



# AGENDA

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## Visit San Luis Obispo County Board of Directors

### Visit San Luis Obispo County Board of Directors Agenda

Wednesday, February 17, 2016

8:30 am

SeaCrest OceanFront Hotel

2241 Price St, Pismo Beach, CA 93449

1. **CALL TO ORDER**
2. **PUBLIC COMMENT (On Non-Agenda Items)**

<b>ANNOUNCEMENTS</b>	<b>C. Davison</b>
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<b>CONSENT AGENDA</b>	<b>J. Jamison</b>
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3. **Approval of January 20, 2016 Board Meeting Minutes - *motion required* (yellow)**  
*Staff will ask for Board approval of the January VSLOC Board Meeting Minutes.*
4. **Approval of January VSLOC Financials - *motion required* (green)**  
*Staff will ask for Board approval of the January VSLOC Financials.*

<b>BUSINESS ITEMS</b>	<b>C. Davison</b>
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5. **Booking.com Update (5 min)**  
*Staff will provide an update on Booking.com functionality and implementation on the VSLOC website.*
6. **Fall Campaign Update (10 min)**  
*Staff will provide an update on the results of the Fall Campaign to date and report on new VSLOC Fall Campaign creative and co-op opportunities that VSLOC is pursuing.*
7. **Research Agency Update (5 min)**  
*VSLOC staff will provide an update on the progress of VSLOC's research study.*
8. **Strategic Planning - *motion required* (5 min)**  
*VSLOC staff will present the Coraggio Group's proposal for a multi-year strategic plan and request Board approval.*
9. **Marketing Agency Update - *motion required* (15 min)**  
*VSLOC staff will provide an update on the new Marketing Agency RFP process, timeline, Intent-to-Bid response and the next steps. VSLOC staff will also provide an update on the current Marketing Agency contract.*
10. **B&B Seat Update - *motion required* (15 min)**  
*The VSLOC Board will consider applicants to fill the B&B seat that is currently open on the Board.*
11. **Sponsorship- *motion required* (30 min)**  
*The VSLOC Board will review and discuss sponsorship applications from the following:*
  - *Festival Mozaic (15 min)*
  - *International Chardonnay Symposium (15 min)*

**12. CEO Report (5 min)**

*Staff will provide an update on current projects, reporting and areas of focus for the months ahead.*

**ADJOURN.**

Brown Act Notice: Each speaker is limited to two minutes of public comment for items not on the agenda. Public comment for each agenda item will be called for separately and is also limited to 2 minutes per speaker. State law does not allow the board to discuss or take action on issues not on the agenda, except that members of the board may briefly respond to statements made or questions posed by the person giving public comment. Staff may be directed by the board to follow-up on such items and/or place them on the next board agenda. The order of agenda items is listed for reference and items may be taken in any order deemed appropriate by the Board of Directors.

ADA Notice: Meeting facilities are accessible to persons with disabilities. If you require special assistance to participate in the meeting, notify Brendan Pringle at (805)541-8000 at least 48 hours prior to the meeting.



# Minutes

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## Visit San Luis Obispo County Board of Directors

### Visit San Luis Obispo County Board of Directors Meeting Minutes

Wednesday, January 20, 2016

8:30am

Allegretto Vineyard Resort  
2700 Buena Vista Dr., Paso Robles, CA 93446

#### 1. **CALL TO ORDER:** Jay Jamison

**PRESENT:** John Arnold, Kathy Bonelli, James Davison, Mark Eads, Lois Fox, Jay Jamison, Noreen Martin, Sam Miller, JP Patel, Nipool Patel, Clint Pearce, Val Seymour, Roger Wightman

**ABSENT:** Jim Hamilton, Rachel Patranella

**STAFF PRESENT:** Chuck Davison, Becky Singh, Michael Wambolt, Brendan Pringle

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**Call to Order at 8:32am.**

#### 2. **PUBLIC COMMENT (On Non-Agenda Items)**

None.

#### **ANNOUNCEMENTS**

Visit California's Dream Eater is filming in SLO County this week. He is visiting Madonna Inn, Sidecar and Splash Café. Visit San Luis Obispo County campaigned to bring him to the County. The Board watched a short clip of the Dream Eater series on Youtube.

TOT figures increased 9.09% year over year for November. The upward trend is expected to continue in December.

Board Discussion.

Public Comment – None.

#### **CONSENT AGENDA**

#### 3. **Approval of December 16, 2015 Board Meeting Minutes**

Board Discussion.

Public Comment – None.

**ACTION:** Moved by Pearce/J. Davison to approve the December 2015 Board Meeting Minutes as presented.

**Motion carried: 13:0**

## **BUSINESS ITEMS**

### **4. Approval of December VSLOC Financials & Re-Forecasted FY2015-16 Budget**

The Re-Forecasted FY2015-16 budget reflects a surplus of \$350,000 in unspent dollars that were reallocated. The proposed reallocations include \$136,000 to be paid immediately to the line-of-credit (which is currently at \$236,000), \$35,000 for strategic planning (which will be reviewed at the February meeting), and \$175,000 toward additional media spends in February, March and April.

Board Discussion.

Public Comment – None.

**ACTION:** Moved by Arnold/Martin to approve the December VSLOC Financials and FY2015-16 Re-Forecasted Budget.

**Motion carried: 13:0**

### **5. B&B Seat Update**

Lois Fox notified VSLOC staff a week ago that she sold her B&B, Belvino Viaggio. VSLOC confirmed with Civitas Advisors that Board members must be associated with a property paying into the assessment (aside from the County representative), and the bylaws also do not allow for non-voting members. C. Davison requested the Board's recommendations to fill the seat. Fox may be able to offer assistance in the outreach effort to fill her seat. At the February meeting, the Board will consider candidates for approval.

Board Discussion. Fox expressed her intent to help VSLOC find a replacement for her seat on the Board.

Public Comment – None.

### **6. SAVOR the Central Coast Update**

C. Davison reminded the Board of the options for the future of SAVOR discussed at the December 16, 2015 Board Meeting, where the Board moved to place the event on hold for further research and recommendations by the Marketing Committee moving into the future, and to ask them to bring back recommendations to the Board.

Amy Olmsted at Sunset notified VSLOC that major sponsors like Volvo are not willing to commit this early. Sunset does not feel it is in a position to commit to a big event for 2016 and play a large role in the event without a major sponsor on board, due to all of their recent restructuring. Olmsted noted that they may be willing to assist with smaller events throughout the year and give VSLOC some editorial assistance. Sunset has also hired F2V to run Celebration Weekend in Sonoma, and Sunset is working on redesigning this event in Sonoma.

The Marketing Committee recommended taking SAVOR on the road as more of a campaign than an event, and using it for branding at food and wine events. VSLOC already has some of these events in the budget. The Marketing Committee seemed open to selling the event, but expressed caution in selling to the right person based on changes and brand awareness. They are not interested in taking on individual events in their own markets and didn't see the value in using the SAVOR name on existing events.

Rob Rossi of Santa Margarita Ranch has expressed that he would like to explore options for facilitating a SAVOR event at the Ranch in Spring 2017. Rossi would need to provide a proposal for consideration.

Board Discussion.

Public Comment – Destini Cavalletto with SMR noted that SMR is still interested in the event at the Ranch.

## 7. Booking Engine Update

Last week, the Executive Committee recommended revisiting the Booking.com/OTA discussion. C. Davison reminded the Board that this solution would be a free solution for VSLOC (including mobile functionality), it offers detailed reporting, and it has a revenue share model where 40% of commission revenue is returned to the VSLOC. Their current partners include NYC & Company, Greater Miami, SF Travel, and Monterey. C. Davison also highlighted the various benefits of Booking.com, and noted that Booking.com has already launched a major initiative to sign up vacation rentals and B&Bs.

Lodging properties can opt out of using Booking.com on the VSLOC website. Lodging properties pay 15% or 18% commission for a premier partnership with Booking.com. Regardless of participation, all lodging partner listings will show up on the VSLOC website. If a better alternative presented itself over the next six months, VSLOC can look to pursue that.

Board Discussion.

Public Comment – None.

**ACTION:** Moved by J. Patel/N. Patel to allow the CEO of VSLOC to move forward in negotiating terms on behalf of VSLOC in order to start services with Booking.com.

**Motion carried: 10:3**  
**Seymour, Martin, and Bonelli opposed.**

## 8. Research Agency Selection

After hearing Oral Presentations from Merrill Research and King Brown, Inc. on January 19, 2016, the Marketing Committee recommended awarding the Research Project contract to Merrill Research at a cost of \$75,000 total for two projects. They came highly recommended by Jennifer Porter of the Paso Robles Wine Country Alliance, who used them for a recent study. The cost for individual communities to opt in and add 6 additional questions is \$2500.

Board Discussion.

Public Comment – None.

**ACTION:** Moved by Martin/N. Patel to award the VSLOC Research Project to and allow the CEO to enter into negotiations and finalize contract for services with Merrill Research.

**Motion carried: 13:0**

## 9. Marketing Agency RFP

Catalyst Marketing Company's agreement with VSLOC ends June 30, 2016. C. Davison discussed the timeline for the FY2016-18 Marketing Agency RFP process, and requested a motion to approve VSLOC's FY2016-18 Marketing Agency RFP. Once approved, the RFP would be released later today.

Board Discussion.

Public Comment – None.

**ACTION:** Moved by Arnold/Eads to approve VSLOC's FY2016-18 Marketing Agency RFP.

**Motion carried: 13:0**

## 10. SLOIFF Sponsorship

San Luis Obispo International Film Festival has submitted a request for sponsorship that includes \$10,000 cash and \$5,000 in-kind, as presented in the agenda packet. SLOIFF has events planned throughout the county, and the sponsorship would include a FAM tour for film scouts that would be countywide. VSLOC is the film commission for the County. Thus far this fiscal year, VSLOC has given \$30,000 in sponsorship funds to the AMGEN Tour of California and \$20,000 to the Cow Parade. The Marketing Committee recommended approval of the sponsorship request.

Board Discussion.

Public Comment – Wendy Eidson, Executive Director of the SLOIFF, thanked VSLOC for its past support, and reiterated that one of the major goals of the SLOIFF is to increase tourism and put heads in beds. She noted that one of the goals of the sponsorship proposal is to show filmmakers what the County has to offer. SLOIFF is partnering with Paso Wine for Zin Weekend, and will be continuing its partnership with Pismo Beach and the Avila Community Foundation. SLOIFF is also trying to bring more media to the County. Eidson also noted that prior to support from the SLOTBID, only 6% of visitors came from outside the County; now, the number is around 30%.

**ACTION:** Moved by J. Davison/Wightman to approve VSLOC's sponsorship of the SLO International Film Festival as stated.

**Motion carried: 13:0**

## 11. Fall Campaign Update

Davison showed the Board examples of banner creative running on sites like BBOOnline.com, RVParking.com, and VacationRentals.com. Davison also showed the December Reporting Metrics to the Board.

Board Discussion.

Public Comment – None.

## 12. CEO Report

On January 12, 2016, the Morro Bay City Council voted unanimously to take over the management of the Morro Bay Tourism Business Improvement District. C. Davison noted he is setting up a meeting with David Buckingham, Morro Bay's City Manager, to discuss the next steps for collaboration. Morro Bay is a partner in the AMGEN Tour of California and IPW.

On January 25, 2016, Pam Roberts will start as VSLOC's Travel Trade Sales Coordinator.

VSLOC's Beginning of Year Bash will be happening January 21, 2016, from 5-7pm at Café Roma. Please RSVP to Brendan Pringle.

VSLOC is hosting its second Industry Educational Symposium at the Embassy Suites in San Luis Obispo on February 3, from 8:30am-11:30am. This symposium will include presentations from Yelp, Booking.com, and the Executive Director of the California Film Commission.

The next Board Meeting is Wednesday, February 17, 2016.

Board Discussion. N. Patel asked about a new California law that requires a carbon monoxide detector in every room. He said he was notified of this legislation by the California Lodging Industry Association. C. Davison noted that the VSLOC team would do further research on the legislation.

Public Comment – Kristin Huebner, Pismo Beach CVB, stated that Gordon Jackson is the President of CLIA and might have further insight.

**ADJOURNMENT**

**Meeting adjourned at 10:22am.**

San Luis Obispo County  
 Visitor's & Conference Bureau  
 2015/2016 January Financial Summary - As of January 31, 2016

<b>Income</b>	<b>This Month</b>	<b>Budgeted for Month</b>	<b>MTD Variance</b>	<b>FISCAL YTD</b>	<b>Budgeted YTD</b>	<b>VTD Variance</b>
PY Carryover	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Current Year Dues Paid In Prior Year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Membership Dues	\$ 4,800	\$ -	\$ 4,800	\$ 35,012	\$ 46,000	\$ (10,988)
<b>TBID Income</b>						
SLO County Unincorporated	\$ 76,583	\$ 71,720	\$ 4,863	\$ 413,536	\$ 467,824	\$ (54,288)
SLO City	\$ -	\$ 50,218	\$ (50,218)	\$ 252,785	\$ 329,586	\$ (76,801)
Pismo Beach	\$ -	\$ 57,976	\$ (57,976)	\$ 371,484	\$ 443,022	\$ (71,538)
Morro Bay	\$ -	\$ 18,456	\$ (18,456)	\$ 130,440	\$ 153,890	\$ (23,450)
Paso Robles	\$ -	\$ 33,236	\$ (33,236)	\$ 171,628	\$ 200,855	\$ (29,227)
Arroyo Grande	\$ 5,647	\$ 5,714	\$ (67)	\$ 40,010	\$ 44,295	\$ (4,285)
Atascadero	\$ -	\$ -	\$ -	\$ 36,911	\$ 27,499	\$ 9,412
Grover	\$ -	\$ 1,779	\$ (1,779)	\$ 12,419	\$ 15,920	\$ (3,500)
<b>Total Income</b>	\$ 87,029	\$ 239,099	\$ (152,069)	\$ 1,464,226	\$ 1,728,891	\$ (264,665)
<b>Expenses</b>						
Unclassified(Reserve & Contingency)	\$ -	\$ -	\$ -	\$ -	\$ 142,656	\$ (142,656)
G&A	\$ 18,105	\$ 34,713	\$ (16,608)	\$ 103,367	\$ 119,975	\$ (16,608)
Industry Research and Resources	\$ 10,151	\$ 26,963	\$ (16,812)	\$ 84,290	\$ 101,102	\$ (16,812)
Travel Trade	\$ 12,549	\$ 44,016	\$ (31,467)	\$ 99,103	\$ 130,570	\$ (31,467)
PR	\$ 11,650	\$ 20,621	\$ (8,971)	\$ 58,965	\$ 67,935	\$ (8,971)
Advertising	\$ 145,496	\$ 78,736	\$ 66,760	\$ 314,044	\$ 247,284	\$ 66,760
Promotions	\$ 6,325	\$ 8,030	\$ (1,705)	\$ 12,727	\$ 14,432	\$ (1,705)
Events	\$ 106	\$ 15,000	\$ (14,894)	\$ 63,786	\$ 78,680	\$ (14,894)
Digital Marketing	\$ 86,166	\$ 72,165	\$ 14,001	\$ 310,552	\$ 296,551	\$ 14,001
Film Commission	\$ 1,041	\$ 8,119	\$ (7,078)	\$ 8,370	\$ 15,447	\$ (7,078)
<b>Total Expenses</b>	\$ 291,590	\$ 308,364	\$ (16,775)	\$ 1,055,203	\$ 1,214,633	\$ (159,430)
<b>Cash Surplus(Deficit)</b>	\$ (204,560)	\$ (69,265)	\$ (135,295)	\$ 409,023	\$ 514,258	\$ (105,234)
<b>Visit SLO County Cash Balances</b>				Current Year Month End	Prior Year Month End	Increase (Decrease)
				\$ 464,343	\$ 206,233	\$ 258,110



**Visit San Luis Obispo County**  
**Balance Sheet Prev Year Comparison**  
As of January 31, 2016

Cash Basis

	Jan 31, 16	Jan 31, 15
<b>ASSETS</b>		
<b>Current Assets</b>		
<b>Checking/Savings</b>		
CNB - Membership	87,399.56	0.00
CNB - TMD	376,943.60	0.00
Rabobank Checking	0.00	206,233.35
Savor Checking Account	18,507.96	5,753.37
<b>Total Checking/Savings</b>	482,851.12	211,986.72
<b>Accounts Receivable</b>		
Accounts Receivable	-3.00	-605.40
<b>Total Accounts Receivable</b>	-3.00	-605.40
<b>Other Current Assets</b>		
Prepaid Rent	3,326.70	0.00
Prepaid Payroll Tax	3,227.72	0.00
<b>Total Other Current Assets</b>	6,554.42	0.00
<b>Total Current Assets</b>	489,402.54	211,381.32
<b>Fixed Assets</b>		
Fixed Assets	32,552.69	32,782.67
Accumulated Depreciation	-23,658.17	-20,832.17
<b>Total Fixed Assets</b>	8,894.52	11,950.50
<b>TOTAL ASSETS</b>	<b>498,297.06</b>	<b>223,331.82</b>
<b>LIABILITIES &amp; EQUITY</b>		
<b>Liabilities</b>		
<b>Current Liabilities</b>		
<b>Accounts Payable</b>		
Accounts Payable	0.00	-537.45
<b>Total Accounts Payable</b>	0.00	-537.45
<b>Credit Cards</b>		
Chase 5458/Master	0.00	3,618.33
<b>Total Credit Cards</b>	0.00	3,618.33
<b>Other Current Liabilities</b>		
Coast National Line of Credit	99,418.00	0.00
Payroll Liabilities	0.00	334.25
<b>Total Other Current Liabilities</b>	99,418.00	334.25
<b>Total Current Liabilities</b>	99,418.00	3,415.13
<b>Total Liabilities</b>	99,418.00	3,415.13
<b>Equity</b>		
Fund Balance	34,053.44	34,053.44
Retained Earnings	147,404.82	175,685.55
Net Income	217,420.80	10,177.70
<b>Total Equity</b>	398,879.06	219,916.69
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>498,297.06</b>	<b>223,331.82</b>



# Minutes

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## Visit San Luis Obispo Marketing Committee

### Visit San Luis Obispo County Marketing Committee Meeting Minutes

Tuesday, January 12, 2016

8:30am

Sands Inn & Suites

1930 Monterey St, San Luis Obispo, CA 93401

#### 1. **CALL TO ORDER:** Chuck Davison

**PRESENT:** Ashlee Akers, Jim Allen, Judith Bean, Molly Cano, Amanda Diefenderfer, Christen Goldie, Gordon Jackson, Lori Keller, Heather Muran, Jennifer Porter

**STAFF PRESENT:** Chuck Davison, Brendan Pringle, Michael Wambolt, Becky Singh, Jordan Carson, Kylee Jepsen

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**Call to Order at 8:32am.**

#### 2. **PUBLIC COMMENT (On Non-Agenda Items)**

Matthew Wilkins, General Manager of Sands Inn & Suites, welcomed the Marketing Committee to the hotel.

