



# AGENDA

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## Visit SLO CAL Executive Committee

### Visit SLO CAL Executive Committee Agenda

Monday, September 18, 2017

11:30am

Visit SLO CAL Conference Room

1334 Marsh Street, San Luis Obispo, CA 93401

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 – motion required</b>	<b>C. Davison</b>
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3. Approval of August 16, 2017 Executive Committee Meeting Minutes (yellow)
4. Approval of June/FY2016-17 Year-End Financials (green)
5. Approval of July and August Financials (green)  
*Staff will ask for Committee approval of the August 16, 2017 Executive Committee Meeting Minutes, the June/FY2016-17 Year-End Financials, and the July and August Financials.*

<b>CEO REPORT</b>	<b>C. Davison</b>
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6. CEO Report (15 min)  
*Staff will provide an update on current projects, reporting and areas of focus for the months ahead.*

<b>BUSINESS ITEMS</b>	<b>C. Davison</b>
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7. FY2016-17 Audit (10 min) – motion required  
*Staff will request Committee approval of VSC's FY2016-17 Audit.*
8. FY2016-17 Annual Report (10 min) – motion required  
*Staff will request Committee approval of VSC's FY2016-17 Annual Report.*
9. PR Agency Selection (10 min) – motion required  
*The Committee will review the Marketing Committee's recommendation on the selection of a PR Agency and make a recommendation for Board approval.*
10. Board and Executive Committee Seats (15 min)  
*The Committee will discuss the process required to fill the open Atascadero Board seat and the Secretary seat on the Executive Committee.*
11. Board Member Attendance (10 min)  
*The Committee will discuss Board member attendance as outlined in the VSC Bylaws, based on the transition to a bi-monthly meeting schedule.*

**12. County Agreement with Airbnb (20 min)**

*Staff will provide an update to the Committee on the current county contract effort requiring Airbnb to pay TOT and assessments (TMD & CBID, where applicable) in the unincorporated area.*

**13. Financial Discussion (15 min)**

*The Committee will discuss VSC's current personal guarantor credit card account and potential changes to its operating and reserve cash account.*

**14. Marketing Update (15 min)**

*Staff will provide an update on key marketing initiatives.*

**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 Executive Committee to discuss or take action on issues not on the agenda, except that members of the Committee may briefly respond to statements made or questions posed by the person giving public comment. Staff may be directed by the Committee to follow-up on such items and/or place them on the next Committee agenda. The order of agenda items is listed for reference and items may be taken in any order deemed appropriate by the Executive Committee.

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 SLO CAL Executive Committee

### Visit SLO CAL Executive Committee

#### Meeting Minutes

Wednesday, August 16, 2017

11:30am

Visit SLO CAL Conference Room

1334 Marsh Street, San Luis Obispo, CA 93401

**1. CALL TO ORDER:** Clint Pearce

**PRESENT:** John Arnold, Aaron Graves, Jay Jamison, Clint Pearce

**ABSENT:** JP Patel

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

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**Call to Order at 11:34am.**

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

None.

**ANNOUNCEMENTS**

Davison reminded the Committee to cc "Records@SLOCAL.com" on any emails pertaining to other Board, Committee and VSC team matters of official Visit SLO CAL business.

**CONSENT AGENDA**

**3. Approval of July 18, 2017 Executive Committee Meeting Minutes**

**4. Approval of August 3, 2017 Executive Committee Special Meeting Minutes**

Davison noted that June/Year-End Financials will be presented to the Executive Committee and Board in September, along with the annual Audit. July Financials will also be presented at these September meetings.

Public Comment – None.

Committee Discussion.

**ACTION:** Moved by Jamison/Graves to approve the Consent Agenda as presented.

**Motion carried: 4:0**

**CEO REPORT**

## **5. CEO Report**

Davison shared U.S. Travel's Travel Trends Index with the Committee, noting that compared to other international markets, the United States is propelling forward. Domestic travel continues to advance, and is forecasted to advance through 2018.

On August 9, 2017, State Fund, our worker's compensation insurance performed a routine payroll audit. We should hear back from their auditor in the next couple months.

On July 31, 2017, VSC received a letter from the IRS asking that VSC pay a penalty for 1099s that they claim arrived late, although they were filed timely. VSC's auditor, Dennis Burkhart, sent a letter in response, and VSC is awaiting follow-up from the IRS.

Davison reported out on the DMA West Leadership Summit (July 31-August 2, 2017), and noted that Visit SLO CAL submitted an RFP for next year's event.

Davison noted that he will not be able to present at the City Managers Meeting on August 18, 2017 due to a schedule conflict with the CalTravel Board Meeting, but is working to reschedule for a different month. He also noted that he will be presenting Visit SLO CAL's annual report to the Morro Bay City Council Meeting on August 22, 2017.

Davison outlined his travel schedule.

Public Comment – None.

Committee Discussion.

## **BUSINESS ITEMS**

### **6. Cannabis Legalization Education**

Davison noted that the role of VSC should be to help educate constituents on how to be successful in an approved Prop 64 California. VSC is working with Cal Travel to create a one-sheet of best practices based on the learnings discovered from other states with legal recreational cannabis to distribute prior to January 1, 2018. At the same time, the organization needs to assert a position on the marketing of cannabis-related activities before January 1, since at least one contributing TMD community (Grover Beach) is advancing recreational cannabis sales. Davison requested feedback from the Committee.

Public Comment – None.

Committee Discussion.

### **7. Highway One Closure Update**

On August 2, 2017, Caltrans announced that a roadway will traverse over the Mud Creek slide, using a series of embankments, beams, rocks, netting culverts and other stabilizing material. A more specific timetable and cost estimate is expected by the end of August. VSC has activated a \$25,000 dollar-for-dollar match advertising co-op for our North Coast partners and members. Davison reported out on his meetings with California State Senator Bill Monning and Assemblyman Jordan Cunningham about the Highway One closure. He noted that Sen. Monning was well-versed on the issue, and that it was an opportunity to educate Assemblyman Cunningham on the need for a timeline on the new road. Cunningham committed to start discussions with Caltrans on this issue. Davison also provided an update on VSC's Highway One communications efforts, including recent interviews with local media. VSC's North Coast constituents continue to express appreciation of the organization's efforts.

Public Comment – None.

Committee Discussion.



## 8. Collaboration Consulting Update

In conjunction with Imperative 1 of the strategic plan (Optimize our organizational capacity), VSC contracted Collaboration for another round of consulting. Davison discussed the WorkTraits assessment that they performed, noting that VSC now uses this for every candidate it is seriously considering to see how they would fit in with the organization and how they would work with their supervisor. He added that the second round of consulting includes re-writing job descriptions to make them more user-friendly and coaching sessions with leadership team members.

Public Comment – None.

Committee Discussion.

## 9. Destination Development Strategy

In conjunction with Imperative 4 of the strategic plan (Advocate for the development of critical tourism infrastructure), VSC is setting the groundwork to develop a long-term tourism infrastructure master plan, also known as a destination development plan. VSC has reached out to consultants that have drafted the destination development plans for major destinations like Travel Portland, Vancouver and others. VSC hopes to have the proposals for consideration by the Board this fall. Davison asked the Executive Committee what they believe the appetite of communities is to engage in this and what might be some hot-button issues to consider in their respective communities. Davison noted that the study could take 18-24 months to complete, and it would have a hefty development cost, due to the size and scope of the region.

Public Comment – None.

Committee Discussion.

## 10. Marketing Update

Davison provided an update on VSC's Travel Trade efforts and upcoming opportunities, Film SLO CAL's recent projects and media exposure, and VSC's PR efforts, press hits and upcoming opportunities. VSC is taking some of the video footage from its latest helicopter shoot, and packaging it into destination video "postcards" for each community. Davison highlighted the July website metrics, noting that the numbers continue to see robust increases year over year.

Davison gave an update on BCF's current projects, including the Annual Report, a deeper competitive analysis and a deeper persona analysis. VSC is in contract negotiations and on-boarding with Goodway, its new media agency of record. Goodway will be re-assessing BCF's media recommendations. Davison noted that The Clymb will be in-market August 21-24 as part of a strategic partnership with VSC.

Davison presented the latest data from Arrivalist and a summary of the major learnings from this data.

At the July meeting, the Executive Committee requested that the VP of Marketing, Brooke Burnham, and the Marketing Committee further vet Audrey Arellano's application to the Marketing Committee. Burnham met with Arellano and the Marketing Committee further vetted her in person at their August 8, 2017 meeting. After interviewing her, the Marketing Committee recommended that the Board approve Arellano's application.

**ACTION:** Moved by Arnold/Jamison to approve Audrey Arellano's application to join the Marketing Committee for recommendation to the Board.

**Motion carried: 4:0**

## ADJOURNMENT

**ACTION:** Moved by Jamison/Arnold to adjourn the meeting.

Meeting adjourned at 1:10 p.m.

San Luis Obispo County  
 Visitor's & Conference Bureau  
 2016/2017 June Financial Summary - With Reforecasted Budget

<b>Income</b>	<b>This Month</b>	<b>Budgeted for Month</b>	<b>MTD Variance</b>	<b>MTD Actual v. Budget %</b>	<b>MTD % of Total Income/Expenses</b>	<b>FISCAL YTD</b>	<b>Reforecasted YTD Budget</b>	<b>YTD Variance</b>	<b>YTD Actual v. Budget %</b>	<b>YTD % of Total Income/Expenses</b>
PY TBID Collected in CY	\$ -	\$ -	\$ -	100.00%	-0.27%	\$ 749,410	\$ 749,410	\$ -	100.00%	16.87%
Membership Dues	\$ (1,200)	\$ -	\$ (1,200)	100.00%	-0.27%	\$ 33,760	\$ 39,000	\$ (5,240)	86.56%	0.76%
<b>TBID Income</b>										
SLO County Unincorporated	\$ 64,317	\$ 64,317	\$ -	100.00%	14.38%	\$ 855,533	\$ 855,533	\$ -	100.00%	19.26%
SLO City	\$ 68,190	\$ 68,190	\$ -	100.00%	15.24%	\$ 699,716	\$ 699,716	\$ 0	100.00%	15.75%
Pismo Beach	\$ 81,741	\$ 81,741	\$ -	100.00%	18.27%	\$ 861,887	\$ 861,887	\$ -	100.00%	19.41%
Morro Bay	\$ 24,621	\$ 24,621	\$ -	100.00%	5.50%	\$ 290,750	\$ 290,750	\$ -	100.00%	6.55%
Paso Robles	\$ 39,994	\$ 39,994	\$ -	100.00%	8.94%	\$ 451,581	\$ 451,580	\$ 0	100.00%	10.17%
Arroyo Grande	\$ 8,915	\$ 8,915	\$ -	100.00%	1.99%	\$ 90,613	\$ 90,613	\$ -	100.00%	2.04%
Atascadero *	\$ -	\$ -	\$ -	0.00%	0.00%	\$ 111,151	\$ 111,151	\$ -	100.00%	2.50%
Grover	\$ 3,166	\$ 3,166	\$ -	100.00%	0.71%	\$ 41,461	\$ 41,461	\$ -	100.00%	0.93%
Adjustment for Actual TBID Collected	\$ 157,672	\$ -	\$ 157,672		35.24%	\$ 255,419	\$ 161,834	\$ 93,585	157.83%	
<b>Total Income</b>	\$ 447,414	\$ 290,942	\$ 156,472	153.78%	100.00%	\$ 4,441,280	\$ 4,352,935	\$ 88,345	102.03%	100.00%
* District pays quarterly										
<b>Expenses</b>										
Contingency Reserve	\$ 22,371	\$ 14,547	\$ 7,824	153.78%	6.36%	\$ 222,064	\$ 217,647	\$ 4,417	102.03%	5.99%
G&A	\$ (15,759)	\$ 17,638	\$ (33,397)	-89.35%	-4.48%	\$ 198,257	\$ 233,202	\$ (34,945)	85.02%	5.35%
Industry Research and Resources	\$ 15,389	\$ 17,211	\$ (1,822)	89.41%	4.38%	\$ 251,372	\$ 401,862	\$ (150,490)	62.55%	6.78%
Travel Trade	\$ 55,022	\$ 50,222	\$ 4,800	109.56%	15.65%	\$ 377,666	\$ 412,902	\$ (35,236)	91.47%	10.19%
Communications	\$ 15,593	\$ 44,294	\$ (28,701)	35.20%	4.44%	\$ 123,825	\$ 373,542	\$ (249,717)	33.15%	3.34%
Advertising	\$ 87,307	\$ 104,432	\$ (17,126)	83.60%	24.84%	\$ 726,997	\$ 651,096	\$ 75,901	111.66%	19.61%
Promotions	\$ 4,308	\$ 6,154	\$ (1,846)	70.00%	1.23%	\$ 38,785	\$ 70,624	\$ (31,840)	54.92%	1.05%
Events	\$ 10,465	\$ 15,150	\$ (4,685)	69.08%	2.98%	\$ 194,543	\$ 194,430	\$ 113	100.06%	5.25%
Digital Marketing	\$ 152,608	\$ 294,578	\$ (141,969)	51.81%	43.42%	\$ 1,534,564	\$ 1,592,485	\$ (57,921)	96.36%	41.40%
Film Commission	\$ 4,173	\$ 12,071	\$ (7,897)	34.57%	1.19%	\$ 38,264	\$ 62,182	\$ (23,919)	61.53%	1.03%
<b>Total Expenses</b>	\$ 351,476	\$ 576,297	\$ (224,820)	60.99%	100.00%	\$ 3,706,336	\$ 4,209,973	\$ (503,637)	88.04%	100.00%
<b>Surplus(Deficit)</b>	\$ 95,938	\$ (285,354)	\$ 381,292	-33.62%		\$ 734,944	\$ 142,962	\$ 591,982	0.00%	
<b>Cash Flow</b>										
Surplus (Deficit)	\$ 95,938					\$ 734,944				
Beginning Cash Balance	\$ 811,296					\$ 467,503				
Change in Accounts Receivable	\$ (303,840)					\$ (814,735)				
Change in Accrued Expenses	\$ 77,686					\$ (19,993)				
Change in Prepaid Expenses	\$ 182					\$ (387)				
Change in Accounts Payable	\$ 144,291					\$ 458,221				
Change in Fixed Assets / Investing Activities	\$ (92,293)					\$ (92,293)				
<b>Visit SLO County Cash Balances</b>	\$ 733,261					\$ 733,261				
Contingency Reserve - 5% of Cummulative Revenues	\$ (364,720)					\$ (364,720)				
<b>Liability on Balance Sheet</b>										
<b>Net Available Cash</b>	\$ 368,541					\$ 368,541				

**Visit SLO CAL**  
**Balance Sheet Prev Year Comparison**  
**As of June 30, 2017**

	Jun 30, 17	Jun 30, 16	\$ Change	% Change
<b>ASSETS</b>				
<b>Current Assets</b>				
<b>Checking/Savings</b>				
1010 · Bank of the Sierra - TMD	572,788.30	461,388.71	111,399.59	24.1%
1020 · Bank of the Sierra - Membership	160,472.38	6,079.22	154,393.16	2,539.7%
1030 · HOB - SAVOR	0.00	34.95	-34.95	-100.0%
<b>Total Checking/Savings</b>	<b>733,260.68</b>	<b>467,502.88</b>	<b>265,757.80</b>	<b>56.9%</b>
<b>Accounts Receivable</b>				
1200 · Accounts Receivable	814,735.45	0.00	814,735.45	100.0%
<b>Total Accounts Receivable</b>	<b>814,735.45</b>	<b>0.00</b>	<b>814,735.45</b>	<b>100.0%</b>
<b>Other Current Assets</b>				
1320 · Prepaid Rent	3,326.70	3,326.70	0.00	0.0%
1340 · Workman's Comp Deposit	387.00	0.00	387.00	100.0%
1350 · Accrued Expenses	19,992.74	0.00	19,992.74	100.0%
<b>Total Other Current Assets</b>	<b>23,706.44</b>	<b>3,326.70</b>	<b>20,379.74</b>	<b>612.6%</b>
<b>Total Current Assets</b>	<b>1,571,702.57</b>	<b>470,829.58</b>	<b>1,100,872.99</b>	<b>233.8%</b>
<b>Fixed Assets</b>				
<b>1400 · Fixed Assets</b>				
1405 · Computer Hardware/Software	24,216.44	22,404.87	1,811.57	8.1%
1410 · Furniture & Fixtures	91,012.07	20,930.63	70,081.44	334.8%
1415 · Leasehold Improvements	37,301.15	32,651.59	4,649.56	14.2%
1425 · Office Equipment	14,560.10	14,560.10	0.00	0.0%
<b>Total 1400 · Fixed Assets</b>	<b>167,089.76</b>	<b>90,547.19</b>	<b>76,542.57</b>	<b>84.5%</b>
<b>1500 · Accumulated Depreciation</b>				
1505 · Comp. Hdwr/Sftwr. Acc. Depr.	-12,451.17	-12,451.17	0.00	0.0%
1510 · Furn. & Fixt. Accum. Depr.	-2,465.00	-2,465.00	0.00	0.0%
1515 · Leasehold Imp. Accum. Depr.	-343.00	-343.00	0.00	0.0%
1525 · Office Equip. Accum. Depr.	-1,288.00	-1,288.00	0.00	0.0%
<b>Total 1500 · Accumulated Depreciation</b>	<b>-16,547.17</b>	<b>-16,547.17</b>	<b>0.00</b>	<b>0.0%</b>
<b>Total Fixed Assets</b>	<b>150,542.59</b>	<b>74,000.02</b>	<b>76,542.57</b>	<b>103.4%</b>
<b>Other Assets</b>				
<b>1600 · Intangibles</b>				
1605 · Trademark - Slocal	15,750.00	0.00	15,750.00	100.0%
<b>Total 1600 · Intangibles</b>	<b>15,750.00</b>	<b>0.00</b>	<b>15,750.00</b>	<b>100.0%</b>
<b>Total Other Assets</b>	<b>15,750.00</b>	<b>0.00</b>	<b>15,750.00</b>	<b>100.0%</b>
<b>TOTAL ASSETS</b>	<b>1,737,995.16</b>	<b>544,829.60</b>	<b>1,193,165.56</b>	<b>219.0%</b>
<b>LIABILITIES &amp; EQUITY</b>				
<b>Liabilities</b>				
<b>Current Liabilities</b>				
<b>Accounts Payable</b>				
2000 · Accounts Payable	231,476.04	75.00	231,401.04	308,534.7%
<b>Total Accounts Payable</b>	<b>231,476.04</b>	<b>75.00</b>	<b>231,401.04</b>	<b>308,534.7%</b>
<b>Credit Cards</b>				
2050 · Rabobank Credit Card	4,619.90	0.00	4,619.90	100.0%
<b>Total Credit Cards</b>	<b>4,619.90</b>	<b>0.00</b>	<b>4,619.90</b>	<b>100.0%</b>
<b>Other Current Liabilities</b>				
<b>2100 · Payroll Liabilities</b>				
2160 · Health Insurance Withheld	468.50	332.95	135.55	40.7%
<b>Total 2100 · Payroll Liabilities</b>	<b>468.50</b>	<b>332.95</b>	<b>135.55</b>	<b>40.7%</b>
2800 · Restricted Reserves	364,719.82	0.00	364,719.82	100.0%
<b>Total Other Current Liabilities</b>	<b>365,188.32</b>	<b>332.95</b>	<b>364,855.37</b>	<b>109,582.6%</b>
<b>Total Current Liabilities</b>	<b>601,284.26</b>	<b>407.95</b>	<b>600,876.31</b>	<b>147,291.7%</b>
<b>Total Liabilities</b>	<b>601,284.26</b>	<b>407.95</b>	<b>600,876.31</b>	<b>147,291.7%</b>
<b>Equity</b>				
3110 · Fund Balance	34,053.44	34,053.44	0.00	0.0%
3120 · Retained Earnings	367,712.21	257,794.86	109,917.35	42.6%
Net Income	734,945.25	252,573.35	482,371.90	191.0%
<b>Total Equity</b>	<b>1,136,710.90</b>	<b>544,421.65</b>	<b>592,289.25</b>	<b>108.8%</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>1,737,995.16</b>	<b>544,829.60</b>	<b>1,193,165.56</b>	<b>219.0%</b>

San Luis Obispo County  
Visitor's & Conference Bureau  
2017/2018 July Financial Summary

<b>Income</b>	This Month	Budgeted for Month	MTD Variance	MTD Actual v. Budget %	MTD % of Total Income/Expenses	FISCAL YTD	YTD Budget	YTD Variance	YTD Actual v. Budget %	YTD % of Total Income/Expenses
PY TMD Collected in CY	\$ 2,019	\$ 2,100	\$ (81)	96.12%	0.52%	\$ 2,019	\$ 195,000	\$ (192,981)	1.04%	0.52%
Membership Dues	\$ 27,750	\$ 9,689	\$ 18,061	286.41%	7.11%	\$ 27,750	\$ 35,299	\$ (7,549)	78.61%	7.11%
<b>TMD Income</b>										
SLO County Unincorporated	\$ 75,912	\$ 75,912	\$ -	100.00%	19.46%	\$ 75,912	\$ 881,199	\$ (805,287)	8.61%	19.46%
SLO City	\$ 51,406	\$ 51,406	\$ -	100.00%	13.18%	\$ 51,406	\$ 720,704	\$ (669,298)	7.13%	13.18%
Pismo Beach	\$ 125,911	\$ 125,911	\$ -	100.00%	32.28%	\$ 125,911	\$ 887,742	\$ (761,831)	14.18%	32.28%
Morro Bay	\$ 41,335	\$ 41,335	\$ -	100.00%	10.60%	\$ 41,335	\$ 299,473	\$ (258,138)	13.80%	10.60%
Paso Robles	\$ 52,788	\$ 52,788	\$ -	100.00%	13.53%	\$ 52,788	\$ 465,127	\$ (412,339)	11.35%	13.53%
Arroyo Grande	\$ 8,206	\$ 8,206	\$ -	100.00%	2.10%	\$ 8,206	\$ 93,331	\$ (85,125)	8.79%	2.10%
Atascadero *	\$ -	\$ -	\$ -	0.00%	0.00%	\$ -	\$ 114,487	\$ (114,487)	0.00%	0.00%
Grover	\$ 4,762	\$ 4,762	\$ -	100.00%	1.22%	\$ 4,762	\$ 42,706	\$ (37,944)	11.15%	1.22%
Adjustment for Actual TBID Collected	\$ -	\$ -	\$ -	0.00%	0.00%	\$ -	\$ -	\$ -	0.00%	0.00%
<b>Total Income</b>	\$ 390,089	\$ 372,109	\$ 17,980	104.83%	100.00%	\$ 390,089	\$ 3,735,068	\$ (3,344,980)	10.44%	100.00%
* District pays quarterly										
<b>Expenses</b>										
Contingency Reserve	\$ 19,504	\$ 18,500	\$ 1,004	105.43%	12.23%	\$ 19,504	\$ 177,003	\$ (157,499)	11.02%	12.23%
G&A	\$ 18,853	\$ 28,739	\$ (9,885)	65.60%	11.82%	\$ 18,853	\$ 254,428	\$ (235,575)	7.41%	11.82%
Industry Research and Resources	\$ 18,308	\$ 23,843	\$ (5,535)	76.79%	11.48%	\$ 18,308	\$ 297,854	\$ (279,546)	6.15%	11.48%
Travel Trade	\$ 24,298	\$ 28,500	\$ (4,202)	85.26%	15.24%	\$ 24,298	\$ 416,670	\$ (392,373)	5.83%	15.24%
Communications	\$ 20,582	\$ 37,002	\$ (16,420)	55.62%	12.91%	\$ 20,582	\$ 231,239	\$ (210,657)	8.90%	12.91%
Advertising	\$ 31,031	\$ 60,842	\$ (29,811)	51.00%	19.46%	\$ 31,031	\$ 1,617,083	\$ (1,586,052)	1.92%	19.46%
Promotions	\$ 4,004	\$ 8,059	\$ (4,055)	49.68%	2.51%	\$ 4,004	\$ 63,138	\$ (59,134)	6.34%	2.51%
Events	\$ -	\$ 2,650	\$ (2,650)	0.00%	0.00%	\$ -	\$ 199,900	\$ (199,900)	0.00%	0.00%
Digital Marketing	\$ 19,359	\$ 36,691	\$ (17,332)	52.76%	12.14%	\$ 19,359	\$ 391,514	\$ (372,155)	4.94%	12.14%
Film Commission	\$ 3,500	\$ 6,339	\$ (2,839)	55.22%	2.20%	\$ 3,500	\$ 75,209	\$ (71,709)	4.65%	2.20%
<b>Total Expenses</b>	\$ 159,440	\$ 251,164	\$ (91,724)	63.48%	100.00%	\$ 159,440	\$ 3,724,040	\$ (3,564,600)	4.28%	100.00%
<b>Surplus(Deficit)</b>	\$ 230,649	\$ 120,945	\$ 109,704	190.71%		\$ 230,649	\$ 11,028	\$ 219,620	2091.42%	
<b>Cash Flow</b>										
Surplus (Deficit)	\$ 230,649					\$ 230,649				
Beginning Cash Balance	\$ 733,261					\$ 733,261				
Change in Accounts Receivable	\$ 113,384					\$ 113,384				
Change in Accrued Expenses	\$ 18,998					\$ 18,998				
Change in Prepaid Expenses										
Change in Accounts Payable	\$ (59,567)					\$ (59,567)				
<b>Visit SLO County Cash Balances</b>	\$ 1,036,724					\$ 1,036,724				
Contingency Reserve - 5% of Cumulative Revenues	\$ (384,224)					\$ (541,723)				
<small>Liability on Balance Sheet</small>										
<b>Net Available Cash</b>	\$ 652,500					\$ 495,000				

**Visit SLO CAL**  
**Balance Sheet Prev Year Comparison**  
**As of July 31, 2017**

	Jul 31, 17	Jul 31, 16	\$ Change	% Change
<b>ASSETS</b>				
<b>Current Assets</b>				
<b>Checking/Savings</b>				
1010 · Bank of the Sierra - TMD	854,580.93	629,605.97	224,974.96	35.7%
1020 · Bank of the Sierra - Membership	182,143.03	13,009.44	169,133.59	1,300.1%
<b>Total Checking/Savings</b>	1,036,723.96	642,615.41	394,108.55	61.3%
<b>Accounts Receivable</b>				
1200 · Accounts Receivable	701,351.76	352,948.12	348,403.64	98.7%
<b>Total Accounts Receivable</b>	701,351.76	352,948.12	348,403.64	98.7%
<b>Other Current Assets</b>				
1320 · Prepaid Rent	3,326.70	3,326.70	0.00	0.0%
1340 · Workman's Comp Deposit	387.00	569.00	-182.00	-32.0%
1350 · Accrued Expenses	994.99	2,762.00	-1,767.01	-64.0%
<b>Total Other Current Assets</b>	4,708.69	6,657.70	-1,949.01	-29.3%
<b>Total Current Assets</b>	1,742,784.41	1,002,221.23	740,563.18	73.9%
<b>Fixed Assets</b>				
<b>1400 - Fixed Assets</b>				
1405 · Computer Hardware/Software	24,216.44	22,404.87	1,811.57	8.1%
1410 · Furniture & Fixtures	91,012.07	20,930.63	70,081.44	334.8%
1415 · Leasehold Improvements	37,301.15	32,651.59	4,649.56	14.2%
1425 · Office Equipment	14,560.10	14,560.10	0.00	0.0%
<b>Total 1400 - Fixed Assets</b>	167,089.76	90,547.19	76,542.57	84.5%
<b>1500 - Accumulated Depreciation</b>				
1505 · Comp. Hdwr/Sftwr. Acc. Depr.	-12,451.17	-12,451.17	0.00	0.0%
1510 · Furn. & Fixt. Accum. Depr.	-2,465.00	-2,465.00	0.00	0.0%
1515 · Leasehold Imp. Accum. Depr.	-343.00	-343.00	0.00	0.0%
1525 · Office Equip. Accum. Depr.	-1,288.00	-1,288.00	0.00	0.0%
<b>Total 1500 - Accumulated Depreciation</b>	-16,547.17	-16,547.17	0.00	0.0%
<b>Total Fixed Assets</b>	150,542.59	74,000.02	76,542.57	103.4%
<b>Other Assets</b>				
<b>1600 - Intangibles</b>				
1605 · Trademark - Slocal	15,750.00	0.00	15,750.00	100.0%
<b>Total 1600 - Intangibles</b>	15,750.00	0.00	15,750.00	100.0%
<b>Total Other Assets</b>	15,750.00	0.00	15,750.00	100.0%
<b>TOTAL ASSETS</b>	<b>1,909,077.00</b>	<b>1,076,221.25</b>	<b>832,855.75</b>	<b>77.4%</b>
<b>LIABILITIES &amp; EQUITY</b>				
<b>Liabilities</b>				
<b>Current Liabilities</b>				
<b>Accounts Payable</b>				
2000 · Accounts Payable	157,493.15	32,962.97	124,530.18	377.8%
<b>Total Accounts Payable</b>	157,493.15	32,962.97	124,530.18	377.8%
<b>Other Current Liabilities</b>				
2800 · Restricted Reserves	384,224.25	173,381.00	210,843.25	121.6%
<b>Total Other Current Liabilities</b>	384,224.25	173,381.00	210,843.25	121.6%
<b>Total Current Liabilities</b>	541,717.40	206,343.97	335,373.43	162.5%
<b>Total Liabilities</b>	541,717.40	206,343.97	335,373.43	162.5%
<b>Equity</b>				
3110 · Fund Balance	34,053.44	34,053.44	0.00	0.0%
3120 · Retained Earnings	1,102,657.46	367,712.21	734,945.25	199.9%
Net Income	230,648.70	468,111.63	-237,462.93	-50.7%
<b>Total Equity</b>	1,367,359.60	869,877.28	497,482.32	57.2%
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>1,909,077.00</b>	<b>1,076,221.25</b>	<b>832,855.75</b>	<b>77.4%</b>



San Luis Obispo County  
Visitor's & Conference Bureau  
2017/2018 August Financial Summary

