue and expenses. (Toni Bodenhammer; Onita Pellegrini; Vern Picconitti; Marshall West)

4. Events & Scheduling – Establish criteria and standards to encourage best practices in the planning and implementation of all events and activities. Scheduling - Coordination of complimentary events and activities. (Jan Mandrell (chair); Alice Forsythe; Marie McCusker; Toni Bodenhammer; Jeannette Ambroge; Jessica Vann Gardner)

a. Advise & Planning & Design

b. Description

c. Logistics - Rack brochures

d. Security

5. Merchandising of Accessories and Retail Items

a. Creation of 150th Logo and Theme via community contest, vendors, etc. (Linda Postenrieder, Christopher Stevick, and Steering Committee as needed)

b. Recommend potential items for sale – coverlet, T- shirts and other merchandising (Vangie Pullins; Linda Postenrieder.; Marie McCusker) Create distribution channels, accounting, and collection methods (wholesale to retail)

6. Heritage (Katherine Reinhart, Kathy Fries, Vern Picconitti; John Benanti; Katie Watts)

7. Education/Youth: (Marilyn Stratford; Ettamarie Peterson; Bill Hammerman; Kathleen Garvey)

8. Recruitment: All committees shall be responsible for the recruitment of new and additional members into existing committees

VI. COMMITTEE ORGANIZATION (cont.)

B. Resources (human)

1. Volunteers

2. Employees in position to assist within their job descriptions

3. Contracts / Vendors (paid) –event coordinator

4. Funding

VII. FINANCIAL PLAN

A. Assumptions

B. Sales Forecast

C. Start-up requirements

D. Key Financial Indicators

E. Investments

F. Sponsorship levels

G. Projected profit and loss

H. Projected cash flow

I. Projected balance sheet

VIII. SUSTAINABILITY

- A. Financial viability**
- B. Social responsibility**
- C. Environmental stewardship**
- D. Carryover for future use**

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