#### **ANNOUNCEMENTS**

The Beginning of Year Bash is happening January 21, 2016 at Cafe Roma in San Luis Obispo.

Kylee Jepsen noted that the digital assets that were provided by the local DMOs have been uploaded to VSLOC's digital asset management system (WebDAM). VSLOC will be reaching out to wine country partners to upload their assets, and will be sharing information about WebDAM's next webinar so that DMOs can learn how to use the system effectively.

DreamEater is coming to SLO County. Thank you to all who encouraged the host to come to the County on Instagram. He will be visiting Madonna Inn, Sidecar, and Splash Cafe during the week of January 18, 2016.

Jepsen announced Restaurant Month promotional activity. Vikki Pass from Catalyst will speak more on out-of-market advertising that was introduced this year for this promotion. Jepsen also recognized SLO Wine Country Association and Paso Robles Wine Country Alliance for their partnership on Local Wine Deals.

Committee Discussion – None.

Public Comment – None.

#### **CONSENT AGENDA**

#### 3. **Approval of December 8, 2015 Marketing Committee Meeting Minutes**

Committee Discussion – None.

Public Comment – None.

C. Davison asked the Marketing Committee to approve the Consent Agenda as presented.

**ACTION:** Moved by Cano/Keller to approve the Consent Agenda as presented.

**Motion carried: 8:0:2  
Porter/Jackson abstained.**

## **BUSINESS ITEMS**

### **4. Marketing Agency RFP**

*Catalyst Marketing Agency was not present for this agenda item.*

VSLOC's agreement with Catalyst Marketing Agency ends June 30, 2016. VSLOC is sending out an RFP for the FY2016-18 marketing agency contract. The marketing agency that is hired will have access to new research and data from which to build a campaign. Catalyst will have the opportunity to participate in the RFP process, and the Marketing Committee will make a recommendation to the Board for approval in March 2016.

Committee Discussion – Porter asked if VSLOC was happy with Catalyst. Davison noted that onboarding with any new agency is difficult, and VSLOC's lack of digital assets did not help. He also noted frequent changes in account managers over the past few months led to a number of challenges and setbacks. Diefenderfer asked if Catalyst has worked well within the marketing budget. Davison responded that they have budgeted well, and that Catalyst has been more challenged with finding unique, creative and effective programs to spend the budgeted funds on. Akers requested that VSLOC add language to the proposal about case studies for co-ops and large partnerships. Porter noted that chemistry is the most important element in any marketing agency relationship.

Public Comment—None.

### **5. SAVOR the Central Coast Update**

Fast Forward Events (F2V) has opted out of the remainder of the SAVOR Joint Venture Agreement for three major reasons:

- 1) The financial structure of SAVOR is too dependent on local DMOs: They are concerned that as VSLOC transitions out of ownership, local DMOs will become less supportive.
- 2) National sponsors don't see high value in San Luis Obispo County: The audience is smaller and harder to get to.
- 3) Volatility around a long-term main event location: Last year, a contract was never reached with Santa Margarita Ranch. There is a lack of long-term options that don't require a substantial build-out, which would be an added expense.

Options moving forward include:

- 1) Ceasing operation of SAVOR, and maintaining the brand trademark for possible similar or different future use.
- 2) Selling the event: F2V suggested that events typically sell for six times the profit (\$78,000) or 0.8 times gross revenue (\$82,000), and that it might be worth more with this year's turnaround. The sale of the event would likely lead to significant changes that may impact the brand and view of VSLOC for those who don't realize we no longer own it. Sale options include engaging a broker or a local partner like Rob Rossi of the Santa Margarita Ranch, and could entail a complete sale of the event, or a similar structure to the F2V deal with VSLOC, where VSLOC would license the brand long-term.
- 3) Place the event on hold for a year, possibly restarting in 2017 with a new production company: SAVOR might lose sponsors as a result (like Sunset), and it might be hard to re-engage DMOs after a year off.

4) Hire a full time event manager and go back to VSLOC running the event: The Board was not interested in pursuing this option.

At their December 16, 2015 meeting, the Board of Directors motioned to place the event on hold for further research and recommendations by the Marketing Committee moving into the future, asking them to bring back recommendations to the Board. The Board had several suggestions:

- 1) Place the event on hold for restructuring
- 2) Use the brand to market events happening throughout the County year-round
- 3) Allow existing events to use the SAVOR brand to promote events in the County
- 4) Create smaller SAVOR events around the County throughout the year, run by each community

Santa Barbara County hosts [epicure.sb](http://epicure.sb), which has small events throughout the Santa Barbara County. However, this concept depends on whether local communities are willing to host such events.

Amy Olmsted at *Sunset* notified us that major sponsors like Volvo are not willing to commit this early. *Sunset* does not feel it is in a position to commit to a big event for 2016 and play a large role in the event, without a major sponsor on board, due to all of their recent restructuring. Olmsted noted that they may be willing to assist with smaller events throughout the year and give VSLOC some editorial assistance. *Sunset* has also hired F2V to run Celebration Weekend in Sonoma.

Committee Discussion – Jackson noted that it would be difficult to run an event next year (September 2016). Diefenderfer commented that the way the event has run in the past, there has never been a full event planning cycle, and it has been run like a “new” event every year. Bean suggested selling the event, and Muran expressed caution in selling it without proper vetting. Cano noted that by attaching SAVOR to other events, it doesn’t advance the mission of the brand, and that none of the DMOs are in the event business. Cano recommended taking SAVOR on the road as more of a campaign than an event, and using it for branding at food and wine events. Porter noted that not many DMOs would be upset if the current SAVOR model went away.

Public Comment – Destini Cavalletto, Santa Margarita Ranch, expressed that the Ranch has an interest in continuing the event in some fashion in 2017. Wendy Eidson, Executive Director of the SLO International Film Festival, said that SAVOR has been a topic of their Board. Many film festivals are becoming food and wine events, and SAVOR has components that SLOIFF would like to add to their festival.

## 6. Sponsorship

Davison discussed the Event Sponsorship application process. The application is on the Members Area of the VSLOC website. This year, sponsorship commitments include the Cow Parade (\$20,000) and Amgen Tour of California (\$30,000)

The SLO International Film Festival has requested sponsorship that includes \$10,000 cash and \$5,000 trade. VSLOC is the Film Commission for SLO County, and the funding request would bring film scouts into the County as an opportunity to leverage the SLOIFF already taking place. Davison noted that the \$10,000 doesn’t have to translate into \$10,000 in “heads in beds” for the week of the event as the benefits are more long-term with film scouts visiting the region, etc.

Committee Discussion – Cano noted that SLOTBID has committed to a \$30,000 sponsorship, which includes a hospitality tent and advertising dollars. Since SLOIFF staff are the experts on advertising for the event, SLOTBID opted this year to allow them to create their own marketing plan for how to spend those advertising dollars. Cano added that since this proposal consists of bringing film producers and film scouts to the area, VSLOC is best positioned to assist. Akers asked if the FAM trip locations have already been determined. Jepsen noted that she has been working on potential locations and asked the Committee to send any suggestions they might have.

Public Comment – Wendy Eidson of the SLO International Film Festival said it is important for the SLOIFF to offer hospitality to filmmakers, and thanked the Marketing Committee for viewing the sponsorship as a long-term investment. The sponsorship will show scouts great film locations, and increase the media attention that SLOIFF has received.

**ACTION:** Moved by Diefenderfer/Porter to recommend VSLOC sponsorship of SLO International Film Festival.

**Motion carried: 10:0**

## **7. Research Agency RFP Proposals**

Davison discussed the Research Agency RFP timeline. Finalists will be notified today (January 12, 2016), and oral presentations will take place on January 19, 2016. The Marketing Committee will make their final recommendation at that time, and the Board will vote on this item on January 20, 2016.

King Brown Partners, Merrill Research and Connected Solutions provided proposals. M/A/R/C opted out of the RFP process. Davison asked the Committee for their recommendations.

Committee Discussion – Porter requested that the Committee have King Brown Partners and Merrill Research give oral presentations, and recommended against Connected Solutions based on their proposal and cost. She noted that Merrill Research was very easy to work with on PRWCA research. They were ahead of schedule, very responsive, and very negotiable. She also noted that Apple is one of their clients. Merrill has its own panel, and King Brown would be developing its own panel. Davison suggested that Merrill drill down on the Central Valley DMA (which currently includes Sacramento). Keller noted that King Brown put their proposal into graphic form, and that this would be easy to convey to constituents. Jackson asked about the spending effort in international tourist research. Davison noted that Visit California’s research is based on the Central Coast, and that SLO County is lumped into that area, which stretches from Santa Cruz and Ventura. VSLOC has asked Visit California for buy-in opportunities to get more information on the SLO County’s international tourism numbers.

The Committee recommended Merrill Research and King Brown Partners as finalists for oral presentations on January 19, 2016.

Public Comment – None.

## **PRESENTATION**

### **8. DMO Spotlight: Travel Paso Robles Alliance**

Diefenderfer unveiled Travel Paso Robles Alliance’s “Paso Mavericks” campaign. This branding campaign focuses on the notion that Paso is a maverick destination for wine and more. Diefenderfer showcased TPRA’s Hotel Month promotion and new website that will debut soon.

Committee Discussion – None.

Public Comment – None.

## **PRESENTATION**

### **9. Catalyst Marketing**

Michelle Meisch and Vikki Pass offered some of the highlights of the Fall Campaign to-date, December media results, updates that were made to keywords, and notable trends. SEM impressions increased 13% over November. Majority of engagement is coming from mobile devices (57% mobile, 14% tablet). The campaign to-date has generated just over 19 million impressions and has driven 20,383 clicks to the landing page. The LA market generated the highest overall click-through rate of VSLOC’s major feeder markets in December.

Meisch and Pass presented new opportunities in the *LA Times*, *SF Gate*, and *OC Register*, and discussed some of VSLOC’s Restaurant Month and Romance Month advertising. They also presented some of the PR highlights for the past month.

The press kit is expected to be completed this week, and upcoming media FAM trips include Terry Gardner, who writes for the *LA Times* and *Chicago Tribune*.

Committee Discussion – Gordon noted that Romance Month advertising should have started a month ago. Keller suggested that with the new opportunities, VSLOC should start testing opportunities and see how effective they are. Muran noted that she is not in favor of the *OC Register* page takeover opportunity. Davison recommended not pursuing any of the options until new banner ads were produced and finalized. Cano asked about other opportunities. Davison responded that *Wine Enthusiast* had proposed a \$170,000 opportunity, and that VSLOC is looking at possibly advertising in *805 Magazine*. Cano asked about international opportunities and Pass said that Visit California is offering a buy-in international opportunity for January and February. Keller noted that Visit California has been successful with television buys, and suggested that there could be opportunities for VSLOC to partner with Visit California on television buys. Pass added that Catalyst is looking at running a 5-page advertorial in *LA Magazine*.

Public Comment – None.

## **10. CEO Report**

The next Marketing Committee meeting is scheduled for February 9, 2016 at 8:30am at the Sands Inn & Suites.

Committee Discussion – None.

Public Comment – None.

## **ADJOURNMENT**

**Meeting adjourned at 11:00am.**



# Minutes

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## Visit San Luis Obispo Marketing Committee

### Visit San Luis Obispo County Marketing Committee Meeting Minutes

Tuesday, January 19, 2016

8:30am

Embassy Suites

333 Madonna Rd, San Luis Obispo, CA 93405

#### 1. **CALL TO ORDER:** Chuck Davison

**PRESENT:** Ashlee Akers, Terrie Banish, Cheryl Cuming, Amanda Diefenderfer, Brent Haugen, Lori Keller, Heather Muran, Jennifer Porter

**STAFF PRESENT:** Chuck Davison, Brendan Pringle, Becky Singh

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**Call to Order at 8:33am.**

#### 2. **PUBLIC COMMENT (On Non-Agenda Items)**

None.

#### **BUSINESS ITEMS**

#### 3. **Research Agency Oral Presentations**

Merrill Research and King Brown Partners gave oral presentations of their research project proposals.

Committee Discussion – Porter, who noted that she contracted with Merrill in the past for Paso Robles Wine Country Alliance, shared her experience with Merrill Research, and said that while their presentation was not as flashy, Merrill's research was strong, and Pat Merrill is easy to work with. She noted that King Brown is probably a higher risk (since they are untested for this County), but they might offer a higher reward. Haugen noted that King Brown didn't offer many examples of similar work they had completed, while Merrill offered specific examples. He also noted that King Brown glossed over how they will bring data to the individual communities. Porter also added that King Brown's strength is in their presentation. Keller noted that King Brown would likely give more actionable data and that they have a true understanding of the organization's goal. Davison said that Diefenderfer, who had to leave for another meeting, scored Merrill higher than King Brown. Singh asked Porter if the results from Merrill were clear enough that she could move forward with strategy. Porter responded that the first draft of the survey results was near perfect, and were clear enough to proceed.

The Marketing Committee voted 6-1 to recommend Merrill Research. Keller voted to recommend King Brown Partners.

Public Comment – None.

#### **ADJOURNMENT**

**Meeting adjourned at 11:46am.**

Chuck Davison  
Visit San Luis Obispo County

Dear Chuck,

All too often, the connection of tourism to economic development is overlooked by areas that could benefit greatly. While it is true that traditional economic development measures aimed at attracting and retaining large businesses may make larger splashes, the steady infusion of dollars into a local economy that is brought by tourism has a terrific multiplier effect, owing to the fact that the smaller businesses who benefit from tourism are more likely to have local ownership. In other words, tourism brings outside dollars to your county, those dollars stay in your community, and they ripple through the local economy. In that context, regional destination marketing organizations such as Visit San Luis Obispo County serve a critical function as they develop and invigorate tourism.

The recently approved TMD has quadrupled Visit San Luis Obispo County's budget, and has positioned you to contribute even more significantly to this economic engine of the County. To honor the commitment of your constituents, you are prepared to create a Strategic Plan that will align staff and stakeholders on the direction for organization, on the actions that need to be taken, and on how success will be measured.

As summarized in our qualifications later in this document, Coraggio has a depth of experience helping a great many destinations define their tourism development strategies, and can offer San Luis Obispo County great value for this process because we are—first and foremost—a strategy firm, and that is what Visit San Luis Obispo County needs most. Our process is tried and true, and our methodologies work. At the same time, because we have such depth in the tourism space, we bring broad perspective and an understanding of the key issues and challenges.

We look forward to the opportunity to work with you to develop your strategy, and please don't hesitate to reach out to us if we can clarify anything or provide any additional information.

Enthusiastically,

A handwritten signature in black ink, appearing to read 'M. Landkamer', with a long horizontal flourish extending to the right.

Matthew Landkamer, Principal  
Coraggio Group  
2240 N. Interstate Ave. Suite 300  
Portland, OR 97227  
503.493.1452



# Overview of our approach to strategy development

Anyone who has participated in a strategic planning initiative in the past may view subsequent similar initiatives with a bit of trepidation. With so many different ways of arriving at the end product, we've worked hard to make the process of getting to the end goal a little less painful and a lot more interesting and engaging—and maybe we can even have some fun along the way.

The key deliverable for this project is a Strategic Plan aimed at achieving defined and measurable goals that will add to the economic and cultural vibrancy of San Luis Obispo County. The graphic below provides a high-level view of Coraggio's framework for Strategic Planning:



We propose the following three-phase approach to the work:



## Get Clear: April 2016



### Immersion Work via telephone interviews and data review

*Assessing San Luis Obispo County's current state of tourism, the capacity for tourism development and readiness for bridging the gap from its current state to the possible future will help us to align strategic decisions with the reality of its capacity to deliver. We will seek the answer to these and other critical strategic questions: How do key stakeholders view the long-term strategic direction of Visit San Luis Obispo County? What do these stakeholders need most from the Strategic Plan?*

Understanding the needs, expectations, opinions and insights of a few of Visit San Luis Obispo County's key stakeholders is critical input to developing the strategic plan and making informed business decisions. We will perform telephone interviews of 8-10 of these stakeholders. Examples might include: hotel management, local TBID representatives, Chamber leadership, elected officials, key customers, etc.