Income	This Month	Budgeted for Month	MTD Variance	MTD Actual v. Budget %	MTD % of Total Income/Expenses	FISCAL YTD	YTD Budget	YTD Variance	YTD Actual v. Budget %	YTD % of Total Income/Expenses
PY TMD Collected in CY	\$ 107,786	\$ 96,450	\$ 11,336	111.75%	19.83%	\$ 109,804	\$ 195,000	\$ (85,196)	56.31%	11.54%
Membership Dues	\$ 585	\$ 3,916	\$ (3,331)	14.94%	0.11%	\$ 46,485	\$ 35,299	\$ 11,186	131.69%	4.88%
<b>TMD Income</b>										
SLO County Unincorporated	\$ 114,399	\$ 114,399	\$ -	100.00%	21.04%	\$ 190,311	\$ 881,199	\$ (690,888)	21.60%	19.99%
SLO City	\$ 103,559	\$ 103,559	\$ -	100.00%	19.05%	\$ 154,965	\$ 720,704	\$ (565,739)	21.50%	16.28%
Pismo Beach	\$ 113,114	\$ 113,114	\$ -	100.00%	20.81%	\$ 239,025	\$ 887,742	\$ (648,717)	26.93%	25.11%
Morro Bay	\$ 41,335	\$ 41,335	\$ -	100.00%	7.60%	\$ 82,670	\$ 299,473	\$ (216,803)	27.61%	8.69%
Paso Robles	\$ 47,152	\$ 47,152	\$ -	100.00%	8.67%	\$ 99,940	\$ 465,127	\$ (365,187)	21.49%	10.50%
Arroyo Grande	\$ 10,925	\$ 10,925	\$ -	100.00%	2.01%	\$ 19,131	\$ 93,331	\$ (74,200)	20.50%	2.01%
Atascadero *	\$ -	\$ -	\$ -	0.00%	0.00%	\$ -	\$ 114,487	\$ (114,487)	0.00%	0.00%
Grover	\$ 4,762	\$ 4,762	\$ -	100.00%	0.88%	\$ 9,524	\$ 42,706	\$ (33,182)	22.30%	1.00%
Adjustment for Actual TMD Collected	\$ -	\$ -	\$ -	0.00%	0.00%	\$ -	\$ -	\$ -	0.00%	0.00%
<b>Total Income</b>	\$ 543,617	\$ 535,612	\$ 8,005	101.49%	100.00%	\$ 951,855	\$ 3,735,068	\$ (2,783,213)	25.48%	100.00%
* District pays quarterly										
<b>Expenses</b>										
Restricted Reserve	\$ 27,181	\$ 21,958	\$ 5,223	123.79%	17.60%	\$ 47,593	\$ 177,003	\$ (129,411)	26.89%	15.22%
G&A	\$ 16,596	\$ 19,262	\$ (2,665)	86.16%	10.75%	\$ 35,450	\$ 254,428	\$ (218,979)	13.93%	11.33%
Industry Research and Resources	\$ 22,401	\$ 27,029	\$ (4,628)	82.88%	14.50%	\$ 40,709	\$ 297,854	\$ (257,145)	13.67%	13.01%
Travel Trade	\$ 20,057	\$ 28,503	\$ (8,446)	70.37%	12.99%	\$ 44,355	\$ 416,670	\$ (372,315)	10.65%	14.18%
Communications	\$ 20,013	\$ 14,369	\$ 5,644	139.28%	12.96%	\$ 40,645	\$ 231,239	\$ (190,594)	17.58%	12.99%
Advertising	\$ 26,679	\$ 93,504	\$ (66,825)	28.53%	17.27%	\$ 57,710	\$ 1,617,083	\$ (1,559,373)	3.57%	18.45%
Promotions	\$ 3,142	\$ 6,174	\$ (3,032)	50.88%	2.03%	\$ 7,095	\$ 63,138	\$ (56,042)	11.24%	2.27%
Events	\$ 5,164	\$ 5,650	\$ (486)	91.39%	3.34%	\$ 5,164	\$ 199,900	\$ (194,736)	2.58%	1.65%
Digital Marketing	\$ 10,585	\$ 61,566	\$ (50,981)	17.19%	6.85%	\$ 29,944	\$ 391,514	\$ (361,570)	7.65%	9.57%
Film Commission	\$ 2,632	\$ 5,204	\$ (2,572)	50.57%	1.70%	\$ 4,132	\$ 75,209	\$ (71,077)	5.49%	1.32%
<b>Total Expenses</b>	\$ 154,450	\$ 283,219	\$ (128,769)	54.53%	100.00%	\$ 312,797	\$ 3,724,040	\$ (3,411,242)	8.40%	100.00%
<b>Surplus(Deficit)</b>	\$ 389,167	\$ 252,393	\$ 136,774	154.19%		\$ 639,058	\$ 11,028	\$ 628,029	5794.70%	
<b>Cash Flow</b>										
Surplus (Deficit)	\$ 389,167					\$ 639,058				
Beginning Cash Balance	\$ 1,036,724					\$ 733,261				
Change in Accounts Receivable	\$ (179,474)					\$ (66,091)				
Change in Accrued Expenses	\$ (14,802)					\$ (15,956)				
Change in Prepaid Expenses										
Change in Accounts Payable	\$ (65,227)					\$ (123,886)				
<b>Visit SLO County Cash Balances</b>	\$ 1,166,387					\$ 1,166,387				
Restricted Reserves - 5% of Cumulative Revenues	\$ (412,313)					\$ (541,723)				
Equity on Balance Sheet										
<b>Net Available Cash</b>	\$ 754,074					\$ 624,663				
<b>Comments to the Board:</b>										
<ul style="list-style-type: none"> <li>- 100% of 2016/2017 TMD funds have been collected and recognized as of 08/31/17</li> <li>- 0% of 2017/2018 TMD funds have been collected as of 08/31/17</li> <li>- Of the \$46,485 in Membership Dues that have been accrued \$32,835 has been collected as of 08/31/17</li> <li>- YTD Expenses for Advertising and Marketing are significantly less than budgeted as the Marketing Contract is still in negotiation</li> <li>- Restricted Reserves have been re-categorized as Equity from a Liability per the Auditor's recommendation</li> </ul>										

**Visit SLO CAL**  
**Balance Sheet Prev Year Comparison**  
**As of August 31, 2017**

	Aug 31, 17	Aug 31, 16	\$ Change	% Change
<b>ASSETS</b>				
<b>Current Assets</b>				
<b>Checking/Savings</b>				
1010 - Bank of the Sierra - TMD	972,012.29	906,585.95	65,426.34	7.2%
1020 - Bank of the Sierra - Membership	194,374.24	16,363.99	178,010.25	1,087.8%
<b>Total Checking/Savings</b>	<b>1,166,386.53</b>	<b>922,949.94</b>	<b>243,436.59</b>	<b>26.4%</b>
<b>Accounts Receivable</b>				
1200 - Accounts Receivable	880,826.17	774,717.73	106,108.44	13.7%
<b>Total Accounts Receivable</b>	<b>880,826.17</b>	<b>774,717.73</b>	<b>106,108.44</b>	<b>13.7%</b>
<b>Other Current Assets</b>				
1320 - Prepaid Rent	3,326.70	3,326.70	0.00	0.0%
1340 - Workman's Comp Deposit	387.00	569.00	-182.00	-32.0%
1350 - Accrued Expenses	35,948.42	40,181.60	-4,233.18	-10.5%
<b>Total Other Current Assets</b>	<b>39,662.12</b>	<b>44,077.30</b>	<b>-4,415.18</b>	<b>-10.0%</b>
<b>Total Current Assets</b>	<b>2,086,874.82</b>	<b>1,741,744.97</b>	<b>345,129.85</b>	<b>19.8%</b>
<b>Fixed Assets</b>				
<b>1400 - Fixed Assets</b>				
1405 - Computer Hardware/Software	24,216.44	22,404.87	1,811.57	8.1%
1410 - Furniture & Fixtures	91,012.07	20,930.63	70,081.44	334.8%
1415 - Leasehold Improvements	37,301.15	32,651.59	4,649.56	14.2%
1425 - Office Equipment	14,560.10	14,560.10	0.00	0.0%
<b>Total 1400 - Fixed Assets</b>	<b>167,089.76</b>	<b>90,547.19</b>	<b>76,542.57</b>	<b>84.5%</b>
<b>1500 - Accumulated Depreciation</b>				
1505 - Comp. Hdwr/Sftwr. Acc. Depr.	-15,088.17	-12,451.17	-2,637.00	-21.2%
1510 - Furn. & Fixt. Accum. Depr.	-6,208.00	-2,465.00	-3,743.00	-151.9%
1515 - Leasehold Imp. Accum. Depr.	-1,630.00	-343.00	-1,287.00	-375.2%
1525 - Office Equip. Accum. Depr.	-4,915.00	-1,288.00	-3,627.00	-281.6%
<b>Total 1500 - Accumulated Depreciation</b>	<b>-27,841.17</b>	<b>-16,547.17</b>	<b>-11,294.00</b>	<b>-68.3%</b>
<b>Total Fixed Assets</b>	<b>139,248.59</b>	<b>74,000.02</b>	<b>65,248.57</b>	<b>88.2%</b>
<b>Other Assets</b>				
<b>1600 - Intangibles</b>				
1605 - Trademark - Slocal	15,750.00	0.00	15,750.00	100.0%
<b>Total 1600 - Intangibles</b>	<b>15,750.00</b>	<b>0.00</b>	<b>15,750.00</b>	<b>100.0%</b>
<b>Total Other Assets</b>	<b>15,750.00</b>	<b>0.00</b>	<b>15,750.00</b>	<b>100.0%</b>
<b>TOTAL ASSETS</b>	<b>2,241,873.41</b>	<b>1,815,744.99</b>	<b>426,128.42</b>	<b>23.5%</b>
<b>LIABILITIES &amp; EQUITY</b>				
<b>Liabilities</b>				
<b>Current Liabilities</b>				
<b>Accounts Payable</b>				
2000 - Accounts Payable	63,774.03	48,082.77	15,691.26	32.6%
<b>Total Accounts Payable</b>	<b>63,774.03</b>	<b>48,082.77</b>	<b>15,691.26</b>	<b>32.6%</b>
<b>Credit Cards</b>				
2050 - Rabobank Credit Card	1,312.15	969.09	343.06	35.4%
<b>Total Credit Cards</b>	<b>1,312.15</b>	<b>969.09</b>	<b>343.06</b>	<b>35.4%</b>
<b>Other Current Liabilities</b>				
<b>2100 - Payroll Liabilities</b>				
2160 - Health Insurance Withheld	0.00	76.30	-76.30	-100.0%
<b>Total 2100 - Payroll Liabilities</b>	<b>0.00</b>	<b>76.30</b>	<b>-76.30</b>	<b>-100.0%</b>
<b>Total Other Current Liabilities</b>	<b>0.00</b>	<b>76.30</b>	<b>-76.30</b>	<b>-100.0%</b>
<b>Total Current Liabilities</b>	<b>65,086.18</b>	<b>49,128.16</b>	<b>15,958.02</b>	<b>32.5%</b>
<b>Total Liabilities</b>	<b>65,086.18</b>	<b>49,128.16</b>	<b>15,958.02</b>	<b>32.5%</b>
<b>Equity</b>				
3120 - Reserved Earnings	412,312.58	217,015.00	195,297.58	90.0%
3130 - Retained Earnings	1,125,416.90	401,839.00	723,577.90	180.1%
Net Income	639,057.75	1,147,762.83	-508,705.08	-44.3%
<b>Total Equity</b>	<b>2,176,787.23</b>	<b>1,766,616.83</b>	<b>410,170.40</b>	<b>23.2%</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>2,241,873.41</b>	<b>1,815,744.99</b>	<b>426,128.42</b>	<b>23.5%</b>



# TRAVEL TRENDS INDEX

JULY 2016

The Travel Trends Index measures the direction and pace of travel volume to and within the U.S. on a monthly basis. The index includes a Current Travel Index (CTI) and a Leading Travel Index (LTI). Both the CTI and the LTI include subcomponents (domestic, international, leisure and business).

## CTI shows travel grew in July 2016. LTI predicts more modest travel growth through the end of 2016, with notably soft international inbound travel and moderate growth in domestic leisure travel.

Overall travel volume (person trips to or within the United States involving a hotel stay or air travel) grew at a slower rate from July 2015 to July 2016 than June 2015 to June 2016. Domestic business travel grew for the second month in a row, after a period of consistent decline. Domestic leisure travel continues to advance, albeit at a slower rate than previous months. International inbound travel resumed its pattern of more restrained growth after surging ahead of the domestic market in June.

### HIGHLIGHTS:

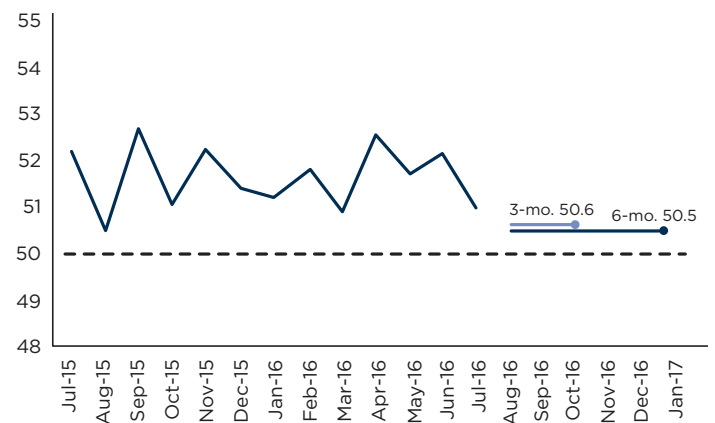
\* For CTI and LTI definitions, please see below.

- The Current Travel Index (CTI) has registered at or above the 50 mark for 79 straight months, as the travel industry continues its six-year expansion.
- The CTI was positive in July, with a reading of 51.0, below the 6-month moving average of 51.7.
- International inbound travel continues to expand, albeit more slowly than in June. The Leading Travel Index (LTI) projects a more subdued outlook for the international inbound market, which will trail the domestic market through the rest of 2016.
- Domestic leisure travel grew in July at the slowest rate since December 2012, but still continues to lead the U.S. travel sector. Domestic business travel advanced slightly in July, but will struggle to remain in positive growth territory through the end of the year.
- The 3- and 6-month LTI readings of 50.6 and 50.5, respectively, indicate that U.S. travel volume is expected to grow at a rate of around 1.1% through January 2017.

### July Travel Trends Index

Current Travel Index and Leading Travel Index

Index (>50=expansion, <50=decline)



Source: Oxford Economics, U.S. Travel Association

*“While growth in domestic leisure travel slowed somewhat in July, it remained the highest-demand travel market heading into the third quarter of this year. The outlook for the rest of the year indicates that domestic leisure travel will continue as the major source of strength for the travel industry. This is a reversal from earlier in this decade’s post-recession economic expansion, when international inbound travel ignited the recovery.”*

- David Huether  
Senior Vice President, Research

	CTI	3-month LTI*	6-month LTI**
June Index	52.2	50.9	50.7
July Index	51.0	50.6	50.5
Direction and Speed	Travel demand increased; at a slower rate than the previous month	Travel is expected to grow over the coming 3 months; at a slightly slower rate	Travel is expected to grow over the coming 6 months; at a slightly slower rate

\* Average outlook reading for Aug 2016 to Oct 2016

\*\* Average outlook reading for Aug 2016 to Jan 2017

The Oxford/U.S. Travel **Current Travel Index (CTI)** measures the direction and pace of travel volume to and within the U.S. on a monthly basis compared to the same month in the prior year. The index is comprised of a weighting of hotel room demand and air passenger enplanements that represents the overall volume of travelers each month. A score above 50 indicates expansion. A score below 50 indicates decline.

The Oxford/U.S. Travel **Leading Travel Index (LTI)** is an indicator of the future direction and pace of travel volume to and within the U.S. over the coming three and six months compared to the same period in the prior year. The LTIs represent average readings over the next three and six months. The LTI econometric model is based on data sets that have demonstrated to predict near-term future travel: online travel searches and bookings for future travel, consumer travel intentions data, and economic fundamentals. A score above 50 indicates expansion. A score below 50 indicates decline.

# TRAVEL TRENDS INDEX (Continued)

The Travel Trends Index measures the direction and pace of travel volume to and within the U.S. on a monthly basis. The index includes a Current Travel Index (CTI) and a Leading Travel Index (LTI). Both the CTI and the LTI include subcomponents (domestic, international, leisure and business).

## ► DETAILED RESULTS

Domestic leisure travel will continue to lead the U.S. travel market, though a dip in vacation intentions and slower growth in leisure-related, forward-looking travel searches signal some potential softening through late 2016. While domestic business travel growth has been in positive territory for the past two months, confidence in further growth remains shaky, and already-slowing growth in forward-looking business travel searches indicates further weakness ahead.

International travel slowed in July 2016 after breakout growth in June. June's growth likely reflected some rebound from a drop in inbound visits in June 2015 rather than the start of a more robust growth trend. The LTI indicates that international travel growth towards the end of the year will be nearly stagnant.

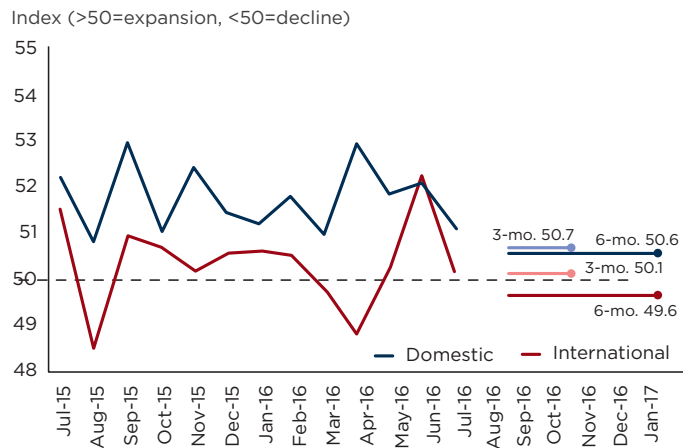
### Travel Trends Index Summary

	Current Travel Index (CTI)				Leading Travel Index (LTI)		6-month LTI vs. CTI 6-month avg	
	6-month avg	May	June	July	3-month*	6-month**	Direction	Speed
<b>Total Market</b>	<b>51.7</b>	<b>51.7</b>	<b>52.2</b>	<b>51.0</b>	<b>50.6</b>	<b>50.5</b>	Increasing ▲	Slower
International	50.3	50.2	52.3	50.2	50.1	49.6	Decreasing ▼	--
Domestic	51.9	51.9	52.2	51.1	50.7	50.6	Increasing ▲	Slower
Business	50.5	49.7	51.4	50.1	49.5	49.9	Decreasing ▼	--
Leisure	52.5	52.8	52.5	51.5	51.2	50.9	Increasing ▲	Slower

\* Average outlook reading for Aug 2016 to Oct 2016

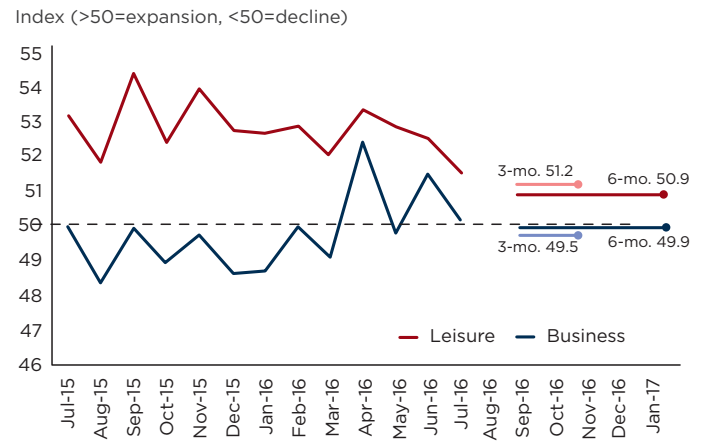
\*\* Average outlook reading for Aug 2016 to Jan 2017

### July Domestic and International Travel Index



Source: Oxford Economics, U.S. Travel Association

### July Domestic Business and Leisure Travel Index



Source: Oxford Economics, U.S. Travel Association

The Oxford/U.S. Travel **Current Travel Index (CTI)** measures the direction and pace of travel volume to and within the U.S. on a monthly basis compared to the same month in the prior year. The index is comprised of a weighting of hotel room demand and air passenger enplanements that represents the overall volume of travelers each month. A score above 50 indicates expansion. A score below 50 indicates decline.

The Oxford/U.S. Travel **Leading Travel Index (LTI)** is an indicator of the future direction and pace of travel volume to and within the U.S. over the coming three and six months compared to the same period in the prior year. The LTIs represent average readings over the next three and six months. The LTI econometric model is based on data sets that have demonstrated to predict near-term future travel: online travel searches and bookings for future travel, consumer travel intentions data, and economic fundamentals. A score above 50 indicates expansion. A score below 50 indicates decline.

The  
**ECONOMIC**  
**REVIEW** of  
**TRAVEL** in  
**AMERICA**

**2017 EDITION**

**U.S. TRAVEL**  
ASSOCIATION

# The Economic Review of Travel in America

2017 EDITION

August 2017

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***The Economic Review of Travel in America, 2017 Edition*** was prepared by:

U.S. Travel Association Research

## PREFACE

This report documents both 2016 and historical measurements of the U.S. travel and tourism industry. It details domestic and international inbound travel volume and the impact of travel on the U.S. economy, as well as the importance of the United States in global tourism. In addition, the report provides analysis on the performance of major travel-related industries in the U.S., such as airlines, lodging, amusement/recreation services and foodservice. Whenever possible, 2017 estimates are included.

This report contains information from the best objective sources and analyses available to objectively portray the importance of travel and tourism to the U.S. economy.

U.S. Travel Association  
Washington, DC  
August 2017

# EXECUTIVE SUMMARY

- U.S. domestic travel volume increased 1.3 percent in 2016, to a total of 2.2 billion person-trips. An increase of 1.8 percent is expected in 2017.
- Domestic leisure person-trips grew by 1.7 percent in 2016 from 2015, and are expected to increase a further 1.8 percent in 2017. Domestic business person-trips decreased 0.2 percent in 2016 from 2015 but are expected to rise 1.8 percent in 2017.
- Total international visitor arrivals to the U.S. declined by 2.4 percent in 2016, and totaled 75.6 million. Growth in international arrivals to the U.S. will likely be relatively stagnant in 2017.
- Overseas visitor arrivals to the U.S. (international visitations excluding Canada and Mexico) declined by 2.1 percent in 2016 and amounted to 37.6 million. The overseas market accounted for half of all international visitors to the United States in 2016.
- Canadian overnight visitations to the United States decreased by 7 percent in 2016, to an estimated 19.3 million. Visitations from Mexico to the U.S. increased by 2 percent in 2016, to an estimated 18.7 million.
- Measured in current dollars, domestic and international travelers spent \$990 billion in the United States in 2016, up 2.1 percent from 2015. Total domestic and international traveler spending in the U.S. is forecasted to increase another 3.1 percent in 2017.
- Domestic traveler expenditures reached \$837 billion in 2016, up 2.9 percent from 2015. Domestic traveler spending is expected to increase 3.5 percent in 2017.
- International travelers spent \$154 billion within the U.S. in 2016 (excluding international airfare and payments for medical, educational, and cross-border seasonal work), down 2.1 percent from 2015.
- Receipts from international passenger fares totaled \$39 billion in 2016, down 6.1 percent from 2015.
- Domestic and international travel spending in the U.S. directly supported 8.6 million jobs within the U.S. travel industry in 2016, up 2.4 percent from 2015.
- Twenty-five cents of every dollar spent on travel goods and services went toward payroll for industry workers in 2016. Total travel-generated payroll reached \$248 billion in 2016, up 4.3 percent from 2015.
- Domestic and international travelers generated \$158 billion in tax revenues for federal, state and local governments in 2016, up 4 percent from 2015.
- The U.S. Travel Association's Travel Price Index (TPI) increased 0.3 percent in 2016, slower than the 1.3 percent growth in the Consumer Price Index for all urban consumers (CPI-U) over the same period in 2015. In 2017, the CPI is expected to increase 3.2 percent, whereas the TPI is expected to increase 3.6 percent.
- Total domestic and international air passenger enplanements increased 3.1 percent in 2016, to 822 million. Employment in the airline industry increased 4.1 percent in 2016, to 671,400 jobs.
- In 2016, U.S. hotel room demand grew 1.7 percent from 2015. Room revenue increased 4.8 percent in 2016, and revenue per available room (RevPAR) increased by 3.2 percent during the same period. During the first four months of 2017, room demand increased 2.3 percent, compared to the same period the year prior. Room revenues increased 4.8 percent and RevPAR increased 3 percent during the same period.
- Total sales in the U.S. foodservice industry increased 5.9 percent in 2016, to \$660 billion. Total employment in this industry increased 3.3 percent to 11 million jobs in 2016. Travelers spent \$176 billion at foodservices and drinking places in 2016, up 4.1 percent from 2015.
- The arts, entertainment and recreation sector earned \$252 billion in total 2016 receipts, up 6.2 percent from 2015. At the same time, employment in this industry increased 3.2 percent to 2.2 million jobs. Travelers spent \$100 billion on arts, entertainment and recreation in 2016, up 3.8 percent from 2015.



September 5, 2017

Burkart & Stevens, an Accountancy Corporation  
694 Santa Rosa Street  
San Luis Obispo, California 93401

This representation letter is provided in connection with your audit of the financial statements of San Luis Obispo County Visitors and Conference Bureau (a nonprofit organization) which comprise the statement financial position as of June 30, 2017, and the related statement of activities and changes in net assets, and statement of cash flows for the year then ended, and the related notes to the financial statements, for the purpose of expressing an opinion as to whether the financial statements are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States.

Certain representations in this letter are described as being limited to matters that are material. Items are considered material, regardless of size, if they involve an omission or misstatement of accounting information that, in light of surrounding circumstances, makes it probable that the judgment of a reasonable person relying on the information would be changed or influenced by the omission or misstatement. An omission or misstatement that is monetarily small in amount could be considered material as a result of qualitative factors.

We confirm, to the best of our knowledge and belief, as of September 5, 2017 the following representations made to you during your audit:

### **Financial Statements**

We have fulfilled our responsibilities, as set out in the terms of the audit engagement letter dated June 29, 2017. Including our responsibility for the preparation and fair presentation of the financial statements.

- The financial statements referred to above are fairly presented in conformity with U.S. generally accepted accounting principles.
- We acknowledge our responsibility for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.
- We acknowledge our responsibility for the design, implementation, and maintenance of internal control to prevent and detect fraud.

- Significant assumptions we used in making accounting estimates, including those measured at fair value, are reasonable.
- Related party relationships and transactions have been appropriately accounted for and disclosed in accordance with the requirements of U.S. GAAP.
- All events subsequent to the date of the financial statements and for which U.S. GAAP requires adjustment or disclosure have been adjusted or disclosed
- We are in agreement with the adjusting journal entries proposed by you and they have been posted to the Organization's accounts.
- The effects of all known actual or possible litigation, claims, and assessments have been accounted for and disclosed in accordance with U.S. GAAP.
- Material concentrations have been properly disclosed in accordance with U. S. GAAP.
- Guarantees, whether written or oral, under which the organization is contingently liable, have been properly recorded or disclosed in accordance with U. S. GAAP.

#### **Information Provided**

- We have provided you with:
  - Access to all information, of which we are aware, that is relevant to the preparation and fair presentation of the financial statements, such as records, documentation, and other matters.
  - Additional information that you have requested from us for the purpose of the audit.
  - Unrestricted access to persons within the Organization from whom you determined it necessary to obtain audit evidence.
  - Minutes of the meetings of the governing board or summaries of actions of recent meetings for which minutes have not yet been prepared.
- All material transactions have been recorded in the accounting records and are reflected in the financial statements.
- We have disclosed to you the results of our assessment of the risk that the financial statements may be materially misstated as a result of fraud.
- We have no knowledge of any fraud or suspected fraud that affects the organization and involves
  - Management
  - Employees who have significant roles in internal control
  - Others where the fraud could have a material effect on the financial statements.



- We have no knowledge of any allegations of fraud or suspected fraud affecting the organization's financial statements communicated by employees, former employees, grantors, regulators, or others.
- We have no knowledge of any instances of noncompliance or suspected noncompliance with laws and regulations whose effects should be considered when preparing financial statements.
- We have disclosed to you all known actual or possible litigation, claims and assessments whose effects should be considered when preparing the financial statements.
- We have disclosed to you the identity of the organization's related parties and all the related party relationships and transactions of which we are aware.
- The organization has satisfactory title to all owned assets, and there are no liens or encumbrances on such assets nor has any asset been pledged as collateral.
- San Luis Obispo County Visitors and Conference Bureau is an exempt organization under Section 501 (c)(6) of the Internal Revenue Code. Any activities of which we are aware that would jeopardize the Organization's tax-exempt status, and all activities subject to tax on unrelated business income or excise or other tax, have been disclosed to you. All required filings with tax authorities are up-to-date.

#### **Other Services**

In regards to the tax services performed by you, we have:

- Made all management decisions and performed all management functions.
- Designated an individual with suitable skill, knowledge, or experience to oversee the services.
- Evaluated the adequacy and results of the services performed.
- Accepted responsibility for the results of the services.

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President

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Treasurer

**SAN LUIS OBISPO COUNTY  
VISITORS AND CONFERENCE BUREAU**

**INDEPENDENT AUDITORS' REPORT  
AND  
FINANCIAL STATEMENTS**

**YEAR ENDED JUNE 30, 2017**

**SAN LUIS OBISPO COUNTY**  
**VISITORS AND CONFERENCE BUREAU**  
Independent Auditors' Report and Financial Statements  
Year Ended June 30, 2017

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## Independent Auditors' Report

To the Board of Directors  
San Luis Obispo County  
Visitors and Conference Bureau  
1334 Marsh Street  
San Luis Obispo, CA 93401

We have audited the accompanying financial statements of San Luis Obispo County Visitors and Conference Bureau (the Organization), which comprise the statement of financial position as of June 30, 2017, and the related statements of activities, changes in net assets, and cash flows for the year then ended, and the related notes to the financial statements.

### **Management's Responsibility for the Financial Statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### **Auditor's responsibility**

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatements.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

San Luis Obispo County  
Visitors and Conference Bureau  
Independent Auditors' Report (continued)  
For the year ended June 30, 2017

**Auditor's responsibility (continued)**

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

**Opinion**

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of San Luis Obispo County Visitors and Conference Bureau as of June 30, 2017, and the results of its operations and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

**DRAFT**

**BURKART & STEVENS**  
an Accountancy Corporation

September 5, 2017

**SAN LUIS OBISPO COUNTY**  
**VISITORS AND CONFERENCE BUREAU**  
STATEMENT OF FINANCIAL POSITION  
June 30, 2017

**ASSETS**

**Current assets**

Cash and cash equivalents (Note 1)  
Accounts receivable (Note 1)  
Prepaid expenses

	2017
	\$ 733,261
	814,735
	23,706
Total current assets	1,571,702
	139,249
	15,750
Total assets	\$ 1,726,701

Total current assets

**Property and equipment (Note 3)**

Property and equipment, net of accumulated depreciation of \$ 27,841

**Other assets**

Trademark

Total assets

**LIABILITIES AND NET ASSETS**

**Current liabilities**

Accounts payable  
Payroll liabilities  
Credit cards payable

	2017
	\$ 231,476
	469
	4,620
Total current liabilities	236,565
	1,125,416
	364,720
Total net assets	1,490,136
Total liabilities and net assets	\$ 1,726,701

Total current liabilities

**Net assets:**

Unrestricted:

Unreserved  
Reserved (Note 6)

Total net assets

Total liabilities and net assets

See independent auditors' report.  
The accompanying notes are an integral part of these financial statements.

