

Appendix 2.3 One-Year Tactical Plan

Under the *Provincial Sales Tax Act*, all designated recipients, including designated recipients not subject to the renewal application requirement, must report to the Province annually. As such all designated recipients (or the designated recipient's service provider), are required to complete the following One-year Tactical Plan **no later than November 30th each year for years two through five**. If plans are available earlier, please submit as they become available. A Five-year Strategic Business Plan is required in year 1.

The One-year Tactical Plan must be consistent with the Five-year Strategic Business Plan and be based on the calendar year.

A sample Tactical Plan template has been provided below. However, the format of the Tactical Plan may be developed specific to your community needs and resources.

Similar to the Five-year Strategic Business Plan, the One-year Tactical Plan must adhere to the MRDT program principles (see box).

Please ensure there is alignment between provincial tourism strategies and community tourism efforts. Additionally, designated recipients should make their One-year Tactical Plans available to tourism industry stakeholders.

If you wish to make material modifications to the Five-year goals, strategies or targets, the changes must be identified in the One-year Tactical Plan and may require approval from the Province (see Section 11: Amendments in Program Requirements).

Your One-year Tactical Plan must contain the following information:

- An overview of the strategic direction from the Five-Year Strategic Business Plan
- Key learning and conclusions from the previous year
- Details about activities and tactics for the upcoming year
- Expected outcomes
- Availability of revenue from other sources to fund projects in addition to the funds from the tax (Reminder: funds from the tax must be incremental to existing sources of funding. The funds from the tax must not replace existing sources of tourism funding in a community)
- A proposed budget for the year ahead

For questions, please contact Destination British Columbia at MRDT@destinationbc.ca.

Quick Reference Guide (from the MRDT Program Requirements):

- *The intention of the tax is to assist designated recipients to fund tourism marketing, programs and projects.*
- *Funds from the MRDT program are intended to augment current funding and cannot be used to replace existing sources of tourism funding in a community.*
- *The MRDT program is intended to contribute to the increase of local tourism revenue, visitation, and economic benefits and should be supported by local government and tourism stakeholders.*

The MRDT program principles are:

- *Effective tourism marketing, programs and projects*
- *Effective local-level stakeholder support, and inter-community collaboration*
- *Marketing efforts that are coordinated and complementary to provincial marketing strategies and tactics*
- *Fiscal prudence and accountability.*

One-Year Tactical Plan Template

Designated Recipient: _____

Designated Accommodation Area: _____

Date Prepared: _____

MRDT Repeal Date: _____

Five Year Period: _____

A description/instructions pertaining to each section is provided in grey text as a guide only. **The format of your One-Year Tactical Plan may be developed specific to your community needs and resources.** If using this template, please delete the blue text and provide your response accordingly. If using your own report template, please ensure it includes the following sections:

Section 1: Overview and Update to Five-year Strategic Context	
Heading	Description
Strategic Direction	<ul style="list-style-type: none"><i>A brief overview of the strategic direction from the Five-Year Strategic Business Plan, which may include an articulation of the Vision, Mission, Goals and Objectives from the Five-Year Strategic Business Plan.</i>
Key Learnings and Conclusions	<ul style="list-style-type: none"><i>Key learnings and conclusions from a situation analysis or annual review that will inform your One-Year Tactical Plan.</i><i>Provide an update on progress to date for current year activities.</i>
Overall Goals, and Objectives	<ul style="list-style-type: none"><i>Overall Goals, Objectives and Targets, if different from the Five-year Strategic Business Plan.</i>
Strategies	<ul style="list-style-type: none"><i>Key Strategies for the year, if different from the Five-Year Strategic Business Plan. If any change in Key Strategies is deemed to be material or a substantial shift from original direction set, then approval from Destination British Columbia will be required before implementation.</i>
Target Markets	<ul style="list-style-type: none"><i>The types of visitors that are priorities for your community for the next year, stating primary and secondary target markets. Include geographic target markets, demographic, and activity-based target groups.</i><i>The desired length of stay that your community is seeking from the target markets, from day visits or overnight getaways to longer vacations.</i>

Section 2: One-Year Tactical Plan with Performance Measures

Please provide a **Project Plan** for each major activity you will undertake in the year ahead using MRDT funds. Authorized purposes of MRDT funds are tourism marketing, programs and projects and any other prescribed purposes as set out by regulation.

Project plans should include the following information for each activity. The recipient can organize the plan in a manner that best reflects their individual approach.

1. The **major category** of the activity. Examples could include marketing, destination and product experience management, visitor services, etc.

Marketing, which may include:

- Media Advertising and Production
- Website - Hosting, Development, Maintenance
- Social Media
- Consumer Shows and Events
- Collateral production and distribution
- Travel Media Relations
- Travel Trade
- Other.

Destination and Product Experience Management, which may include:

- Industry Development and Training - Enhancing Education and Knowledge (for example: Market Readiness, Packaging and Industry Workshops)
- Product Experience Enhancement and Training (for example: Itinerary Development, Content Development and Key Experience Creation)
- Research & Evaluation
- Other.