In addition, we propose a simple stakeholder survey be developed that will give Coraggio a broader view into your challenges and opportunities before we join you for the strategic planning workshops.

To the degree that existing documentation exists that would inform our process, we would request access to that information at this stage, as well.

## Get Focused: April-May 2016



### 1. Three-Year Plan Development Workshops

*As the saying goes, "If we don't know where we're going any road will take us there." Having a smart, targeted plan and a clear path for executing the plan is key.*

We will work with you to design three very focused, high-energy workshops with your strategic planning team. Each of these workshops would be distributed over two days, with an afternoon session on the first day and a morning session on the second day. We would also schedule a

one-hour meeting at the end of the second day's meeting to brief the Board's Strategic Planning Subcommittee on our progress.

### Workshop One

In the first workshop, we would focus on the part of the plan we call "Strategic Clarity". This is the high-level view of your strategy, and includes the following elements:

#### Vision

*What is the ideal future state we are trying to create?*

#### Mission

*What is our purpose? What are we here to make happen?*

#### Values

*What are the fundamental beliefs that shape how we work together and serve our mission?*

#### Brand Intention

*What do we want to be known for? What is the enduring perception or emotion that describes the total experience of our organization?*

#### Position

*What unique & sustainable value do we deliver, where do we deliver it, and for whom?*

### Workshop Two

In the second workshop, we would work with the team to define the "Focus" part of the plan, which includes these elements:

#### Strategic Imperatives

*What must be accomplished over the planning horizon?*

#### Objectives

*How will we measure success?*

### Workshop Three

In the final workshop, we will work with your team to align on the "Action" part of the plan—the Initiatives that you will undertake within the planning horizon:

#### Initiatives

*What collective actions do we need to take, that are transformative in nature?*

## Get Moving: May 2016



*Having a compelling Plan and knowing how to communicate that Plan—both are essential for the success of the effort.*

#### **Deliverable: Final Strategic Plan documentation**

Once we return from the workshops, we will take some time to collect everything the strategic planning team decided into one coherent document.

We have a one-page Strategic Plan format that has proven very effective at helping participants and non-participants alike to understand the overview of the strategic plan, while also being able quickly reference the specifics. In this way, the final document acts as both a guide to working the plan, and as a tool for communicating it.

# Coraggio Team and Experience

## About Coraggio

Established in 2005, Coraggio is a west-coast focused management consultancy. Drawing upon our experience working across multiple industry sectors, we use best practices in management, organizational design and continuous improvement methodologies to analyze and understand our client organizations at a systemic level. We help our clients get clear, get focused and get moving on their most important strategic, operational and organizational challenges—ultimately creating the pathway for them to improve operational efficiency, service delivery and leadership and management effectiveness.

We believe our experience and background would provide you with a unique and valuable perspective in developing your Strategic Plan. Specifically, we work across multiple industry categories including Government, Legal, Energy, Education, Healthcare and Consumer. This broad industry perspective enables us to draw upon a deep well of best practices, insight, and knowledge that we will apply to the project.

Each of our senior consultants has 15+ years of experience in their respective fields of strategy, organizational assessments and restructuring, process redesign, change management, and stakeholder engagement. Our consultants have either been part of large world-wide consulting firms, such as McKinsey & Company, Accenture, Deloitte Consulting and Hildebrandt, or a senior leader inside a global organization, including Nike, the Walt Disney Company, First Union Bank (now Wells Fargo) and Nautilus.

## Coraggio's Areas of Specialization:

**Strategic Clarity and Planning**—We work with leadership teams to create clarity and alignment in strategy and planning. Common outputs of this work are long-term strategic clarity frameworks, strategic plans, business modeling, and business plans.

**Leadership/Stakeholder Group Facilitation Processes**—We offer deep experience in helping diverse stakeholder groups—within individual agencies or across multiple organizations—to successfully manage sensitive dynamics, have “real” conversations, and collaborate to reach reasonable solutions and a new common ground.

**Organizational Change and Transitions**—We design, plan, and implement organizational change initiatives. We take a systems-level approach to organizational change that integrates strategy, leadership, structure, culture, processes and systems in order to create positive, lasting change.

**Executive and Organizational Development**—We provide counsel, coaching, and facilitated development work with executives and teams. We also work with leadership teams to design and implement organizational development strategies and to provide guidance on how to improve leadership alignment and overall effectiveness.

**Organizational Assessments**—We conduct both qualitative and quantitative assessments of teams and organizations in order to provide clarity and an action plan around desired changes. Our assessments include organizational structure, organizational capabilities and competencies, cultural bench, leadership effectiveness, and change readiness.

**Lean Six Sigma/Process Improvement**—We work to ensure that Continuous Improvement becomes part of our clients' cultural DNA. We have deep expertise in process assessment and diagnostics aimed at helping clients to significantly improve efficiency and service delivery. As part of our process improvement work, we design implementation roadmaps and provide practical guidance and facilitation to ensure success.

## Coraggio's Experience with Destination Marketing Organizations:

We believe we would provide Visit San Luis Obispo County with a level of acumen in the DMO space that is important to a positive outcome for this project. Though we have worked with many DMOs over the years, we find that each has their own set of unique challenges they are navigating, each with particular circumstances that need to be thoughtfully addressed in order to achieve the right results and sustained, long-term success.

## Examples of Coraggio Clients:

### DMO/Travel Experience

- Visit California
- Visit Oregon
- Visit Portland
- San Luis Obispo TBID
- Ontario, Calif. CVB
- Santa Monica CVB
- Wyoming Office of Tourism
- San Diego Tourism Authority
- Beverly Hills CVB
- Travel Oregon
- LA INC. (now Los Angeles Tourism and Convention Board)
- San Francisco Travel
- Travel Portland
- Santa Barbara CVB
- Visit Oakland
- Visit West Hollywood
- Western Association of CVBs
- Alaska Travel Industry Association
- Tri Valley, CA CVB

### Other Business & Industry Experience

- Knowledge Universe
- US Olympic Committee
- Portland State University
- Port of Portland
- Nike
- Adidas
- California Lottery
- Orlando Magic
- Portland Trailblazers
- Portland General Electric (PGE)
- Starbucks
- American Red Cross
- Providence Health System
- New Seasons Market
- Sacramento County
- Multnomah County
- State of Oregon
- State of Washington

## Coraggio consultants assigned to the Visit San Luis Obispo County project:



### Matthew Landkamer

Principal

Matthew helps clients think through, better understand and then take action on their most important strategy, organizational change, and brand challenges. His art and design background, combined with hands-on business experience, allows him to bring a unique balance of creative design thinking and strategic rigor to each of his client engagements. He is a skilled facilitator and problem solver with an impressive ability to start the conversations that need to be had inside organizations, and among organizational leaders—the kind of conversations that lead to valuable insights, bold thinking and needed results.

Matthew has spent 18 years leading marketing and strategy initiatives for organizations of all sizes from large companies to small, entrepreneurial ventures. Before joining Coraggio, he was a leader of the marketing group at a Seattle-based global architecture firm, where he also helped lead strategy for that firm's Planning and Urban Design practice.

Matthew holds a Bachelor of Arts degree from Nebraska Wesleyan University. He is certified in the Prosci® Change Management methodology, and has completed training in Public Interest Design through the Social, Economic, and Environmental Design (SEED) Network.



### Craig Trames

Principal

Craig is an engaging and insightful facilitator of strategy, brand, sales, marketing and innovation. He has an impressive and effective way of making sure the right conversations—the real conversations that need to be had—are front and center and that client teams are able to work together to mobilize around new opportunities and to find the right solutions to mission-critical challenges.

Craig has worked with a wide range of clients including adidas, Portland Fire and Rescue, Tillamook Creamery, NBC Universal Studios Hollywood, New Seasons Market, and a number of Travel & Tourism organizations such as San Francisco, Beverly Hills, Santa Monica and Santa Barbara.

Over the past 30 years, Craig has taken on a wide range of leadership roles with an emphasis on marketing, sales and product development, 11 years of which were spent at Nike. Afterward, Craig served as CEO of Pacific Crest Outward Bound School. Craig is proud to have been a senior consultant with Coraggio since 2006.

## References

### **Kim Baker**

Vice President of Marketing, Santa Monica CVB

310.319.6263

kbaker@santamonica.com

### **Molly Cano**

Tourism Manager, City of San Luis Obispo

805.781.7165

mcano@slocity.org

## Proposed Budget

Our requested fee for this project is a flat rate of \$30,000, billed as follows:

April 2016: \$13,000

May 2016: \$17,000

This fee does not include costs related to travel, which will be billed at cost. All invoices are due net 30.

## AARON GRAVES

654 Rancho Drive +  
San Luis Obispo, CA 93405 +  
Aaron@GravesInvestments.com +  
805.704.0334 +

## CHUCK DAVISON

+ President and CEO  
+ Visit San Luis Obispo County  
+ San Luis Obispo, CA 93401

Dear Mr. Davison:

Please accept this resume packet as my formal application to become a Board Member of the Tourism Marketing District.

I have been responsible for the acquisition of two hospitality properties in this last year. First purchasing the Pleasant Inn in Morro Bay. It is an 11 room boutique one block up from the Embarcadero. Maintaining a high standard for customer service, cleanliness, and charming décor keeps the Pleasant Inn in the top 20% of hotels on Trip Advisor and receiving their "Certificate of Excellence".


Another recent purchase was the Burton Inn in Cambria. It is a 14 room Bed & Breakfast in the heart of the village with tremendous potential. I am aggressively updating and re-branding the Inn. When completed it will be a top performer and a beloved destination amongst Central Coast travelers.

In addition to our overseeing our current properties I am also a Hotel Broker, helping third parties to buy and sell hospitality businesses. Frequently, the value of a hotel can be adjusted depending on it's market potential, branding, and trends within the industry. Maintaining this knowledge and expertise keeps me fully immersed in Central Coast tourism.

I currently sit as a Board Member of the Morro Bay Tourism Business Improvement District as well as the Morro Bay Tourism Bureau. As a stakeholder, I feel it's important to help guide the community and shape the future of tourism in Morro Bay. I have enjoyed my time working with Morro Bay tourism so much that I would like to contribute my efforts towards making the Central Coast a competitive and unique destination in the future. It is for these reasons that I would be honored to become a Board Member of the Tourism Marketing District.

Thank you for your consideration.

Sincerely,



AARON GRAVES





**VISIT SAN LUIS OBISPO COUNTY**  
**TOURISM MARKETING DISTRICT BOARD APPLICATION FORM**  
**APPLICATION PROCESS CLOSES FEBRUARY 10 AT 5 PM**

NAME OF APPLICANT: Aaron S. Graves

COMPANY: Burton Inn

ADDRESS: 4022 Burton Drive, Cambria CA 93428

PHONE: 805.704.0334 EMAIL: Aaron@GravesInvestments.com

TOTAL YEARS IN HOSPITALITY INDUSTRY: Born into hospitality. Grandparents built our first hotel.

BACKGROUND EXPERIENCE:

Please see attached resume.

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**Employment History**

CURRENT EMPLOYER: Self Employed YRS OF SERVICE: 10

TITLE: Director of Everything

PAST EMPLOYER: \_\_\_\_\_ YRS OF SERVICE: \_\_\_\_\_

TITLE: \_\_\_\_\_

**Community/Board Involvement**

ORGANIZATION: Morro Bay Tourism Business Improvement Dist. TITLE: Board Member

DATES OF INVOLVEMENT: November 2015 - Current

ORGANIZATION: Morro Bay Tourism Bureau TITLE: Board Member

DATES OF INVOLVEMENT: November 2015 - Current

ORGANIZATION: Opera San Luis Obispo TITLE: Board Member

DATES OF INVOLVEMENT: 2009 - 2011

For more information, contact Visit San Luis Obispo County at (805) 541-8000.

# AARON GRAVES

- + ADDRESS: 654 RANCHO DR. SAN LUIS OBISPO, CA 93405
- + EMAIL: AARON@GRAVESINVESTMENTS.COM
- + PHONE: 805.704.0334

## WORK EXPERIENCE

DIRECTOR OF EVERYTHING  
2010 - PRESENT

GRAVES FAMILY REAL ESTATE PORTFOLIO  
CENTRAL COAST & LAS VEGAS

- + Own & Manage 14 room B&B: Burton Inn, Cambria
- + Own & Manage 11 room Boutique Hotel: Pleasant Inn, Morro Bay
- + Recently sold 47 room weekly hotel, Las Vegas, Nevada
- + Own & manage 110 +/- rental doors & 13 full-time employees
- + Principal partner executing all 1031 exchange activities
- + Sold / Exchanged / Purchased 135 keys of family assets since 2010

OPERATIONS ASSISTANT  
2006 - 2010

GRAVES FAMILY REAL ESTATE PORTFOLIO  
LAS VEGAS, NV

- + Assisted with managing hotel and properties
- + Renovate assets
- + Audited rent roles
- + Originate project financing

## COMMUNITY INVOLVEMENT

Morro Bay Tourism Business Improvement District: Board Member      November 2015 - Current  
Morro Bay Tourism Bureau: Board Member      November 2015 - Current  
Cal Poly Performing Arts Center, San Luis Obispo: Sponsor      25<sup>th</sup> Anniversary  
Opera San Luis Obispo: Board Member      2009 - 2011  
F-PAC: Foundation for the Performing Arts Center, San Luis Obispo: Sponsor      Ongoing

## EDUCATION

CALIFORNIA REAL ESTATE BROKER LICENSE  
2007 - PRESENT

LICENSE # 01787901

MASTERS OF BUSINESS ADMINISTRATION  
2006 - 2007

- + Honors Graduate, GPA 3.9

BACHELOR OF ARTS PHILOSOPHY  
2002 - 2005

- + Minor in Business Administration



## VISIT SAN LUIS OBISPO COUNTY

### TOURISM MARKETING DISTRICT BOARD APPLICATION FORM

APPLICATION PROCESS CLOSES FEBRUARY 10 AT 5 PM

NAME OF APPLICANT: ALMA AYON  
COMPANY: SUNDANCE BED & BREAKFAST  
ADDRESS: 7735 SUNDANCE TRAIL  
PHONE: (805) 226-2888 EMAIL: info@SundanceBandB.com  
TOTAL YEARS IN HOSPITALITY INDUSTRY: 242

BACKGROUND EXPERIENCE: EXECUTIVE PRODUCER - TV & LIVE EVENTS.  
WORKED 20+ YEARS IN ENTERTAINMENT. AT  
UNIVISION, TELEMUNDO NETWORK AND NBC  
LOS ANGELES. WORKED IN CREATIVE, MARKETING  
AND PROMOTIONS DEPARTMENTS.

#### Employment History

CURRENT EMPLOYER: CHEF/OWNER YRS OF SERVICE: 242  
TITLE: SUNDANCE BED & BREAKFAST  
PAST EMPLOYER: ALGO MAS ENTERTAINMENT YRS OF SERVICE: 10+  
TITLE: EXECUTIVE TELEVISION & LIVE EVENTS  
PRODUCER

#### FUTURE Community/Board Involvement

ORGANIZATION: MUST! CHARITIES TITLE: CHEF  
DATES OF INVOLVEMENT: \_\_\_\_\_  
ORGANIZATION: WELLNESS KITCHEN TITLE: CHEF  
DATES OF INVOLVEMENT: \_\_\_\_\_  
ORGANIZATION: \_\_\_\_\_ TITLE: \_\_\_\_\_  
DATES OF INVOLVEMENT: \_\_\_\_\_

For more information, contact Visit San Luis Obispo County at (805) 541-8000.

CASS HOUSE  
CAYUCOS

Jenna Hartzell  
*Director of Service & Marketing*  
Cass House Cayucos  
222 North Ocean Avenue  
Cayucos, CA 93430  
[jenna@casshousecayucos.com](mailto:jenna@casshousecayucos.com)

Chuck Davison  
President & CEO  
Visit San Luis Obispo County  
1334 Marsh Street  
San Luis Obispo, CA 93401

Dear Mr. Davison and the VSLOC Board of Directors,

I am interested in serving on your Board of Directors to fill the open seat designated for a Bed and Breakfast.

I am currently the Director of Service & Marketing at the Cass House in Cayucos and have been in charge of customer service, booking, event coordination, and marketing for the last year. We are in the process of opening to our full capacity (new grill restaurant and bakery) this June. Being part of a team that has built a project from the ground up combined with my former job and volunteer experience gives me confidence to say that I think I would bring excellent perspective and knowledge to your Board of Directors.

As a former Executive Director of the non-profit SLO County Arts Council, I am comfortable analyzing budgets, programs, managing staff and collaborating with board members all while working within a very strict budget. Some of my responsibilities included; leading a state-wide initiative on the local level, coordinating more than 25 organizations and their volunteers for programs and events that brought the arts to the children and families of SLO County, as well as serving on the Board and committees that impacted the economic growth of the businesses in Downtown San Luis Obispo.

Being a young professional, a wife and mother, and an active community member, I am passionate in all efforts towards making the quality of life here in SLO County better and more attractive to tourists so that our local communities continue to thrive because of the work we do in this industry.

Thank you for your consideration.