**SAN LUIS OBISPO COUNTY**  
**VISITORS AND CONFERENCE BUREAU**  
STATEMENT OF ACTIVITIES  
For the Year Ended June 30, 2017

<b>Revenue and Support</b>	Unrestricted
Membership dues	\$ 33,759
Assessment revenue (Note 2)	4,407,520
Interest Income	61
Total revenues	4,441,340
<b>Expenses</b>	
Marketing	1,009,551
Advertising and promotion (Note 8)	997,606
Salaries and wages	504,072
Contract services	174,147
Trade shows	165,837
Sponsorships	112,429
Website	66,390
Staff expenses	59,561
Health and workers compensation insurance	55,868
Rent - office (Note 5)	49,505
Trade and media	41,233
Payroll tax	40,102
Partner services	33,323
Legal and professional fees	30,951
Computer expenses	25,307
Office supplies and postage	22,455
Printing	20,398
Utilities	15,263
Retirement plan (Note 4)	14,005
Dues and subscriptions	12,101
Insurance	11,315
Depreciation (Note 3)	11,294
Board/committee meetings	9,696
Themed programs	3,977
Equipment rent	3,058
Rent - storage	2,608
Credit card charges	1,719
Repairs and maintenance	863
Retirement plan administration fee	600
Taxes	392
Miscellaneous	73
Total expenses	3,495,699
<b>Change in net assets</b>	<b>\$ 945,641</b>

See independent auditors' report.  
The accompanying notes are an integral part of these financial statements.

**SAN LUIS OBISPO COUNTY**  
**VISITORS AND CONFERENCE BUREAU**  
STATEMENT OF CHANGES IN NET ASSETS  
For the Year Ended June 30, 2017

**Net assets**

Beginning - July 1, 2016

Change in net assets

**Ending - June 30, 2017**

Unrestricted	
\$	544,495
	945,641
<b>\$</b>	<b>1,490,136</b>

See independent auditors' report.  
The accompanying notes are an integral part of these financial statements.



**SAN LUIS OBISPO COUNTY**  
**VISITORS AND CONFERENCE BUREAU**  
STATEMENT OF CASH FLOWS  
For the Year Ended June 30, 2017

	2017
<b>Cash flows from operating activities:</b>	
(Deficiency)/excess of revenues over expenses	\$ 945,641
Reconciliation of excess of revenues over expenses to cash provided by operating activities:	
Depreciation	11,294
(Increase) decrease in accounts receivable	(814,735)
(Increase) decrease in prepaid expenses	(20,379)
(Increase) decrease in trademark	(15,750)
(Decrease) increase in accounts payable	231,476
(Decrease) increase in payroll liabilities	134
(Decrease) increase in credit cards payable	4,620
Net cash provided (used) by operating activities	342,301
<b>Cash flows from investing activities:</b>	
Purchase of fixed assets	(76,543)
Net cash provided (used) by investing activities	(76,543)
<b>Net increase in cash</b>	265,758
<b>Cash at beginning of year</b>	467,503
<b>Cash at end of year</b>	<b>\$ 733,261</b>

**Supplemental disclosure (see Note 1 for additional income tax disclosure)**

Income taxes paid for the year ended June 30, 2017	\$ 10
Interest paid for the year ended June 30, 2017	\$ -

See independent auditors' report.  
The accompanying notes are an integral part of these financial statements.

**SAN LUIS OBISPO COUNTY**  
**VISITORS AND CONFERENCE BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
June 30, 2017

**NOTE 1: ORGANIZATION AND PURPOSE**

San Luis Obispo County Visitors and Conference Bureau (Organization) is a not-for-profit corporation organized to inspire travel and foster our unique experiences to create life-long ambassadors and economic growth for San Luis Obispo County. The Organization works with strategic partners, our members and our lodging constituents to build the brand through a data-driven, efficient and dynamic marketing program. The Organization's activities include marketing, advertising, public relations, group sales, promotions, events and sponsorships. The Organization is exempt from federal and state income taxes under Internal Revenue Code Section 501(c)(6).

**NOTE 2: SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

*Basis of Presentation* – The Organization's policy is to prepare its financial statements on the accrual basis of accounting. Accordingly, revenues are recognized when earned and expenses are recognized when the obligation is incurred.

*Cash and Cash Equivalents* – Cash and cash equivalents include all monies in banks and highly liquid investments with maturity dates of less than three months. The carrying value of cash and cash equivalents approximates fair value because of the short maturities of those financial instruments.

*Accounts Receivable* – Accounts receivable consists mainly of assessment revenue. Management has determined that there are no uncollectible accounts at June 30, 2017. Therefore, no allowance for doubtful accounts has been recorded.

*Revenue* - The Organization receives the majority of its revenues from tourist related industry memberships, member supported programs and assessment revenue, all of which are entirely within San Luis Obispo County.

*Fixed Assets* – Fixed assets are recorded at cost. Depreciation is provided for using accelerated methods over periods ranging from 5 to 7 years.

*Employees* - The Organization employs eight full-time employees and one part time employee.

*Use of Estimates* – The preparation of financial statements in conformity with U.S. generally accepted accounting principles requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

*Financial Statement Presentation* – Under Statement of Financial Standards No. 117, the Organization is required to report information regarding its financial position and activities according to three classes of net assets: unrestricted net assets, temporarily restricted net assets, and permanently restricted net assets. The Organization has only unrestricted net assets. Unrestricted net assets represent the portion of expendable funds that are available for support of Organization operations.

**SAN LUIS OBISPO COUNTY**  
**VISITORS AND CONFERENCE BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
June 30, 2017

**NOTE 1: SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)**

*Contributions* – Statement of Financial Accounting Standards No. 116 requires the Organization to record contributions received as unrestricted, temporarily restricted, or permanently restricted support depending on the existence or nature of any donor restrictions. Donor-restricted contributions whose restrictions are met in the same year are reported as unrestricted support. SFAS No. 116 also requires recognition of contributed services meeting certain criteria, at fair values. The organization has only unrestricted contributions.

**NOTE 2: ASSESSMENT REVENUE**

In June 2015, the Organization was awarded a contract to manage the countywide Tourism Marketing District beginning July 1, 2015 and running through June 30, 2020. The district provides a 1% assessment on all lodging room nights in San Luis Obispo County for those businesses paying TOT. The 1% assessment is remitted to the Organization to use for countywide tourism marketing. The following amounts were received during the fiscal year ended June 30, 2017:

	<u>2017</u>
County of San Luis Obispo	\$ 1,194,001
City of San Luis Obispo	827,251
City of Atascadero	148,889
City of Morro Bay	374,978
City of Grover Beach	45,196
City of Arroyo Grande	111,245
City of Paso Robles	639,760
City of Pismo Beach	<u>1,066,200</u>
	<u>\$ 4,407,520</u>

**NOTE 3: FIXED ASSETS**

Fixed assets at June 30, 2017 consisted of the following:

	<u>2016</u>
Furniture, fixtures and equipment	\$ 24,216
Computer hardware and software	105,573
Leasehold improvements	<u>37,301</u>
	167,090
Less: Accumulated depreciation	<u>(27,841)</u>
Net fixed assets	<u>\$ 139,249</u>

Depreciation expense for the year ended June 30, 2017 was \$ 11,294, including amortization of assets held under capital leases.

**SAN LUIS OBISPO COUNTY**  
**VISITORS AND CONFERENCE BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
June 30, 2017

**NOTE 4: PENSION PLAN**

The Organization has a profit sharing plan. The Organization contributed \$ 14,005 to the pension plan during the fiscal year ended June 30, 2017. The plan covers all employees over the age of 18 who have been employed for one year or more and have worked 1,000 or more hours during the current year. The Organization's contribution to the profit sharing plan is not mandatory.

**NOTE 5: COMMITMENTS**

**Building Rent**

The Organization signed a lease on December 6, 2013 for new office space which provided for an initial seventeen-month term with four consecutive one-year renewal options. The base rent was \$1,643 per month plus common area expenses which are estimated to be \$575 per month. The lease was amended to extend the term through July 31, 2015. As of July 17, 2015, the Organization signed a lease for new office space located at 1334 Marsh Street in San Luis Obispo. The initial term is 36 months with optional three consecutive two-year terms. The total rent per month amounted to \$ 4,125 during the year ended June 30, 2017.

**Copier**

On August 12, 2015 the Organization entered into a fifty-eight month lease agreement with De Lage Landen Financial for a copier beginning on August 12, 2015 and ending June 12, 2020. The lease calls for monthly rental payments of \$143 beginning on September 15, 2015. Future minimum lease payments are as follows:

	<u>Year</u>	<u>Amount</u>
For the year ending June 30,	2018	\$ 1,716
	2019	1,716
	2020	1,573
Total		\$ 5,005

**NOTE 6: NET ASSETS – RESERVED**

Based upon funding contracts with various governmental agencies, the Organization is required to reserve 5% of total recorded revenue during the year. These funds are to be used during periods when there are lower than anticipated collections and unforeseeable costs in carrying out the programs. The total reserved at June 30, 2017 is \$364,720.

**SAN LUIS OBISPO COUNTY**  
**VISITORS AND CONFERENCE BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
June 30, 2017

**NOTE 7: CONCENTRATION OF CREDIT RISK**

The Organization maintains its operating cash account at an institution which is insured by the Federal Deposit Insurance Corporation (FDIC) up to \$250,000. At various times throughout the year, the balance has exceeded the insured amount. The total in excess of the FDIC insured limits amounted to \$ 504,979 at June 30, 2017.

**NOTE 8: ADVERTISING COSTS**

Advertising costs are expensed as incurred throughout the year. Advertising costs for is as follows:

	<u>2017</u>
Advertising costs for the year ending June 30,	\$ <u>997,606</u>

**NOTE 9: SUBSEQUENT EVENTS**

Management has evaluated subsequent events through September 5, 2017, the date which the financial statements were available to be issued. There were no subsequent events to report.

## **Communication with Those Charged with Governance at the Conclusion of the Audit**

September 5, 2017

Board of Directors  
San Luis Obispo County  
Visitors and Conference Bureau  
San Luis Obispo, CA. 93401

**DRAFT**

We have audited the financial statements of San Luis Obispo Visitors and Conference Bureau, a nonprofit organization, for the year ended June 30, 2017, and have issued our report thereon dated September 5, 2017. Professional standards require that we provide you with information about our responsibilities under generally accepted auditing standards as well as certain information related to the planned scope and timing of our audit. We have communicated such information in our letter to you dated September 5, 2017. Professional standards also require that we communicate to you the following information related to our audit.

### **Significant Audit Findings**

#### **Qualitative Aspects of Accounting Practices**

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by San Luis Obispo Visitors and Conference Bureau are described in Note 2 to the financial statements. The Organization adopted the accrual basis of accounting during 2017. We noted no transactions entered into by the Organization during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper period.

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ significantly from those expected. Certain financial statement disclosures are particularly sensitive because of their significance to financial statement users. The financial statement disclosures are neutral, consistent, and clear.

#### **Difficulties Encountered in Performing the Audit**

We encountered no significant difficulties in dealing with management in performing and completing our audit.

Board of Directors  
San Luis Obispo County  
Visitors and Conference Bureau

### **Corrected and Uncorrected Misstatements**

Professional standards require us to accumulate all misstatements identified during the audit, other than those that are clearly trivial, and communicate them to the appropriate level of management. Management has corrected all such misstatements. In addition, none of the misstatements detected as a result of audit procedures and corrected by management were material, either individually or in the aggregate, to the financial statements taken as a whole.

### **Disagreements with Management**

For purposes of this letter, a disagreement with management is a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditor's report. We are pleased to report that no such disagreements arose during the course of our audit.

### **Management Representations**

We have requested certain representations from management that are included in the management representation letter dated September 5, 2017.

### **Management Consultations with Other Independent Accountants**

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involved application of an accounting principle to the Organization's financial statements or a determination of the type of auditor's opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

### **Other Audit Findings or Issues**

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the Organization's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.

This information is intended solely for the use of the Board of Directors charged with governance and, if appropriate, management of San Luis Obispo County Visitors and Conference Bureau and is not intended to be, and should not be, used by anyone other than these specified parties.

**BURKART & STEVENS,**  
**an Accountancy Corporation**

San Luis Obispo, CA  
September 5, 2017

**SAN LUIS OBISPO COUNTY**  
**VISITORS AND CONFERENCE BUREAU**

**MANAGEMENT ADVISORY COMMENTS**

For the Year Ended  
June 30, 2017



September 5, 2017

To The Board of Directors at  
San Luis Obispo County  
Visitors and Conference Bureau  
San Luis Obispo, CA. 93401

In planning and performing our audit of the financial statements of San Luis Obispo County Visitors and Conference Bureau as of and for the year ended June 30, 2017, in accordance with auditing standards generally accepted in the United States of America, we considered the Organization's internal control over financial reporting as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control.

A *deficiency* in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies in internal control, such that there is a reasonable possibility that a material misstatement of the Organization's financial statements will not be prevented, or detected and corrected on a timely basis.

Our consideration of internal control was for the limited purpose described in the preceding paragraph and was not designed to identify all deficiencies in internal control that might be material weaknesses. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified..

However, during our audit we became aware of some matters that are opportunities for strengthening internal controls and operating efficiency. This letter does not affect our report dated September 5, 2017, on the financial statements of San Luis Obispo County Visitors and Conference Bureau.

We will review the status of these comments during our next audit engagement. We have already discussed many of these comments and suggestions with Organization management, and we will be pleased to discuss these comments in further detail at your convenience, to perform any additional study of these matters, or to assist you in implementing the recommendations. Our comments are summarized as follows:

**Segregation of Accounting Duties**

During our review of the cash receipt process, it was noted that the person opening the mail was posting the cash receipts, preparing the bank deposit and taking the deposit to the bank. It is recommended that another individual open the checks when they come in the mail and make a listing of the checks received prior to giving them to that individual to prepare the bank deposit. This list can then be reconciled with the deposits recorded on the books by the bookkeeper.

This recommendation has been implemented.

**Vendor Invoices**

During our previous review it was noted that several vendor invoices were missing proper documentation and in some cases there were no supporting documents to substantiate the payment. Without the proper documentation vendors could be over or underpaid. We have noted a significant improvement over the last two years but it was noted a limited number of invoices still did not have the approval stamp or any type of notation as to approval for payment.

We recommend that all invoices be approved and some type of notation be made on the invoice as to approval prior to payment. This recommendation has been implemented.

**Concentration Risk**

During our test of cash, it was noted that cash accounts that were held with one bank exceeded the \$250,000 FDIC (Federal Deposit Insurance Corporation) insured limits by approximately \$504,979 at June 30, 2017.

Recommendation:

We recommended that the Organization transfer funds to a second bank sufficient enough to fall under the FDIC per depositor insured limits.

We wish to thank Chuck, Brendan and Allison at San Luis Obispo County Visitors and Conference Bureau for their support and assistance during our audit.

This report is intended solely for the information and use of the Board of Directors, management and others within the Organization and is not intended to be and should not be used by anyone other than these specified parties. This letter does not affect our report dated September 5, 2017 for the financial statements of San Luis Obispo County Visitors and Conference Bureau.

**BURKART & STEVENS**  
**Accountancy Corporation**

September 5, 2017

## Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public.  
▶ Information about Form 990 and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

2016

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

**A** For the 2016 calendar year, or tax year beginning 7/01, 2016, and ending 6/30, 2017

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> San Luis Obispo County Visitors and Conference Bureau 1334 MARSH STREET SAN LUIS OBISPO, CA 93401	<b>D</b> Employer identification number 77-0221126	<b>E</b> Telephone number (805) 541-8000
<b>F</b> Name and address of principal officer: <u>CHUCK DAVISON</u> Same As C Above		<b>G</b> Gross receipts \$ <u>4,441,340.</u> <b>H(a)</b> Is this a group return for subordinates? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> <b>H(b)</b> Are all subordinates included? If 'No,' attach a list. (see instructions) Yes <input type="checkbox"/> No <input type="checkbox"/>	
<b>I</b> Tax-exempt status: <input type="checkbox"/> 501(c)(3) <input checked="" type="checkbox"/> 501(c) ( <u>6</u> ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		<b>H(c)</b> Group exemption number ▶	
<b>J</b> Website: ▶ <u>WWW.SLOCAL.com</u>		<b>L</b> Year of formation: <u>1986</u>	
<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶		<b>M</b> State of legal domicile: <u>CA</u>	

**Part I Summary**

	1 Briefly describe the organization's mission or most significant activities: <u>THE ORGANIZATION IS A MEMBERSHIP ORGANIZATION. ITS FUNCTION IS TO INSPIRE TRAVEL AND FOSTER OUR UNIQUE EXPERIENCES TO CREATE LIFE-LONG AMBASSADORS AND ECONOMIC GROWTH FOR SAN LUIS OBISPO COUNTY.</u>		
Activities & Governance	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3 Number of voting members of the governing body (Part VI, line 1a) .....	3	14
	4 Number of independent voting members of the governing body (Part VI, line 1b) .....	4	14
	5 Total number of individuals employed in calendar year 2016 (Part V, line 2a) .....	5	9
	6 Total number of volunteers (estimate if necessary) .....	6	19
	7a Total unrelated business revenue from Part VIII, column (C), line 12. ....	7a	0.
	b Net unrelated business taxable income from Form 990-T, line 34. ....	7b	0.
Revenue	8 Contributions and grants (Part VIII, line 1h) .....	2,778,865.	4,441,279.
	9 Program service revenue (Part VIII, line 2g) .....	300.	
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) .....	2,494.	61.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) .....	-164,377.	
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) .....	2,617,282.	4,441,340.
	Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) .....	
14 Benefits paid to or for members (Part IX, column (A), line 4) .....			
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) .....		502,048.	617,740.
16a Professional fundraising fees (Part IX, column (A), line 11e) .....			
b Total fundraising expenses (Part IX, column (D), line 25) ▶ .....			
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) .....		1,752,196.	2,877,959.
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) .....	2,254,244.	3,495,699.	
19 Revenue less expenses. Subtract line 18 from line 12. ....	363,038.	945,641.	
Net Assets or Fund Balances	20 Total assets (Part X, line 16) .....	544,830.	1,726,701.
	21 Total liabilities (Part X, line 26) .....	335.	236,565.
	22 Net assets or fund balances. Subtract line 21 from line 20 .....	544,495.	1,490,136.

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer	Date			
	<u>CHUCK DAVISON</u> Type or print name and title	<b>DRAFT</b>	President		
<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	<u>Dennis J Burkart</u>				<u>P00118088</u>
	Firm's name	Firm's address		Firm's EIN ▶	
<u>BURKART AND ASSOCIATES</u>		<u>694 SANTA ROSA ST</u> <u>SAN LUIS OBISPO, CA 93401</u>		<u>77-0014050</u>	Phone no. <u>(805) 543-6876</u>

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III [X]

1 Briefly describe the organization's mission:

See Schedule O

2 Did the organization undertake any significant program services during the year which were not listed on the prior

Form 990 or 990-EZ? [ ] Yes [X] No

If 'Yes,' describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No

If 'Yes,' describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

THE ORGANIZATION WORKS WITH STRATEGIC PARTNERS, OUR MEMBERS AND OUR LODGING CONSTITUENTS TO BUILD THE BRAND THROUGH A DATA-DRIVEN, EFFICIENT AND DYNAMIC MARKETING PROGRAM. THE ORGANIZATION'S ACTIVITIES INCLUDE MARKETING, ADVERTISING, PUBLIC RELATIONS, GROUP SALES, PROMOTIONS, EVENTS AND SPONSORSHIP.

4b (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4c (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4d Other program services (Describe in Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses

**Part IV Checklist of Required Schedules**

		Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If 'Yes,' complete Schedule A.		X
2	Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?	X	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I.		X
4	<b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If 'Yes,' complete Schedule C, Part II.		
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If 'Yes,' complete Schedule C, Part III.	X	
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If 'Yes,' complete Schedule D, Part I.		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If 'Yes,' complete Schedule D, Part II.		X
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If 'Yes,' complete Schedule D, Part III.		X
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If 'Yes,' complete Schedule D, Part IV.		X
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If 'Yes,' complete Schedule D, Part V.		X
11	If the organization's answer to any of the following questions is 'Yes', then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If 'Yes,' complete Schedule D, Part VI.	X	
b	Did the organization report an amount for investments – other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VII.		X
c	Did the organization report an amount for investments – program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VIII.		X
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part IX.		X
e	Did the organization report an amount for other liabilities in Part X, line 25? If 'Yes,' complete Schedule D, Part X.	X	
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If 'Yes,' complete Schedule D, Part X.	X	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? If 'Yes,' complete Schedule D, Parts XI and XII.	X	
b	Was the organization included in consolidated, independent audited financial statements for the tax year? If 'Yes,' and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI and XII is optional.		X
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E.		X
14a	Did the organization maintain an office, employees, or agents outside of the United States?		X
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If 'Yes,' complete Schedule F, Parts I and IV.		X
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If 'Yes,' complete Schedule F, Parts II and IV.		X
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If 'Yes,' complete Schedule F, Parts III and IV.		X
17	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If 'Yes,' complete Schedule G, Part I (see instructions).		X
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If 'Yes,' complete Schedule G, Part II.		X
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If 'Yes,' complete Schedule G, Part III.		X



**Part IV Checklist of Required Schedules** (continued)

	Yes	No
<b>20a</b> Did the organization operate one or more hospital facilities? <i>If 'Yes,' complete Schedule H.</i>		X
<b>b</b> If 'Yes' to line 20a, did the organization attach a copy of its audited financial statements to this return?		
<b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If 'Yes,' complete Schedule I, Parts I and II.</i>		X
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If 'Yes,' complete Schedule I, Parts I and III.</i>		X
<b>23</b> Did the organization answer 'Yes' to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If 'Yes,' complete Schedule J.</i>	X	
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If 'Yes,' answer lines 24b through 24d and complete Schedule K. If 'No,' go to line 25a.</i>		X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
<b>d</b> Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?		
<b>25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If 'Yes,' complete Schedule L, Part I.</i>		
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If 'Yes,' complete Schedule L, Part I.</i>		
<b>26</b> Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If 'Yes,' complete Schedule L, Part II.</i>		X
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If 'Yes,' complete Schedule L, Part III.</i>		X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV.</i>		X
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV.</i>		X
<b>c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If 'Yes,' complete Schedule L, Part IV.</i>		X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M.</i>		X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If 'Yes,' complete Schedule M.</i>		X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I.</i>		X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If 'Yes,' complete Schedule N, Part II.</i>		X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If 'Yes,' complete Schedule R, Part I.</i>		X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Part II, III, or IV, and Part V, line 1.</i>		X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
<b>b</b> If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If 'Yes,' complete Schedule R, Part V, line 2.</i>		
<b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If 'Yes,' complete Schedule R, Part V, line 2.</i>		
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If 'Yes,' complete Schedule R, Part VI.</i>		X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O.	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V. [ ]

Table with columns for question number, question text, and Yes/No checkboxes. Includes sections for backup withholding, employee reporting, unrelated business income, foreign accounts, prohibited tax shelter transactions, deductible contributions, and 501(c)(7), (12), (1), and (29) organizations.

Part VI Governance, Management, and Disclosure For each 'Yes' response to lines 2 through 7b below, and for a 'No' response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI. [X]

Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include: 1a Enter the number of voting members of the governing body at the end of the tax year. 14; 1b Enter the number of voting members included in line 1a, above, who are independent. 14; 2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? X; 3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person? X; 4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? X; 5 Did the organization become aware during the year of a significant diversion of the organization's assets? X; 6 Did the organization have members or stockholders? X; 7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? X; 7b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? X; 8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: 8a The governing body? X; 8b Each committee with authority to act on behalf of the governing body? X; 9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If 'Yes,' provide the names and addresses in Schedule O. X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

Table with 3 columns: Question, Yes, No. Rows include: 10a Did the organization have local chapters, branches, or affiliates? X; 10b If 'Yes,' did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?; 11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? X; 11b Describe in Schedule O the process, if any, used by the organization to review this Form 990. See Schedule O; 12a Did the organization have a written conflict of interest policy? If 'No,' go to line 13. X; 12b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? X; 12c Did the organization regularly and consistently monitor and enforce compliance with the policy? If 'Yes,' describe in Schedule O how this was done. See Schedule O. X; 13 Did the organization have a written whistleblower policy? X; 14 Did the organization have a written document retention and destruction policy? X; 15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision? 15a The organization's CEO, Executive Director, or top management official. X; 15b Other officers or key employees of the organization. See Schedule O. X; 16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? X; 16b If 'Yes,' did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed CA
18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
Own website [ ] Another's website [ ] Upon request [X] Other (explain in Schedule O) See Sch. O [X]
19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year. See Schedule O
20 State the name, address, and telephone number of the person who possesses the organization's books and records: CHUCK DAVISON 1334 MARSH STREET SAN LUIS OBISPO CA 93401 (805) 541-8000



**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII.

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

1 a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of 'key employee.'
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)					(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee			
(1) NOREEN MARTIN PAST PRESIDENT	2 0	X		X			0.	0.	0.
(2) CLINT PEARCE VICE CHAIR	2 0	X		X			0.	0.	0.
(3) SAM MILLER MEMBER	1 0	X					0.	0.	0.
(4) SARAH MAGGELET MEMBER	0 0	X					0.	0.	0.
(5) NIPOOL PATEL MEMBER	1 0	X					0.	0.	0.
(6) VAL SEYMOUR MEMBER	1 0	X					0.	0.	0.
(7) JIM HAMILTON MEMBER	1 0	X					0.	0.	0.
(8) MARK EADS MEMBER	1 0	X					0.	0.	0.
(9) KATHLEEN BONELLI MEMBER	1 0	X					0.	0.	0.
(10) AARON GRAVES MEMBER	1 0	X					0.	0.	0.
(11) CHUCK DAVISON President & CEO	40 0			X			0.	0.	0.
(12) JP PATEL Secretary	1 0			X			0.	0.	0.
(13) JOHN ARNOLD Treasurer	2 0			X			0.	0.	0.
(14) JAY JAMISON Chairman	2 0			X			0.	0.	0.

**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)					(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee			
(15) CHUCK DAVISON PRESIDENT & CEO	40 0			X			175,000.	0.	0.
(16)									
(17)									
(18)									
(19)									
(20)									
(21)									
(22)									
(23)									
(24)									
(25)									
<b>1 b Sub-total</b> .....							175,000.	0.	0.
<b>c Total from continuation sheets to Part VII, Section A</b> .....							0.	0.	0.
<b>d Total (add lines 1b and 1c)</b> .....							175,000.	0.	0.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization ▶ 1

	Yes	No
3 Did the organization list any <b>former</b> officer, director, or trustee, key employee, or highest compensated employee on line 1a? <i>If 'Yes,' complete Schedule J for such individual.</i> .....		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If 'Yes,' complete Schedule J for such individual.</i> .....	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If 'Yes,' complete Schedule J for such person.</i> .....		X

**Section B. Independent Contractors**

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ▶ 0

**Part VIII Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII.

		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	1 a Federated campaigns	1 a				
	b Membership dues	1 b 33,759.				
	c Fundraising events	1 c				
	d Related organizations	1 d				
	e Government grants (contributions)	1 e 4,407,520.				
	f All other contributions, gifts, grants, and similar amounts not included above	1 f				
	g Noncash contributions included in lines 1a-1f: \$					
	<b>h Total.</b> Add lines 1a-1f		4,441,279.			
<b>Program Service Revenue</b>	Business Code					
	2 a					
	b					
	c					
	d					
	e					
	f All other program service revenue					
	<b>g Total.</b> Add lines 2a-2f					
<b>Other Revenue</b>	3 Investment income (including dividends, interest and other similar amounts)		61.		61.	
	4 Income from investment of tax-exempt bond proceeds					
	5 Royalties					
	6 a Gross rents	(i) Real				
		(ii) Personal				
		b Less: rental expenses				
		c Rental income or (loss)				
	d Net rental income or (loss)					
	7 a Gross amount from sales of assets other than inventory	(i) Securities				
		(ii) Other				
		b Less: cost or other basis and sales expenses				
		c Gain or (loss)				
	d Net gain or (loss)					
	8 a Gross income from fundraising events (not including.. \$ _____ of contributions reported on line 1c). See Part IV, line 18	a				
	b Less: direct expenses	b				
	c Net income or (loss) from fundraising events					
	9 a Gross income from gaming activities. See Part IV, line 19	a				
	b Less: direct expenses	b				
c Net income or (loss) from gaming activities						
10 a Gross sales of inventory, less returns and allowances	a					
b Less: cost of goods sold	b					
c Net income or (loss) from sales of inventory						
Miscellaneous Revenue						
Business Code						
11 a						
b						
c						
d All other revenue						
e Total. Add lines 11a-11d						
<b>12 Total revenue.</b> See instructions		4,441,340.	0.	0.	61.	

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX.

<b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.				
2 Grants and other assistance to domestic individuals. See Part IV, line 22.				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	175,000.			
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0.			
7 Other salaries and wages	329,072.			
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	14,005.			
9 Other employee benefits	59,561.			
10 Payroll taxes	40,102.			
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	30,951.			
d Lobbying				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)				
12 Advertising and promotion	997,606.			
13 Office expenses	22,455.			
14 Information technology				
15 Royalties				
16 Occupancy	49,505.			
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	11,294.			
23 Insurance	67,183.			
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <u>MARKETING</u>	1,009,551.			
b <u>CONTRACT LABOR</u>	174,147.			
c <u>TRADE SHOWS</u>	165,837.			
d <u>SPONSORSHIP</u>	112,429.			
e All other expenses	237,001.			
25 Total functional expenses. Add lines 1 through 24e.	3,495,699.			
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

**Part X Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part X.

		(A) Beginning of year		(B) End of year		
<b>Assets</b>	1	Cash – non-interest-bearing.....	467,503.	1	733,261.	
	2	Savings and temporary cash investments.....		2		
	3	Pledges and grants receivable, net.....		3		
	4	Accounts receivable, net.....		4	814,735.	
	5	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L.....		5		
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L.....		6		
	7	Notes and loans receivable, net.....		7		
	8	Inventories for sale or use.....		8		
	9	Prepaid expenses and deferred charges.....	3,327.	9	23,706.	
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D.....	10a	167,090.		
	10b	Less: accumulated depreciation.....	10b	27,841.	10c	139,249.
	11	Investments – publicly traded securities.....		11		
	12	Investments – other securities. See Part IV, line 11.....		12		
	13	Investments – program-related. See Part IV, line 11.....		13		
	14	Intangible assets.....		14		
	15	Other assets. See Part IV, line 11.....		15	15,750.	
16	<b>Total assets.</b> Add lines 1 through 15 (must equal line 34).....	544,830.	16	1,726,701.		
<b>Liabilities</b>	17	Accounts payable and accrued expenses.....		17	231,476.	
	18	Grants payable.....		18		
	19	Deferred revenue.....		19		
	20	Tax-exempt bond liabilities.....		20		
	21	Escrow or custodial account liability. Complete Part IV of Schedule D.....		21		
	22	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L.....		22		
	23	Secured mortgages and notes payable to unrelated third parties.....		23		
24	Unsecured notes and loans payable to unrelated third parties.....		24			
25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D.....	335.	25	5,089.		
26	<b>Total liabilities.</b> Add lines 17 through 25.....	335.	26	236,565.		
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>					
	27	Unrestricted net assets.....	544,495.	27	1,490,136.	
	28	Temporarily restricted net assets.....		28		
	29	Permanently restricted net assets.....		29		
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.</b>					
	30	Capital stock or trust principal, or current funds.....		30		
	31	Paid-in or capital surplus, or land, building, or equipment fund.....		31		
	32	Retained earnings, endowment, accumulated income, or other funds.....		32		
33	<b>Total net assets or fund balances</b> .....	544,495.	33	1,490,136.		
34	<b>Total liabilities and net assets/fund balances</b> .....	544,830.	34	1,726,701.		