Visitor Services, which may include:

- Visitor Services Activities (for example: Visitor Services via Social Media, Mobile Apps, Roving/Mobile Visitor Services, Ambassadors, Kiosks)
- Other.

Meetings and Conventions:

- Examples could include conferences, events, sales, etc.

Other:

- Other activities not covered by the above categories, such as capital expenditures if **pre-approved by government** (prior to application), etc.

2. Please list and describe **the tactics** your community will use to achieve the strategies outlined in Section 1 of your Five-Year Strategic Business Plan. There may be several tactics for each activity.
3. Please provide an **implementation plan** that includes a short description, quantifiable objectives, rationale, action steps, potential partnerships, resources, sources of funding, responsibilities, timeframe, budget, and evaluation mechanism.
4. Please outline the **performance measures, expected outputs and outcomes**. Note, designated recipients receiving a tax rate of 3% are subject to additional reporting requirements. Please refer to Appendix 2.2 for more information about annual reporting of performance measures.

A Project Plan Template is attached on the following page for reference.

Project Plan Template

A description/instructions pertaining to each section is provided in grey text as a guide only. **The format of your Project Plan may be developed specific to your community needs and resources. If using this template, please delete the grey text and provide your response accordingly.**

Major Category: *(e.g., Marketing - Travel Trade; Visitor Services – Mobile Apps; Conferences)*

Activity Title: *Please provide the title of activity.*

Tactics:

Please list and describe the tactics to be used to achieve the strategies outlined in Section 1 of the Strategic Business Plan. There may be several tactics for each activity.

Implementation Plan:

For each activity, an implementation plan should include a short description, quantifiable objectives, rationale, action steps, potential partnerships, resources, sources of funding, responsibilities, timeframe, budget, and evaluation mechanism.

Performance Measures:

- *Please review the tactics listed above and identify expected outcomes and outputs for each.*
- *Report out annually on the performance measures (refer to Appendix 2.2).*
- *The performance measures must align with the four MRDT Program Principles:*
 - *Effective tourism marketing, programs and projects*
 - *Effective local-level stakeholder support, and inter-community collaboration*
 - *Marketing efforts that are coordinated and complementary to provincial marketing strategies and tactics*
 - *Fiscal prudence and accountability.*
- *Consider the following definitions when preparing the output and outcome measures:*
 - *Outputs - measure the level of service provided by a project or provides information about what was done. They define "what you did", e.g., hosted four media familiarization trips.*
 - *Outcomes - measures on the achievement of broader goals such as increasing average visitor yield or enhancing the customer experience.*
- *Examples only:*

Output Measures:

- *Types of marketing activities*
- *Number of event campaigns and results*
- *Description of social media activities and outcomes*
- *Number of media placements*
- *Number of conventions and meeting sales*
- *Webpage visits*
- *Visitor inquiries/calls*

Outcome Measures:

- *Visitor volume*
- *Visitor nights & visitor spending*
- *Visitor revenues*
- *Average length of stay*
- *Accommodation revenues*
- *Number of new tourism businesses*

Section 3: MRDT Budget for One-Year Tactical Plan

Designated recipients **must** complete the budget table as provided below.

Revenues		Budget \$
	Carry-forward from previous calendar year	
	MRDT	
	Local government contribution	
	Stakeholder contributions	
	Co-op funds received (e.g. CTO; DMO-led projects)	
	Other local stakeholder contributions	
	Grants – Federal	
	Grants – Provincial	
	Grants/Fee for Service - Municipal	
	Retail Sales	
	Interest	
	Other	
	Total Revenues	
Expenses		Budget \$
	Marketing	
	Marketing staff – wage and benefits	
	Media advertising and production	
	Website - hosting, development, maintenance	
	Social media	
	Consumer Shows, events	
	Collateral production, and distribution	
	Travel media relations	
	Travel trade	
	Other (please describe)	
	Subtotal	
	Destination & Product Experience Management	
	Destination & Product Experience Management Staff – wage and benefits	
	Industry development and training	
	Product experience enhancement and training	
	Research and evaluation	
	Other (please describe)	
	Subtotal	
	Visitor Services	
	Visitor Services activities	
	Other (please describe)	
	Subtotal	
	Meetings and Conventions	
	Meetings, conventions, conferences, and events etc.	
	Subtotal	
	Administration	
	Management and staff unrelated to program implementation – wages and benefits	
	Finance staff – wages and benefits	
	Human Resources staff – wages and benefits	
	Board of Directors costs	
	Information technology costs – workstation-related costs (i.e. computers, telephone, support, networks)	
	Office lease/rent	

Expenses		Budget \$
	General office expenses	
	<i>Subtotal</i>	
	Other	
	All other wages and benefits not included above	
	Other activities not included above (please describe)	
	<i>Subtotal</i>	
	Total Expenses:	
Balance or Carry Forward		