Sincerely,



Jenna Hartzell



## VISIT SAN LUIS OBISPO COUNTY

### TOURISM MARKETING DISTRICT BOARD APPLICATION FORM

APPLICATION PROCESS CLOSES FEBRUARY 10 AT 5 PM

NAME OF APPLICANT: Jenna Hartzell  
COMPANY: Cass House Cayucos  
ADDRESS: 222 N. Ocean Ave.  
PHONE: 995-3669 EMAIL: jenna@casshousecayucos.com  
TOTAL YEARS IN HOSPITALITY INDUSTRY: one

BACKGROUND EXPERIENCE:

see letter

#### Employment History

CURRENT EMPLOYER: Cass House Cayucos YRS OF SERVICE: one  
TITLE: Director of Service & Marketing  
PAST EMPLOYER: SLO County Arts Council YRS OF SERVICE: five  
TITLE: Executive Director

#### Community/Board Involvement

ORGANIZATION: SLO Downtown Assn. TITLE: Board Member  
DATES OF INVOLVEMENT: Jan. 2010 - Dec. 2011  
ORGANIZATION: SLO County Alliance for Arts Edu. TITLE: Director  
DATES OF INVOLVEMENT: 2013 - 2015  
ORGANIZATION: SLO County's Open Studios Art Tour TITLE: Director/Chair  
DATES OF INVOLVEMENT: 2010 - 2015

For more information, contact Visit San Luis Obispo County at (805) 541-8000.



## Visit San Luis Obispo County Event Sponsorship Application Form

Requesting Organization (please designate if non-profit): Mozart Festival Assn. dba Festival Mozaic

Contact: Bettina Swigger, Executive Director Phone: 805-781-3009

Email: bettina@festivalmozaic.com Event Website: FestivalMozaic.com

Mailing Address: P.O. Box 311 City, State, Zip: San Luis Obispo, CA 93406

Organization Mission: Festival Mozaic creates powerful live music experiences in the County of  
Luis Obispo for a regional, statewide and national audience.

Event Title: 46th Annual Summer Music Festival

Date(s)/Time of the Event: July 13-24, 2016

Funding Request: \$15,000 + \$5,000 in-kind media support Overall Event Budget: \$603,000

Attendee Ticket Price (if any): free- \$165 Exhibitor Price (if any): N/A

Budget Cycle or Fiscal Year of the Event: 2016-2017; Festival Mozaic's fiscal year runs October 1 - September 30

Total Anticipated Room Reservations: unknown

Attendees: 5,000 Exhibitors: 65 (visiting artists) Sponsors: 200

Total Anticipated Attendees: 5,000

Please send your application to [brendan@visitsanluisobispo.com](mailto:brendan@visitsanluisobispo.com). Once your complete application is received, Visit San Luis Obispo County will review and respond within six to ten weeks. We request ample lead time on all sponsorship requests to fully evaluate through our tiered process, which may include staff review, Marketing Committee review and Board of Directors review. Visit San Luis Obispo County may require additional information (i.e., financials, budget, Board members, etc.) and will let you know if further documentation is needed.

**Visit San Luis Obispo County**  
1334 Marsh Street  
San Luis Obispo, CA 93401  
[www.VisitSanLuisObispoCounty.com](http://www.VisitSanLuisObispoCounty.com)

FESTIVAL  
MOZAIC

### **About Festival Mozaic – Organizational Overview**

Since 1971, Festival Mozaic has operated as a premier San Luis Obispo County cultural attraction, bringing world-class visiting artists to perform for a diverse and broad audience. With concerts and events in a variety of venues that range from grand concert halls to intimate churches, from private homes to pastoral outdoor settings, Festival Mozaic is the only performing arts event of its caliber that is truly County-wide.

Each summer (and at ancillary events throughout the year), classical music lovers and musicians come together to enjoy music performance and related events in a festive and stimulating atmosphere. More than just a series of concerts, Festival Mozaic is an integrated experience showcasing the bounty of the Central Coast by including culinary, wine and hospitality elements into our offerings.

Over its five decades, the Festival has built a reputation for world-class programming and performance standards throughout the United States. For these reasons, festival-goers return to the festival *year after year*. Festival-goers are an elite group and they trust the Festival brand to provide events of the highest quality that are unparalleled.

The artistic direction, executive staff, and board share a commitment to bringing the highest quality of live classical music to the Central Coast. A particular focus of festival programming is presenting emerging artists at particularly vibrant and exciting junctures in their careers.

The festival enriches concert presentations with events that provide a social and cultural context for the music. The festival sees itself as building on a rich tradition to build a relevant relationship between audiences and art form. This commitment is expressed in the way the festival selects artists, the way it designs and presents its programs, and the way the audience is encouraged to experience the programming. The Festival has a proven track record for cultivating repeat attendees, and has ambitious goals for growing attendance and support in the coming years.

The Festival is the primary reason that numerous travelers visit San Luis Obispo County each year. While they are here, they also visit the region's beaches, vineyards, and historical attractions. In a few particular cases, visitors to the Festival have ultimately moved to San Luis Obispo County after attending the Festival for several years.

#### Festival Snapshot:

- 20+ Events in venues all around San Luis Obispo County (see appendix A)
- Anticipated attendance – 4,000 – 5,000 – 24% from outside area (see appendix B)
- Visitors from outside the area attend multiple events and stay for an average of 3+ nights locally. (2015 Audience Survey).
- Potential for 1,500 out-of-area attendees at 3 nights each: 4,500 room nights
- Target Audience: The Festival draws an educated, affluent and sophisticated audience who return year over year.
- Demographics - A Semcast data profile report of the Festival's database shows:
  - 28% of Festival Mozaic customers have a net worth of \$2.5 – \$5 million
  - 48% of Festival Mozaic customers own homes valued at \$500k - \$3M
  - 57% of Festival Mozaic customers have college/graduate degrees
  - 76% are women ages 55-75+
  - 37% regularly participate in charitable giving

- Ticket Prices range from free (Midday Mini-Concerts, Master Classes, Open Rehearsals, Simulcasts) to \$165 (Notable Encounter Dinners in Private Homes)
- Festival Mozaic is a 501(c)3 nonprofit organization supported by a diverse group of individuals, businesses, foundations and government support. Our primary source of support is from individuals who attend our events, develop a long-term relationship with the Festival and come back time and time again. We aim to cultivate repeat attenders. (See exhibit C for budget)

### **Visit San Luis Obispo County Support**

Funds from Visit San Luis Obispo County will be specifically earmarked to support Festival Mozaic’s out-of-county area marketing efforts. These include:

- Summer Ticket brochure – 10,000 printed; 4,000 mailed to out-of-county addresses; 1,800 distributed through winery partners to out-of-county wine club members - \$5,100 (printing and mailing)
- Co-branded Festival Mozaic/Visit San Luis Obispo County tri-fold brochure (“Destination: Music” – 20,000 printed and mailed to the Central Coast Consolidated Music List, a list-share of 20 music/cultural arts organizations with high-wealth individuals in Santa Barbara/Ventura County - \$5,500
- Facebook ad campaign targeting out-of-county cultural travelers \$400
- Radio promotions – KUSC Southern California and KVPR in Fresno/Bakersfield - \$2,800
- Ad placement in out-of-market publications – San Francisco Classical Voice, LA Times - \$1,200

Total: \$15,000

In-Kind: \$5,000 through Media FAMS trips; providing marketing strategy and support; promoting Festival Mozaic as a valuable part of the cultural identity of San Luis Obispo County.

### **About the Fringe Series**

Festival Mozaic seeks sponsorship from Visit San Luis Obispo County to support its Fringe series. Because classical music is perceived as an elite art form, the Festival addresses the challenge of bringing in new audiences through its Fringe series, which presents classically-trained musicians performing in contemporary and crossover genres. The 2016 Festival will include four Fringe concerts in San Luis Obispo County.

#### **Intersection – July 14**

*"Diamond-hard brilliance, uncommonly poetic depths...Stunning."* —Los Angeles Times

Violinist Laura Frautschi, cellist Kristina Reiko Cooper and pianist John Novacek, and their group Intersection, have forged a powerful connection with audiences worldwide. Laura, Kristina and John have individually achieved enviable successes as soloists and chamber musicians in the world of classical music, and together they venture beyond artistic borders, exploring new music, world music, jazz, Latin, Broadway/film music and an irresistible blend of arrangements.

#### **PROJECT Trio – July 17**

*"Wide appeal, subversive humor and first-rate playing."*—The Wall Street Journal

Combining the virtuosity of world-class artists with the energy of rock stars, PROJECT Trio is breaking down traditional ideas of chamber music. Based in Brooklyn, New York, flutist Greg Pattillo, cellist Eric Stephenson, and bassist Peter Seymour met at the Cleveland Institute of Music. The Trio got its big break in 2006 when Greg Pattillo’s Beatbox Flute video went viral on YouTube, receiving millions of views in its first week. \*PROJECT Trio will also present a master class for young musicians as part of their Festival appearance.



**The Other Mozart – July 19**

*"Strikingly beautiful."* —New York Times

Actress, playwright, producer and violinist Sylvia Milo is the creator of this one-woman show, which explores the world of Nannerl Mozart, Wolfgang's sister. Set in a stunning 18-foot dress designed by Magdalena Dabrowska from the National Theater of Poland and directed by Isaac Byrne, the play is based on facts, stories and lines pulled directly from the Mozart family's humorous and heartbreaking letters. Original music was written for the play by Nathan Davis and Phyllis Chen - featured composers of Lincoln Center's Mostly Mozart Festival, BAM and the International Contemporary Ensemble.

**Duo Baldo – July 22**

*"Hilarious. And that guy can really play the fiddle."* – *A guy in the third row*

The Italian musical comedy team Duo Baldo is renowned violinist Brad Repp and pianist/actor Aldo Gentileschi. Their critically acclaimed performances combine virtuosic musicianship, theatrical humor, and pop culture. Duo Baldo made their debut with Italian tenor Andrea Bocelli in 2004. After winning first prize at the 2009 Musicomicon, they performed at the opening of the 2010 Salzburg Festival. Violinist Brad Repp has appeared as violin soloist with José Carreras in two Asia tours. He performs on a 1736 Testore violin. Aldo performs on whatever piano he can find.

**As sponsor of the Fringe Series, sponsorship benefits include:**

- Series sponsorship recognition in all Fringe series advertising and promotion (including Ticket Brochure, mailed to 10,000 and distributed through 12 winery partners and other publicity channels, individual event posters/promotional postcards, etc. See Appendix E).
- Recognition and logo placement in all other print & online marketing materials
- Ad space in souvenir program book
- Complimentary tickets for Visit San Luis Obispo County giveaways, promotions and contests, board members or clients (no cap, but limited to performances not dinner events)
- Integration of Visit San Luis Obispo County "plan your visit" content into Festival's website
- Access to high-def, professional video of Festival events and activities to promote County as a cultural destination
- Invitation to attend special Festival VIP events, including Preview Party, Closing Cast Party, Board reception and others
- Positioning of Visit San Luis Obispo County services in all email marketing sent to out-of-area customers
- Creation/Curation of San Luis Obispo County as a Cultural Destination for FAMS group and journalists (in-kind)
- Exposure to a high-value client base resulting in longer stays, higher dollars spent and an elite group of cultural tourists who have tremendous influence among their peers
- Other sponsorship benefits can be determined/negotiated as needed

**Marketing Plan**

The Festival has a small staff and all marketing is overseen by the Executive Director. The Festival uses multifaceted marketing techniques to reach the audience as defined above. Due to the demographic of the typical Festivalgoer, print marketing makes up for a large percentage of the marketing budget. However, the Festival also serves as a thought-leader in the field of classical music, and as such, makes a concerted effort to stay abreast of technology. As such, the Festival ensures maximum mobile utility for all its communications, including the use of a sophisticated all-in-one marketing/ticketing system (Vendini) and an app. General marketing highlights are listed below.

With Visit San Luis Obispo County's support, the Festival could leverage existing marketing efforts to bring a wider audience to the Festival and the County.

Print Materials (see enclosed) - \$15,000

- 24-page ticket brochure booklet + ticket order form
  - Designed by Subplot Studios, this booklet details concerts, performances & venues
  - 10,000 printed and mailed to 5,000 households in FM's database + add'l 5,000 purchased to match target demographic, in Southern California, Bay Area, Central Valley & Arizona
- 64-page souvenir program
  - Designed by Aldridge Design
  - 3,500 printed and handed out at Festival events
  - Includes program details, artists' bios, paid and trade advertisements, donor lists, etc.
- Individual Event postcards
  - Designed in house and sent to target mailing lists to target ticket sales for specific events within the Festival season (see enclosed)
  
- Annual Report
  - Designed in house and disseminated to major donors and community at large to demonstrate festival's impact and reach

Website and Email - \$8,000 annually

- Website and email marketing managed by Vendini, seamlessly integrating ticketing into the online marketing experience. The Festival adopted this system in January 2015 and has only begun to scratch the surface of its vast capabilities.
- Quarterly eblasts are sent detailing news from behind the scenes, upcoming concerts, and fun musical facts
- Eblasts can be targeted to specific patrons based on giving and ticket-buying history
- Website is optimized for mobile devices
- Website is updated regularly by staff
- Mobile App (available on all OS) is run by InstantEncore, who provides apps for music organizations the world over, including the Sydney Opera, the LA Philharmonic, Carnegie Hall and others.

Video and Audio - \$8,000 annually

- Festival Mozaic has a contract with the professional Musician's Union, preventing the resale or monetization of concert recordings or videos.
- As an auditory and visual phenomenon, the Festival is uniquely poised to showcase its works using new technology. While we firmly believe that nothing compares to live performance, and our audio/visual links are used to encourage likely participants to attend a Festival event, we make strides to capture the Festival experience as much as possible.
- The Festival maintains an active YouTube channel with more than 20 HD video clips from past events. We will be exploring ways to maximize exposure in the 2016 season, using the help of a marketing intern from Cal Poly.

- Audio recordings are housed on a special server online for artists to review and access. CD recordings of specific concerts are given to donors as appreciation gifts.

#### Radio - \$5,000

- KCBX Public Radio: 300 spots annually, in-kind media sponsor – additional promotion through weekly program KCBX In Concert, for which FM Executive Director is a host
- KUSC Classical Radio: 100 spots annually, partial in-kind media sponsor – spots designed to bring LA visitors to SLO County
- KVPR Public Radio: 50 spots annually, partial in-kind media sponsor – spots designed to bring Central Valley visitors to SLO County

#### Print Advertising - \$10,000 annually

- Festival Mozaic advertises in Visit SLO County magazine, and we have been featured in both editorial and advertorial in past years.
- LA Times – Sunday Arts section
- The Tribune – two “wrap” ads on the paper announcing the summer season and when tickets go on sale
- SLO Life Magazine
- Various trade ads in program books for other nonprofit arts groups, including SLO Symphony, Cal Poly Arts, PCPA TheaterFest, SLO Little Theatre, Open Studios Art Tour, Canzona, SLO Opera, SLO International Film Festival, etc.

#### Social Media - \$400 (new for 2016 – we have not paid for engagement until this year)

- Facebook
  - Festival Mozaic has 2,100 “likes”
  - Vendini tickets are integrated into Facebook to promote ease of ticket purchase
- Instagram
  - Festival Mozaic has 218 followers
  - Account created in 2015
- Twitter
  - Festival Mozaic has 504 followers
  - Account created in 2011

#### Event Principal Biographies

**Scott Yoo, Music Director**, has led Festival Mozaic since 2005. Yoo brings his prowess as a gifted violinist and a conductor to the Festival. His major orchestra took place in a performance of Mendelssohn’s Violin Concerto with the Boston Symphony at age 12. He received first prize in the 1988 Josef Gingold International Violin Competition, the 1989 Young Concert Artists International Auditions, and the 1994 Avery Fisher Career Grant. After graduating with honors from Harvard University, Yoo founded the Metamorphosen Chamber Orchestra, conducting the ensemble in its series at Jordan Hall in Boston, and more than ninety performances on tour. As a guest conductor, Yoo has led the Colorado, Dallas, Indianapolis, San Francisco and Utah Symphonies. He regularly conducts the St. Paul Chamber Orchestra, and led their Elliott Carter Festival as well as numerous subscription series. He has conducted the New World Symphony, the Civic Orchestra of Chicago, and the orchestras of Columbus, Hong Kong, Honolulu, Kansas City, Louisville, Winnipeg, Mexico City, Nashville, and Phoenix. In Europe, he conducted the City of London Sinfonia, Orchestre de Bretagne, Odense Symphony and the Estonian National Symphony. He recently made his debut with the Seoul Philharmonic and his debut with Yomiuri Nippon Orchestra in Tokyo. Recent recording projects include the complete orchestral works

of Earl Kim with the RTE National Orchestra of Ireland for Naxos and works of Mozart and Elliott Carter for Bridge Records. Yoo serves as an ambassador for San Luis Obispo and Festival Mozaic wherever he conducts and performs internationally.

**Bettina Swigger, Executive Director**, developed a love of music when she began playing the viola at age five. Originally from Albuquerque, New Mexico, Bettina comes to Festival Mozaic from Colorado Springs, where she served as founding executive director of the Cultural Office of the Pikes Peak Region, an arts advocacy organization. Prior to that, she was the manager of the Colorado College Summer Arts Festival, which includes a Summer Music Festival, Dance Intensive, Vocal Arts Symposium and film series. She holds a bachelor’s degree in Comparative Literature from Colorado College. A passionate advocate for all the creative arts, Bettina has served as an elected member of the National Emerging Leaders Council for Americans for the Arts and as a Peer Assistance Network Consultant for the Colorado Arts Council. She serves on the board of Arts Obispo, the San Luis Obispo County Arts Council, the Association of California Symphony Orchestras, and on the board for Leadership San Luis Obispo. Bettina was named one of the Top 20 Under 40 by the San Luis Obispo Tribune in 2012.