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Form 990 (2016)

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI.

1	Total revenue (must equal Part VIII, column (A), line 12)	1	4,441,340.
2	Total expenses (must equal Part IX, column (A), line 25)	2	3,495,699.
3	Revenue less expenses. Subtract line 2 from line 1	3	945,641.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	544,495.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	1,490,136.

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII.

		Yes	No
1	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other <u>See Sch. O</u>		
If the organization changed its method of accounting from a prior year or checked 'Other,' explain in Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		X
If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:			
<input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
2b	Were the organization's financial statements audited by an independent accountant?	X	
If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:			
<input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
2c	If 'Yes' to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	X	
If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O. <u>See Schedule O</u>			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		X
3b	If 'Yes,' did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.		

BAA

Form 990 (2016)



**Schedule B**  
**(Form 990, 990-EZ,**  
**or 990-PF)**

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**  
▶ Information about Schedule B (Form 990, 990-EZ, 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2016**

Name of the organization San Luis Obispo County Visitors and Conference Bureau	Employer identification number 77-0221126
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**Organization type** (check one):

**Filers of:**

Form 990 or 990-EZ

**Section:**

- 501(c)( 6 ) (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- 527 political organization

Form 990-PF

- 501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year . . . . . ▶ \$ \_\_\_\_\_

**Caution.** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer 'No' on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

**Schedule B (Form 990, 990-EZ, or 990-PF) (2016)**

Name of organization

Employer identification number

San Luis Obispo County Visitors and

77-0221126

**Part I** Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CITY OF ATASCADERO CALIFORNIA 6550 EL CAMINO REAL ATASCADERO, CA 93422	\$ 148,889.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions.)</small>
2	CITY OF GROVER BEACH CALIFORNIA 180 HIGHWAY ONE GROVER BEACH, CA 93433	\$ 45,196.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions.)</small>
3	CITY OF MORRO BAY CALIFORNIA 845 EMBARCADERO MORRO BAY, CA 93442	\$ 374,978.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions.)</small>
4	CITY OF PASO ROBLES 1000 SPRING STREET PASO ROBLES, CA 93446	\$ 639,760.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions.)</small>
5	CITY OF PISMO BEACH 760 MATTIE ROAD PISMO BEACH, CA 93449	\$ 1,066,200.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions.)</small>
6	CITY OF SAN LUIS OBISPO 1039 CHORRO STREET SAN LUIS OBISPO, CA 93401	\$ 827,251.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions.)</small>



Name of organization <b>San Luis Obispo County Visitors and</b>	Employer identification number <b>77-0221126</b>
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**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	COUNTY OF SAN LUIS OBISPO CALIFORNI ----- 1087 SANTA ROSA STREET ----- SAN LUIS OBISPO, CA 93401 -----	\$ 1,194,001.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
8	CITY OF ARROYO GRANDE ----- 300 E BRANCH STREET ----- ARROYO GRANDE, CA 93420 -----	\$ 111,245.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
-----	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
-----	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
-----	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
-----	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization <b>San Luis Obispo County Visitors and</b>	Employer identification number <b>77-0221126</b>
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**Part II Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	N/A ----- ----- -----		
	----- ----- -----	\$-----	-----
	----- ----- -----	\$-----	-----
	----- ----- -----	\$-----	-----
	----- ----- -----	\$-----	-----
	----- ----- -----	\$-----	-----
	----- ----- -----	\$-----	-----
	----- ----- -----	\$-----	-----

Name of organization

San Luis Obispo County Visitors and

Employer identification number

77-0221126

**Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$            N/A  
 Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		

(e) Transfer of gift		Relationship of transferor to transferee
Transferee's name, address, and ZIP + 4		

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift		Relationship of transferor to transferee
Transferee's name, address, and ZIP + 4		

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift		Relationship of transferor to transferee
Transferee's name, address, and ZIP + 4		

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift		Relationship of transferor to transferee
Transferee's name, address, and ZIP + 4		

**SCHEDULE C**  
**(Form 990 or 990-EZ)**

**Political Campaign and Lobbying Activities**

OMB No. 1545-0047

For Organizations Exempt From Income Tax Under section 501(c) and section 527

**2016**

Department of the Treasury  
Internal Revenue Service

▶ **Complete if the organization is described below.** ▶ **Attach to Form 990 or Form 990-EZ.**  
▶ **Information about Schedule C (Form 990 or 990-EZ) and its instructions**  
**is at [www.irs.gov/form990](http://www.irs.gov/form990).**

**Open to Public Inspection**

If the organization answered 'Yes,' on Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered 'Yes,' on Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered 'Yes,' on Form 990, Part IV, line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of organization <b>San Luis Obispo County Visitors and</b>	Employer identification number <b>77-0221126</b>
--	---

**Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.**

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV. (see instructions for definition of 'political campaign activities')
- 2 Political campaign activity expenditures (see instructions) ..... ▶ \$ \_\_\_\_\_
- 3 Volunteer hours for political campaign activities (see instructions) .....

**Part I-B Complete if the organization is exempt under section 501(c)(3).**

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 ..... ▶ \$ \_\_\_\_\_
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 ..... ▶ \$ \_\_\_\_\_
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? .....  Yes  No
- 4a Was a correction made? .....  Yes  No
- b If 'Yes,' describe in Part IV.

**Part I-C Complete if the organization is exempt under section 501(c) , except section 501(c)(3).**

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ..... ▶ \$ \_\_\_\_\_
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ..... ▶ \$ \_\_\_\_\_
- 3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ..... ▶ \$ \_\_\_\_\_
- 4 Did the filing organization file **Form 1120-POL** for this year? .....  Yes  No
- 5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-.	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.
(1)	-----			
(2)	-----			
(3)	-----			
(4)	-----			
(5)	-----			
(6)	-----			

**Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).**

- A** Check  if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).
- B** Check  if the filing organization checked box A and 'limited control' provisions apply.

**Limits on Lobbying Expenditures**  
(The term 'expenditures' means amounts paid or incurred.)

(a) Filing organization's totals

(b) Affiliated group totals

<b>1 a</b> Total lobbying expenditures to influence public opinion (grass roots lobbying) .....		
<b>b</b> Total lobbying expenditures to influence a legislative body (direct lobbying) .....		
<b>c</b> Total lobbying expenditures (add lines 1a and 1b) .....		
<b>d</b> Other exempt purpose expenditures .....		
<b>e</b> Total exempt purpose expenditures (add lines 1c and 1d) .....		
<b>f</b> Lobbying nontaxable amount. Enter the amount from the following table in both columns .....		

If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:
Not over \$500,000	20% of the amount on line 1e.
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.
Over \$17,000,000	\$1,000,000.

<b>g</b> Grassroots nontaxable amount (enter 25% of line 1f) .....		
<b>h</b> Subtract line 1g from line 1a. If zero or less, enter -0- .....		
<b>i</b> Subtract line 1f from line 1c. If zero or less, enter -0- .....		

**j** If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?  Yes  No

**4-Year Averaging Period Under section 501(h)**  
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

**Lobbying Expenditures During 4-Year Averaging Period**

Calendar year (or fiscal year beginning in)	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) Total
<b>2 a</b> Lobbying nontaxable amount .....					
<b>b</b> Lobbying ceiling amount (150% of line 2a, column (e)) .....					
<b>c</b> Total lobbying expenditures .....					
<b>d</b> Grassroots nontaxable amount .....					
<b>e</b> Grassroots ceiling amount (150% of line 2d, column (e)) .....					
<b>f</b> Grassroots lobbying expenditures .....					

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Schedule C (Form 990 or 990-EZ) 2016

**Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).**

	(a)		(b)
	Yes	No	Amount
<i>For each 'Yes' response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.</i>			
1 During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
a Volunteers?			
b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?			
c Media advertisements?			
d Mailings to members, legislators, or the public?			
e Publications, or published or broadcast statements?			
f Grants to other organizations for lobbying purposes?			
g Direct contact with legislators, their staffs, government officials, or a legislative body?			
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?			
i Other activities?			
j Total. Add lines 1c through 1i.			
2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?			
b If 'Yes,' enter the amount of any tax incurred under section 4912			
c If 'Yes,' enter the amount of any tax incurred by organization managers under section 4912			
d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

**Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).**

	Yes	No
1 Were substantially all (90% or more) dues received nondeductible by members?	1	X
2 Did the organization make only in-house lobbying expenditures of \$2,000 or less?	2	X
3 Did the organization agree to carry over lobbying and political campaign activity expenditures from the prior year?	3	X

**Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered 'No,' OR (b) Part III-A, line 3, is answered 'Yes.'**

1 Dues, assessments and similar amounts from members	1	33,759.
2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).		
a Current year	2a	
b Carryover from last year	2b	
c Total	2c	
3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	
4 If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4	0.
5 Taxable amount of lobbying and political expenditures (see instructions)	5	0.

**Part IV Supplemental Information**

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions); and Part II-B, line 1. Also, complete this part for any additional information.

**SCHEDULE D  
(Form 990)**

**Supplemental Financial Statements**

OMB No. 1545-0047

**2016**

Department of the Treasury  
Internal Revenue Service

▶ **Complete if the organization answered 'Yes' on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**  
▶ **Attach to Form 990.**

▶ **Information about Schedule D (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).**

**Open to Public Inspection**

Name of the organization

San Luis Obispo County Visitors and  
Conference Bureau

Employer identification number

77-0221126

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year.....		
2 Aggregate value of contributions to (during year).....		
3 Aggregate value of grants from (during year).....		
4 Aggregate value at end of year.....		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?.....	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?.....	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**Part II Conservation Easements.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (e.g., recreation or education)	<input type="checkbox"/> Preservation of a historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements.....	2 a
b Total acreage restricted by conservation easements.....	2 b
c Number of conservation easements on a certified historic structure included in (a).....	2 c
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register.....	2 d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ \_\_\_\_\_

4 Number of states where property subject to conservation easement is located ▶ \_\_\_\_\_

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?.....  Yes  No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \_\_\_\_\_

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$ \_\_\_\_\_

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?.....  Yes  No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 8.

1 a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1..... ▶ \$ \_\_\_\_\_

(ii) Assets included in Form 990, Part X..... ▶ \$ \_\_\_\_\_

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:

a Revenue included on Form 990, Part VIII, line 1..... ▶ \$ \_\_\_\_\_

b Assets included in Form 990, Part X..... ▶ \$ \_\_\_\_\_



**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

- 3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
- a  Public exhibition
  - b  Scholarly research
  - c  Preservation for future generations
  - d  Loan or exchange programs
  - e  Other \_\_\_\_\_
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered 'Yes' on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1 a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  Yes  No
- b If 'Yes,' explain the arrangement in Part XIII and complete the following table:
- |                                 | Amount |
|---------------------------------|--------|
| c Beginning balance             | 1 c    |
| d Additions during the year     | 1 d    |
| e Distributions during the year | 1 e    |
| f Ending balance                | 1 f    |
- 2 a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Yes  No
- b If 'Yes,' explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII.

**Part V Endowment Funds.** Complete if the organization answered 'Yes' on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1 a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment  \_\_\_\_\_ %
  - b Permanent endowment  \_\_\_\_\_ %
  - c Temporarily restricted endowment  \_\_\_\_\_ %
- The percentages on lines 2a, 2b, and 2c should equal 100%.

- 3 a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |  | Yes    | No |
|--|--------|----|
| (i) unrelated organizations  | 3a(i)  |    |
| (ii) related organizations   | 3a(ii) |    |
| b If 'Yes' on line 3a(ii), are the related organizations listed as required on Schedule R? | 3b     |    |

- 4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1 a Land				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other		167,090.	27,841.	139,249.
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				139,249.



**Part VII Investments – Other Securities.**

N/A

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives.....		
(2) Closely-held equity interests.....		
(3) Other -----		
(A) -----		
(B) -----		
(C) -----		
(D) -----		
(E) -----		
(F) -----		
(G) -----		
(H) -----		
(I) -----		
<b>Total.</b> (Column (b) must equal Form 990, Part X, column (B) line 12.) . . . ▶		

**Part VIII Investments – Program Related.**

N/A

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
<b>Total.</b> (Column (b) must equal Form 990, Part X, column (B) line 13.) . . . ▶		

**Part IX Other Assets.**

N/A

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, column (B) line 15.) . . . . . ▶	

**Part X Other Liabilities.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25

(a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) CREDIT CARD PAYABLE	4,620.
(3) PAYROLL LIABILITIES	469.
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
(11)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, column (B) line 25.) . . . . . ▶	5,089.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII. . . . . See Part XIII.

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements.....		<b>1</b>	4,441,340.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
	a Net unrealized gains (losses) on investments.....	<b>2 a</b>		
	b Donated services and use of facilities.....	<b>2 b</b>		
	c Recoveries of prior year grants.....	<b>2 c</b>		
	d Other (Describe in Part XIII.).....	<b>2 d</b>		
	e Add lines <b>2 a</b> through <b>2 d</b> .....		<b>2 e</b>	
3	Subtract line <b>2 e</b> from line 1.....		<b>3</b>	4,441,340.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
	a Investment expenses not included on Form 990, Part VIII, line 7b.....	<b>4 a</b>		
	b Other (Describe in Part XIII.).....	<b>4 b</b>		
	c Add lines <b>4 a</b> and <b>4 b</b> .....		<b>4 c</b>	
5	Total revenue. Add lines <b>3</b> and <b>4 c</b> . (This must equal Form 990, Part I, line 12.).....		<b>5</b>	4,441,340.

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements.....		<b>1</b>	3,495,699.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
	a Donated services and use of facilities.....	<b>2 a</b>		
	b Prior year adjustments.....	<b>2 b</b>		
	c Other losses.....	<b>2 c</b>		
	d Other (Describe in Part XIII.).....	<b>2 d</b>		
	e Add lines <b>2 a</b> through <b>2 d</b> .....		<b>2 e</b>	
3	Subtract line <b>2 e</b> from line 1.....		<b>3</b>	3,495,699.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
	a Investment expenses not included on Form 990, Part VIII, line 7b.....	<b>4 a</b>		
	b Other (Describe in Part XIII.).....	<b>4 b</b>		
	c Add lines <b>4 a</b> and <b>4 b</b> .....		<b>4 c</b>	
5	Total expenses. Add lines <b>3</b> and <b>4 c</b> . (This must equal Form 990, Part I, line 18.).....		<b>5</b>	3,495,699.

**Part XIII Supplemental Information.**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

**Part X - FIN 48 Footnote**

MANAGEMENT HAS REVIEWED THE FINANCIAL STATEMENTS AND HAVE DETERMINED THAT THERE ARE NO UNCERTAIN TAX POSITIONS

**SCHEDULE J**  
**(Form 990)**

**Compensation Information**

OMB No. 1545-0047

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

**2016**

▶ Complete if the organization answered 'Yes' on Form 990, Part IV, line 23.

▶ Attach to Form 990.

▶ Information about Schedule J (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

Name of the organization

San Luis Obispo County Visitors and

Employer identification number

77-0221126

**Part I Questions Regarding Compensation**

1 a Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- |  |   |
|--|---|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use    |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence    |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees      |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (such as, maid, chauffeur, chef) |

b If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If 'No,' complete Part III to explain.....

2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked in line 1a? .....

3 Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- |  |  |
|--|--|
| <input type="checkbox"/> Compensation committee              | <input type="checkbox"/> Written employment contract                     |
| <input type="checkbox"/> Independent compensation consultant | <input type="checkbox"/> Compensation survey or study                    |
| <input type="checkbox"/> Form 990 of other organizations     | <input type="checkbox"/> Approval by the board or compensation committee |

4 During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a Receive a severance payment or change-of-control payment? .....
- b Participate in, or receive payment from, a supplemental nonqualified retirement plan? .....
- c Participate in, or receive payment from, an equity-based compensation arrangement? .....
- If 'Yes' to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.**

5 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a The organization? .....
- b Any related organization? .....
- If 'Yes' on line 5a or 5b, describe in Part III.

6 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a The organization? .....
- b Any related organization? .....
- If 'Yes' on line 6a or 6b, describe in Part III.

7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If 'Yes,' describe in Part III.....

8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If 'Yes,' describe in Part III.....

9 If 'Yes' on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? .....

	Yes	No
1 a		
1 b		
2		
3		
4 a		X
4 b		X
4 c		X
5 a		
5 b		
6 a		
6 b		
7		
8		
9		

**BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990.**

**Schedule J (Form 990) 2016**

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

**Note:** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

	(A) Name and Title	(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1	CHUCK DAVISON PRESIDENT & CEO	175,000. 0.	0. 0.	0. 0.	0. 0.	0. 0.	175,000. 0.	0. 0.
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								

**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

**SCHEDULE O**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is  
at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2016**

**Open to Public  
Inspection**

Name of the organization

San Luis Obispo County Visitors and  
Conference Bureau

Employer identification number

77-0221126

**Form 990, Part III, Line 1 - Organization Mission**

THE ORGANIZATION WORKS WITH STRATEGIC PARTNERS, OUR MEMBERS AND OUR LODGING  
CONSTITUENTS TO BUILD THE BRAND THROUGH A DATA-DRIVEN, EFFICIENT AND DYNAMIC  
MARKETING PROGRAM. THE ORGANIZATION'S ACTIVITIES INCLUDE MARKETING, ADVERTISING,  
PUBLIC RELATIONS, GROUP SALES, PROMOTIONS, EVENTS AND SPONSORSHIP.

**Form 990, Part VI, Line 11b - Form 990 Review Process**

TAX RETURN REVIEWED BY TREASURER AND PRESIDENT PRIOR TO FILING

**Form 990, Part VI, Line 12c - Explanation of Monitoring and Enforcement of Conflicts**

CONFLICT OF INTEREST POLICY IS REVIEWED ANNUALLY

**Form 990, Part VI, Line 15b - Compensation Review & Approval Process - Officers & Key Employees**

COMPENSATION IS DETERMINED USING COMPARABLE DATA AND IS VOTED ON BY THE BOARD OF  
DIRECTORS

**Form 990, Part VI, Line 18 - Explanation of Other Means Forms Available For Public Inspection**

INFORMATION IS AVAILABLE UPON REQUEST.

**Form 990, Part VI, Line 19 - Other Organization Documents Publicly Available**

COPIES AVAILABLE UPON REQUEST

**Form 990, Part XII, Line 1 - Change of Accounting Method**

AT THE BEGINNING OF THE FISCAL YEAR, MANAGEMENT DECIDED TO CHANGE FROM THE CASH TO  
THE ACCRUAL BASIS OF ACCOUNTING.

**Form 990, Part XII, Line 2 - Change of Oversight or Selection Process**

EXECUTIVE BOARD ACTS AS AUDIT COMMITTEE AND REVIEWS AUDIT REPORT.

THIS PROCESS HAS NOT CHANGED FROM THE PRIOR YEAR.

**California Exempt Organization  
Annual Information Return**

Calendar Year 2016 or fiscal year beginning (mm/dd/yyyy) 7/01/2016, and ending (mm/dd/yyyy) 6/30/2017

Corporation/Organization name <b>SAN LUIS OBISPO COUNTY VISITORS AND CONFERENCE BUREAU</b>		California corporation number <b>1644196</b>
Additional information. See instructions.		FEIN <b>77-0221126</b>
Street address (suite or room) <b>1334 MARSH STREET</b>		PMB no.
City <b>SAN LUIS OBISPO</b>	State <b>CA</b>	Zip code <b>93401</b>
Foreign country name	Foreign province/state/county	Foreign postal code

**A** First Return  Yes  No  
**B** Amended Return  Yes  No  
**C** IRC Section 4947(a)(1) trust  Yes  No  
**D** Final Information Return?  
 Dissolved  Surrendered (Withdrawn)  Merged/Reorganized  
 Enter date (mm/dd/yyyy)  \_\_\_\_\_  
**E** Check accounting method:  
 1  Cash 2  Accrual 3  Other  
**F** Federal return filed? 1  990T 2  990-PF 3  Sch H (990)  
 4  Other 990 series  
**G** Is this a group filing? See instructions  Yes  No  
**H** Is this organization in a group exemption?  
 If 'Yes,' what is the parent's name? \_\_\_\_\_  
**I** Did the organization have any changes to its guidelines  
 not reported to the FTB? See instructions.  Yes  No

**J** If exempt under R&TC Section 23701d, has the organization engaged in political activities?  
 See instructions  Yes  No  
**K** Is the organization exempt under R&TC Section 23701g?  Yes  No  
 If 'Yes,' enter the gross receipts from nonmember sources \$ \_\_\_\_\_  
**L** If organization is exempt under R&TC Section 23701d and meets the filing fee exception, check box.  
 No filing fee is required   N/A  
**M** Is the organization a Limited Liability Company?  Yes  No  
**N** Did the organization file Form 100 or Form 109 to report taxable income?  Yes  No  
**O** Is the organization under audit by the IRS or has the IRS audited in a prior year?  Yes  No  
**P** Is federal Form 1023/1024 pending?  Yes  No  
 Date filed with IRS \_\_\_\_\_  
 CACA1112L 11/30/16

**Part I Complete Part I unless not required to file this form. See General Instructions B and C.**

<b>Receipts and Revenues</b>	1 Gross sales or receipts from other sources. From Side 2, Part II, line 8. ....	1	61.
	2 Gross dues and assessments from members and affiliates. ....	2	
	3 Gross contributions, gifts, grants, and similar amounts received. .... SEE .SCH. .B	3	4,441,279.
	4 Total gross receipts for filing requirement test. Add line 1 through line 3. <b>This line must be completed.</b> If the result is less than \$50,000, see General Instruction B. ....	4	4,441,340.
	5 Cost of goods sold. ....	5	
	6 Cost or other basis, and sales expenses of assets sold. ....	6	
	7 Total costs. Add line 5 and line 6. ....	7	
	8 Total gross income. Subtract line 7 from line 4. ....	8	4,441,340.
<b>Expenses</b>	9 Total expenses and disbursements. From Side 2, Part II, line 18. ....	9	3,495,699.
	10 Excess of receipts over expenses and disbursements. Subtract line 9 from line 8. ....	10	945,641.
<b>Filing Fee</b>	11 Total payments. ....	11	
	12 Use tax. See General Instruction K. ....	12	
	13 Payments balance. If line 11 is more than line 12, subtract line 12 from line 11. ....	13	
	14 Use tax balance. If line 12 is more than line 11, subtract line 11 from line 12. ....	14	
	15 Filing fee \$10 or \$25. See General Instruction F. ....	15	10.
	16 Penalties and Interest. See General Instruction J. ....	16	
	17 <b>Balance due.</b> Add line 12, line 15, and line 16. Then subtract line 11 from the result. ....	17	10.

**Sign Here** Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer <b>DENNIS J BURKART</b>	Title <b>PRESIDENT</b>	Date	Telephone <b>(805) 541-8000</b>
Preparer's signature <b>DENNIS J BURKART</b>	Date	Check if self-employed <input type="checkbox"/>	PTIN <b>P00118088</b>
Firm's name (or yours, if self-employed) and address <b>BURKART AND ASSOCIATES 694 SANTA ROSA ST SAN LUIS OBISPO, CA 93401</b>			FEIN <b>77-0014050</b> Telephone <b>(805) 543-6876</b>

May the FTB discuss this return with the preparer shown above? See instructions.  Yes  No



SAN LUIS OBISPO COUNTY VISITORS AND  
**Part II Organizations with gross receipts of more than \$50,000 and private foundations**  
 regardless of amount of gross receipts – complete Part II or furnish substitute information.

77-0221126

<b>Receipts from Other Sources</b>	1	Gross sales or receipts from all business activities. See instructions.	●	1	
	2	Interest	●	2	
	3	Dividends	●	3	61.
	4	Gross rents	●	4	
	5	Gross royalties	●	5	
	6	Gross amount received from sale of assets (See instructions)	●	6	
	7	Other income. Attach schedule	●	7	
	8	Total gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Side 1, Part I, line 1	●	8	61.
<b>Expenses and Disbursements</b>	9	Contributions, gifts, grants, and similar amounts paid. Attach schedule	●	9	
	10	Disbursements to or for members	●	10	
	11	Compensation of officers, directors, and trustees. Attach schedule	●	11	175,000.
	12	Other salaries and wages	●	12	329,072.
	13	Interest	●	13	
	14	Taxes	●	14	40,102.
	15	Rents	●	15	49,505.
	16	Depreciation and depletion (See instructions)	●	16	11,294.
	17	Other Expenses and Disbursements. Attach schedule	●	17	2,890,726.
	18	Total expenses and disbursements. Add line 9 through line 17. Enter here and on Side 1, Part I, line 9	●	18	3,495,699.

<b>Schedule L Balance Sheet</b>		<b>Beginning of taxable year</b>		<b>End of taxable year</b>	
		<b>(a)</b>	<b>(b)</b>	<b>(c)</b>	<b>(d)</b>
<b>Assets</b>					
1	Cash		467,503.	●	733,261.
2	Net accounts receivable			●	814,735.
3	Net notes receivable			●	
4	Inventories			●	
5	Federal and state government obligations			●	
6	Investments in other bonds			●	
7	Investments in stock			●	
8	Mortgage loans			●	
9	Other investments. Attach schedule			●	
10a	Depreciable assets	90,547.		167,090.	
b	Less accumulated depreciation	16,547.	74,000.	27,841.	139,249.
11	Land			●	
12	Other assets. Attach schedule		3,327.	●	39,456.
13	Total assets		544,830.		1,726,701.
<b>Liabilities and net worth</b>					
14	Accounts payable			●	231,476.
15	Contributions, gifts, or grants payable			●	
16	Bonds and notes payable			●	
17	Mortgages payable			●	
18	Other liabilities. Attach schedule		335.		5,089.
19	Capital stock or principal fund		544,495.	●	1,490,136.
20	Paid-in or capital surplus. Attach reconciliation			●	
21	Retained earnings or income fund			●	
22	Total liabilities and net worth		544,830.		1,726,701.

<b>Schedule M-1 Reconciliation of income per books with income per return</b>			
Do not complete this schedule if the amount on Schedule L, line 13, column (d), is less than \$50,000.			
1	Net income per books	●	945,641.
2	Federal income tax	●	
3	Excess of capital losses over capital gains	●	
4	Income not recorded on books this year. Attach schedule	●	
5	Expenses recorded on books this year not deducted in this return. Attach schedule	●	
6	Total. Add line 1 through line 5	●	945,641.
7	Income recorded on books this year not included in this return. Attach schedule	●	
8	Deductions in this return not charged against book income this year. Attach schedule	●	
9	Total. Add line 7 and line 8	●	
10	Net income per return. Subtract line 9 from line 6	●	945,641.

**Schedule B**  
**(Form 990, 990-EZ,**  
**or 990-PF)**

Department of the Treasury  
Internal Revenue Service

California Copy  
**Schedule of Contributors**

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**  
▶ Information about Schedule B (Form 990, 990-EZ, 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2016**

Name of the organization <b>San Luis Obispo County Visitors and Conference Bureau</b>	Employer identification number <b>77-0221126</b>
--	---

**Organization type** (check one):

**Filers of:**

Form 990 or 990-EZ

**Section:**

- 501(c)( 6 ) (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- 527 political organization

Form 990-PF

- 501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year . . . . . ▶ \$ \_\_\_\_\_

**Caution.** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer 'No' on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

**Schedule B (Form 990, 990-EZ, or 990-PF) (2016)**

Name of organization

San Luis Obispo County Visitors and

Employer identification number

77-0221126

**Part I** Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CITY OF ATASCADERO CALIFORNIA ----- 6550 EL CAMINO REAL ----- ATASCADERO, CA 93422 -----	\$ 148,889.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions.)
2	CITY OF GROVER BEACH CALIFORNIA ----- 180 HIGHWAY ONE ----- GROVER BEACH, CA 93433 -----	\$ 45,196.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions.)
3	CITY OF MORRO BAY CALIFORNIA ----- 845 EMBARCADERO ----- MORRO BAY, CA 93442 -----	\$ 374,978.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions.)
4	CITY OF PASO ROBLES ----- 1000 SPRING STREET ----- PASO ROBLES, CA 93446 -----	\$ 639,760.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions.)
5	CITY OF PISMO BEACH ----- 760 MATTIE ROAD ----- PISMO BEACH, CA 93449 -----	\$ 1,066,200.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions.)
6	CITY OF SAN LUIS OBISPO ----- 1039 CHORRO STREET ----- SAN LUIS OBISPO, CA 93401 -----	\$ 827,251.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>  (Complete Part II for noncash contributions.)

Name of organization <b>San Luis Obispo County Visitors and</b>	Employer identification number <b>77-0221126</b>
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**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	COUNTY OF SAN LUIS OBISPO CALIFORNI 1087 SANTA ROSA STREET SAN LUIS OBISPO, CA 93401	\$ 1,194,001.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
8	CITY OF ARROYO GRANDE 300 E BRANCH STREET ARROYO GRANDE, CA 93420	\$ 111,245.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
---	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
---	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
---	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
---	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization <b>San Luis Obispo County Visitors and</b>	Employer identification number <b>77-0221126</b>
--	---

**Part II** **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	N/A		
	----- ----- -----	\$-----	-----
	----- ----- -----	\$-----	-----
	----- ----- -----	\$-----	-----
	----- ----- -----	\$-----	-----
	----- ----- -----	\$-----	-----
	----- ----- -----	\$-----	-----
	----- ----- -----	\$-----	-----

Name of organization

San Luis Obispo County Visitors and

Employer identification number

77-0221126

**Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ \_\_\_\_\_ N/A  
 Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
-----	-----
-----	-----

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	-----	-----	-----

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
-----	-----
-----	-----

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	-----	-----	-----

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
-----	-----
-----	-----

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	-----	-----	-----

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
-----	-----
-----	-----

**2016 Corporation Depreciation and Amortization**

**3885**

Attach to Form 100 or Form 100W. FORM 199

Corporation name SAN LUIS OBISPO COUNTY VISITORS AND CONFERENCE BUREAU	California corporation number 1644196
--	--

**Part I Election To Expense Certain Property Under IRC Section 179**

1	Maximum deduction under IRC Section 179 for California.....	1	\$25,000
2	Total cost of IRC Section 179 property placed in service.....	2	
3	Threshold cost of IRC Section 179 property before reduction in limitation.....	3	\$200,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-.....	4	
5	Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-.....	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property (elected IRC Section 179 cost).....	7	
8	Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7.....	8	
9	Tentative deduction. Enter the <b>smaller</b> of line 5 or line 8.....	9	
10	Carryover of disallowed deduction from prior taxable years.....	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5.....	11	
12	IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.....	12	
13	Carryover of disallowed deduction to 2017. Add line 9 and line 10, less line 12.....	13	

**Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356**

14	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation	
	CABINERY	3/25/2016	14,434.	131.	S/L	28	525.		
	FLOORING	2/23/2016	15,418.	187.	S/L	28	561.		
	COUNTERTOP	4/08/2016	2,800.	25.	S/L	28	102.		
	NETWORK SERVER	6/28/2007	1,437.	1,437.	200DB	5			
	CUSTOM BUILT PC	5/30/2008	539.	539.	200DB	5			
15	Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).....						15	11,294.	