Full list of Festival artists can be found at [FestivalMozaic.com](http://FestivalMozaic.com).

## APPENDIX A: 2016 Summer Festival Events

### 2016 Summer Festival Season-At-A-Glance

<b>Date</b>	<b>Time</b>	<b>Event</b>	<b>Venue</b>	<b>Work(s) By</b>
Wed., 7/13	6 p.m.	Notable Encounter Dinner: Transfigured Night	Private Home, Arroyo Grande	Schoenberg
Thurs., 7/14	7:30 p.m.	Fringe Series: Intersection	Cuesta College Cultural and Performing Arts Center, San Luis Obispo	Mix of jazz, Broadway, classical, and new works.
Fri., 7/15	10 a.m.	Open Rehearsal	Cuesta College Cultural and Performing Arts Center, San Luis Obispo	Handel, Torelli, Bach
Fri., 7/15	7:30 p.m.	Chamber Series: Legacy of Genius	Cuesta College Cultural and Performing Arts Center, San Luis Obispo	Mahler, Britten, Mozart, Schoenberg
Sat., 7/16	12 p.m.	Free Midday Mini-Concert: Mozart by the Sea	Santa Rosa Catholic Church, Cambria	Mozart

<b>Date</b>	<b>Time</b>	<b>Event</b>	<b>Venue</b>	<b>Work(s) By</b>
Wed., 7/13	6 p.m.	Notable Encounter Dinner: Transfigured Night	Private Home, Arroyo Grande	Schoenberg
Sat., 7/16	7:30 p.m.	Orchestra Series: Baroque in the Vines	Chapel Hill, Shandon	Handel, Torelli, Bach
Sun., 7/17	10:30 a.m.	Master Class: PROJECT Trio	Avila Beach Community Center	
Sun., 7/17	3 p.m.	Fringe Series: PROJECT Trio	See Canyon Fruit Ranch, Avila Beach	PROJECT Trio
Sun., 7/17	6 p.m.	Notable Encounter Dinner: Dueling Violins	Allegretto Vineyard Resort, Paso Robles	Prokofiev
Mon., 7/18	10:30 a.m.	Master Class: Combined Brass with Michael Tiscione and Samuel Schlosser	Private Home TBA	
Mon., 7/18	7:30 p.m.	Chamber Series: The Viennese Connection	Congregation Beth David, San Luis Obispo	Wolf, Korngold, Beethoven
Tues., 7/19	7:30 p.m.	Fringe Series: The Other Mozart	Cuesta College Cultural and Performing Arts Center, San Luis Obispo	Sylvia Milo
Wed., 7/20	12:00 p.m.	Free Midday Mini-Concert: Violin Recital with Emily Daggett Smith and Noam Elkies	Trinity United Methodist Church, Los Osos	Mozart, Lutoslawski, Debussy
Wed., 7/20	3:30 p.m.	Open Rehearsal	Mission San Luis Obispo de Tolosa	Mozart, Schubert
Wed., 7/20	6 p.m.	Dinner in the Plaza	Mission Plaza, San Luis Obispo	Big Sky Café
Wed., 7/20	7 p.m.	Pre-Concert Lecture:	Mission San Luis Obispo de Tolosa Parish Hall	Dr. Alyson McLamore
Wed., 7/20	8 p.m.	Orchestra Series: Mozart in the Mission	Mission San Luis Obispo de Tolosa	Mozart, Schubert

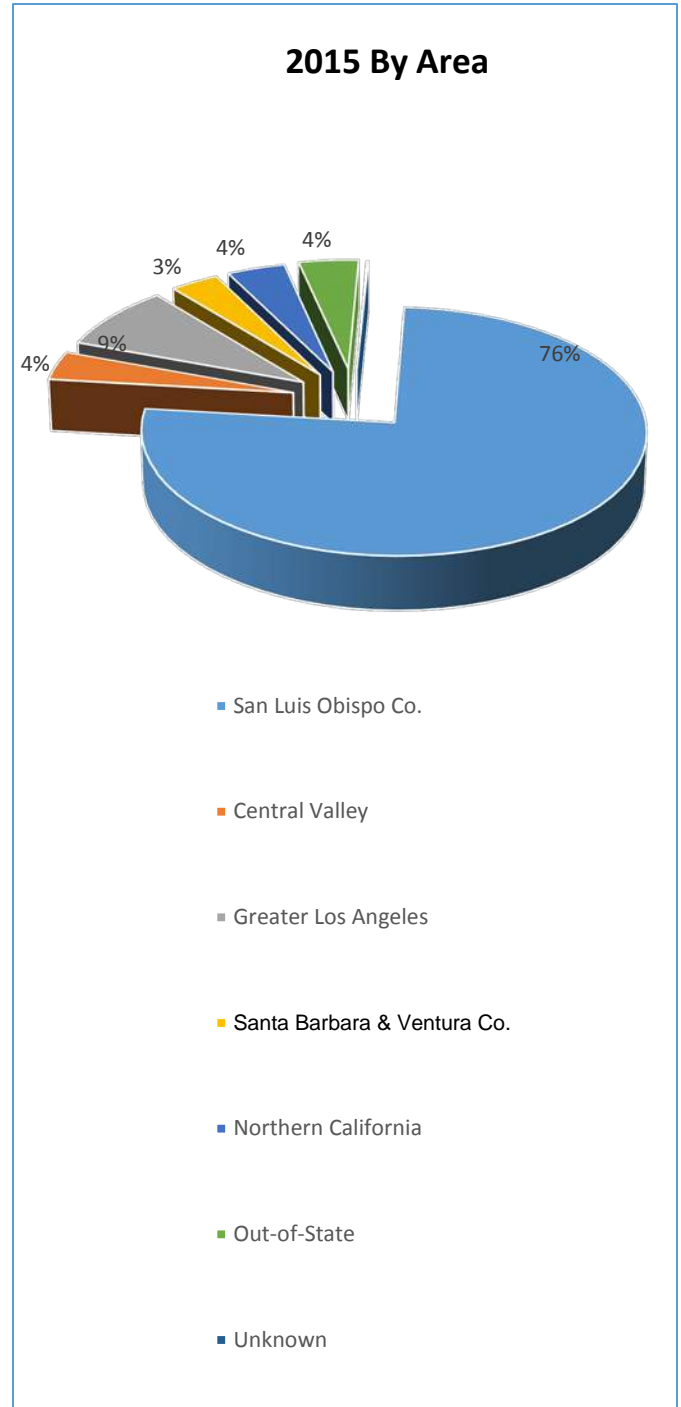
Thu., 7/21	10:30 a.m.	Master Class: Kristina Reiko Cooper, cello	Private Home TBA	
Thu., 7/21	5 p.m.	Notable Encounter Insight: On-Stage with Schubert	Cuesta College Cultural and Performing Arts Center, San Luis Obispo	Schubert
Thu., 7/21	6 p.m.	Festival Picnic Dinner	Cuesta College CPAC Courtyard, San Luis Obispo	SLO Provisions
Thu., 7/21	7:30 p.m.	Chamber Series: Scott Yoo and Friends	Cuesta College Cultural and Performing Arts Center, San Luis Obispo	Weber, Berg, Schubert
<b>Date</b>	<b>Time</b>	<b>Event</b>	<b>Venue</b>	<b>Work(s) By</b>
Fri., 7/22	12 p.m.	Free Midday Mini-Concert: Piano Recital with John Novacek	Unitarian Universalist Fellowship, San Luis Obispo	Beethoven, Ginastera
Fri., 7/22	7:30 p.m.	Fringe Series: Duo Baldo	Pavilion on the Lake, Atascadero	Duo Baldo
Sat., 7/23	10 a.m.	Open Rehearsal	Performing Arts Center, San Luis Obispo	Mahler
Sat., 7/23	8 p.m.	Orchestra Series: Mahler in Perspective	Performing Arts Center, San Luis Obispo	Mahler
Sun., 7/24	10:30 a.m.	Notable Encounter Brunch: Winds in the Valley	Private Home, Avila Beach	Nielsen
Sun., 7/24	3 p.m.	Chamber Series: Festival Finale	Cuesta College Cultural and Performing Arts Center, San Luis Obispo	Mahler, Liszt, Nielsen, Shostakovich, Brahms

**APPENDIX B: Festival Attendance by Zip Code**

The following charts illustrate the breakdown of individual Festival ticketbuyers FOR SUMMER 2015 ONLY. These numbers do not reflect the overall number of tickets sold (4,017 in 2015); merely the number of ticketbuyers. With Visit San Luis Obispo County’s support, we believe there is great opportunity to grow these numbers.

<b>2015 Individual Ticket Buyers By Zip Code</b>		
San Luis Obispo Co.	582	76.0%
Central Valley	29	3.8%
Greater Los Angeles	65	8.5%
Santa Barbara & Ventura Co.	26	3.4%
Northern California	31	4.0%
Out-of-State	32	4.2%
Unknown	1	0.1%
	<b>766</b>	<b>100.0%</b>

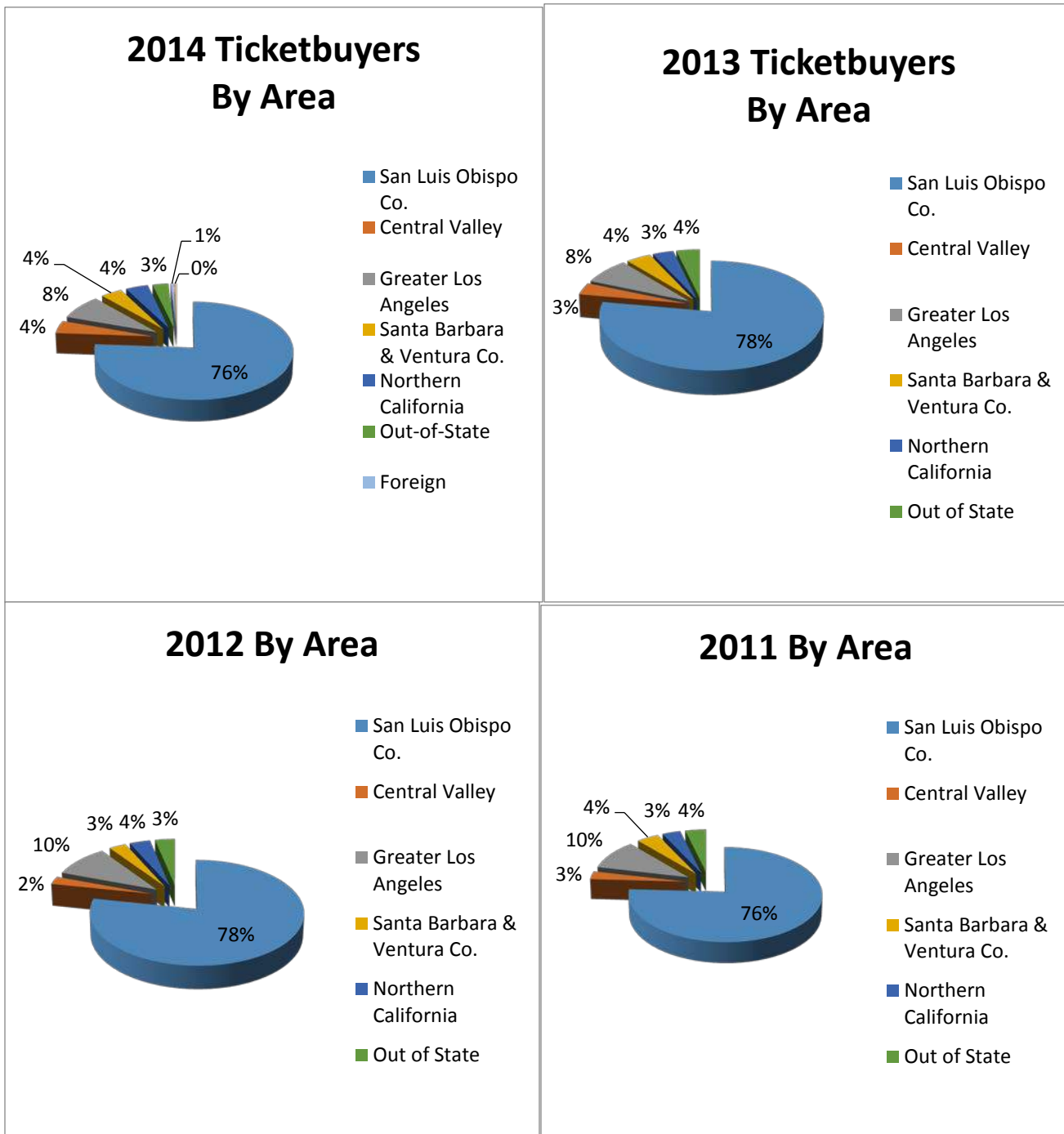
<b>Out-of-State Breakdown</b>		
AZ	4	0.5%
CO	1	0.1%
DC	1	0.1%
FL	1	0.1%
GA	1	0.1%
HI	1	0.1%
KY	1	0.1%
MA	3	0.4%
MD	1	0.1%
MN	2	0.3%
NV	2	0.3%
OH	2	0.3%
OR	1	0.1%
PA	1	0.1%
TX	4	0.5%
VA	3	0.4%
WA	3	0.4%
	<b>32</b>	<b>4.2%</b>
<b>Total Tickets Sold:</b>		<b>4,017</b>



**History of Individual Ticketbuyers by Area**

Through our integrated ticketing/marketing/fundraising platform, Vendini, we analyze all ticket sales immediately following all event seasons and use the findings to determine our ad buys and placements in our marketing plan. Figures

below are for the summer festival only; when we factor in our off-season WinterMezzo offerings, ticketbuyers from out of the area account for 30% of the Festival’s total audience.



**Appendix C: Festival Mozaic Overall Operating Budget FY2016**

Festival Mozaic Relies on the following sources of income to produce and promote its programs:

- Earned Income
  - Ticket Sales Revenue (approx 44%)
  - Fundraising events (5%)
  - Program Advertising (1%)
- Contributed Income
  - Individuals (including Board) (33%)



- Corporations and small business (7%)
- Government (5%)
  - California Arts Council, County Supervisors, City of San Luis Obispo
- Endowment/Investment Interest (5%)
- In-Kind Donations (*not included in budget below*) - \$460,000

<b>FESTIVAL MOZAIC</b>	<b>FY2016 Budget</b>
<b>Income*</b>	
<b>Visit San Luis Obispo County Sponsorship</b>	15,000
<b>3100 · Contributed Income</b>	270,000
<b>4100 · Ticket Income - Summer Series</b>	208,500
<b>4110 · Ticket Income - WinterMezzo</b>	42,000
<b>4200 · Fundraiser Income</b>	25,000
<b>4300 · Advertising Income</b>	13,000
<b>4400 · Merchandise Income</b>	5,500
<b>4600 · Investment and Interest Income</b>	24,000
<b>Total Income</b>	<b>603,000</b>
<b>Gross Profit</b>	603,000
<b>Expense</b>	
<b>4150 · Ticket Expenses - Summer Series</b>	14,000
<b>4350 · Advertising Income Expense</b>	
<b>4470 · Merchandise Income Expenses</b>	1,500
<b>4801 · Fundraiser Income Expenses</b>	2,500
<b>5100 · Musician Expenses - Summer</b>	186,416
<b>5130 · WinterMezzo Musician Expenses</b>	6,000
<b>5200 · Production Expenses - Summer</b>	54,800
<b>5250 · WinterMezzo Production Expenses</b>	15,838
<b>5300 · Development Expenses</b>	6,000
<b>5400 · Marketing Expenses - Summer</b>	40,000
<b>5445 · WinterMezzo Marketing Expenses</b>	6,100
<b>5800 · Administrative Personnel Costs</b>	180,000
<b>5900 · Administrative Expenses</b>	90,110
<b>7000 · Miscellaneous Expenses</b>	
<b>Total Expense</b>	603,264
<b>Net Income</b>	<b>-264</b>

**Appendix D: Festival Mozaic Board of Directors**

OFFICERS

Jeri Corgill – Director Administrative Services, City of Greenfield  
*President*

Dennis Schneider, President, Biokinetic Engineering  
*Vice President*

Steve Bland – Owner, SLO Provisions  
*Past President*

Juliane McAdam – SLO Senior Nutrition  
*Secretary*

Warren Jensen – San Luis Obispo County Counsel, Retired  
*Treasurer*

MEMBERS

John Frey – Retired Professor

Don Maruska - Don Maruska & Co.  
Consulting

John Gilbert- Owner, John Gilbert Co.  
Medical Executive Search Firm

Jo Anne Miller – Brown Dog Partners

Gail Kammermeyer – Community Volunteer

Susan Branche Poteet – Certified Financial  
Planner

Jano Kray – Data Processing Security  
Professional

Mike Poyntz – Central Coast Mortgage

Marti Lindholm – Retired Teacher

Rick Sample – Morgan Stanley

Anne Marr – Community Volunteer

Bernard Singsen, M.D. – Retired Physician



Appendix E: Festival Mozaic Ticket Brochure Cover, Visit SLO County page & Fringe Series Detail

Festival Mozaic, [www.FestivalMozaic.co](http://www.FestivalMozaic.co)  
P.O. Box 311, San Luis Obispo, CA 9340



## Fringe Series



### Fringe Series: Intersection

Cuesta College Cultural & Performing Arts Center

7:30 PM

It's Classical Musicians Doing Un-Classical Things! Join Festival favorites pianist John Novacek and cellist Kristina Reiko Cooper, along with violinist Laura Frautschi for soulful expression, instrumental virtuosity and playful banter. This program features an irresistible blend of classical, jazz, Latin, Broadway/film music, vital new commissions, and the group's own original compositions and arrangements, ranging from tango to bossa nova, to Mendelssohn and beyond.