**Part III Summary**

16	Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).....	16	
17	Total depreciation claimed for federal purposes from federal Form 4562, line 22.....	17	
18	Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 2, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.).....	18	

**Part IV Amortization**

19	(a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC section (see instr)	(f) Period or percentage	(g) Amortization for this year	
20	Total. Add the amounts in column (g).....						20	
21	Total amortization claimed for federal purposes from federal Form 4562, line 44.....						21	
22	Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 2, line 12.....						22	



2016 Corporation Depreciation and Amortization

3885

Attach to Form 100 or Form 100W. FORM 199

Table with Corporation name (SAN LUIS OBISPO COUNTY VISITORS AND CONFERENCE BUREAU) and California corporation number (1644196).

Part I Election To Expense Certain Property Under IRC Section 179

Table for Part I with rows 1-13 for calculating the election to expense certain property under IRC Section 179.

Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356

Table for Part II with columns (a) through (h) for listing property, acquisition dates, costs, and depreciation amounts.

Part III Summary

Table for Part III with rows 16-18 summarizing total depreciation and adjustments.

Part IV Amortization

Table for Part IV with columns (a) through (g) for listing property, acquisition dates, costs, and amortization amounts.

**2016**

**Corporation Depreciation and Amortization**

**3885**

Attach to Form 100 or Form 100W. FORM 199

Corporation name <b>SAN LUIS OBISPO COUNTY VISITORS AND CONFERENCE BUREAU</b>	California corporation number <b>1644196</b>
--	---

**Part I Election To Expense Certain Property Under IRC Section 179**

1 Maximum deduction under IRC Section 179 for California.....	<b>1</b>	\$25,000
2 Total cost of IRC Section 179 property placed in service.....	<b>2</b>	
3 Threshold cost of IRC Section 179 property before reduction in limitation.....	<b>3</b>	\$200,000
4 Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-.....	<b>4</b>	
5 Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-.....	<b>5</b>	
<b>6</b> (a) Description of property	(b) Cost (business use only)	(c) Elected cost
7 Listed property (elected IRC Section 179 cost).....	<b>7</b>	
8 Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7.....	<b>8</b>	
9 Tentative deduction. Enter the <b>smaller</b> of line 5 or line 8.....	<b>9</b>	
10 Carryover of disallowed deduction from prior taxable years.....	<b>10</b>	
11 Business income limitation. Enter the smaller of business income (not less than zero) or line 5.....	<b>11</b>	
12 IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.....	<b>12</b>	
13 Carryover of disallowed deduction to 2017. Add line 9 and line 10, less line 12.....	<b>13</b>	

**Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356**

14 (a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
IPAD WITH CC RE	5/15/2012	844.	514.	S/L	7	121.	
LG 28" MONITOR	6/30/2016	331.	24.	S/L	7	47.	
2 TABLETS	6/30/2016	1,183.	85.	S/L	7	169.	
MAC COMPUTER	12/07/2015	2,785.	279.	S/L	5	557.	
LG 28"MONITOR	9/02/2015	329.	24.	S/L	7	47.	
15 Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).....						<b>15</b>	

**Part III Summary**

16 Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).....	<b>16</b>	
17 Total depreciation claimed for federal purposes from federal Form 4562, line 22.....	<b>17</b>	
18 Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 2, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.).....	<b>18</b>	

**Part IV Amortization**

19 (a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC section (see instr)	(f) Period or percentage	(g) Amortization for this year
20 Total. Add the amounts in column (g).....	<b>20</b>					
21 Total amortization claimed for federal purposes from federal Form 4562, line 44.....	<b>21</b>					
22 Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 2, line 12.....	<b>22</b>					

2016 Corporation Depreciation and Amortization

3885

Attach to Form 100 or Form 100W. FORM 199

Table with Corporation name (SAN LUIS OBISPO COUNTY VISITORS AND CONFERENCE BUREAU) and California corporation number (1644196).

Part I Election To Expense Certain Property Under IRC Section 179

Table for Part I with 13 rows. Includes fields for maximum deduction, total cost, threshold cost, reduction in limitation, and dollar limitation for taxable year.

Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356

Table for Part II with 15 rows. Columns include Description of property, Date acquired, Cost or other basis, Depreciation allowed, Depreciation method, Life or rate, Depreciation for this year, and Additional first year depreciation.

Part III Summary

Table for Part III with 3 rows. Includes Total depreciation claimed for federal purposes and Depreciation adjustment.

Part IV Amortization

Table for Part IV with 7 rows. Columns include Description of property, Date acquired, Cost or other basis, Amortization allowed, R&TC section, Period or percentage, and Amortization for this year.

**2016 Corporation Depreciation and Amortization**

**3885**

Attach to Form 100 or Form 100W. FORM 199

Corporation name <b>SAN LUIS OBISPO COUNTY VISITORS AND CONFERENCE BUREAU</b>	California corporation number <b>1644196</b>
--	---

**Part I Election To Expense Certain Property Under IRC Section 179**

1 Maximum deduction under IRC Section 179 for California.....	<b>1</b>	\$25,000
2 Total cost of IRC Section 179 property placed in service.....	<b>2</b>	
3 Threshold cost of IRC Section 179 property before reduction in limitation.....	<b>3</b>	\$200,000
4 Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-.....	<b>4</b>	
5 Dollar limitation for taxable year. Subtract line 4 from line 1. If zero or less, enter -0-.....	<b>5</b>	
<b>6</b> (a) Description of property (b) Cost (business use only) (c) Elected cost		
7 Listed property (elected IRC Section 179 cost).....	<b>7</b>	
8 Total elected cost of IRC Section 179 property. Add amounts in column (c), line 6 and line 7.....	<b>8</b>	
9 Tentative deduction. Enter the <b>smaller</b> of line 5 or line 8.....	<b>9</b>	
10 Carryover of disallowed deduction from prior taxable years.....	<b>10</b>	
11 Business income limitation. Enter the smaller of business income (not less than zero) or line 5.....	<b>11</b>	
12 IRC Section 179 expense deduction. Add line 9 and line 10, but do not enter more than line 11.....	<b>12</b>	
13 Carryover of disallowed deduction to 2017. Add line 9 and line 10, less line 12.....	<b>13</b>	

**Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356**

14 (a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Depreciation allowed or allowable in earlier years	(e) Depreciation method	(f) Life or rate	(g) Depreciation for this year	(h) Additional first year depreciation
3 DESKS	9/11/2015	2,854.	204.	S/L	7	408.	
2 CUBICLES	1/16/2016	2,574.	184.	S/L	7	368.	
4 CUBICLES	2/05/2016	3,838.	274.	S/L	7	548.	
2 FREE STANDING	3/18/2016	516.	37.	S/L	7	74.	
2 BOOKSHELVES	5/12/2016	663.	47.	S/L	7	95.	
15 Add the amounts in column (g) and column (h). The total of column (h) may not exceed \$2,000. See instructions for line 14, column (h).....					<b>15</b>		

**Part III Summary**

16 Total: If the corporation is electing: IRC Section 179 expense, add the amount on line 12 and line 15, column (g) or Additional first year depreciation under R&TC Section 24356, add the amounts on line 15, columns (g) and (h) or Depreciation (if no election is made), enter the amount from line 15, column (g).....	<b>16</b>	
17 Total depreciation claimed for federal purposes from federal Form 4562, line 22.....	<b>17</b>	
18 Depreciation adjustment. If line 17 is greater than line 16, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 17 is less than line 16, enter the difference here and on Form 100 or Form 100W, Side 2, line 12. (If California depreciation amounts are used to determine net income before state adjustments on Form 100 or Form 100W, no adjustment is necessary.).....	<b>18</b>	

**Part IV Amortization**

19 (a) Description of property	(b) Date acquired (mm/dd/yyyy)	(c) Cost or other basis	(d) Amortization allowed or allowable in earlier years	(e) R&TC section (see instr)	(f) Period or percentage	(g) Amortization for this year
20 Total. Add the amounts in column (g).....						<b>20</b>
21 Total amortization claimed for federal purposes from federal Form 4562, line 44.....						<b>21</b>
22 Amortization adjustment. If line 21 is greater than line 20, enter the difference here and on Form 100 or Form 100W, Side 1, line 6. If line 21 is less than line 20, enter the difference here and on Form 100 or Form 100W, Side 2, line 12.....						<b>22</b>

2016

Corporation Depreciation and Amortization

3885

Attach to Form 100 or Form 100W. FORM 199

Table with Corporation name (SAN LUIS OBISPO COUNTY VISITORS AND CONFERENCE BUREAU) and California corporation number (1644196).

Part I Election To Expense Certain Property Under IRC Section 179

Table for Part I with rows 1-13 for calculating the election to expense certain property under IRC Section 179.

Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356

Table for Part II with columns (a) through (h) for listing property and calculating depreciation under R&TC Section 24356.

Part III Summary

Table for Part III with rows 16-18 for summarizing depreciation and amortization adjustments.

Part IV Amortization

Table for Part IV with columns (a) through (g) for listing property and calculating amortization.



2016 Corporation Depreciation and Amortization

3885

Attach to Form 100 or Form 100W. FORM 199

Table with Corporation name (SAN LUIS OBISPO COUNTY VISITORS AND CONFERENCE BUREAU) and California corporation number (1644196).

Part I Election To Expense Certain Property Under IRC Section 179

Table for Part I with 13 rows. Includes fields for maximum deduction, total cost, threshold cost, reduction in limitation, dollar limitation, and listed property details.

Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356

Table for Part II with 15 rows. Columns include description, date acquired, cost, depreciation allowed, method, life or rate, depreciation for this year, and additional first year depreciation.

Part III Summary

Table for Part III with 3 rows. Summary of depreciation amounts and adjustments.

Part IV Amortization

Table for Part IV with 7 rows. Columns include description, date acquired, cost, amortization allowed, R&TC section, period or percentage, and amortization for this year.

2016 Corporation Depreciation and Amortization

3885

Attach to Form 100 or Form 100W. FORM 199

Table with Corporation name (SAN LUIS OBISPO COUNTY VISITORS AND CONFERENCE BUREAU) and California corporation number (1644196).

Part I Election To Expense Certain Property Under IRC Section 179

Table for Part I with rows 1-13. Includes fields for maximum deduction, total cost, threshold cost, reduction in limitation, and dollar limitation.

Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356

Table for Part II with columns (a) through (h) and rows 14-15. Includes property descriptions like OSMOSIS, SONOS SPEAKER, RUG AND STOOL, etc.

Part III Summary

Table for Part III with rows 16-18. Summary of depreciation and adjustments.

Part IV Amortization

Table for Part IV with columns (a) through (g) and rows 19-22. Amortization details.



2016

Corporation Depreciation and Amortization

3885

Attach to Form 100 or Form 100W. FORM 199

Table with Corporation name (SAN LUIS OBISPO COUNTY VISITORS AND CONFERENCE BUREAU) and California corporation number (1644196).

Part I Election To Expense Certain Property Under IRC Section 179

Table for Part I with 13 rows. Includes fields for maximum deduction, total cost, threshold cost, reduction in limitation, and dollar limitation.

Part II Depreciation and Election of Additional First Year Depreciation Deduction Under R&TC Section 24356

Table for Part II with 15 rows. Columns include Description, Date acquired, Cost, Depreciation allowed, Depreciation method, Life or rate, Depreciation for this year, and Additional first year depreciation.

Part III Summary

Table for Part III with 3 rows. Includes Total depreciation claimed for federal purposes and Depreciation adjustment.

Part IV Amortization

Table for Part IV with 7 rows. Columns include Description of property, Date acquired, Cost, Amortization allowed, R&TC section, Period or percentage, and Amortization for this year.

9/14/17

04:03PM

**Statement 1**  
**Form 199, Part II, Line 11**  
**Compensation of Officers, Directors, Trustees and Key Employees**

**Current Officers:**

Name and Address	Title and Average Hours Per Week Devoted	Total Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
CHUCK DAVISON	President & CEO 40.00	\$ 0.	\$ 0.	\$ 0.
,				
NOREEN MARTIN	PAST PRESIDENT 2.00	0.	0.	0.
,				
CLINT PEARCE	VICE CHAIR 2.00	0.	0.	0.
,				
SAM MILLER	MEMBER 1.00	0.	0.	0.
,				
SARAH MAGGELET	MEMBER 0	0.	0.	0.
,				
JP PATEL	Secretary 1.00	0.	0.	0.
,				
JOHN ARNOLD	Treasurer 2.00	0.	0.	0.
,				
NIPOOL PATEL	MEMBER 1.00	0.	0.	0.
,				
VAL SEYMOUR	MEMBER 1.00	0.	0.	0.
,				
JIM HAMILTON	MEMBER 1.00	0.	0.	0.
,				
MARK EADS	MEMBER 1.00	0.	0.	0.
,				
KATHLEEN BONELLI	MEMBER 1.00	0.	0.	0.
,				

**Statement 1 (continued)**  
**Form 199, Part II, Line 11**  
**Compensation of Officers, Directors, Trustees and Key Employees**

**Current Officers:**

Name and Address	Title and Average Hours Per Week Devoted	Total Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
AARON GRAVES	MEMBER 1.00	\$ 0.	\$ 0.	\$ 0.
JAY JAMISON	Chairman 2.00	0.	0.	0.
<b>Total</b>		<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

**Key Employees:**

Name	Title and Average Hours Per Week Devoted	Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
CHUCK DAVISON	PRESIDENT & CEO 40	175,000.	0.	0.
<b>Total</b>		<u>\$ 175,000.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

**Statement 2**  
**Form 199, Part II, Line 17**  
**Other Expenses**

Accounting Fees.....	\$ 30,951.
Advertising and Promotion.....	997,606.
BOARD/COMMITTEE MEETINGS.....	9,696.
COMPUTER EXPENSES.....	25,307.
CONTRACT LABOR.....	174,147.
CREDIT CARD FEES.....	1,719.
DUES AND SUBSCRIPTIONS.....	12,101.
EQUIPMENT RENTAL.....	3,058.
Insurance.....	67,183.
MARKETING.....	1,009,551.
MISCELLANEOUS.....	73.
Office Expenses.....	22,455.
Other Employee Benefit.....	59,561.
PARTNER SERVICES.....	33,323.
PENSION PLAN ADMIN FEE.....	600.
Pension Plan Contributions.....	14,005.
PRINTING.....	20,398.
REPAIRS & MAINTENANCE.....	863.
SPONSORSHIP.....	112,429.
STORAGE RENT.....	2,608.
TAXES.....	392.
THEMED PROGRAMS.....	3,977.
TRADE AND MEDIA.....	41,233.
TRADE SHOWS.....	165,837.
UTILITIES.....	15,263.

**Statement 2 (continued)**  
**Form 199, Part II, Line 17**  
**Other Expenses**

WEBSITE .....	\$ 66,390.
Total	\$ <u>2,890,726.</u>

**Statement 3**  
**Form 199, Schedule L, Line 12**  
**Other Assets**

Prepaid Expenses and Deferred Charges .....	23,706.
TRADEMARK .....	15,750.
Total	\$ <u>39,456.</u>

**Statement 4**  
**Form 199, Schedule L, Line 18**  
**Other Liabilities**

CREDIT CARD PAYABLE .....	4,620.
PAYROLL LIABILITIES .....	469.
Total	\$ <u>5,089.</u>



# ANNUAL REPORT



**DRAFT**

FY 2016/17



**DRAFT**

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**DRAFT**

# DEAR STAKEHOLDERS,

Visit SLO CAL is pleased to share our FY 2016/17 Annual Report, along with a glimpse of what is to come in the year ahead. As we reflect on the past year, we are proud of the progress and accomplishments our industry and our organization have achieved and we appreciate your support.

In FY 2016/17, we applied the insights gained from extensive research to launch the new, unifying and emotionally resonant countywide brand, SLO CAL. This brand was brought to life through all of you and introduced to consumers through the iconic "Life's Too Beautiful to Rush" campaign, targeting six key feeder markets and three target personas.

Visit SLO CAL's promotional efforts are part of our multi-year Strategic Plan that sets the stage for major advancement in the coming years. Our continued goals are to: 1) create greater awareness of our county and its assets, and 2) increase demand for overnight stays. The Strategic Plan has provided our organization with an illuminated roadmap and navigational direction for the next three years of the Tourism Marketing District.

As we look to the new fiscal year, Visit SLO CAL continues to seek ways to expand the SLO CAL brand, efficiently and effectively reaching potential travelers with the right message, at the right time, in the right place. We also strive to advance our strategic partnerships, identifying and leveraging opportunities for economic vitality throughout the county.

With our most productive year as an organization behind us, the opportunities that lie ahead for SLO CAL seem endless. The tourism industry in the county is more unified than ever, and our collective efforts as partners are having an impact on our guests, our communities and our residents. Thank you for your continued partnership, support and collaboration. We look forward to another amazing year with you in SLO CAL!

All the Best,



Chuck Davison  
President & CEO  
Visit SLO CAL



# OUR VISION

**DRAFT**

A vibrant and prosperous SLO CAL, fueled by a collaborative and flourishing tourism industry

## ABOUT US

Visit SLO CAL (VSC) is a small, but mighty team of destination marketing professionals who work with, and on behalf of, our community, our members and our lodging constituents to promote San Luis Obispo County, California (SLO CAL) to travelers from around the world. As the sole countywide non-profit destination marketing and management organization (DMMO) for SLO CAL, our mission is to “inspire travel and foster our unique experiences to create life-long ambassadors and economic growth for SLO CAL”.

Our goal is to work with strategic partners, our members and our lodging constituents to build the SLO CAL brand through a data-driven, efficient and dynamic marketing program. Built on research with a strategy of continuous improvement, this program aims to establish SLO CAL as a favorite West Coast destination that is known for its signature slower pace of life and wide variety of incredible, immersive guest experiences.



# STRATEGIC PLAN

**DRAFT**

The VSC Board of Directors approved the organization's three-year Strategic Plan (Strategic Direction 2020) in June 2016. Since then, the VSC staff, board and partners have been executing key initiatives to accomplish the outlined objectives and five over-arching imperatives. VSC worked with Coraggio Group to map out a detailed Operational Plan and prioritized its initiatives, which the Board approved in November 2016.

## IMPERATIVES

### OPTIMIZE OUR ORGANIZATIONAL CAPACITY

#### OBJECTIVES:

- Increased employee engagement and satisfaction scores
- Ratio of administrative cost to economic impact

#### INITIATIVES:

- Align our organizational structure with our strategic plan
- Establish a continuous learning program for the VSC Team
- Evaluate and develop the tools, systems and technologies we need to succeed

### ESTABLISH BRAND CLARITY AND INCREASED AWARENESS THROUGH UNIFIED EFFORTS

#### OBJECTIVES:

- Bi-annual growth of awareness in targeted visitor categories
- Bi-annual growth of awareness in targeted markets
- Bi-annual growth of awareness in targeted segments

#### INITIATIVES:

- Establish a unifying and emotionally resonant San Luis Obispo County brand
- Produce and share data-driven strategic insights
- Inspire and activate tourism ambassadors

### BUILD AND EXPAND STRATEGIC PARTNERSHIPS

#### OBJECTIVES:

- Balanced inventory of partnerships
- Inbound partnership opportunities
- Earned Partnership Value (EPV)

#### INITIATIVES:

- Develop a system for annual partnership planning
- Align resources to manage partnerships
- Identify, develop and activate relationships
- Work with our partners to identify and reduce duplication of efforts

### ADVOCATE FOR THE DEVELOPMENT OF CRITICAL TOURISM INFRASTRUCTURE

#### OBJECTIVES:

- Increased visitor volume
- Increased international visitor volume
- Draft of Tourism Infrastructure Master Plan completed
- Increased total air service

#### INITIATIVES:

- Develop long-term Tourism Infrastructure Master Plan
- Enable access to San Luis Obispo County via increased transportation options
- Initiate feasibility study for conference center
- Advocate and educate to support international tourism readiness

### DEMONSTRATE VALUE TO OUR STAKEHOLDERS, PARTNERS AND COMMUNITIES

#### OBJECTIVES:

- Year-over-year growth in total stakeholder participation at VSC events/meetings
- Increased stakeholder satisfaction scores
- Year-over-year growth in local media coverage
- Deliver on objectives as stated in annual marketing plan
- Community engagement with countywide tourism

#### INITIATIVES:

- Develop an engaged and high-functioning tourism culture for San Luis Obispo County
- Create an impactful annual marketing plan and timeline
- Develop and execute a local communication strategy
- Develop a plan for advocacy on behalf of stakeholders

# FY2016 /17 BOARD OF DIRECTORS

**Jay Jamison · Chair** | Pismo Coast Village | Pismo Beach  
*Elected Designated RV Park Seat (—June 2019)*

**Clint Pearce · Vice Chair** | Madonna Enterprises | San Luis Obispo  
*Elected Designated At-Large Seat (—June 2019)*

**JP Patel · Secretary** | Best Western Plus Colony Inn | Atascadero  
*Appointed Atascadero Seat (—June 2020)*

**John Arnold · Treasurer** | Holiday Inn Express | Paso Robles  
*Appointed Paso Robles Seat (—June 2018)*

**Noreen Martin · Past President** | Martin Resorts | Unincorporated Area  
*Elected Designated At-Large Seat (—June 2017)*

**Kathleen Bonelli** | Paso Robles Vacation Rentals | Paso Robles  
*Elected Designated Vacation Rental Seat (—June 2019)*

**James Davison** | Pelican Inn & Suites | Unincorporated Area  
*Appointed Unincorporated Area Seat (—February 2017)*

**Mark Eads** | SeaVenture Beach Hotel | Pismo Beach  
*Elected Designated At-Large Seat (—June 2019)*

**Aaron Graves** | The Rigdon House | Unincorporated Area  
*Elected Designated Bed & Breakfast Seat (—June 2018)*

**Jim Hamilton** | County of San Luis Obispo  
*County At-Large Appointee (—June 2020)*

**Rachel Lima** | Hampton Inn & Suites | Arroyo Grande  
*Appointed Arroyo Grande Seat (—February 2017)*

**Sarah Maggelet\*** | Sarah's Suite | Unincorporated Area  
*Appointed Unincorporated Area Seat (—June 2019)*

**Sam Miller** | Holiday Inn Express | Grover Beach  
*Appointed Grover Beach Seat (—June 2018)*

**Nipool Patel** | Lamplighter Inn & Suites | San Luis Obispo  
*Appointed San Luis Obispo Seat (—June 2020)*

**Val Seymour** | The Front Street Inn & Spa | Morro Bay  
*Appointed Morro Bay Seat (—June 2020)*

**Roger Wightman** | Sandcastle Inn | Pismo Beach  
*Appointed Pismo Beach Seat (—June 2018)*

*\*Appointed to Unincorporated Area Seat after James Davison resigned from the Board*

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# FY2016 /17 MARKETING COMMITTEE

**Ashlee Akers** | Partner & Vice President of Client Services | Verdin

**Jim Allen** | Director of Marketing and Communications | Hearst Castle

**Terrie Banish** | Deputy City Manager – Outreach/Promotions/Events | City of Atascadero

**Molly Cano** | Tourism Manager | City of San Luis Obispo

**Cheryl Cuming** | Chief Administrative Officer | Unincorporated County Business Improvement District (CBID)

**Amanda Diefenderfer** | Destination Manager | Travel Paso Robles Alliance

**Christen Goldie** | Revenue & Marketing Director | The Apple Farm

**Gordon Jackson** | Executive Director | Pismo Beach Conference and Visitors Bureau (CVB)

**Lori Keller** | Chief Executive Officer | Martin Resorts

**Jennifer Little** | Tourism Manager | City of Morro Bay

**Heather Muran** | Executive Director | San Luis Obispo Wine Country Association

**Jennifer Porter** | Executive Director | Paso Robles Wine Country Alliance

**John Sorgenfrei** | President & Owner | TJA Advertising



# FY2016 /17 ADVISORY COMMITTEE

Jim Bergman | City Manager | Arroyo Grande  
 Matthew Bronson | City Manager | Grover Beach  
 David Buckingham | City Manager | Morro Bay  
 Dan Buckshi | County Administrator | County of San Luis Obispo  
 Lynn Compton | Supervisor | County of San Luis Obispo  
 Red Davis | Councilmember | Morro Bay  
 Thomas Frutchey | City Manager | Paso Robles  
 Barbara Harmon | Councilmember | Arroyo Grande

Erik Howell | Mayor Pro Tem | Pismo Beach  
 Jim Lewis | City Manager | Pismo Beach  
 Katie Lichtig | City Manager | City of San Luis Obispo  
 Tom O'Malley | Mayor | Atascadero  
 Steve Martin | Mayor | Paso Robles  
 Heidi Harmon | Mayor | City of San Luis Obispo  
 Rachelle Rickard | City Manager | Atascadero  
 Mariam Shah | Councilmember | Grover Beach

## OUR TEAM

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**Chuck Davison** • *President & CEO*

Leads the VSC team, advancing the initiatives of the Strategic Plan to position the organization for success; Manages board, committee, community and strategic partner relations

**(Open)** • *Executive Assistant*



**Brooke Burnham** • *Vice President of Marketing*

Leads the Marketing Department, managing the integrated marketing program, including paid, earned and owned media, as well as agency relations, partners and contractors; Oversees the Marketing Committee and acts as their liaison to the Board of Directors

**(Open)** • *Communications Director*

**(Open)** • *Brand & Digital Marketing Manager*



**Jordan Carson** • *Marketing Coordinator*

Coordinates consumer and industry social media efforts for VSC; Provides support to the Vice President of Marketing, including the coordination of monthly promotions, content development and sponsorship events

**BCF** • *Marketing Agency*

**Research** • *Research Agencies*

**Kylee Corliss** • *Film SLO CAL*

**PR Agency** • *TBD*



**Michael Wambolt** • *Director of Travel Trade*

Leads the Travel Trade Department, representing VSC at tradeshow and sales missions throughout the country and internationally, and hosting FAMs in the county; Advances domestic and international awareness of the county in the meeting and conference and the travel and leisure segments



**Pam Roberts** • *Events & Membership Manager*

Plans and executes all VSC industry events, trade shows and consumer events; Oversees Membership Services, providing support to existing members and activating new members



**Brendan Pringle** • *Operations Manager*

Manages multi-departmental projects, accounting operations and IT; Serves as the liaison to the VSC Board and Committees

# WHY TOURISM MATTERS

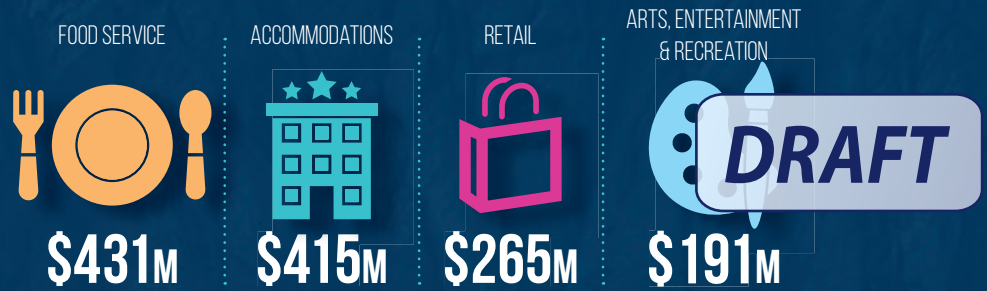
VSC's mission to "inspire travel and foster our unique experiences to create life-long ambassadors and economic growth for SLO CAL" is at the core of everything we do. Tourism supports SLO CAL's communities by creating jobs, generating tax revenue and supporting local businesses, all while fostering a higher quality of life through added amenities, diverse activities and robust local services.

## TRAVEL SPENDING

**\$1.59B**  
UP 1.2% OVER 2015

SOURCE: DEAN RUNYAN

## DIRECT SPENDING FROM EACH SECTOR



**DRAFT**

## VISITOR SPENDING

**\$1.53B**  
UP 1.1% OVER 2015

### HOTELS AND MOTELS



\$923M

### DAY TRAVEL



\$318M

### CAMPGROUNDS



\$139M

### PRIVATE HOMES



\$108M

### VACATION HOMES



\$46M

## DIRECT SPENDING BY DOMESTIC AND INTERNATIONAL TRAVELERS AVERAGED



SOURCE: DEAN RUNYAN



**1 OUT OF 8 SLO COUNTY JOBS DEPEND ON TRAVEL AND TOURISM**

SOURCES: CALIFORNIA ECONOMIC DEVELOPMENT DEPARTMENT + DEAN RUNYAN

**17,820**  
TOTAL JOBS

ACCOMMODATIONS & FOOD SERVICE	ARTS, ENTERTAINMENT & RECREATION	RETAIL	GROUND TRANSPORTATION	VISITOR AIR TRANSPORTATION	OTHER TRAVEL
10,650 JOBS	4,970 JOBS	1,490 JOBS	440 JOBS	90 JOBS	180 JOBS

## LOCAL TAX REVENUE

# \$61.7M

WHICH COVERS EXPENSES FOR



EACH SLO CAL HOUSEHOLD WOULD PAY AN ADDITIONAL \$595<sup>70</sup> IN TAXES

WITHOUT THE TAX REVENUE GENERATED BY TRAVEL AND TOURISM

SOURCES: DEAN RUNYAN + U.S. CENSUS BUREAU

VISITOR TAX RECEIPTS

# \$44M

VS.

BUSINESS TAX RECEIPTS

# \$18M

## LODGING BY THE NUMBERS

	FY 2014/15	FY 2015/16	FY 2016/17	
<b>TOT</b>	\$ 33,563,348	\$ 35,926,108	\$ 37,616,854	UP <b>12.1%</b> OVER 3 YEARS <small>SOURCE: VISIT SLO CAL</small>
<b>OCC</b>	70.5%	69.9%	68.9%	SUPPLY UP <b>4.1%</b> OVER 3 YEARS <small>SOURCE: STR, INC</small>
<b>ADR</b>	\$ 135.64	\$ 144.00	\$ 148.54	UP <b>9.5%</b> OVER 3 YEARS <small>SOURCE: STR, INC</small>
<b>REV PAR</b>	\$ 95.63	\$ 100.64	\$ 102.37	UP <b>7.0%</b> OVER 3 YEARS <small>SOURCE: STR, INC</small>

## SMITH TRAVEL RESEARCH (STR) REPORTS

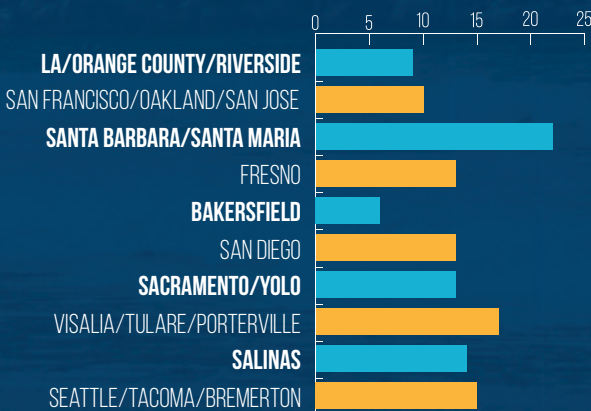
VSC uses weekly and monthly STR reports to monitor lodging industry performance and track seasonal changes and incidental impacts for 11 communities and the county as a whole.

**DRAFT**

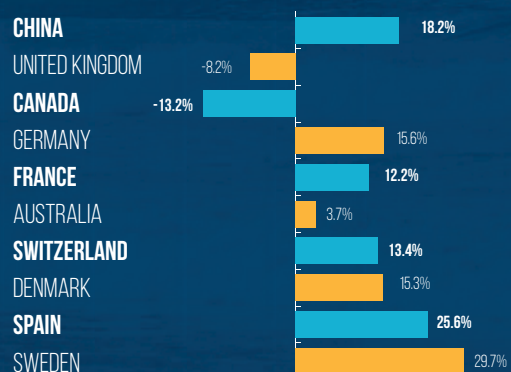
## VISAVUE® TRAVEL

VSC continues to invest in the Visit California co-op on VisaVue® Travel data for both domestic and international travel spending in SLO CAL. The quarterly and annual reports offer key information on spending by market segment and merchant category, allowing VSC to gain insights on market impacts, changes and opportunities.

### 2016 TOP ORIGINATING MSA<sub>s</sub> YOY \$ GROWTH (PERCENTS)



### 2016 TOP \$ COUNTRIES YOY \$ GROWTH (PERCENTS)





# TRAVEL TRADE

**DRAFT**

VSC's Travel Trade Department expanded efforts in FY 2016/17 with a number of new initiatives, including its first independent international representation in the United Kingdom (UK) and Ireland, and the attendance of two additional Visit California programs: the Mexico Sales Mission and Club California France. VSC also strategically targeted tour operators and meeting planners through tradeshows, sales missions, familiarization tours (FAMs) and association connections.

*SEP*

2016

VSC Tour & Travel  
Sales Mission  
VCA China FAM



*OCT*

2016

VCA China FAM  
VCA  
UK SuperFAM



*NOV*

2016

VSC Meeting &  
Conference Sales  
Mission



*DEC*

2016

CalSAE Seasonal  
Spectacular



*JAN*

2017

VCA Mexico Sales  
Mission

## PARTNERSHIP WITH BLACK DIAMOND

For the first time ever, VSC had direct travel trade representation in the UK and Ireland markets. VSC's partnership with Black Diamond in FY 2016/17 included:

- Training for Product Managers/Travel Agents
- VSC-Specific UK FAM
- Exclusive VSC Sales Mission in London and Dublin

## MEETINGS & CONFERENCES

VSC actively promoted SLO CAL as a premier meetings destination at tradeshows and through industry associations, resulting in:

- 84 Appointments and Leads
- \$5M Estimated Buying Power





7 FAMS WITH  
50 TRAVEL PROFESSIONALS



7 TRADESHOWS

### 5 SALES MISSIONS



10 CITIES

86 LEADS

5 AGENCY TAKEOVERS

**DRAFT**

FEB

MAR

APR

MAY

JUN

2017

2017

2017

2017

2017

NTA Travel Exchange

MPI Northern California Expo

Black Diamond UK/Ireland Sales Mission

Vacation Rental Management Association Conference

US Travel Association IPW

Go West Summit

MPI Sacramento/Sierra Nevada Tradeshow

VCA China Sales Mission

VCA Mexico SuperFAM

Connect California

Nan Hu Travel China Tour Operator FAM

California Cup

Black Diamond UK/Ireland FAM

VCA France FAM



### SALES MISSIONS

VSC targeted top four operators in China, the UK and Mexico through domestic and international sales missions. Through these missions, VSC built awareness for the destination, trained travel agency call centers and cultivated relationships with top travel agents and product managers. In FY 2016/17, travel trade sales missions resulted in:

- 103 Industry Appointments
- 86 Leads
- \$100M Estimated Buying Power

### FAM TOURS

This year, VSC hosted travel trade FAMs from China, the UK, Ireland, France and Mexico to showcase the tour opportunities throughout SLO CAL. These FAMs included:

- 50 International Travel Professionals
- Top-Producing Travel Agency Product Managers
- \$15M Estimated Buying Power

# EARNED MEDIA

## MEDIA FAM TOURS/HOSTED MEDIA

In FY 2016/17, VSC partnered with Visit California, Central Coast Tourism Council and local DMO partners to host and/or work directly with over 100 journalists to craft stories featuring SLO CAL as a premier West Coast destination. The journalists that VSC hosted worked with major outlets, such as:



## VISIT CALIFORNIA MEDIA RECEPTIONS

VSC took full advantage of opportunities offered through Visit California to reach national and international media.

### • LOS ANGELES MEDIA RECEPTION

- 80+ Writers, Editors and Press
- Notable Media: AAA Westways, Condé Nast, Disney

### • CHICAGO MEDIA BOOT CAMP

- 20+ Writers, Editors and Digital Influencers
- Notable Media: Dallas Morning News, Delta Sky, Chicago Tribune, National Geographic Traveler, USA Today

### • NEW YORK MEDIA RECEPTION

- 192 Writers, Editors and Press
- Notable Media: Fodor's, NBC's TODAY, ShermansTravel, Travel + Leisure

### • SAN FRANCISCO MEDIA RECEPTION

- 80+ Writers, Editors and Press
- Notable Media: AFAR, Bay Area News Group, San Francisco Chronicle, Smart Meetings, Sunset

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HOSTED MEDIA ACCOUNTED FOR 110 SEPARATE ARTICLES FOR SLO CAL, INCLUDING



150,000 REACH  
\$3,800 VALUE



101,681 REACH  
\$2,974 VALUE



63,372 REACH  
\$35,830 VALUE



50,000 REACH  
\$6,000 VALUE



170,000 REACH  
\$17,141 VALUE



258,214 REACH  
\$10,467 VALUE



101,562 REACH  
44,922 UNIQUE MONTHLY VISITORS



## DESKSIDES + EVENTS

Conducting meetings (desksides) or hosting events with members of the press in their home market is an effective and efficient way for VSC to share information about SLO CAL, pitch story ideas and cultivate relationships with writers, editors and influencers. In FY 2016/17, VSC conducted such press relations in multiple markets.

- **NEW YORK: 3 DESKSIDE MEETINGS**  
Notable Media: Condé Nast Traveler, The Rachael Ray Show and Magazine, Successful Meetings
- **DENVER: 10 DESKSIDE MEETINGS**  
Notable Media: 5280 Magazines, AAA Encompass, Denver Post, National Geographic Social
- **SEATTLE: 25 DESKSIDE MEETINGS**  
Notable Media: Destination Wineries, Evening Magazine, Northwest Travel & Life, Seattle Times

## PRESS RELEASES

In FY 2016/17, VSC wrote over a dozen press releases featuring seasonal story ideas, new attractions and key VSC initiatives, including Restaurant Month and Travel & Tourism Week. Releases are distributed directly to VSC's media contacts, through events and on the news wire, reaching thousands of writers and editors worldwide.

## PR CONTRACTORS

VSC public relations efforts expanded in FY 2016/17 to include in-market representation in Denver and Seattle, in addition to local contractors. Through these contracts, VSC leveraged their established relationships and met with media in market to garner press coverage in conjunction with the launch of new air service.

## IPW 2017 MEDIA MARKETPLACE

In June 2017, VSC represented SLO CAL at the IPW Media Marketplace, conducting 23 on-site media visits and proactive outreach, sharing press releases and story ideas.

**DRAFT**

## PARTNERSHIP WITH BLACK DIAMOND

In November 2016, VSC began a contract with international public relations and trade agency, Black Diamond. This strategic relationship has increased VSC's media presence in the UK and Ireland markets by pitching stories, identifying opportunities and hosting media events, resulting in:

**40,998,890** IN MEDIA CIRCULATION

**\$633,021** IN PUBLIC RELATIONS VALUE

## CRISIS COMMUNICATION

In FY 2016/17, two natural crises in the county required activation of the VSC Crisis Communication Plan that was developed in 2015: the Chimney Fire and the closure of Highway 1.

- **CHIMNEY FIRE:**  
The Chimney Fire consumed over 46,000 acres in SLO CAL in August and September of 2016, and VSC worked quickly and consistently to keep constituents updated via the website, email alerts and industry-specific social media channels.
- **PFEIFFER BRIDGE CLOSURE AND HIGHWAY 1 LANDSLIDES:**  
VSC has worked closely with state, regional and local partners to activate a crisis communications strategy around the Highway 1 closure, informing the public, press and tourism industry partners through a variety of tactics and outlets, including:



**CRISIS PLAN**

TALKING POINTS FOR INDUSTRY PARTNERS

ONLINE CLOSURE INFORMATION HUB

CONSUMER RESOURCES & DETOUR MAPS

**224**  
LODGING PROPERTY VISITS

INDUSTRY OUTREACH:

**24**  
VISITOR CENTER & CHAMBER VISITS

**ONGOING MEDIA RELATIONS, INTERVIEWS + INFORMATION**

# OWNED MEDIA

**DRAFT**

## SLOCAL.COM WEBSITE

With the launch of the new "Life's Too Beautiful to Rush" SLO CAL brand campaign, VSC also launched a dynamic, interactive landing page featuring a video header, visual mapping tour of the county and snapshots of the individual destinations.

Additionally, the previous website continues to house VSC's robust guest-experience information, event calendar and blog. This site has seen extensive growth in traffic due to VSC's ad campaign, strategic content development and continued site optimization efforts.

### 2016-2017 SNAPSHOT



**2,082,828**  
WEBSITE VISITS



**316.6%**  
YOY



**1,134,390**  
UNIQUE VISITORS



**199.6%**  
YOY



**3,532,325**  
PAGEVIEWS



**137.7%**  
YOY



**1.7**

AVERAGE PAGES PER VISIT



**2.6 MILLION**

MINUTES ON SLOCAL.COM



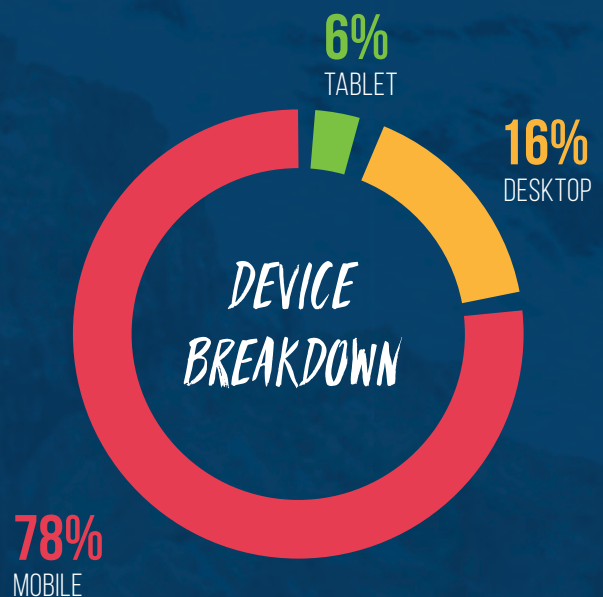
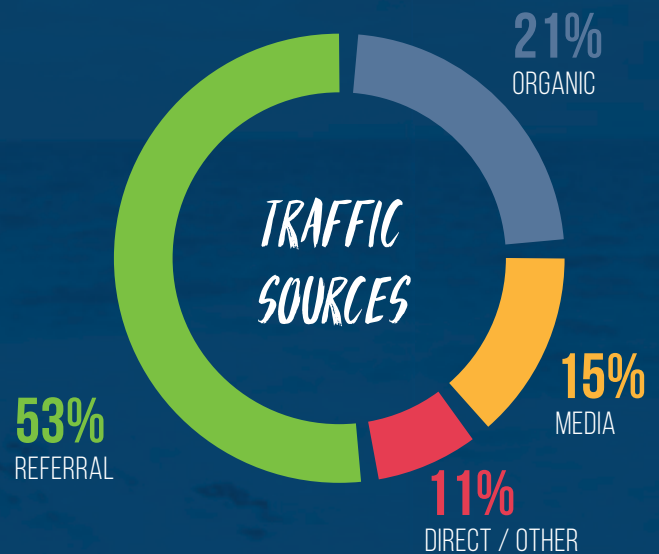
ORGANIC SEARCH TRAFFIC

**26.6%** YOY



MOBILE TRAFFIC INCREASE

**621.6%** YOY





# E-MAIL MARKETING

## THIS MONTH IN SLO CAL

*This Month in SLO CAL* is VSC's monthly newsletter, sharing trip ideas, giveaways, seasonal blog posts, unique deals and signature events with 36,000 subscribers. VSC also sends targeted e-blasts to strategic markets, such as promotions sent to Seattle and Denver subscribers supporting the new direct flights to San Luis Obispo County.

## THIS WEEK IN SLO CAL

Every Thursday, VSC delivers the weekly industry newsletter, *This Week in SLO CAL*, to lodging constituents, members and partners, sharing industry insights, travel trends, VSC news, crisis communications and local events.

## 2017/18 VISITORS MAGAZINE

In 2017, VSC expanded the *SLO CAL Visitors Magazine* (SCVM) with fresh, rich content and new branding. The SCVM provides an important opportunity to inspire travelers through engaging stories about SLO CAL's unique culinary, wine, adventure, cultural and coastal scenes, as well as exciting events and hidden backstories about our destination. The 2017 SCVM included new features on local picks, regional drives and *A Day in the Life*, where readers get to meet interesting people in SLO CAL.

- 45,000 SCVMs were printed and distributed
- SCVM was distributed through:
  - Travel & Corporate Locations in Los Angeles and San Francisco
  - VCA Welcome Centers
  - Requests on SLOCAL.com
  - Businesses, Hotels & Visitor Centers in SLO CAL

**DRAFT**

## SLO CAL BLOG

The SLO CAL blog continues to be a critical part of telling the destination story, inspiring travel and gaining organic search engine traffic. VSC has developed a strategic content calendar, expanding efforts to engage website users, tell unique stories and highlight partners through dynamic content. VSC also worked with Expedia to help create a blog post for SLOCAL.com, which was shared on Expedia's social media channels. VSC follows a "create once, distribute everywhere" (CODE) model, distributing content widely through email marketing, social media and website pages. In FY 2016/17, the VSC blog saw 400,605 pageviews, an increase of 251.36% over FY 2015/16.

## SOCIAL MEDIA

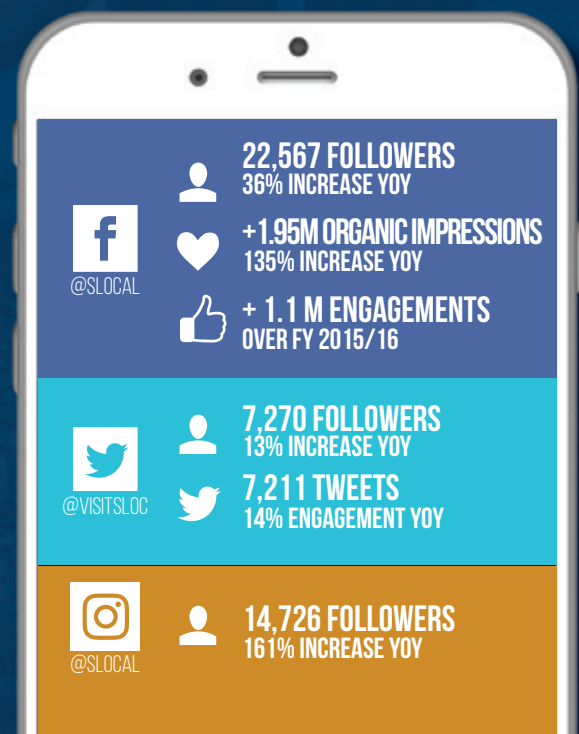
VSC applied the new SLO CAL brand to all social media channels in 2017. VSC also continues to expand efforts to work with influencers, allowing them to tell the SLO CAL story directly to their hyper-engaged audiences.

## INFLUENCERS

VSC continues to seek opportunities to expand online SLO CAL presence through brand ambassadors near and far. In FY 2016/17, VSC hosted two influencers, and will grow this program in the coming year.

Pete Halvorsen - @PeteHalvorsen 199K Followers

Corey Marshall - @MissFoodieProblems 87K Followers

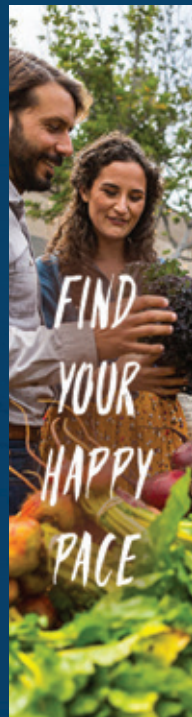
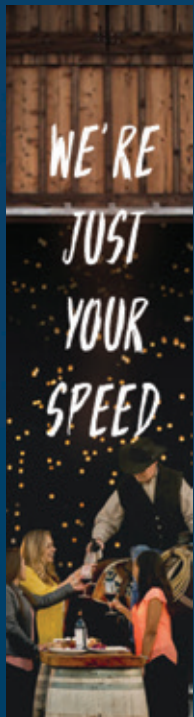


# PAID MEDIA

**DRAFT**

## NEW SLO CAL BRAND

In January of 2017, VSC completed a key Strategic Plan imperative, rolling out the first ever countywide tourism brand, SLO CAL, and the "Life's Too Beautiful to Rush" campaign to support it. Built on research, including the Share-of-Wallet Study and the Feeder Market Study, the new campaign is both data-driven and emotionally resonant. With it, San Luis Obispo County became SLO CAL, a "world you've been too busy to see," with a sense of place that connects with both visitors and residents.



## CAMPAIGN BY THE NUMBERS



TOTAL WEB TRAFFIC\*  
**1,797,695**



ENGAGED USERS  
**135,314**



ENGAGED USERS CVR  
**7.5%**



ARRIVALS\*\*  
**6,093**



CONTENT PAGE VIEWS  
(BUZZFEED & MATADOR)  
**230,866**



COST PER WEIGHTED  
CONVERSION  
**\$12.60**



COST PER ARRIVAL  
**\$88.64**



COST PER MINUTE  
OF ENGAGEMENT  
**\$4.53**

\*TOTAL WEB TRAFFIC DURING CAMPAIGN PERIOD, NOT JUST PAID MEDIA EFFORTS

\*\*ARRIVALS ARE BASED ON MEDIA PLACEMENTS TRACKABLE THROUGH ARRIVALIST AND ARE NOT INCLUSIVE OF ALL ARRIVALS RESULTING FROM THE MEDIA PLAN

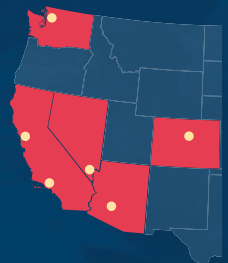
## TARGET MARKETS

VSC's limited advertising budget means that each dollar must be spent strategically, hitting the right people, at the right time, with the right message, and only those people. VSC reduces waste by careful targeting and optimization toward three strategic personas and by narrowing the focus to six key feeder markets, chosen through research data and to support the two new direct flights.

## 6 MARKETS

LOS ANGELES  
SAN FRANCISCO  
SEATTLE

DENVER  
PHOENIX  
LAS VEGAS







## PERSONAS

VSC's marketing strategy leverages psychographic segmentation to go beyond the demographics of household income, age, education level, etc., to uncover the beliefs, motivations, aspirations and lifestyles that enable engagement with the person, not just the target market.

### MOM TO THE MAX

Scheduled, Connected, Affluent,  
Seeks Transparency



### ACTIVE ADVENTURER

Active, Mid-High Affluent, Educated,  
Passionate Experience-Seekers



### CULTURED CLASS

Educated, Risk Takers, Gracious,  
Confident, Professionals

**DRAFT**

## COOPERATIVE ADVERTISING

Telling the full countywide travel story enables the consumer to envision a more extensive and dynamic vacation experience in SLO CAL, leading to longer stays and higher spending. VSC's co-op ad programs enable multiple organizations to join forces and funds to do just that – creating efficiencies and multiplying impact. In FY 2016/17, VSC worked with the Marketing Committee to identify and implement a variety of co-op ad programs, including:

PARTICIPANTS:  
MORRO BAY • ARROYO GRANDE  
ATASCADERO • SAN LUIS OBISPO  
PISMO BEACH

2 ARTICLES | 5 :90 VIDEOS

PARTICIPANTS:  
ATASCADERO • PASO ROBLES  
SAN LUIS OBISPO

"FORGET NORCAL AND SOCAL, SLO CAL IS WHERE IT'S AT"

2 ARTICLES

Alaska AIRLINES

7 PAGE CO-OP

RAN MAY 2017 IN ALASKA AIRLINES' IN-FLIGHT MAGAZINE





# RESEARCH

## RESEARCH NOW

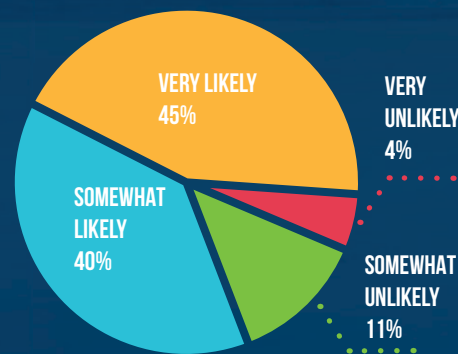
VSC hired a global market research firm, Research Now, to conduct a three-wave Brand Lift Study (BLS) to measure consumer awareness of the SLO CAL brand in key feeder markets. The first wave was completed ahead of the advertising launch and established a baseline from which to measure the campaign's impact. Wave two was conducted during the summer, following the campaign, and wave three will be conducted next year. So far, the BLS shows:

### FAMILIARITY WITH SLO CAL

39% HAVE VISITED SLO CAL IN THE PAST, UP FROM 38% IN WAVE 1

61% HAVE NOT VISITED OF WHICH 68% WOULD BE INTERESTED IN VISITING SLO CAL

### LIKELIHOOD TO CONSIDER VISITING SLO CAL AFTER SEEING ADS



**DRAFT**

## ARRIVALIST

Another way that VSC is tracking the success of the "Life's Too Beautiful to Rush" campaign is through a new contract with Arrivalist, a platform that evaluates the link between marketing exposure and market visitation. Arrivalist places tracking pixels on the SLOCAL.com website and on the digital ads VSC places to track interactions with consumers (viewing ads, visiting the website, etc.) and actual visits to SLO CAL (when their mobile device arrives in the county).

PAID MEDIA ARRIVALS  
6,093  
TOP 5 STATES  
% ARRIVALS

CALIFORNIA	83.0%
WASHINGTON	7.1%
ARIZONA	5.4%
COLORADO	2.3%
TEXAS	0.3%

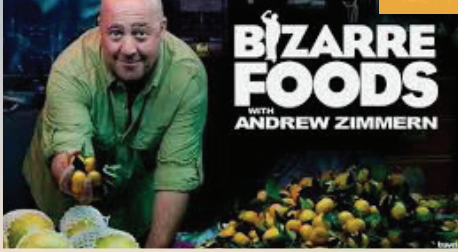
OWNED MEDIA ARRIVALS  
887  
TOP 5 STATES  
% ARRIVALS

CALIFORNIA	83.0%
NEVADA	2.0%
ARIZONA	1.8%
COLORADO	1.7%
TEXAS	1.6%

MONTH	EXPOSURES	ARRIVALS
JAN (21 <sup>ST</sup> TO 31 <sup>ST</sup> )	7.96%	1.39%
FEB	27.28%	14.04%
MAR	26.75%	20.57%
APR	29.08%	27.82%
MAY	5.25%	15.83%
JUNE	3.64%	12.65%
JULY(1 <sup>ST</sup> TO 17 <sup>TH</sup> )	0.04%	7.69%

**DRAFT**

# FILM SLO CAL



Along with the new SLO CAL brand, the SLO CAL Film Commission was rebranded as Film SLO CAL (FSC). FSC promotes, tracks and facilitates filming in the county. In 2016, filming remained strong with 120 project leads coming through the FSC office in the calendar year. These projects included independent feature films, television programs, commercials, photo shoots, music videos, documentary films and more. In 2016, FSC reported:

**316**  
FILMING  
DAYS

**\$6.3M**  
ECONOMIC IMPACT  
FOR SLO CAL

**OVER 85**  
PRODUCTIONS

### NOTABLE PRODUCTIONS INCLUDED:

- Bizarre Foods with Andrew Zimmerman (Viewership: 1M)
- Beach Front Bargain Hunt (Viewership: 9.4M)
- Shark Week (Viewership: 2M)
- The Real Housewives of Beverly Hills
- Commercial film or still shoots for Subaru, Polaris, Dodge, Jeep, Samsung, ipsey, Neiman Marcus and Bic Soleil
- Visit California "Living the Dream" TV commercial

## FILM INDUSTRY LOCATION FAMILIARIZATION TOUR

As part of its sponsorship of the SLO Film Fest, FSC hosted 12 location managers, scouts and filmmakers for a two-day film location scouting FAM through the county. Participants included independent film makers and location scouts for studios, such as Disney.

## MAJOR FILM COMMISSION TRADE SHOWS

**FILM IN CALIFORNIA EVENT:** FSC met with representatives from Paramount and Disney, and with location managers who work on features, commercials and TV series.

**ASSOCIATION OF FILM COMMISSIONERS INTERNATIONAL (AFCI) LOCATIONS CONFERENCE:** FSC promoted SLO CAL as a film location to over 500 industry professionals seeking locations for upcoming feature films, TV shows and commercials.

## NEW FILM SLO CAL BROCHURE

This year, FSC produced its first-ever *Film in SLO CAL* marketing brochure, showcasing a sample of the beautiful film locations in the county and providing information on production services available in the region. This is the first time FSC has had a branding piece of this caliber to display and distribute to filmmakers at trade shows and events.





# SPONSORSHIPS + EVENTS

**DRAFT**

VSC continues to seek event sponsorships and partnerships that align with VSC's mission, fit the SLO CAL brand and provide additional exposure to the key markets and personas.

## SAVOR ON THE ROAD

Last year, VSC reinvented SAVOR as an event marketing activation, taking it on the road to key target markets. To accomplish an immersive SLO CAL destination experience, VSC partnered with a variety of local restaurants, winery, brewery, distillery and activity members to create "SAVOR—A San Luis Obispo County Experience." VSC organized destination installations with food, wine, beer and spirit tastings, as well as craft products and local foods, at the San Diego Bay Wine + Food Festival in November and the Seattle Wine & Food Experience in February.



*SAN DIEGO – 5,000 ATTENDEES AND 11 PARTNERS  
SEATTLE – 2,000 ATTENDEES AND 9 PARTNERS*



**\$50,000** SPONSORSHIP

2 HOURS TV COVERAGE

30 SECOND COMMERCIALS

ONLINE VIDEO, BANNER ADS,  
SOCIAL MEDIA POSTS + E-BLAST INCLUSION



## VSC DELIVERS AMGEN TOUR OF CALIFORNIA TO SLO CAL

VSC sponsored the AMGEN Tour of California for the second year in a row, contributing \$50,000 to support a race start in Pismo Beach and a finish in Morro Bay on May 16, 2017. The race route covered many SLO CAL communities during the two-hour live international broadcast, including Grover Beach, Arroyo Grande and Edna Valley, as well as a sprint down Higuera Street in downtown San Luis Obispo. In addition to the coverage, VSC, along with the start and finish cities, received promotions, such as international TV commercials on NBC Sports, online video ads, social media coverage and more.

**5,896** Total Tour Tracker Ad Views for VSC

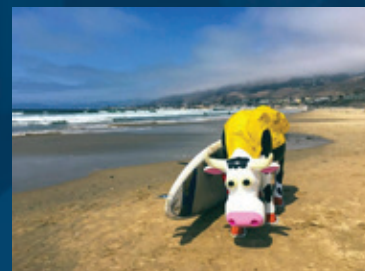
**17,688** Total Tour Tracker Ad Views for Pismo Beach, Morro Bay and VSC

Social Media: **13** Social Posts / **461,014** Reach

VSC: **5** Emails / **298,959** Deliveries / **19.86%** Open Rate

## COWPARADE SLO COUNTY

Contributing \$20,000, VSC was the Official Tourism Sponsor for CowParade SLO County, a countywide art installation that ran from September 2016 to April 2017. VSC collaborated with local marketing firm BCA to create and produce seven "Adventure Cow" videos featuring activities throughout the county—from kayaking in Morro Bay to ziplining in Santa Margarita, grapestomping in Paso Robles to the Polar Bear Dip in Cayucos. The video promotion saw:



**40,800+** Facebook Video Views / **5,000+** Instagram Video Views

# INDUSTRY EDUCATION

**DRAFT**

VSC is dedicated to providing the latest industry information, research and resources to tourism partners, lodging constituents and VSC members. In FY 2016/17, VSC hosted several industry events covering a wide range of topics, including:

RESEARCH  
 SOCIAL LODGING  
 CUSTOMER SERVICE  
 INTERNATIONAL  
 TOURISM IMPACT  
 CHINA  
 VACATION RENTALS  
 PERSONAS  
 RECEPTIVES  
 SLO CAL  
 ADVOCACY  
 INFLUENCERS  
 HOTELS  
 VISIT CALIFORNIA

## INDUSTRY EDUCATIONAL SYMPOSIUM

In October 2016, VSC held an Industry Educational Symposium, designed to cover important and timely industry topics, which were focused on perfecting operational effectiveness and increasing revenue.

## GLOBAL READY TRAINING

VSC partnered with Visit California to host a first-of-its-kind Global Ready China seminar in December 2016. The seminar provided more than 75 attendees with an understanding of the Chinese tourist and insight on how to welcome this growing market.

## INDUSTRY SOCIAL MEDIA CHANNELS

VSC utilized the industry social media channels established last year to inform constituents and industry partners on industry news, local accomplishments and crisis updates for the Chimney Fire and the Highway 1 closure.