[www.intersectiontrio.com](http://www.intersectiontrio.com)

Generously sponsored by Mike and Shirley Ritter

THU JUL  
14



### Fringe Series: PROJECT Trio

See Canyon Fruit Ranch, Avila Beach

3:00 PM

PROJECT Trio is a passionate, high energy chamber flute, cello and bass music ensemble comprised of three virtuosic composer/performers from Brooklyn, NY. Flutist Greg Patillo is recognized throughout the world for his redefinition of the flute sound. His groundbreaking "beatbox flute" performance videos on YouTube have been viewed more than 20 million times.

[www.whatisproject.org](http://www.whatisproject.org)

Generously sponsored by Chevron

Gates to this outdoor venue open one hour before showtime. Chairs are NOT provided with lawn seating. Picnics are welcome. Please be prepared for sunny conditions. Beer and wine available for purchase.

SUN JUL  
17

## Experience classical training with a contemporary twist



### Fringe Series: The Other Mozart

Cuesta College Cultural & Performing Arts Center

7:30 PM

This one-woman theater piece explores the true and untold story of Nannerl Mozart, Wolfgang's sister, with historic music and letters. The show features an original score for the instruments Nannerl knew intimately, such as clavichords, music boxes, and bells. With the opulent beauty of the dress and hair design, the sweet smell of perfume, and the clouds of dusting powder rising from the stage, the performance creates a multi-sensual experience and transports the audience into a world of outsized beauty and delight – but also of overwhelming restrictions and prejudice.

[www.theothermozart.com](http://www.theothermozart.com)

Generously sponsored by Libbie Agran & Guy Fitzwater

TUE JUL  
19



### Fringe Series: Duo Baldo

Pavilion on the Lake, Atascadero

7:30 PM

Back by Popular Demand! The musical comedy team Duo Baldo is renowned violinist Brad Repp and pianist/actor Aldo Gentileschi. Their critically acclaimed performances combine virtuosic musicianship, theatrical humor, and pop culture. Table seating includes a glass of wine from one of the Festival's favorite wineries and a tasting sampler of tapas.

[www.duobaldo.com](http://www.duobaldo.com)

Generously sponsored by the City of Atascadero

FRI JUL  
22



## Visit San Luis Obispo County Event Sponsorship Application Form

Requesting Organization (please designate if non-profit): FULL GLASS PRODUCTIONS, INC. 501(c)(3)

Contact: LINDA SANPEI Phone: 805 543.2288

Email: LINDA@PARKERSANPEI.COM Event Website: THECHARDONNAYSYMPOSIUM.COM

Mailing Address: 3940-7 BROAD ST., # 301 City, State, Zip: SAN LUIS OBISPO, CA 93401

Organization Mission: TO ESTABLISH AN INTERNATIONAL EVENT THAT WILL  
INTRODUCE AND FURTHER ESTABLISH SLO COUNTY AS A MAJOR TOURIST DESTINATION

Event Title: INTERNATIONAL CHARDONNAY SYMPOSIUM

Date(s)/Time of the Event: MAY 12-14, 2016

Funding Request: \$ 20,000 Overall Event Budget: \$ 225,000

Attendee Ticket Price (if any): \$ 35 - \$ 100 Exhibitor Price (if any): \$ 300

Budget Cycle or Fiscal Year of the Event: 2016

Total Anticipated Room Reservations: 1450

Attendees: 2,500 Exhibitors: 100 Sponsors: 15

Total Anticipated Attendees: 3,000

Please send your application to [brendan@visitsanluisobispo.com](mailto:brendan@visitsanluisobispo.com). Once your complete application is received, Visit San Luis Obispo County will review and respond within six to ten weeks. We request ample lead time on all sponsorship requests to fully evaluate through our tiered process, which may include staff review, Marketing Committee review and Board of Directors review. Visit San Luis Obispo County may require additional information (i.e., financials, budget, Board members, etc.) and will let you know if further documentation is needed.

**Visit San Luis Obispo County**  
1334 Marsh Street  
San Luis Obispo, CA 93401  
[www.VisitSanLuisObispoCounty.com](http://www.VisitSanLuisObispoCounty.com)



## FUNDING PROPOSAL FOR THE 2016 INTERNATIONAL CHARDONNAY SYMPOSIUM

Herein is a proposal by Full Glass Productions, Inc., a 501(c)(3) non-profit organization, to request sponsorship funds from the Visit San Luis Obispo County TMD for the Annual International Chardonnay Symposium. This request supersedes any and all previous requests.

---

### **MISSION**

The International Chardonnay Symposium (ICS) brings together the world's most influential Chardonnay producers for a three-day exploration and celebration of the most-consumed white wine in the world. Hosting an international event in San Luis Obispo County provides us with the unique opportunity to showcase our region on a global stage. Attending media, gatekeepers, and consumers will in turn become ambassadors for bolstering long-term tourism to our region by promoting it as a top destination for wine, culinary, cultural and coastal tourism.

### **BACKGROUND**

The Chardonnay Symposium was initially formed by the major Chardonnay producers in the Santa Ynez/Santa Maria Valley in 2009. And, although well organized, it lacked the hospitality details (marketing, hotels, restaurants, etc.) to develop into a noteworthy event.

Rick Loughead, with the desire to counteract the recent losses of SLO County's main wine events (i.e., World of Pinot, Hospice du Rhône, and Central Coast Wine Classic), purchased the event in 2013 and formed a non-profit corporation to retain its presence in San Luis Obispo County in perpetuity.

With a foresight to position the event on a global stage by attracting top winemakers from around the world, revered Sommeliers, media, trade and enthusiasts, the 2015 event was launched as the International Chardonnay Symposium. The 2015 event attracted 1200+ attendees over three days to

### Advisory Board

John King,  
Co-Chair

Rick Loughead,  
Co-Chair

Linda Sanpei,  
Executive Director

Mike Casola

Terence Concannon

Mark Eads

Dan Fox

Bill Hendricks

Benoît Lecat

Meridith May

June McIvor

Michael McNeill

Anne Moses

Mike Sinor

John Sorgenfrei

Brian Talley

twelve separate events held in Pismo Beach and Avila Beach. The enthusiasm of the attendees validated the need for such an event. Leading Sommeliers and trade who had never experienced the Central Coast are now advocating the region to their consumers, media continue to write about the event, and vintners from overseas are eager to participate in 2016. We approach the second annual International Chardonnay Symposium with great anticipation for further positioning our region as an epicenter for Chardonnay through this international event.

The 2015 event was funded by the Pismo Beach Hospitality Association and Avila Beach Tourism Alliance, each providing \$20,000 seed money and \$15,000 in marketing support. The Highway 1 Discovery Route provided \$10,000 in marketing support and sponsors Farm Supply and Tricor Braun contributed \$4,000. John King and Rick Laughead provided \$37,000. Last year's event resulted in net ticket sales from guests of \$15,714 and net sales from winery participation of \$12,839.

## **2016 OVERVIEW**

The three-day event, May 12-14, 2016, will place the world's preeminent wines and culinary talent alongside San Luis Obispo County vintners and purveyors. We are planning to host 80-plus wineries from the U.S., France, Australia, Argentina, Italy, Tasmania, South Africa, and beyond.

The ICS will target an upscale audience that consumes wine, enjoys experiential travel. Though we foresee the primary audience coming from drive-to markets in the initial years, we anticipate greater national and global attendance as the ICS continues to elevate its reputation as a top-shelf international event.

This year's event will be headquartered in Edna Valley at Greengate Ranch & Vineyards, with a majority of the seminars located in Edna Valley, Pismo Beach and Avila Beach. We anticipate that 2017 will expand to include coastal and north county wineries' participation in the formation of wine club dinners and other hospitality opportunities.

The 2016 symposium will host eighteen events over three days, ranging in price from \$50-\$90 for seminars and tastings; \$125-\$150 for winemaker dinners, and \$75-\$100 for the Grand Tasting. Exhibitor registration for the Vintners Wine Tech Symposium and for the Grand Tasting are each \$300.

As a sponsor, Visit San Luis Obispo County will receive national and international recognition through ICS's advertising, marketing and public relations efforts throughout the year. This will include branding on print and digital assets, website, and access to attending media. By building county brand ambassadors through the attending Sommeliers, media and out-of-area trade and consumers, the county can be assured that

these ambassadors will promote the region as a year-round top cultural, culinary and coastal experience on par with the best destinations nationally and internationally.

### **ATTENDANCE DATA**

Hosting the event in the shoulder season, during what has traditionally been a slow tourism week on the Central Coast, provides a significant increase in weekday and weekend room nights. We anticipate 2,500 participants, 60% out-of-area, staying an average of two nights in Pismo Beach, Avila Beach, and San Luis Obispo, while 20 renowned sommeliers will stay on-site at Greengate Ranch & Vineyards and Edna Valley vacation rentals.

Overnight patterns will reflect a higher concentration of midweek stays along with maximized occupancy on the weekend. We forecast a higher percentage of out-of-area guests, 60%, through our industry focus and greater media representation, with estimated booked room-nights of more than 1,450 exceeding \$300,000 in gross revenue, in addition to the dollars spent among our county's restaurants, wine shops, tasting rooms, retail stores and attractions. We fully expect room occupancy to exceed 1,000 rooms per event day within 2 to 3 years during this shoulder season contributing significantly to additional visits per year to the county.

Lodging partners and sponsor BIDs will be prominently featured on the ICS website with links to their respective websites. Additionally, lodging partners will have the opportunity to provide their guests with \$20-off ticket purchases and therefore be able to bundle and promote packages for guests which they will do online, through newsletters and social media.

Millions of trade and consumers will be reached through our media pre- and post-event editorial, advertising and social media efforts. Additional coverage of the event and our region will be secured through proactive media outreach and press releases. We plan to host no less than 30 out-of-area journalists to attend the event and tour the various attractions of our county. SLO Wine Country Association will host a media tour that will overlap ICS, bringing 8-12 additional media.

Eventbrite is being used for ticket sales and will provide relevant statistics at the conclusion of the event. Sales will be tracked by several discount and access codes to segregate tickets purchased by winery participants, wine club members, lodging partner guests, trade and media. Registration data will include the zip code of all attendees and, if they're traveling from out of the area, whether they plan to stay at a hotel, motel, B&B or vacation rental.

## **VENUES & ACCOMMODATIONS**

Symposium events will be held at a variety of locations throughout San Luis Obispo County. The beautiful Greengate Ranch & Vineyards in the Edna Valley is the main event center and will be home to the VIP Welcome BBQ, La Paulée Dinner & Vintner Awards Ceremony, VIP Seminars and Grand Tasting & Auction. Additional seminars and intimate winemaker dinners will be held throughout Pismo Beach and Avila Beach locations such as, The Cliffs Resort, Lido at Dolphin Bay, Sycamore Mineral Springs Resort, Avila Lighthouse Suites, Avila Beach Golf Resort and other yet-to-be determined locales in SLO County.

## **SPOTLIGHT REGION**

Chablis, the most-famous Chardonnay region in the world, will be our spotlight region in 2016. Focus on key international regions will aid in building the global positioning of the symposium.

## **EVENTS**

The 2016 ICS will also include the new Sparkling Wine & Oysters Gala, as well as six Winemaker Dinners with Culinary Institute of America Chefs and Sommeliers. By popular demand, the Sommelier Chardonnay Challenge Wine Competition and the Vintners Wine Tech Symposium will be part of the event again this year. The Grand Tasting and La Paulée Dinner and Vintner Awards Ceremony will return as the social highlights of the weekend. The following seminars reflect a diverse array of topics:

### **Thursday, May 12**

*Vintners Wine Tech Symposium*  
*Sommelier Chardonnay Challenge*

### **Friday, May 13**

*French Forum: Exploring the Wonders of White Burgundy*  
*Wente Clone Comparative Tasting*  
*Pét-Nat, Sparkling Wine & Oyster Gala*  
*La Paulée Dinner and Vintner Awards Ceremony*

### **Saturday, May 14**

*What's Oak Got To Do With It?*  
*Pairing Chardonnay & Artisanal Cheese*  
*Taste the Difference: Exploring California's Distinct Chardonnay Regions*  
*Hone Your Chardonnay Blind Tasting Skills*  
*Grand Tasting*

Please visit the website, [www.thechardonnaysymposium.com](http://www.thechardonnaysymposium.com), for a complete list of times and locations for the May 12 -14, 2016 events.



## **BRANDING**

As a result of analyzing last year's attendance, which doubled from the previous year, it was obvious that mass marketing was both expensive and ineffective. This could be due to the fact that SLO County is not well recognized as a major destination when compared to Monterey or Santa Barbara Counties. However, from the wine trade perspective, this county has a well-deserved reputation for both wine quality and hospitality. The 2015 ICS event established itself as a premier international Chardonnay event due to its inclusion of major recognized moderators, panelists, vintners, sommeliers and chefs. It's imperative that for a major event to succeed it must first establish itself as a recognizable brand and this requires a long term commitment from several resources. However, the trade has recognized and embraced that ICS represents the Chardonnay industry and has international.

## **MARKETING OVERVIEW**

The marketing goal of the ICS is to build buzz , increase attendance, and expand fan base around the ICS brand to ultimately make the it an internationally acclaimed and profitable event.

### **Marketing**

- Target the drive-to and fly-to markets of Southern CA, Northern CA, Fresno, Bakersfield, Las Vegas and Phoenix using geo-fencing initiatives.
- Target an upscale audience that consume wine, enjoys experiential travel.
- Promote the ICS through regional, national and international print, broadcast and digital media, ICS and partner websites, press releases, social media, newsletters and direct media outreach.
- Create banner ads to be shared with participating wineries, DMOs, associations and ancillary partners.
- Promote the ICS in key feeder markets via pop-up tastings.
- Expand our national and global attendance.
- Develop monthly newsletter content for use by the vintners, lodging properties, sponsors and tourism associations.
- Collaborate with Vintners & Growers Associations, wine importers and ancillary partners to create compelling outreach to the sphere of influence.
- Produce creative for use in print and digital advertising.
- Generate POS materials, such as rack cards, posters and brochures that showcase the event and the region at large.
- Develop and showcase compelling videography of the event and the region as a whole.

- Highlight hotel specials/packages that promote both the event and the lodging properties.
- Create compelling contests that engage consumers to attend the event.
- Share photos via Instagram, Facebook, Twitter. These photos can be owned by ICS and/or sponsors or they can be user-generated photos. If user-generated, the person who took the photo will receive credit.
- Cross-promote on all of ICS's social media accounts, including relevant hashtags for ICS and sponsors, on Facebook, Instagram and Twitter.
- Interact with other related content on Facebook, Instagram and Twitter to increase awareness and entice consumers to attend the event.

### **Public Relations**

- Engage media to attend the event, while encouraging pre- and post-event coverage of the ICS. To date we have 25+ qualified media scheduled to attend the event, with several more anticipated.
- Work with SLO Wine Country to develop a FAM Tour that includes the ICS.
- Craft series of four targeted press releases to be sent out prior to the ICS event.
- Write and distribute a post-event press release recapping the highlights of the 2016 event and announce the dates of the 2017 ICS.
- Work with our media sponsors, *Tasting Panel Magazine*, *SOMM Journal*, *805 Living*, *Wine Country This Month*, *Touring and Tasting* and *Wine Enthusiast*, to develop pre-event content.

### **Advertising Plan**

- *Wine Enthusiast Magazine* (print, digital, newsletters)
- *Wine Country This Month* (April full page)
- *Tasting Panel Magazine*, *SOMM Journal* (digital & print)
- *Orange County Register*, *Orange Coast Magazine*,
- *NewportIndy.com* (digital, blogs, e-newsletters, retargeting)
- *805 Living Magazine* (March, April & May-digital & print)
- Facebook and YouTube advertising

The ICS generated over 65 million earned media impressions in print, broadcast and digital media in 2015, and an estimated 10 million impressions through social media. We anticipate doubling the reach in both categories in 2016.

### **COMMITTED & TARGETED SPONSORS**

The existing budget approximates \$225,000 and the event has secured commitments from:

1. Pismo Beach CVB: \$30,000 capital/\$30,000 marketing assistance

2. Avila Beach Tourism Alliance: \$20,000 capital/\$10,000 marketing assistance
3. Highway 1 Discovery Route: \$20,000 capital/\$10,000 marketing assistance

In an effort to:

1. Provide an additional 1,450 room-nights in revenue for county lodging properties during one of the season's slowest shoulder months
2. Ensure the Symposium stays in San Luis Obispo County in perpetuity
3. Create a synergistic tourism partnership between the communities of Avila Beach, Pismo Beach, Highway 1 Discovery Route and the San Luis Obispo County TMD
4. Ensure the highest level of participation among vintners and industry tastemakers
5. And maintain cohesion and growth in the event's year-over-year development

Additional targeted sponsors include: Aaqua Tools, AEB Group, Alain Fouquet French Cooperage, Alfano Motorcars, Amcor Flexibles, American Tartaric Products, Andre, Morris & Buttery, Artisan Barrels & Tanks, Associates Insectary, BAR Architects, Barrel Mill, Bin to Bottle, Boswell Company, Bruni Glass, CalWest Rain, Canton Cooperage, CANVAS, Castoro Bottling, Cellotape, Compli Software, Cortica Benicia USA, Criveller California, Dickenson Peatman & Fogarty, Dignity Health, EcoLab, Enartis Vinqury, Encore Glass, Eurofins, Farm Credit West, Farm Supply, Franmara Wine Accessories, G3, Gamajet, Glenn Burdette, Greenleaf Technologies, Grey Creek, Golden State Overnight, Herrick Grapevines, Hinman & Carmichael, Hoffmeister Barrelworks, Honeywell Analytics, Honeywell Automation & Controls, Innerstave, Lowthorp Richards, Magorian Mine Services, Marrone Bio Innovations, Mavrik North America, Mepco Label Systems, Mercier Barrels, Microworks Wine Software, Mistral Barrels, Morris & Garritano, Nadalie Tonnellerie, Pack n' Ship Direct, Paso Robles Tank, Pickering Winery Supply, Portocork, Rabobank, Radiant Fires, Revolution Equipment Sales, SLO County Farm Bureau, Saury USA, Scott Laboratories, Seguin Moreau, Sespe Consulting, Simpson Garrity Innes & Jacuzzi, Sonoma Cast Stone, StaVin Incorporated, Sunridge Nurseries, Tetra Tech, Tom Beard Company, Topco Barrel Racks, Trader Joe's, Tricor Braun WinePak, True Fabrications, Trust Automation, Vintegrate, Wallace Group, Walter & Prince Law, Western Square Industries, and Wine Direct.

## **IMPACT**

Because the hospitality community has the ability to provide the meeting facilities, food, beverage – and even more important – room accommodations, they and the regional DMOs are critical partners to ensure return visits. In addition to the quality of our restaurants and hotel accommodations, our county has special environments that must be seen to be appreciated and this will occur as new visitors are invited into the unique areas of the county. And, therein lies the importance of the winery participation; all major wineries have developed, at considerable expense, a wine club membership program and some of

the largest wine club memberships are located in this county. The majority of these consumers are located outside this county and generally look forward to a reason to visit. This consumer meets our ideal profile – a variable age level, one that appreciates our wine-friendly atmosphere, and a relatively affluent visitor. This year a selected group of 5 to 6 wineries have agreed to initiate a special program for their wine club members. All club members would qualify for certain discounts, and between 10 to 20 out-of-area couples would be invited to a special wine club dinner at the designated winery or location of their choice. In addition, ICS would donate to the wine club package with guest passes to the seminars and Grand Tasting. In 2017 and 2018, this format would be expanded throughout the county, and over time, the inclusion of wine club dinners in Santa Barbara and Monterey counties might qualify the ICS for marketing assistance with the State of California (Visit California).

For this specific reason, it is vital to concentrate on major wine club members, as opposed to the general public for tasting events. The event must appeal to the trade as well as consumers to be most effective and wine club members' attendance helps meet that goal. Another example of the benefit of wine trade participants was apparent at last year's event, which was the first time sommeliers were invited to participate. Several mentioned that although they had sold quality wine from the Arroyo Grande and Edna Valley areas, they had never visited here previously and thought that this area was located in Northern California. They were so impressed that several have made arrangements for a return visit on their own. Incidentally, this year we will host 20+ sommeliers representing major U.S. restaurants as well as Culinary Institute of America (CIA) chefs. In both cases, new participants will be invited each year in order to gain the greatest exposure to the county and the event.

### **FUNDING PROPOSAL & REQUEST**

The ICS is proposing the following sponsorship package from VSLOC/TMD Funds:

1. \$20,000 in event funding (\$10,000 seed capital + \$10,000 marketing). The balance of the required income to be derived from the seminar, dinner and vintner sales (\$85,000).

### **PHILANTHROPY**

The Symposium adopted the Department of Wine & Viticulture and Department of Recreation, Parks & Tourism Administration at Cal Poly as its charitable beneficiaries, contributing significant funding to these two vital programs.

## **MEASUREMENT OF SUCCESS**

We see this as a tremendous opportunity for the county to embrace its unique position as the country's premier ocean-side destination for wine production and appreciation. The foundation has already been built for this world-class international event, showcasing our beautiful county, our gracious communities, our commitment to our partners in the winemaking industry, and our dedication to making San Luis Obispo County a top-of-mind vacation and tourism destination.

By becoming a main sponsor of the International Chardonnay Symposium, Visit San Luis Obispo County will help accomplish our mission of establishing a unique international event in our county that will prosper tourism while building long-lasting economic vitality for our community. Success is measured when we have a world-class, self-sustaining, county-wide annual international event that showcases our county as a top destination for wine, culinary, cultural and coastal tourism.

In closing, the importance of identifying the International Chardonnay Symposium with the County of San Luis Obispo cannot be underestimated. We believe partnering with the ICS will provide Visit San Luis Obispo County with the exceptional long-term branding and outreach opportunities to out-of-area travelers who will become repeat visitors to the county.

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'Linda Parker Sanpei', is written over a horizontal line. The signature is stylized and cursive.

Linda Parker Sanpei

Director

The 2016 International Chardonnay Symposium



# Visit San Luis Obispo County

## Activity Report, January 2016

### - What's New -



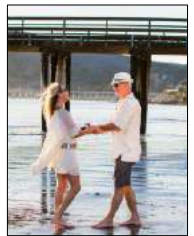
#### **New Pre-Roll Videos Set to Launch**

After procuring brand-new video assets of SLO County, Visit San Luis Obispo County is excited to launch three new pre-roll videos in feeder markets as part of VSLOC's shoulder season campaign. The videos showcase the region with three separate themes: "Hang Time," "Cruise In," and "Joy Ride."

The pre-roll videos are viewable on the VSLOC Youtube Channel: <http://bit.ly/1ScmhHM>.

#### **San Luis Obispo County Romance Month is Here!**

February is Romance Month in San Luis Obispo County and Visit SLO County is giving away a Mini-Moon to one lucky couple this month. Check it out on the VSLOC Facebook page at [Facebook.com/VisitSanLuisObispoCounty](https://www.facebook.com/VisitSanLuisObispoCounty). It's not too late for you to upload your Valentine's Day or February deals. Log on to your member page today, and make sure to mark 'Romance' and 'Valentine's Day' in the category section when submitting events and deals. Email Jordan at [Jordan@VisitSanLuisObispoCounty.com](mailto:Jordan@VisitSanLuisObispoCounty.com) or call 805-541-8000 for more information.



#### **Booking Engine Approved—Action Required!**



The Visit San Luis Obispo County Board of Directors has approved contracting with Booking.com as a booking tool on the [VisitSanLuisObispoCounty.com](http://VisitSanLuisObispoCounty.com) website. All lodging members who are currently contracted with Booking.com will be automatically opted in. Those who would like to opt out should contact Michael Wambolt by February 12, 2016. For those who choose to opt out, the "Book Now" link on the Visit San Luis Obispo County website will link directly to their personal lodging site. Lodging properties that are not currently contracted with Booking.com, but would like to be, should contact Michael at [michael@visitsanluisobispo.com](mailto:michael@visitsanluisobispo.com) or 805-541-8000 for more information.

#### **Visit San Luis Obispo County Welcomes Pam Roberts**

Visit San Luis Obispo County is excited to welcome its new Travel Trade Sales Coordinator—Pam Roberts.

Pam brings more than 18 years of tourism marketing and sales experience, most recently managing the Visitor Center for the SLO Chamber of Commerce, overseeing a staff of eight. She was able to increase retail sales by 185%. Before that, she managed the California Welcome Center in Pismo Beach (the busiest Welcome Center in California). Pam spent six years in Wellington, New Zealand helping to coordinate large scale events such as Harvest Crusade, which saw more than 12,000 attendees. Pam also owned her own boutique, which allowed her to coordinate many events from weddings to teas on the Central Coast.



#### **Board of Directors Bed-and-Breakfast (B&B) Seat: Apply Now!**

Visit San Luis Obispo County (VSLOC) is now accepting applications for the bed-and-breakfast seat on the VSLOC Board of Directors, which will be vacant as of February 2016. Board meetings are currently held on the third Wednesday of each month from 8:30 – 10:00am and rotate locations throughout the county. Those desiring to serve on the board, and currently working as part of the management team of an assessed B&B in San Luis Obispo County, should visit the Members Area of the Visit San Luis Obispo County website for more details. For questions, contact Brendan at 805-541-8000 or [brendan@VisitSanLuisObispoCounty.com](mailto:brendan@VisitSanLuisObispoCounty.com).

#### **Visit SLO County Attends NTA Travel Exchange**

Visit San Luis Obispo County's Director of Travel Trade, Michael Wambolt, travelled to Atlanta, Georgia for the 2016 National Travel Association (NTA) Travel Exchange, January 31st – February 4th. VSLOC secured 38 appointments with international and domestic tour operators. VSLOC's main objective for this show was to secure leads from emerging markets and continue the educational process that our county is no longer just a stopover, but a multi-day destination.





Visit San Luis Obispo County is a 501c6 tourism non-profit. For more information please call (805)541-8000.



Featured in *SF Gate*:  
San Luis Obispo's  
Bang the Drum  
Brewery (left) and  
Morro Bay's  
Taco Temple  
(right).



## Trending

### Public Relations

- Derek Low, DerekLow.co – Pismo Beach, San Luis Obispo: February 18-19
- Betsy Malloy, Examiner.com – Paso Robles and Cayucos: February 27-28
- Will McGough, Gear Patrol: February 28-March 3
- Visit California New York Media Event: March 22
- Visit California Texas Media Bootcamp: April 7-8
- North America Travel Journalists Association FAM: April 8-10

### Media

- SF Gate – Hit the trails <http://sfg.ly/23TuS68>
- SF Gate – Taco Temple takes road food to exalted heights <http://sfg.ly/1T1i6gX>
- SF Gate – The new craft-brew artisans in San Luis Obispo County <http://sfg.ly/20GIP9y>
- Canadian World Traveller – Been dreaming of California
- Canadian World Traveller – Stay & Play: California Style
- Lady from a Tramp (UK) – Roadtrippin' – Madonna Inn, San Luis Obispo <http://bit.ly/100m7eX>

### Travel Trade

- MPI Northern California Expo: February 10
- Go West Travel Summit: February 20-25
- MPI Sacramento Trade Show & Sales Mission: March 14-16
- Visit California China Sales Mission: April 8-15
- International Pow Wow: June 18-22



### Visit San Luis Obispo County Set to Attend

#### Domestic and International Visit California Media Events

Visit San Luis Obispo County is preparing for four upcoming Visit California Media Events. These events include New York (March), Austin, TX (April), and Vancouver and Calgary, Canada (May). VSLOC Senior Communications Coordinator Kylee Jepsen will be attending these events on behalf of the County, pitching the Culinary, Coastal and Cultural assets of each destination within the region.

### eHotelier News Article:

#### 5 Ways to Improve Direct Online Booking Conversions

In an effort to avoid paying online travel agent commissions of 20 percent or more, hotel marketing teams are increasingly investing in digital advertising campaigns to drive traffic directly to their sites. While attracting more unique monthly visitors is a necessary step for hotels looking to increase direct online bookings, the average abandonment rate for hotel sites is a whopping 77 percent!

Here are five areas where hoteliers have the most opportunity to improve conversions through their direct online sales channel: <http://bit.ly/20RVKB9>



### VISIT SLO COUNTY WEB ACTIVITY

VISITS:	50,686
UNIQUE VISITORS:	38,376
PAGE VIEWS:	156,974
AVG. PAGE VIEWS/VISIT:	3.10
AVG. TIME ON SITE:	2:38
TOTAL ORGANIC TRAFFIC:	29,823
% OF ORGANIC:	59%
MOBILE VISITS:	29,441

#### MOST VISITED EVENT:

FARMER'S MARKET (766 VIEWS)	
TOTAL BLOG VISITS:	8,955
MOST SHARED BLOG: MEET CHEF CHRIS BECKETT	
<a href="http://bit.ly/1ORKMKJ">HTTP://BIT.LY/1ORKMKJ</a>	

### VISIT SLO COUNTY

#### FACEBOOK

LIKES: 14,617	NEW: 913
TOT. IMPRESSIONS:	633,077
HIGHEST ENGAGEMENT: HAVE YOU HIKE THE AVILA RIDGE TRAIL? (1730 ENGAGEMENTS)	
MOST LIKED: HAVE YOU HIKE THE AVILA RIDGE TRAIL? (1204 LIKES)	

	FOLLOWERS	NEW
TWITTER:	5,901	116
43.3K IMPRESSIONS		
TWEETS: 6,417		
PINTEREST:	636	9
PINS: 802		
INSTAGRAM:	2,601	491
POSTS: 525		

#### VISITOR GUIDE DIST.

WEB DOWNLOADS:	59
GUIDES DISTRIBUTED:	3193
TOTAL:	3252

#### MONTHLY E-SPECIAL

SUBSCRIBERS:	36,031
# OF OPENS:	6,460
# OF CLICK-THROUGHS:	763

#### THIS WEEK IN SLO COUNTY

CIRCULATION:	897
MOST CLICKED LINK:	
STR Report—Week of 1/10	

## December 2015 vs December 2014 Lodging Statistics (STR, Inc.)

Current Month - December 2015 vs December 2014												
	Occ %		ADR		RevPAR		Percent Change from December 2014					
	2015	2014	2015	2014	2015	2014	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold
Atascadero, CA+	48.9		102.27		50.00							
Morro Bay, CA+	49.9	48.8	101.99	97.89	50.86	47.75	2.2	4.2	6.5	6.5	0.0	2.2
Paso Robles, CA+	58.5	58.7	113.04	110.50	66.17	64.84	-0.3	2.3	2.0	19.9	17.5	17.2
Pismo Beach, CA+	53.3	51.1	134.31	125.76	71.57	64.23	4.3	6.8	11.4	11.5	0.1	4.4
San Luis Obispo, CA+	59.2	57.0	117.78	110.70	69.72	63.06	3.9	6.4	10.6	10.6	0.0	3.9
San Simeon, CA+	47.1	48.4	108.95	104.13	51.28	50.36	-2.7	4.6	1.8	1.8	0.0	-2.7
Five Cities+	52.1	51.1	128.16	119.94	66.75	61.29	1.9	6.9	8.9	9.0	0.0	2.0
North Coast+	51.9	50.1	132.04	125.92	68.48	63.10	3.5	4.9	8.5	8.5	0.0	3.5
North County+	55.9	55.8	110.52	106.96	61.83	59.70	0.2	3.3	3.6	25.9	21.5	21.8
South County+	55.4	53.9	122.94	115.33	68.15	62.12	2.9	6.6	9.7	9.7	0.0	2.9
San Luis Obispo County	54.4	52.8	119.90	113.83	65.22	60.08	3.1	5.3	8.6	12.8	3.9	7.1
<b>Santa Barbara/Santa Maria</b>	59.1	58.2	155.88	152.90	92.17	89.03	1.5	2.0	3.5	2.4	-1.1	0.4
<b>Monterey/Salinas</b>	53.1	50.3	151.44	146.83	80.38	73.84	5.5	3.1	8.9	9.4	0.5	6.1
<b>California</b>	63.8	62.3	134.76	131.52	85.93	81.96	2.3	2.5	4.8	5.3	0.4	2.7

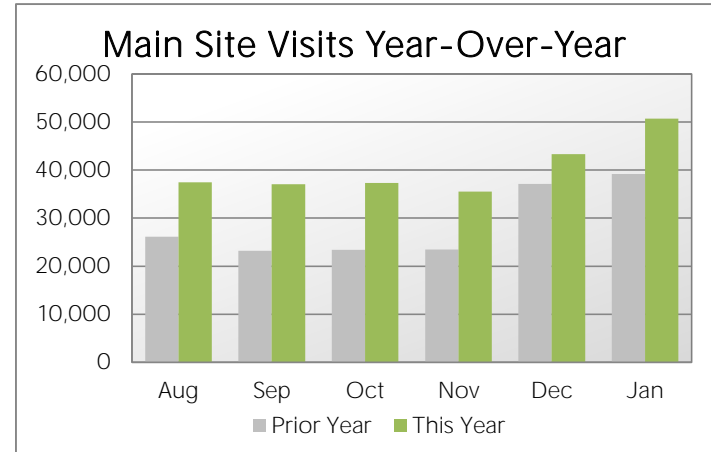
## Year to Date Lodging Statistics (STR, Inc.)