 Visit SLO CAL

 @VisitSLOCAL

## 2017 ANNUAL VISIT SLO CAL TOURISM EXCHANGE

The Tourism Exchange in May is VSC's largest industry event of the year, bringing together community partners, lodging constituents, VSC members and government officials to celebrate National Travel & Tourism Week. Here, attendees heard the latest industry intelligence from guest speakers, learned from tourism industry experts and networked with peers. The VSC Tourism Exchange saw a record attendance in 2017.



SPEAKERS FROM...

170 ATTENDEES





# STRATEGIC PARTNERSHIPS

Following the Strategic Plan imperative to “build and expand strategic partnerships,” VSC continued cultivating and strengthening collaboration with several national, statewide and regional organizations in marketing, development and continuous improvement.

**DRAFT**

## VISIT CALIFORNIA

VSC understands the value of the tourism funnel and having strong relationships with DMOs at the national, state and regional level. It is critical for VSC to stay top-of-mind with these organizations, and Visit California (VCA), the state’s destination marketing organization, has proven to be a key ally in accomplishing VSC’s mission. To help maintain this vital relationship, VSC President & CEO, Chuck Davison, sits on VCA’s Branding Committee and VSC staff and partners attend many VCA events, participate in VCA programs and collaborate frequently.

**GLOBAL READY SEMINAR:** VSC partnered with VCA to host training for local partners around the Chinese culture and Chinese guest. For more information, see page 20.

**CHINA & MEXICO SALES MISSIONS:** VSC continued to increase international awareness of SLO CAL by attending VCA’s China and Mexico Sales Missions, allowing VSC access to a network of premier travel agencies and resources.

**MEXICO AND CANADA CEO MISSION:** In May, Chuck Davison joined a delegation of senior industry leadership and elected officials on a VCA CEO Mission to deepen ties and reaffirm our industry’s commitment in Mexico and Canada in response to the U.S. political climate and economic factors impacting international travel.

**SILVER ANNIVERSARY CELEBRATION:** Chuck Davison and VSC Vice President of Marketing, Brooke Burnham, attended Visit California’s Silver Anniversary Celebration in May. Also representing SLO CAL at the event were Paso Robles Mayor, Steve Martin; VSC and VCA Board Member Noreen Martin and VSC Board Chair Jay Jamison.

**CALIFORNIA DMO LEADERSHIP SUMMIT:** Chuck Davison was among 11 destination CEO’s invited by VCA to participate in their DMO Leadership Summit. Attendees discussed a wide array of topics, including government affairs, industry trends, organizational governance and business issues.

**HIGHWAY 1 CLOSURE COLLABORATION:** VSC has been working closely with VCA and partners along the Central Coast to help inform the public and travel trade around the Highway 1 closure (see page 12 for details).



**“LIVING THE DREAM” COMMERCIAL\*:** VCA featured SLO CAL in their “Living the Dream” TV commercial, which began airing nationally and internationally in the winter.

Supported by planned VCA media spend of \$26.1M in FY16/17; deployed through broadcast and online TV channels in 6 markets:



\*CAMPAIGN YIELDED OVER 900M IMPRESSIONS



# LOCAL PARTNERSHIPS

**DRAFT**

# OTHER INDUSTRY RELATIONS



## SLO COUNTY REGIONAL AIRPORT (SLOCRA)

VSC partners with the SLOCRA to attract new visitors to the area, develop new flights and support existing routes. VSC supported new flight development with over \$460,000 in marketing to activate the new markets. Three new flights, two serving new markets, were established in FY 2016/17 (see page 23 for more details).



## CAL POLY

VSC collaborates with Cal Poly on several initiatives, including Poly Parent Adventures, internships for the Cal Poly Experience Industry Management students and the Local Economic Development Committee for the President's Council of Advisors, which VSC President & CEO Chuck Davison serves on.

**POLY PARENT ADVENTURES:** VSC and Cal Poly continued their partnership to promote Poly Parent Adventures, offering special deals and packages.

- 35 member participants
- 1,527 pageviews

**VSC INTERNSHIP PROGRAM:** VSC employed two Cal Poly seniors as full-time interns to gain multi-departmental DMO experience, including events, marketing and travel trade promotion.



## ECONOMIC VITALITY CORPORATION

VSC President & CEO Chuck Davison serves on the Board of the Economic Vitality Corporation (EVC). VSC and EVC collaborate on many issues, including working with the SLOCRA to advocate for additional air service.



## AMTRAK

Amtrak is a VSC member and acts as a strong strategic partner in attracting visitors to SLO CAL via Los Angeles, San Francisco and San Diego.

## DMO PARTNERS

VSC collaborates with local destination marketing organizations (DMOs) to expand their reach and impact, while seeking to reduce and avoid duplication of efforts. Each DMO has a seat on the VSC Marketing Committee, informing the annual VSC Marketing Plan.



## BRAND USA

Brand USA leads the nation's global marketing effort to promote the US as a premier travel destination.



## U.S. TRAVEL ASSOCIATION

U.S. Travel is the leading force that grows and sustains travel, and protects the freedom to travel.



## DESTINATIONS INTERNATIONAL

Destinations International (formerly Destination Marketing Association International) is the global destination marketing association, providing education, resources and advocacy for DMOs worldwide.



## DMA WEST

DMA West is the trade association for destination marketing organizations in the western US, providing regionally specific educational enrichment and networking opportunities.



## CALIFORNIA TRAVEL ASSOCIATION (CALTRAVEL)

CalTravel is the unified voice of California's travel industry, bringing tourism businesses together in education and advocacy. Chuck Davison serves on both the board of directors and the executive committee.



## CENTRAL COAST TOURISM COUNCIL (CCTC)

VSC Vice President of Marketing, Brooke Burnham, serves on the board of this regional DMO. VSC partnered with CCTC to attract international tour groups and media to the county.

# TOURISM INFRASTRUCTURE

One of the five key imperatives of the VSC Strategic Plan is to advocate for the development of critical tourism infrastructure. VSC has been working on a number of related initiatives over the past year, including air service development and conducting the Conference Center Feasibility Study.

**DRAFT**

## AIR SERVICE DEVELOPMENT

VSC partnered with San Luis Obispo County Regional Airport and the EVC to grow flight service to SLO CAL. VSC assists in the development and support of new flights, including promotional campaigns that target new flight markets to grow awareness and demand. FY 2016/17 brought an additional San Francisco flight with United Airlines, a new direct flight to Seattle with Alaska Airlines and new direct service to Denver with United Airlines, marking the first new flight markets in nearly 10 years.



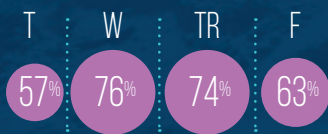
ADDITIONAL FLIGHT SERVICE TO SAN FRANCISCO HAS ALSO BEEN SECURED

15-20,000<sup>SQ</sup><sub>FT</sub>  
BALLROOM DESIRED

- 81% OF THOSE WHO HAVEN'T BOOKED BEFORE WOULD CONSIDER BOOKING IN SLO CAL IF THE NEW FACILITY WAS BUILT
- 84% OF MEETING PLANNERS WOULD BOOK IN FALL, WINTER AND SPRING
- OF THOSE WHO HAVE BOOKED, 79% ARE DEFINITELY OR LIKELY TO RETURN IF THE NEW FACILITY WAS BUILT

MID-WEEK & SHOULDER SEASON SHOW HIGHEST POTENTIAL

PEAK EVENT TIMING



## CONFERENCE CENTER FEASIBILITY STUDY

VSC conducted the Conference Center Feasibility Study to explore new opportunities for mid-week and non-peak-season tourism business. The study clearly showed strong potential for a mid-size conference facility to be successful in SLO CAL. The study was shared with business and government leaders throughout the county, and VSC is committed to supporting such an initiative in the future.





# MOVING FORWARD

In the coming year, VSC will focus on a number of projects related to the five imperatives in our Strategic Plan. From establishing brand clarity and building partnerships, to advocating for continued infrastructure development and demonstrating value to our communities, VSC is committed to strategic progress for the county.

**DRAFT**

## NEW AIRPORT TERMINAL + AIR SERVICE DEVELOPMENT

VSC will continue to seek opportunities to work alongside the SLOCRA to promote air travel to the destination. The new terminal is scheduled to open in November 2017, offering new ways to welcome visitors to the destination and remind them of all there is to do in SLO CAL. With the initial success of the Denver and Seattle flight markets, VSC is committed to working with EVC and the SLOCRA on flight development to increase vacations to SLO CAL.

## NEW WEBSITE

VSC is currently in the process of developing a brand-new website with the leading destination marketing website company, Simpleview, Inc. The new brand hub will be content-forward and consumer-focused, leveraging the latest technology, dynamic storytelling and data-driven construction to deliver the ultimate user experience. From vacation inspiration to trip-planning utility, every aspect of the travel consideration and conversion journey will be addressed, including continued partnership with Booking.com.

## NEW BRAND PARTNERSHIPS

VSC is currently working on co-marketing opportunities with local and national brands, including one with local company LeftLane Sports and their sister company The Clymb. Such strategic marketing partnerships enable VSC to amplify the SLO CAL brand through content creation, influencers and promotions with more established partner brands. These co-branding agreements build awareness through strong reach and add authority through key target personas.

## ADVOCACY

Advocacy for the tourism industry and our partners will take a front seat for VSC in the coming year as an advocacy strategy is developed to identify, vet and support key initiatives that will advance the tourism industry in SLO County.

## NEW PR FIRM

VSC will soon be contracting a national public relations agency for FY 2017/18 and developing a year-long communications strategy to reach national and international media through proactive initiatives.

## BRAND AMBASSADOR + INFLUENCER PROGRAM

Marketing is increasingly about reaching consumers through trusted sources. In FY 2017/18, VSC will expand programs to identify, collaborate with and host influencers and brand ambassadors. Providing or facilitating excellent, authentic content will help expand and galvanize the SLO CAL brand with key target audiences through large, national influencers, as well as regional and local brand ambassadors.

# FY 2017/18 BUDGET

Estimated cost of providing activities in the next fiscal year:

**\$3,724,040**

Estimated amount of surplus or deficit revenue carried over from the previous fiscal year:

**\$734,944**

Estimated amount of contribution from non-assessment sources:

**\$35,299**

Reserves:

**\$364,720**

Cash Carry-Over:

**\$368,541**

**DRAFT**

TRAVEL TRADE (11.19%)

GENERAL AND ADMINISTRATIVE (4.75%)

DIGITAL MARKETING (10.51%)

FILM COMMISSION (2.02%)

CONTINGENCY RESERVE (6.83%)

INDUSTRY RESEARCH & RESOURCES (8.00%)

COMMUNICATIONS (6.21%)

EVENTS (5.37%)

PROMOTIONS (1.70%)

**VISIT SLO CAL BUDGET\***

**\$3,724,040**

ADVERTISING (43.42%)

\*This is a more detailed budget by category than the budget found in the Management District Plan (MDP). However, the Advertising budget is increasing 5.7% from the 15.0% allowable variance defined in the MDP (35.0% to 37.3%)



# APPENDIX

**DRAFT**

## METHOD AND BASIS OF LEVYING ASSESSMENT

The annual assessment rate is one percent (1%) of gross short-term (stays 30 or fewer consecutive days) room rental revenue. With the passage of the Tourism Marketing District (TMD) on June 10, 2015, implementation of the assessment began July 1, 2015, and continues for five (5) years through June 30, 2020. The county and each city are responsible for collecting the assessment from lodging businesses within their respective jurisdictions on a monthly or quarterly basis, including any delinquencies, penalties and/or interest. Within thirty (30) days of receipt, the county and each city then forward the assessments collected to the TMD managed by VSC.

## PROPOSED BOUNDARY, ZONE OR CLASSIFICATION CHANGES

There are no proposed boundary, zone or classification changes for the coming year.

## SLO CAL TOURISM MARKETING DISTRICT

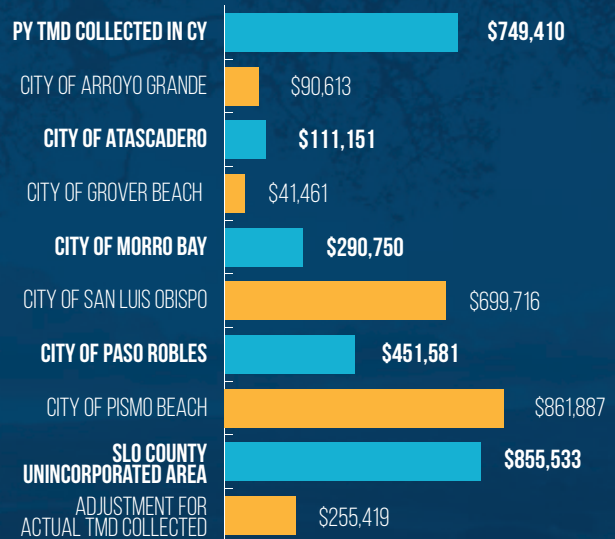
Developed by VSC, the San Luis Obispo County TMD (SLOCTMD) is a new countywide cooperative effort to collectively market all that the county has to offer for the benefit of assessed lodging businesses. The assessment district provides specific benefits to payors by funding marketing, advertising, promotions and sales efforts for assessed businesses.

The SLOCTMD provides an opportunity for lodging businesses throughout the county to collaboratively engage in marketing, advertising, sales and promotional efforts. This joint effort helps foster synergy among the county and businesses, and ensures TMD dollars are spent in the most streamlined manner possible. It aims to establish SLO CAL as a premier Central Coast tourism destination and a leader in the California tourism community.

The core focus of the SLOCTMD is twofold: to put more heads in beds and to increase the average daily rate charged for those beds.

To that end, the programs funded by the SLOCTMD have two specific goals: (1) to increase awareness of SLO CAL as an overnight destination, and (2) to increase lodging demand for the destination and lengthen visitors' average stay (leading to boosted lodging sales and revenue).

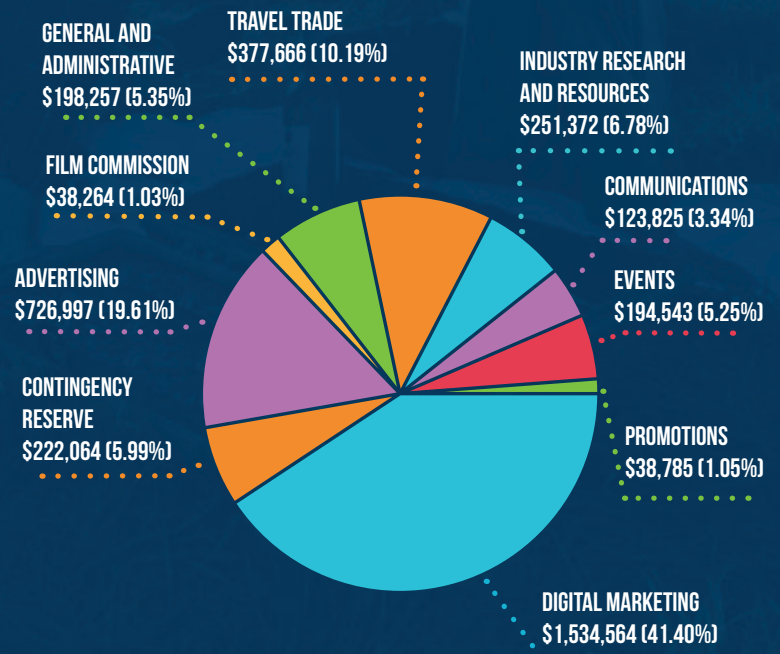
## \*ASSESSED FUNDS FROM FY 2016/17



\*Collections remitted from July 1, 2016 to June 30, 2017, including funds collected from the prior year based on the transition from cash to accrual accounting method, as well as adjustments made for current year remittances that varied from accrued amounts.

## FY 2016/17 DETAILED EXPENDITURES PAID

(Amounts and percentages)



***DRAFT***







**TURNER FOR**



**SAN LUIS OBISPO COUNTY  
CALIFORNIA**



# **REQUEST FOR PROPOSAL**



**TURNER**

a fahlgren mortine company

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# **SERVICES AND ACTIVITIES**

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# LETTER OF INTEREST & EXECUTIVE SUMMARY

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*Provide a letter of interest and an executive summary of your proposal.*

August 23, 2017

Dear Visit SLO CAL Team,

Thank you for considering TURNER in your RFP process to support Visit SLO CAL's tourism efforts. Our team is excited about the opportunity to represent such a special destination; many of team have spent time in Central California and would be honored to help tell your story far and wide.

TURNER is a full-service public relations, social media and digital communications firm representing some of the world's best destinations, resorts and brands. We specialize in tourism, travel and active lifestyle brands. (The places you want go and the items you need in your suitcase.) Our client roster includes a deep bench of DMOs including Utah, Bermuda, Alberta, Toronto, Estes Park, Cheyenne, Albuquerque and South Walton.

TURNER was founded in 1997 in Denver, CO, and we have offices in New York, Chicago and Miami to best service our worldwide clients.

We are confident we can take Visit SLO CAL's storytelling and media exposure to new heights. You will find through this RFP that one of our key specialties is generating positive, quality and continual media coverage for tourism destinations, often reshaping and expanding perceptions of the destination.

Thank you for your consideration of TURNER. We have so many stories from our visits, and we would be honored to represent Visit SLO CAL!

Best Regards,

*Angela Berardino*

Angela Berardino

*Chief Strategy & Integration Officer*

angela@turnerpr.com

**TURNER**  
a fahlgren mortine company

**NEW YORK | CHICAGO | DENVER | MIAMI**

1614 15th Street, Fourth Floor

Denver, CO 80202

303.333.1402 (o)

720.232.4934 (c)

## NATURE OF SERVICES & ACTIVITIES

*Provide a description of the nature of the proposer's services and activities.*

### Media Relations

We're trained like journalists and respected for our national relationships and deliberate, well-researched approach. TURNER has established itself as a go-to resource for travel and lifestyle brands among the top editors, freelancers and influencers who drive editorial trends. Our outreach yields unmatched results, building brand awareness, driving sales and inspiring action. Our team continually develops new and creative ways to work across the changing media landscape, from digital broadcast to visual storytelling. We also execute media training services for clients to ensure key brand and message points are clear during speeches, print and broadcast interviews.

### Influencer Relations

Through both organic and paid influencer programming, we develop and execute customized programs across verticals. Our team is extremely skilled at finding the

right influencers for your brand and creating lasting relationships that will deliver results for both you and those who drive your business. When campaigns involve paid influencer activation, we negotiate individual contracts, deliver product and experience and ensure the campaign adheres to legal requirements.

### Press & FAM Trips

Experience is what counts when it comes to influencer marketing and public relations. On custom-designed press and FAM trips with built-in brand and product positioning, we show off the most unique aspects of our resort and destination clients, giving writers and influencers unforgettable adventures. Press trips are not limited to our travel clients, however. We frequently arrange product and gear reviews for our lifestyle portfolio, and in some cases develop creative partnerships to deliver value to multiple clients during a single trip. The result is coverage that inspires and motivates travelers.

### Events & Showrooms

Business is personal for us. In a world filled with screens, getting face-to-face is still the best strategy. Every year, TURNER plans and executes dozens of showroom, branding and consumer events, as well as media days, all of which introduce our clients' collections and destinations to targeted writers, editors, influencers and bloggers in interactive and memorable ways. We are skilled at creative activations in markets of all sizes, and our ideas include a strong social media component to extend events into the digital sphere.

### Crisis Communications

We handle the unexpected bumps in the road. TURNER provides rapid, all-encompassing public relations crisis management to help protect, repair and promote clear, transparent messaging and a positive brand reputation for our clients in real time.



## Celebrity Placement

We can't deny the power of celebrity influence (even as the definition of celebrity is changing rapidly). The right, carefully chosen influencer can create invaluable assets for brands among consumers, retailers and stakeholders around the globe. TURNER connects brands to the right celebrities, stylists, and designers to grow markets, generating high profile exposure for fashion and luxury brands, hotels and destinations. We also deliver product placement opportunities across major broadcast and print outlets, ranging from location shooting to wardrobe partnerships with major productions.

## Travel Trade Relations & Destination Representation

Building and implementing tailored destination distribution and marketing campaigns is our forte. Our data-driven travel trade strategies focus not only on increasing product distribution and awareness, but also boosting overall sales and consumer

bookings. Our campaigns include a mix of approaches: perception studies, special events and roadshows, cooperative marketing programs, tradeshow representation and familiarization and education programs. We also provide strategic counsel for clients on how to best increase their travel trade-marketing footprint and B-to-B strategy, always in a budget-conscious and market-specific manner.

## Partnerships

The right collaborations and partnerships create marketing platforms and business opportunities to help brands stand out in their categories. TURNER's creative team excels at finding unexpected partners for our clients, resulting in co-branded marketing programs, fashion capsule collections, stand-out service offerings, and most importantly generating incredible media results and viral social campaigns.

## Research

We conduct a substantial amount of research at the onset of an integrated plan and work with clients throughout our partnership to benchmark and regularly capture the data needed to turn insights into action. From audience and competitor analyses to web and social media listening and analytics, we dig deep into market conditions, consumer behaviors, and constantly shifting trends to help futureproof our clients against their always-evolving business landscape. In tandem with the extensive resources of our parent company Fahlgren Mortine, we encompass both generative and evaluative areas, with full-spectrum qualitative and quantitative research methodologies.

## AGENCY HISTORY & EXPERTISE IN TRAVEL & TOURISM AND PUBLIC RELATIONS

*Provide the year in which your company was formed. Note your company's history and expertise in travel and tourism public relations.*

### Agency History

Our journey began in 1997 in Denver, CO, rooted in public relations with a steadfast belief in the power of the media to share brand stories.

TURNER quickly earned a reputation as one of the most trusted and effective agencies, establishing a national client base and expanding the business year-over-year. In 2003, we made a passion play and shifted from a generalist practice to a specialty firm focused on travel and lifestyle brands. We opened a second office in New York City in 2005 and became one of the first PR firms to pioneer a social media practice in 2008.

In 2015, we opened an office in Chicago, and this year we've expanded to Miami. Today we're proud to serve our longtime clients with the most talented PR, digital, social media and content specialists brought together by our shared passions for the industries we represent.

### Expertise in Travel & Tourism

TURNER has the deepest bench of niche PR and social media experts anywhere. We work exclusively with travel/tourism and active lifestyle brands. (All the places you want to go and the items you'll pack for your journey.) We are selective about our client partners – you won't find 300 brands on our roster because every brand we work with is a big deal to our team. While our roots are in media relations, we've certainly evolved with the changing demands of a fast-paced industry. In 2008, we were the first travel PR firm to pioneer a social media division; and today, we offer a blended PR and digital service designed to tell compelling brand stories across paid, earned and owned channels.

Our current client roster includes the Direct Marketing Offices (DMOs) of Utah, Albuquerque (NM), Bermuda, Alberta, Toronto, South Walton (FL), Cheyenne (WY) and Estes Park (CO), as well as numerous other travel and hospitality brands. You will find through this RFP that one of our specialties is generating positive media coverage for national and international tourism destinations. Our team is results-focused and has an internal culture focused on proactive media results at all times.

# 40+ TEAM MEMBERS

NEW YORK • DENVER • CHICAGO • MIAMI

**330 HOURS**  
VOLUNTEERING

IN THE PAST YEAR

**1430 HOURS** HIKING,  
BIKING, PADDLING

**150+**

Journalists  
hosted  
annually

**30**

Trips to different  
countries

**2**

Barrels in  
the office  
kegerator

FOUNDED 1997 WITH DENVER HQ AND NATIONAL  
CLIENT BASE IN MULTIPLE INDUSTRIES

OPENED NY OFFICE 2005

OPENED CHICAGO OFFICE 2015

'95

'00

'05

'10

'15

**TURNER**

SPECIALIZED IN OUR INDUSTRIES 2003

FIRST TRAVEL PR FIRM TO START  
SOCIAL MEDIA DIVISION 2008

OPENED MIAMI OFFICE 2017



**90%**

Of clients served  
by more than  
one office

**100%**

Authentic

**360°**

Innovative &  
integrated  
solutions for  
every client

## WE REPRESENT THE WORLD'S BEST PLACES, EXPERIENCES AND LIFESTYLE BRANDS

## PRIMARY ADDRESS

List the address from which the primary work on the contract would be performed.

### Headquarters:

TURNER  
1614 15th Street, Floor 4  
Denver, CO 80202  
(o) 303-333-1402

### Additional Offices:

TURNER New York  
250 West 39th Street, Floor 16  
New York, NY 10018  
(o) 212-889-1700

### Secondary Support Offices (as needed):

- Chicago, IL
- Miami, FL
- Our parent company, Fahlgren Mortine, has 11 offices in the U.S. to include Columbus, Cleveland, Cincinnati, Dayton and Toledo, OH; Charleston, WV; Fort Lauderdale, FL; Boise, ID; Lexington, KY.; and Greenville and Myrtle Beach, SC

## AGENCY SIZE

Note the size of agency by headcount, listing the number of full and part-time employees. Do not list any subcontractors in this section.

TURNER currently employs forty (40) full time employees. We currently do not have any part-time employees.

## CONFLICT OF INTEREST

*List all tourism-related clients for whom you have acted in the United States during the past 18 months. You must certify that there are no conflicts of interest between any existing contracts. Client relationships that could potentially be a conflict of interest must be listed together with a discussion of how the proposer will resolve the potential conflict of interest. The respondent cannot currently be working with a DMO located in San Luis Obispo County.*

TURNER has no conflict of interests with Visit SLO CAL.

## CURRENT TOURISM CLIENTS

### Visit Albuquerque

TURNER has been Visit Albuquerque's agency of record since 2012. Through an aggressive public relations program, TURNER has effectively put Albuquerque in the spotlight on a national and regional level. Our agency worked with the Visit Albuquerque team to turn Breaking Bad (a popular television show with controversial topics) into a pop culture sensation embraced by travelers across the globe. TURNER's successful media campaigns have led to Visit Albuquerque receiving a Bronze PRSA Anvil Award for its Breaking Bad tourism campaign in 2014, year-over-year record-breaking results with more than 109 articles generated in 2015, reaching nearly 700 million impressions, numerous journalists visiting the destination, and resulting in several accolades such as "What to do in Albuquerque" a top 10 Google travel search in 2015.

### Utah Office of Tourism

TURNER has been the public relations agency of record for the Utah Office of Tourism since 2013. TURNER has implemented a highly successful North American media relations program for Utah, including proactive media relations, FAM and press trips, in-market media missions, media material creation,

partner webinars and presentations, trade show representation and more. TURNER's work on The Mighty Five™ campaign showcasing Utah's National Park collection led to numerous industry accolades for the tourism office. At the end of 2015, Utah was named Fodor's top destination in the world to visit in 2016.

### Visit Cheyenne

TURNER was contracted with Visit Cheyenne on project work for Cheyenne's Frontier Days for the last five years and became the agency of record for all domestic media relations for the charming Western town in 2014. While Frontier Days is their signature event, Cheyenne was looking to expand their tourism reach to other times throughout the year. Through a dedicated PR campaign that highlighted Cheyenne's rich Western culture and proximity to outdoor recreation, the town has been featured in Yahoo! Travel, AAA Via, Cowboys & Indians, Elevation Outdoors, Sunset, The Travel Channel, and more.

### Visit Estes Park

TURNER has represented Visit Estes Park for seven years, starting with the organization in 2010. During this time, our agency has increased

media relations results year-over-year, garnered industry awards including the PRSA 2014 Silver Anvil award for crisis communications efforts surrounding the 2013 thousand year flood that occurred in Estes Park, and helped guide and garner a steady momentum of nationally-recognized travel accolades including Travel + Leisure's America's Favorite Towns 2014, Budget Travel's America's Coolest Small Towns 2014 and Smithsonian Best Small Towns to Visit in 2015. In 2015, media efforts from the TURNER team resulted in more than 843 million impressions with an excess of \$9.3 million in advertising value.

### Visit South Walton

As Visit South Walton's agency of record, the TURNER team focuses on traditional and nontraditional media relations for the expansive Florida destination. Located along a 26-mile stretch of northwest Florida's Coast, South Walton encompasses an unparalleled strand of 16 distinct beach neighborhoods, each with its own traditions, charm and visual style. TURNER is responsible for supporting their in-house PR team with a strategy targeted at media and influencers that will impact partners through positive



stories and relationships within targeted outlets. Through the 2017 contract year, TURNER will organize deskmate meetings, intimate events in top media markets, and arrange individual and group media FAM trips.

### **Tourism Toronto**

TURNER is contracted for U.S. public relations efforts for Tourism Toronto, focusing on traditional online, print, and broadcast media outlets. In addition to media relations, the cross-office team, with members in New York City and Denver, is responsible for press/FAM coordination, in-market media missions, and special events, trade show representation, and more. While Toronto has been a premier global destination for travelers worldwide, with the increased popularity with other Canadian cities such as Vancouver and Montreal, their PR coverage in the United States was waning. With a robust strategy that highlighted Toronto's diverse neighborhoods, growing culinary and beer scene and unique cultural offerings, TURNER was able to put the city back in the conversation with top tier outlets and niche, tastemaker publications. In 2016, the city was featured in everything from The New York Times, Lonely Planet, Refinery29.com, CNTraveler.com, ChicagoParent.com, PasteMagazine.com, CNN.com, Shape, Afar.com, and New York Post.

### **Travel Alberta**

As Travel Alberta's agency of record for North American public relations efforts, the TURNER team focuses on traditional and nontraditional media relations for the expansive

Canadian province. Alberta is known for their five national parks and the outdoor adventures within, as well as their culturally-rich cities Calgary and Edmonton. TURNER is responsible for supporting their in-house PR team with a strategy targeted at media and influencers that will impact both their urban and rural partners through positive stories and relationships within targeted outlets. TURNER organized deskmate meetings, intimate events in top media markets, and arranged individual and group media FAM trips. These events highlight the diversity of the province, develop newsworthy pitch angles to add share-of-voice and add Alberta's many destinations to travellers' bucket lists and assisted with any community and crisis communications efforts as needed. National Geographic Traveler ranked Banff National Park in Alberta as the top place to visit in 2017.

### **Bermuda Tourism Authority**





















TURNER is employed as the Bermuda Tourism Authority's agency of record for North America and is responsible for creating and implementing results-oriented public relations strategies for the island. Scope of work includes managing a robust PR program including media relations, press/FAM trip coordination, partnership and collaboration development, influencer outreach, crisis/issues management and online press rooms. Results delivered for 2016 include over 500 articles spanning print, online and broadcast, generating 1,163,654,808 impressions and \$16 million in ad value equivalency. 55 media

were hosted including 14 editors and journalists on group trips, 30 journalists on individual trips and 11 on influencer trips. Coverage highlights include sizable features in Robb Report, Wall Street Journal, Men's Journal, Virtuoso Life, and Lonely Planet. Bermuda was recognized with numerous awards including Travel + Leisure's 50 Best Places to Travel in 2017, Frommer's Best Places to Go in 2017, Condé Nast Traveler's The Best Places to Travel in 2017, Lonely Planet's Best in Travel in 2017 and Associated Press' Where to Go in 2017. Additionally, TURNER was awarded the Hospitality Sales and Marketing Association International (HSMAI) Platinum Award as well as Best of Show in the field of Public Relations for its "Finding Bermuda's Adventurous Side" campaign.