Year to Date - December 2015 vs December 2014												
	Occ %		ADR		RevPAR		Percent Change from YTD 2014					
	2015	2014	2015	2014	2015	2014	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold
Atascadero, CA+												
Morro Bay, CA+	66.1	64.5	121.45	115.75	80.24	74.64	2.5	4.9	7.5	7.5	0.0	2.5
Paso Robles, CA+	72.7	71.7	131.79	125.85	95.81	90.21	1.4	4.7	6.2	13.2	6.6	8.1
Pismo Beach, CA+	73.0	72.0	157.99	148.77	115.39	107.05	1.5	6.2	7.8	7.8	0.0	1.5
San Luis Obispo, CA+	73.7	71.4	136.11	126.45	100.33	90.32	3.2	7.6	11.1	11.0	-0.0	3.2
San Simeon, CA+	63.2	63.2	125.35	115.96	79.27	73.32	0.0	8.1	8.1	8.1	0.0	0.0
Five Cities+	71.7	70.7	151.44	142.11	108.60	100.47	1.4	6.6	8.1	8.1	0.0	1.5
North Coast+	68.3	66.7	149.13	140.84	101.92	94.00	2.4	5.9	8.4	8.4	0.0	2.4
North County+	70.2	69.4	128.60	122.41	90.27	84.99	1.1	5.1	6.2	16.7	9.9	11.1
South County+	72.7	71.0	144.11	134.68	104.70	95.68	2.3	7.0	9.4	9.4	0.0	2.3
San Luis Obispo County	70.7	69.4	139.95	131.82	98.98	91.42	2.0	6.2	8.3	10.2	1.8	3.8
<b>Santa Barbara/Santa Maria</b>	74.2	71.4	179.77	172.57	133.45	123.26	3.9	4.2	8.3	7.3	-0.9	3.0
<b>Monterey/Salinas</b>	70.4	67.8	188.53	180.15	132.77	122.11	3.9	4.7	8.7	9.1	0.4	4.3
<b>California</b>	74.7	72.7	149.96	140.19	112.01	101.86	2.8	7.0	10.0	10.5	0.5	3.3



### Total Traffic Overview:

	Aug	Sep	Oct	Nov	Dec	Jan
Visits:	37,447	37,075	37,359	35,523	43,292	50,686
Unique Visitors:	30,571	30,275	30,414	28,908	34,379	38,376
Bounce Rate:	49%	47%	51%	51%	48%	51%
Pageviews:	113,518	119,020	109,772	109,024	138,722	156,974
Avg Pageviews Per Visit:	3.03	3.21	2.94	3.07	3.20	3.10
Avg Time on Site:	0:02:19	0:02:25	0:02:06	0:02:18	0:02:36	0:02:38
Total Organic Search Traffic:	27,187	26,914	26,711	24,267	31,112	29,823
% of Traffic Organic Search:	73%	73%	71%	68%	72%	59%
Entry Pages From Search:	2,012	2,040	1,960	1,843	1,769	1,918
VisitSLOCounty Visits:	0	0	0	6,592	13,104	13,938
VisitSLOCounty Bounce Rate:	0%	0%	0%	90%	89%	86%



### Mobile/Tablet Snapshot:

	Aug	Sep	Oct	Nov	Dec	Jan
Visits:	20,530	20,534	21,160	20,055	25,072	29,441
% of visits	55%	55%	57%	56%	58%	58%
Bounce Rate:	52%	50%	54%	54%	50%	57%
Pageviews:	55,887	59,683	56,219	55,051	73,318	74,611
Avg Time on Site:	0:02:08	0:02:12	0:01:51	0:02:00	0:02:20	0:02:08

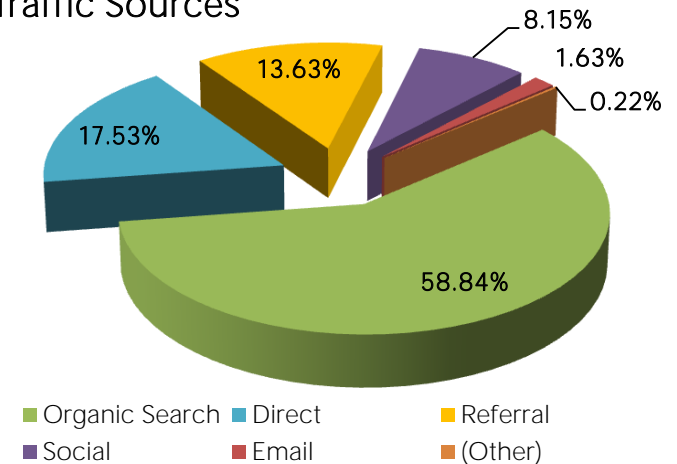
### Industry Averages:

Pages / Visit	Avg. Visit Duration	Bounce Rate
2.60	0:02:16	55.98%

#### SEO Overview:

- \* Visits increased 29% compared to last year.
- \* Unique Visitors on the site increased 33% year over year.
- \* Pageviews increased 10% compared over this time last year.
- \* Organic traffic increased 17% year over year.
- \* Organic entries to the Thursday Farmers Market page increased by 773% and by 204% on the Fairs and Festivals Events page.

### Traffic Sources



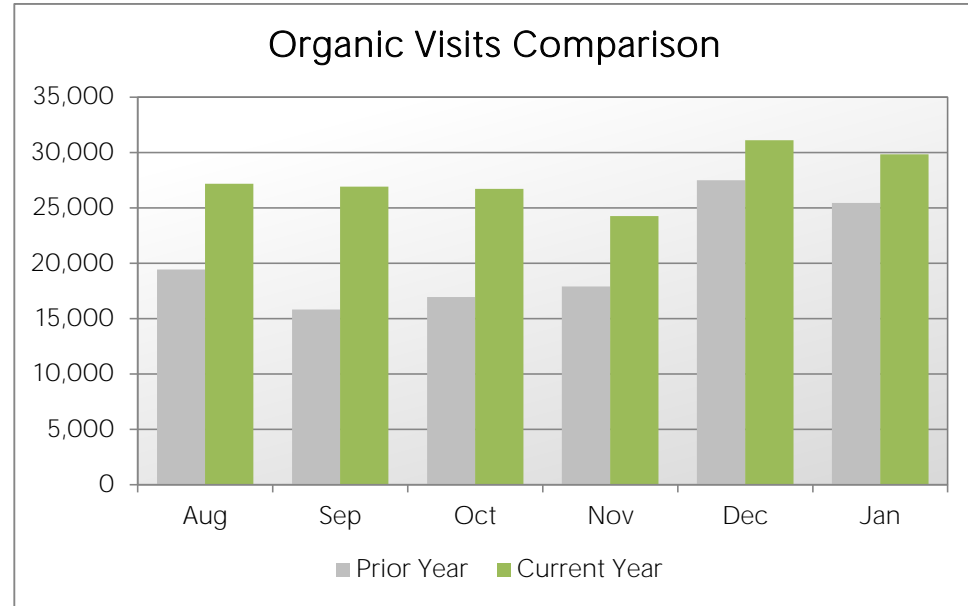
## Organic Search Traffic:

Organic Traffic	% of Total Site Traffic	
Visits	29,823	58.84%

Organic Engagement Compared to Site Engagement		
Pageviews Per Visit	3.35	8.26%
Avg. Time on Site	0:02:52	8.39%
New Visits	65.99%	-3.29%
Bounce Rate	45.61%	-10.80%

Search Engine	Visits	Percent
google	26,947	90.36%
yahoo	1,701	5.70%
bing	1,031	3.46%
aol	87	0.29%
ask	43	0.14%
msn	7	0.02%

Exact Keyword	Visits	Percent
(not provided)	27,973	93.80%
san luis obispo	149	0.50%
restaurant month san luis obispo	77	0.26%
how.to.travel.and.make.money.online.for.	42	0.14%
slo restaurant month	34	0.11%
san luis obispo events	23	0.08%
restaurant month slo	21	0.07%
visitsanluisobispocounty.com	20	0.07%
http://www.visitsanluisobispocounty.com	19	0.06%
san luis obispo restaurant month	19	0.06%



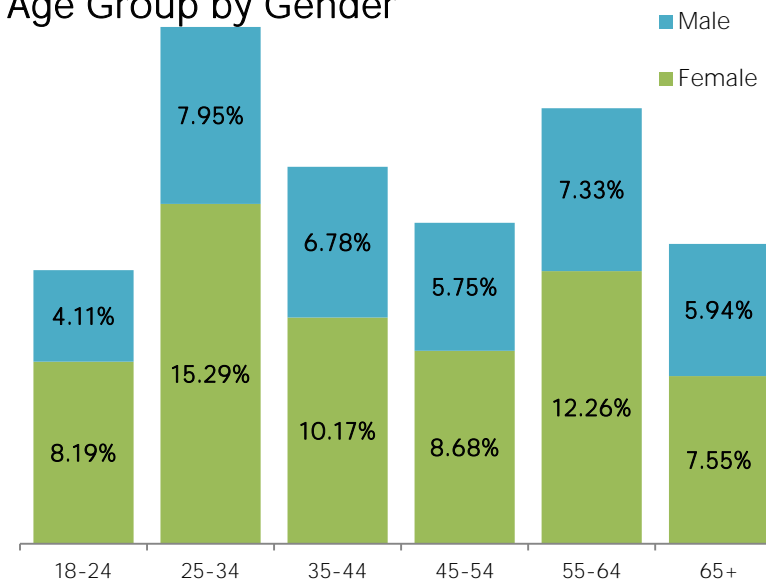
Landing Page	Visits	Percent
/restaurant-month	7,131	23.91%
/events	3,991	13.38%
/	3,154	10.58%
/activities	681	2.28%
/events/461/thursday-farmers-market	672	2.25%
/events/all/fairs_and_festivals	602	2.02%
/our-area	545	1.83%
/blog/773/7-things-to-do-when-it-rains-on-the-central-coast	385	1.29%
/lodging	302	1.01%
/events/all/childrens_activities	242	0.81%

## Demographics & Interests

### Affinity Categories:

Top 10 Affinity Categories	Visits
Movie Lovers	18,235
TV Lovers	16,389
Cooking Enthusiasts/Aspiring Chefs	16,216
News Junkies & Avid Readers/Entertainment & Celebrity News Junkies	15,642
Travel Buffs	13,556
News Junkies & Avid Readers	12,670
Technophiles	11,129
Home Decor Enthusiasts	11,043
Health & Fitness Buffs	10,844
Shutterbugs	9,843

### Age Group by Gender



### Other Categories:

Top 10 Categories	Visits
News/Weather	10,647
Arts & Entertainment/Celebrities & Entertainment News	10,543
Arts & Entertainment/TV & Video/Online Video	7,804
Food & Drink/Cooking & Recipes	7,069
Real Estate/Real Estate Listings	4,300
Reference/General Reference/Dictionary & Encyclopedias	3,725
Travel/Air Travel	3,651
Food & Drink/Food/Baked Goods	3,577
Travel/Hotels & Accommodations	3,515
Internet & Telecom/Email & Messaging	3,068

**Affinity Categories** broaden the scope to identify users in terms of lifestyle; for example, Technophiles, Sports Fans, and Cooking Enthusiasts. These categories are defined in a similar way to TV audiences, and represent an opportunity to understand the behavior of your audience.

**Other Categories** are used to classify groups of users based on the specific content they consume, along with how recently and frequently they consume that content. This category data provides a more focused view of your users, and lets you analyze behavior more narrowly than Affinity Categories.

\* Per Google

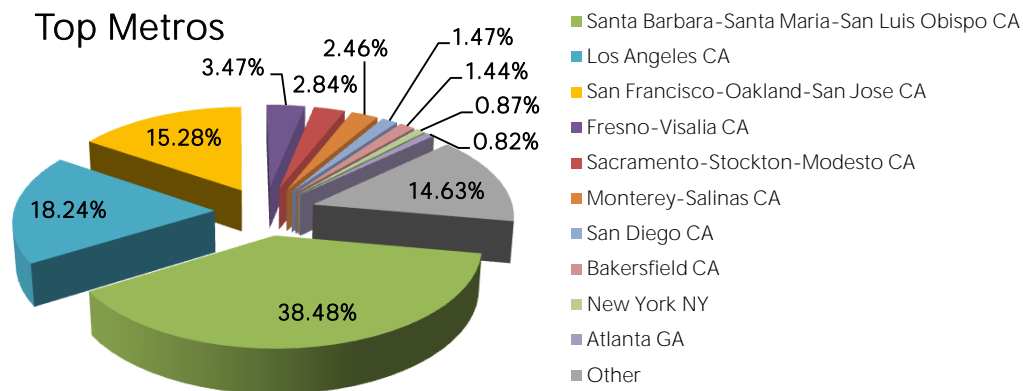
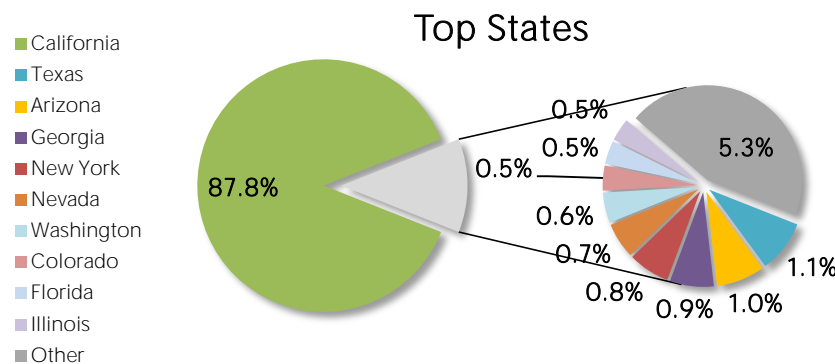
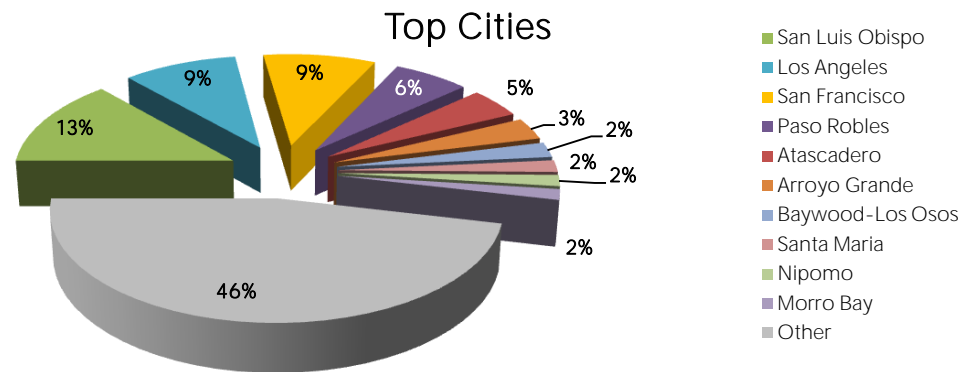
### Top Content:

Top Landing Pages	Entrances
/restaurant-month	14,046
/	7,021
/events	5,157
/lodging	2,368
/activities	768
/events/461/thursday-farmers-market	766
/events/all/fairs_and_festivals	679
/our-area	672
gaucho-in-paso-robles	615
coast	484

Top Content Pages	Pageviews
/restaurant-month	44,883
/	9,784
/events	8,488
/lodging	3,457
/events/all/fairs_and_festivals	2,024
/our-area	1,918
/deals	1,753
/events?page=1	1,319
/activities	1,156
/events/all/childrens_activities	1,152

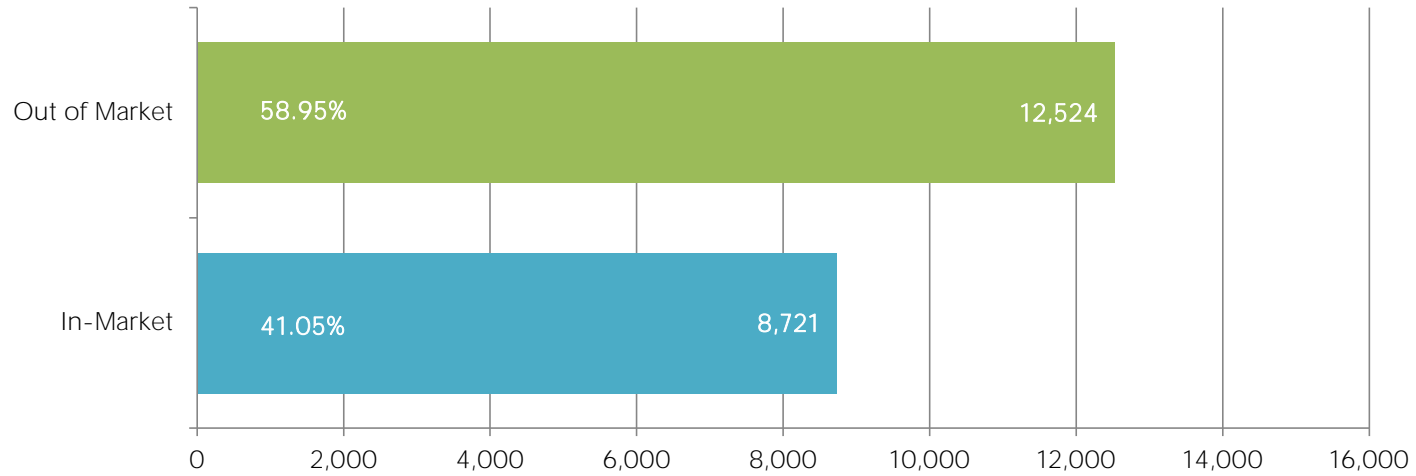
Top Exit Pages	Exits
/restaurant-month	12,218
/	4,071
/events	2,198
/lodging	2,005
/our-area	798
/events/461/thursday-farmers-market	688
/blog/886/meet-chef-chris-beckett-executive-chef-of-fish-ga	636
/events/all/fairs_and_festivals	573
/deals	507
/blog/773/7-things-to-do-when-it-rains-on-the-central-coast	461

### Geographic:



## In-MarketVsVistor:

### Desktop Visits



### Mobile/Tablet Visits