### **Current Travel Clients (non-tourism)**

- Aloft Element Austin
- Audley Travel
- Crowne Plaza Denver
- Hoxton Williamsburg
- JW Marriott Austin
- Le Meridien Downtown Denver - AC Hotel
- Park Hyatt Beaver Creek
- Park Terrace Hotel, New York
- REI Adventures
- The Source Hotel Denver
- Viceroy Snowmass
- Waldorf Astoria Park City
- Westin Austin Downtown
- World Nomads

## CURRENT LIFESTYLE CLIENTS



# **PERSONNEL AND MANAGEMENT**

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## TEAM

*Identify all individuals on the proposer's team who will assist in managing the work in this contract proposal and list with position title. Include a general description of the duties for each position title.*

TURNER employs more than 40 communication professionals and each team is tailored based on the needs of the destination, scope of work and geographic preferences. We are suggesting a team led out of Denver (for time zone ease), however, we can easily rearrange to lead from NYC if that is preferable. Our team works across an integrated platform and our job functions aren't completely aligned with the titles noted in this RFP, however, we've explained roles below.

## PRIMARY TEAM

*For 'primary' account members, please provide an overview of each individual's experience on tourism accounts, and include current resumes/biographies. Provide education, experience and expertise with pertinent information demonstrating qualifications for this RFP. Include length of time with agency, current position and length of time in any previous related positions. Do not exceed two pages per person.*



### **Deborah Park, VP, Travel**

Deborah has been with TURNER for nearly two years, and brings 12 years of tourism and hospitality experience to the team. She understands stakeholder relations and tourism offices inside and out, and will be able to successfully manage the ROI per objective for the account. She currently oversees the tourism accounts for Utah, Toronto and Estes Park, and has a strong tourism and media relations background, previously handling national and international communications for Visit Denver. In her role, she also oversaw all social media channels and content for the Convention & Visitors Bureau. Deborah also spent six years working both at agencies and in-house

for Universal Studios Hollywood overseeing International, Travel, Hispanic and Online Media. Deborah holds a Bachelor's Degree in Journalism and Fine Arts from the University of Colorado, Boulder and a Master's Degree in Sports & Entertainment Marketing from University of Colorado, Denver. She joined the TURNER team in 2015.

**ROLE WITH VSC:** Deborah will serve as account strategist and will ensure all contract terms are met.



### **Katie Bonneau, Senior Account Supervisor**

Katie began her communications career as a bicoastal member of the Baltz & Company team before continuing on to launch Kwittken's Hospitality & Lifestyle division, KFF. Working on a broad scope of clients including hotels, restaurants, food and wine events, wineries, and spirit brands, Katie fostered her passion for the hospitality industry leading accounts in the Los Angeles office and New York headquarters. Past client experience includes American Express, JW Marriott, Wynn Las Vegas, Park Hyatt New York, Food & Wine Classic in Aspen, Chipotle, James Beard Award winning Maison Premiere, Hangar 1 Vodka, Brooklyn Winery, and Hope Family Wines. Katie holds a Bachelor of Science in Government from Claremont McKenna College. She has been with TURNER for one year.

**ROLE WITH VSC:** As your day-to-day contact and account lead, Katie will manage and ensure the success of the program and pitch your story on a daily basis.



### **Ashley Cox, Account Executive**

Ashley provides account and media relations support for TURNER's ever-expanding portfolio of travel and tourism brands. After receiving her degree in Public Relations from Illinois State University's School of Communications in 2013, Ashley moved to Denver to pursue her dream of living in the mountains and launching her career in public relations, and has been with TURNER since. Utilizing her past experiences, prominent writing skills and creative thinking, Ashley works with hotel and destination teams to secure top media coverage and to ensure all client needs and expectations are exceeded. When not working or traveling, Ashley enjoys hiking with her dog, Iggy Pup, and taking advantage of the great outdoors.

**ROLE WITH VSC:** Ashley will serve as the key publicist on the team with a focus of securing placement in your Top 100 list of media. She will also be responsible for uncovering unique story ideas at the onset of our collaboration.



### **Jordan Gover, Junior Account Executive**

Jordan came to TURNER as an intern in 2015, but she impressed the team so much that she was quickly offered a full-time position working on a variety of destination and resort accounts. She previously worked for the National Park Service in Yosemite organizing community events and volunteer participation and has worked for the PR/marketing team for Delaware North, a leader in the hospitality and tourism industry. Obsessed with all things outdoor adventure & enthusiastic about "spreading the stoke," Jordan works with media to tell the unique and engaging stories of her destination clients. She handles reporting and provides useful insights and measurable results for all initiatives and coverage. A graduate of Drake University, Jordan has a degree in Journalism and Mass Communication.

**ROLE WITH VSC:** In addition to assisting with incoming media requests and inquiries, Jordan will spearhead reporting and measurement within our reporting platform, TrendKite.



## SECONDARY TEAM

*For “secondary” account members, please provide an overview of each individual’s experience (including on tourism accounts), education and expertise, include length of time with agency and current position. Do not exceed one page per person.*



### **Angela Berardino, Chief Strategy + Integration Officer**

Overseeing TURNER’s travel and tourism division, Angela delivers brilliant strategy and ensures top results for each and every client. Angela joined TURNER in 2008, bringing with her a deep-rooted background in travel, technology and lifestyle branding, allowing her to integrate traditional PR with a wide variety of new digital channels. Angela oversees all of TURNER’s travel and tourism accounts, including the tourism offices of Bermuda, Utah, Albuquerque, Estes Park, Toronto, Alberta and Cheyenne. She also spearheads the strategic integration between tourism and lifestyle brands to develop cross-promotional partnerships. Prior to TURNER, Angela served in marketing communication roles in-house with hotel company RockResorts, as well as Visit Denver. Today, Angela serves on the national board of Public Relations Society of America (PRSA) Travel + Tourism Section, and is a sought after speaker at tourism conferences. Angela holds a B.A. from Tulane University in International Relations.

**ROLE WITH VSC:** Angela is involved in strategic planning and is available to your team as needed for brainstorming, branding sessions, etc. Her time is not tracked against your account hours.



### **Campbell Levy, VP, Media Relations**

Campbell serves as TURNER’s VP of media relations and ensures we deliver top tier media strategy and results for clients. Campbell has been with TURNER for more than seven years and has 12 years of relevant tourism and hospitality experience. Working on all TURNER tourism accounts, Campbell is committed to securing coverage in the nation’s top publications. He excels at crafting compelling messages and working with renowned freelancers and editors to deliver relevant story ideas. Campbell has unmatched media relationships in the U.S. and Canada, and specializes in development of creative experiences from the ground up, creating trend ideas and centerpieces before competitors. Prior to TURNER, Campbell worked at a travel PR firm based in Aspen, CO, and has also worked as a backcountry guide. He is also a sponsored mountain biker. Campbell has an English degree from the University of Denver.

**ROLE WITH VSC:** Campbell leads media strategy at TURNER and will be available for the team to ensure our team continually lands notable media coverage. He will also follow and create trends, ensuring we’re delivering journalists and influencers with unique experiences worth covering.

# ORGANIZATIONAL CHART

Include a detailed organizational chart for your entire organization, and an organizational chart for the management and personnel that will be assigned to this account, if applicable.



Vice President	Adel Grobler	Naureen Kazl	Campbell Levy	Deb Park		Melanie Dennig	Kelsey Comstock	Venessa Correa	
Senior Director					Megan Brown	Kate Kulczyk			
Senior Account Supervisor	Lauren Ryback	Megan Warner	Katie Bonneau	Caitlin Martz					
Senior Account Executive					Tyler Wilcox	Sam Bonizzi	Sam Mittman	Molly Early	Jennifer Schraven
Account Executive	Shayna Aiston	Whitt Kelly	Ashley Cox	Audrey Neidenbach	Jessica Stollberg	Alexis Chavez	Laura Kepus	Holly Dugan	Ally Redmond
Junior Account Executive	Danina Kaplan		Jordan Gover				Amanda Leonick	Jessica Schianodicola	
Account Coordinator							Lauren Lopez		

## ORGANIZATIONAL CHART OF TURNER'S VISIT SLO CAL TEAM

**ANGELA BERARDINO**  
*Chief Strategy & Integration Officer*

**DEBORAH PARK**  
*Vice President, Travel*

**CAMPBELL LEVY**  
*Vice President, Media Relations*

**KATIE BONNEAU**  
*Senior Account Supervisor*

**ASHLEY COX**  
*Account Executive*

**JORDAN GOVER**  
*Junior Account Executive*

## RESOURCES

*Please indicate adequate availability and accessibility of agency resources and staff to properly execute to this contract.*

TURNER has adequate personnel and resources to service this account. We will not need to hire additional associates.

## SUBCONTRACTORS

TURNER will not employ subcontractors for this scope of work.



# SCOPE OF WORK

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*For each of the following project areas, the proposer should prove capability, describing strategies to be used and quality controls. Sufficient detail must be given and must include examples of past projects, ability to meet deadlines and managerial experience. The proposer should demonstrate knowledge of the tourism space, knowledge and understanding of branding in a global marketplace, and the shifting dynamics of how consumers receive and use information today.*

## RESEARCH & TRENDS

Before we jump into PR recommendations and planning, we begin with current consumer and editorial trend research. TURNER has access to a variety of secondary research data including PRIZM, eMarketer, ORC International, MRI American Consumer Survey and Scarborough. In conjunction with the research from SLO CAL's partners, these tools enable us to ensure all campaigns are effective, efficient and results-driven. A sample of research:

- **As aging Millennials** gain affluence, they continue to change the face of travel booking and consumption. Digital platform disruption is here to stay. Millennials expect to find tailored, personalized information and recommendations. They often travel in large groups and seek out accommodations with plenty of space for everyone. Younger Millennial travelers (20-somethings) tend to be drawn toward gregarious pleasures that can be shared on social media to make friends jealous. This trend presents a great opportunity for SLO CAL to highlight the destination's natural beauty and access to adventure for solo and athletic travelers, as well as family-friendly and accessible offerings ideal for young families.

- **Authenticity:** North American travelers are becoming more selective about where they go, searching for authentic experiences that cater to their interests and offer "only-in" adventures. More travelers want to experience the destination through the eyes of a local; they want to learn about the authentic culture in a destination rather than just being tourists in the traditional sense. SLO CAL can leverage this trend by highlighting the characters, experiences and scenery that are unique to the destinations.

### Editorial Trends

Additionally, we begin every plan with research on what both consumers and media are looking for (both current travelers and predictive of editorial trends), and tie our media relations strategy into those trends. A sample of that research is included below, followed by specific campaign ideas we will implement to ensure San Luis Obispo has significant share-of-voice.

- **Discover the Undiscovered:** According to [Booking.com](#), travelers will unleash their inner explorer like never before in 2017 and beyond. Approximately 45 percent plan to be more adventurous in their choice of

destination in the coming year, while 47 percent would like to explore corners of the globe that none of their friends have visited. Inviting media to dive deep into SLO CAL's adventure offerings — showing them an unexpected side of the destination — would garner coverage aimed at the intrepid traveler.

- **Cultural:** One of the most prominent trends in travel is travelers looking for authentic and stimulating experiences. [Travel Market Report](#) identifies that more travelers want to experience the destination through the eyes of a local and they want to learn something new. Local ambassadors can serve as the best voice for the destination, providing essential insight into the true SLO CAL experience via participation in press trips, editorial opportunities and on social media. Additionally, San Luis Obispo has a rich Native American history stretching back to the Chumash people — a heritage that could be highlighted more substantially in public relations campaigns.



- Local Travel:** Millennials value experiences over things, but [Forbes](#) reports that they often don't have the means to book vacations at world-class locations. In 2017, young adults will travel to destinations within their budget, either taking advantage of a strong dollar abroad or within their own country, state or backyards. Capitalizing on drive markets and locations with quick flights to the state, SLO CAL can easily highlight its diverse offerings to travelers who are just a stone's throw away. Not everyone has Hearst Castle in their backyard! A focused effort on drive-market can be measured as a KPI of the public relations program, with a layer of influencers from key feeder markets (including San Diego, Los Angeles, the Bay Area, etc.).
  - Culinary Tourism:** While 95 percent of travelers are interested in some kind of unique food experience when they travel, for other travelers, it's a major factor that drives travel decisions. [Travel Weekly](#) reports that that 95 percent is up from a mere 47 percent in 2013. Travelers are looking for authentic and local experiences such as lessons with a chef or foraging for ingredients. Travelers will love to learn from the best of the best — how to catch rockfish off the coast and the way to cook it to perfection,
- the secret to putting together the ultimate Cal-Mex taco, or a night in the kitchen with a chef at a well-known spot to see the awesome trends he or she is capitalizing on. We have identified this as one of San Luis Obispo's biggest opportunity areas.
- Education and History-Driven Tourism:** Shifting away from merely preoccupying children while traveling, Millennial parents are seeking to make family vacations immersive and instructive for children. A [Trendhunter](#) insight reports parents want to immerse children in the languages, practices and histories of the destinations they visit. A recent report by [U.S. News & World Report](#) cites history-drive trips as a top family travel trend to watch in 2017. San Luis Obispo already has a number of identified attractions that are being promoted — but we'd like to amplify that by targeting a wider reach of publications. This would work ideally with a treasure map format (perhaps even with car or RV rental partner) over a series of days. It could also be developed as a scavenger hunt for media on competing routes.
- Transformational Travel:** For 2017, [Vogue](#) states that "Industry leaders are saying that transformational travel is the next evolution [in experiential travel]. It has similar elements of experiential travel, but taken a step further — it's travel motivated and defined by a shift in perspective, self-reflection and development, and a deeper communion with nature and culture." Tying into the below proposed narrative of Slow/Mindful Travel, SLO CAL's diverse outdoor offerings and various serene vistas make the destination a prime playground for travelers seeking an experience rooted in nature, mindfulness and transformation. Thanks to the presence of Cal Poly, San Luis Obispo is linked inextricably with the past, present and future of agriculture; featuring the innovative people, places, and lifestyle of those in this community, and taking it one step further into how travelers can be a part of it, would be an opportunity to highlight unique experiences and fit within the transformational travel trend.

## MEDIA RELATIONS & PUBLIC RELATIONS SERVICES

TURNER has a signature process to ensure we build thoughtful, tailored, effective plans for public relations and strategic communications. In the following sections we illustrate how our process will meet the needs of your scope of work.

### Step One: Define Program Objectives

We'll work closely with your team to set clear, measurable goals to reach your target audiences. We will measure against these goals throughout the year to be certain we're delivering ROI.

### Step Two: Develop Tailored Strategies

No two brands are identical, and our approach shouldn't be, either. We develop a deeply tailored approach to ensure we're meeting your objectives.

### Step Three: Define Narratives

One of our greatest strengths at TURNER is creative storytelling tied to unique selling points and travel trends. We know what journalists are seeking and we're passionate about sharing your stories in a manner that will get attention.

### Step Four: Execute Integrated Campaigns/Plan

We are storytellers. It is important that our message is consistent and impactful across all platforms so that we can garner frequent, on-brand placements that reach out target audience.

### Step Five: News Bureau Basics

We are detail-oriented specialists who subscribe to important tools and processes to ensure consistency and results.

### Step Six: Stakeholder and In-State Media

Our deep expertise in tourism ensures that we understand how to create communication strategies and programs for each group of stakeholders and local media who are critical to ensuring participation, funding and enthusiasm for SLO CAL's efforts.

### Step Seven: Monitor, Measure, Report

We utilize Barcelona Principles based measurement and reporting. Starting with a clear definition of success we create a measurement program that is key to our execution. It is also one of the main reasons we have such great partnerships with our clients.

## PUBLIC RELATIONS STRATEGIC PLAN

- *Create, implement and measure annual strategic public relations plan to increase awareness through earned media coverage locally, regionally and nationally.*
- *Assist in and support international public relations programs including those conducted through UK contractor, Visit California and other partnerships.*
- *Work with VSC staff and contractors to align the PR plan with owned and paid media strategies for a comprehensive, integrated marketing program.*
- *Provide collaboration on and assistance with the development and execution of an annual strategic content plan, which integrates paid, earned and owned media content development and delivery*

## Step One: Define Program Objectives

**The purpose of the PR Agency: helping to build and maintain top-of-mind awareness of SLO CAL as a premier destination.**

- Increased awareness will drive growth in visitation, spend and market share for SLO CAL
- As an extension of the VSC team, the Representation Firm will ensure all activity represents SLO CAL in ways that support the organization's strategies and mission, while protecting and preserving their integrity and brand

In order to evaluate the success of our PR plan and activities, we will develop a final version of our objectives and goals in collaboration with your team.

**A SAMPLE of goals includes:**

**Ensure SLO CAL is top of mind among key decision makers within identified target markets and nationally relevant media outlets.**

- Goal: At least 40 percent of coverage is within the Top 100 list of media
- Goal: At least 60 percent of coverage contains key messaging

**Introduce SLO CAL to a broader audience of potential travelers, ensuring the state's share-of-voice among competitors of iconic U.S. destinations.**

- Goal: Generate coverage of SLO CAL in round-up articles that positions the destination alongside its main competitors and validates it as a must see destination
- Goal: Host a minimum of 10 writers on assignment

**Increased awareness of SLO CAL's tourism product, including a focus on the drive markets of the surrounding areas to encourage increased visitation.**

- Goal: Garner media coverage for SLO CAL in each of the top five regional feeder market

## Step Two: Develop Tailored Strategies for SLO CAL:

- **Utilize Barcelona Principles-based measurement and reporting.** Starting with a clear definition of success and creating a measurement program is key to our execution. It's also a key reason we have strong partnerships with our destination clients.
- **Create a detailed calendar of activities and pitching themes to ensure consistency and market depth.** Our calendar clearly outlines the timelines for pitches, press trips, trade shows, media events and major consumer events in a clear tactical timeline – but we tie those baseline tactics into larger creative threads so that we're telling the story holistically. This also allows us to carefully track our results to ensure we're giving equal pitching time to the many areas and activities across SLO CAL.

**We tailor outreach to targeted journalists and outlets and pair with creative press materials.** This includes individualized and proactive pitching, creative releases and storytelling, press trips, and in-market media blitzes (outlined in greater detail in the creative approach in the following pages). We will consistently communicate key messages based on SLO CAL's unique selling points, take advantage of seasonal travel angles and signature events (as well as partners' special offerings and promotions) and continue to utilize trends in travel and the media to ensure that the destination garners consistent, quality coverage.

- Achieve a program mix that balances **topline brand awareness with articles which inspire urgency in booking (especially during shoulder seasons).**
- **Enhance digital integration throughout PR tactics.** From the pressroom to how we define media materials and press visits to in-market media weeks, we will deliver our message in a way that is highly engaging and shareable.

## PROACTIVE PROGRAMS

*As part of the annual strategic plan, manage proactive efforts to gain earned media exposure for SLO CAL.*

- *Plan, execute and manage a pitch calendar for targeted media in all forms of media: broadcast, print, online/ blogs, etc. (consumer travel, hard news/economics reporters, travel/meetings trade publications, destination/leisure publications, food/wine publications) appropriate for SLO CAL.*
- *Maintain strong relationships with key target media, writers, editors and influencers on behalf of Visit SLO CAL and seek all opportunities for stories or other coverage.*

### Step Three:

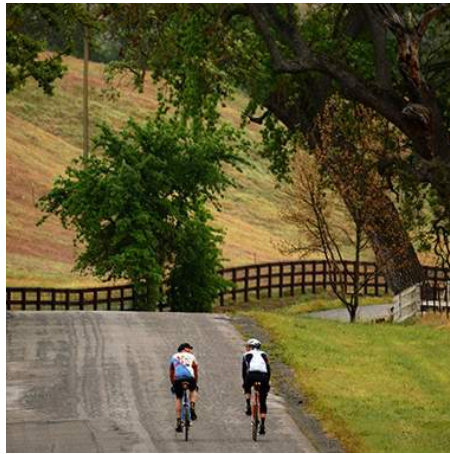
# TELLING YOUR STORY: SLO CAL NARRATIVES

One of the greatest assets and biggest challenges of SLO CAL is that there is a vast variety of stories to tell across a wide number of media verticals. Our suggestion is to focus on targeted narratives on a quarterly cycle, allowing efficiencies in gathering assets, targeting media verticals, creating press materials and arranging media events and FAM trips. A sample of campaign themes is presented below, along with tactical executions of each. Once on board, we'll work closely with your team to refine and tailor our campaigns to hit your key messages and priority initiatives for the year.



# SLO MOTION

San Luis Obispo may give visitors the chance to slow down and savor the moments that make up an unforgettable vacation – but slowing down doesn't mean that excitement and adventure aren't available here. **SLO is a destination in motion**, whether it's exploring Lopez Lake, climbing the coastal dunes in Guadalupe or zipping down the Bob Jones Bike Trail. These active adventures pair perfectly with the wealth of wellness offerings in San Luis Obispo, providing peace of mind and body to match the thrills of the outdoors.

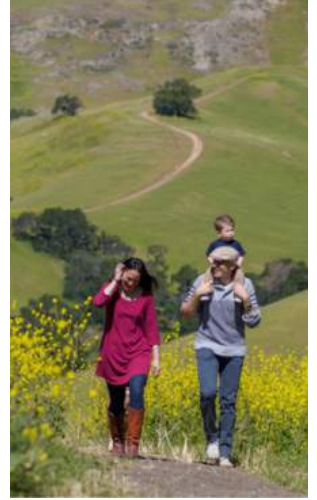




# FIND CALIFORNIA'S CENTER

A play on the common meditation mantra of “finding your center” and the fact that SLO is located directly between San Francisco & San Diego, the narrative focuses on how **SLO is the perfect “centered” destination for the current mindful travel trend**. In addition, SLO exists as the intersection of a number of different types of classic Golden State cultures and experiences; cowboy vs. surf culture, culinary vs. oenophiles, adventure travel (kayaking, hiking, etc.) vs. lifestyle/luxury vacation (wine, shopping) vs. family destination. San Luis Obispo County is the ultimate culmination of California.





# IT'S ALL RELATIVE

Tying into the family travel trends of celebration travel and multi-generational travel, San Luis Obispo makes for a road-less-traveled family escape to **disconnect from everyday routines and focus on reconnecting with relatives** through the vast variety of experiences the destination offers. From outdoor adventure to wine/beer tasting and wellness to immersive attractions, San Luis Obispo reinvents and re-boots the family getaway, creating shared memories at every turn.

# Step Four: Execute Integrated Campaigns/Plan

We'll develop a detailed calendar designed to deliver consistent messaging across multiple channels. We do this through a wide variety of tactics across a number of platforms.

## Integrated Calendar

We use a dynamic calendar that maps out our pitch targets each month for the entire year. We'll keep it flexible enough to accommodate events and changes, but this master map ensures that we're giving equal love and attention to all of SLO CAL's vibrant story lines. It will cross-reference:

	PROGRAM	ELEMENT	JUL	AUG	SEPT	OCT	NOV	DEC	
EARNED	What's New		What's New Q1			What's New Q2			
	Stakeholder Training			Training 1: Summer Packages/Pitch Angles			Training 2: FAM Hosting		
	Media Weeks		Front Range (Denver/Boulder Desksides)				Chicago Desksides		
	Long Lead Pitches		Art & Culture	Food / Wine / Beer	Family/Holiday	Artisanal San Luis Obispo	Nature	Valentine's Day Getaways/Packages	
	Short Lead Pitches		Adventure	Family	Nature	Off-Beat SLO	Winter Travel	2018 Travel	
	FAMS	Individual FAMS Group FAM			SLO Motion		Find California's Center		
EXPERIENCES	Calendar of Events		Fourth of July Celebrations	Cruisin' Festival		Halloween	Thanksgiving	Christmas Light Parade	
OWNED	Blog	Story 1	Summer Break Getaways/Packages	Blog Post: Discovery Experiences	Blog Post: #LiveFree Outdoors	Blog Post: Unexpected Culinary Experiences	Blog Post: The Artist in All of Us	Blog Post: Off the Beaten Path	
		Story 2	On the Water San Luis Obispo a	SLO Made	Fall Colors	Off-Beat SLO	Outdoor Adventure	SLO Beer & Wine Scene	
	Photo Shoots		TBD Based on Image Needs for Visitor Guide, Website, Social, etc.						
	Social Media Campaigns	SLO Motion Find California's Center Slow/Mindful Travel							

- Major Events:** San Luis Obispo has a large calendar of events, many of which are annual occurrences. TURNER'S approach to handling these events is a proactive, tiered implementation which categorizes events based on the level of support needed/ allocated from the public relations team.
- Key Messages:** We'll clearly outline how key narratives will be pitched to both long- and short-lead media during every quarterly period, ensuring there is plenty of time to gather relative information from stakeholders.
- Seasonality and Geography:** We identify key verticals, top feeder markets and seasonal offerings to ensure that we're promoting accurate timelines. We also map out key areas of the destination to ensure we're promoting each area with equal weight.

## Media pitching

For both long and short lead outlets, we'll clearly outline targets, assets needed and timelines that fit with our planned and defined narratives:



### Opportunity: "Destination Guide"

We'll work with travel editor Lilit Marcus on a story about "Rediscovering California." While listicles about San Francisco & Los Angeles have been exhausted to death, we'll highlight SLO as the destination with everything a trip to California is meant to be, without the pretense.



### Opportunity: "Travel" section

While San Luis Obispo was featured in the newspaper's "36 hours" section in 2015, that doesn't mean our opportunities in the travel section are over. We'll continue to work with key contacts there to maintain visibility — from Elaine Glusac on adventure travel stories to Shivani Vora in the "InTransit" section.



### Opportunity: "Scrapbook" section

We will pitch Managing Editor Laura Teusink a story highlighting the great variation available in San Luis Obispo — a perfect fit for the very visual scrapbook section which tells stories primarily through images. In our pitch, we'll highlight how beauty manifests itself in many different ways in the area, from the Hearst Castle to the Madonna Inn; from wine country to the beach; from cowboy to surf cultures.



### Opportunity: "Just Back From" section

We will work with Senior Editor Paul Brady to highlight different aspects of San Luis Obispo over a multi-day period. We will work with the writers to highlight diverse elements that are available to travelers in the area, everything from adventure to shopping to culinary travel.



### Opportunity: "The Go List"

As adventure travel enthusiasts around the world seek the next big destination, "The Go List" is often one of the first places many look. We'll work with contributors to the publication on a story about how San Luis Obispo has become a hot spot for all kinds of outdoor enthusiasts, from climbing coastal dunes to hiking the Nine Sisters to kayaking Pismo Beach.

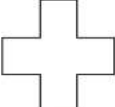


**San Francisco Chronicle****“Travel” section** (Jill Robinson, Contributor)

San Luis Obispo will be featured in a destination piece on finding California’s center highlighting the setting, appeal and insider’s tips to the destination.

**Sunset****“Outdoor Adventure” section** (Lauren Ladoceour, Travel Editor)

We would feature San Luis Obispo as a destination in motion highlighting the different outdoor adventures that can be experienced such as exploring Lopez Lake, climbing the coastal dunes in Guadalupe or zipping down the Bob Jones Bike Trail.

WELL  GOOD

**“Good Travel” section** (Kathryn Romeyn, Editor) Feature San Luis Obispo as the perfect “centered” destination, based on its location between San Francisco and Los Angeles, tying in the current mindful travel trend through SLO’s wealth of wellness offerings.

**Parents****“Health” section** (Karen Cicero, Travel Editor)

Pitch San Luis Obispo as the road-less-traveled family escape that truly offers families to disconnect from everyday routines and focus on reconnecting with each other through a variety of verticals SLO has to offer while also tying to the family trends of celebration travel and multi-generational travel.

**R H A P S O D Y****“One Fine Day” section** (Ellen Carpenter, Editor in Chief)

We would pitch San Luis Obispo as the destination in a 24-hour itinerary highlighting how the destination ties to three major trends: slow travel, mindful travel and celebration & multi-generational travel.

## Familiarization (FAM) Trips:

- *Develop, promote and execute SLO CAL press FAM events and individual media visits in market each year for targeted participants.*
- *Assist with press FAMs in conjunction with other in-market events and PR initiatives through Visit California, Black Diamond and CCTC.*

## SLO Motion: Where Outdoor Adventure Meets Wellness & Mindfulness



### DAY 1

We'll throw our guests into the deep end right away with a morning kayak adventure to **Fossil Point**, just south of Avila Beach. Accompanied by an expert guides Vincent and Emily Shay, they'll explore hidden coves and ruggedly beautiful cliffs, arches and overhangs where lichen, algae, sea stars, limpets and anemones form a colorful living rainbow. Fossil Point also boasts some of the most impressive kelp forests on the Central Coast, making it a favorite for playful otters, seals and sea lions. Paddling in deeper water also means that we may be joined by dolphins and maybe – depending on the time of year – whales.

After working all those muscles out on the ocean, a soak is well earned. Fortunately, **Avila Hot Springs** is not far away. Our guests will sink into this destination's 20' x 20' therapeutic hot mineral soaking pool, its 104-degree water drawn from a natural artesian well. The local Salinan Indians bathed in these local waters for relief from injuries and ailments. Afterwards, independent massage therapist Beverly Aviani will work her magic during a soothing rubdown.

Our first day in SLO Motion will wrap up by getting our hands dirty at the **Cal Poly Organic Farm**, ground zero for sustainable agricultural practices and innovation. Guests will tour the 11-acre production unit (certified organic by California Certified Organic Farmers), and then help pick and prepare a true farm-to-table dinner, complemented by Cal Poly wine, meat and other local ingredients. Dr. Scott Steinmaus, head of the school's horticulture and food science department, will share insight into the past, present and future of food.



## DAY 2

The Edna Valley is filled with some of California's best vineyards – but we'll make our guests work for their wine during a spectacular morning bike ride on the **Tiffany Ranch Road Loop**. Guided by local experts from Central Coast Outdoors, they'll meander through the rolling picturesque terrain, with plenty of stops to taste wines at such award winning wineries as Saucelito Canyon, Kynsi, and Chamisal. We'll end up at Baileyana Winery, located in a restored historic schoolhouse, and unwind with a complimentary wine tasting with winemaker Christian Roguenant accompanied by a gourmet picnic lunch — featuring a special to-go helping of **Splash Cafe's** legendary clam chowder, of course.

Next, we'll relax and recharge with some yoga...but it won't be *too* relaxing. Our guests will hook up with **SLO Yoga Center** and head to Tideland Park for a SUP Yoga session out on the water. They'll learn how to adapt to the motion of the board, discovering the continuous challenge to balance, while strengthening their core and leg muscles. The ocean views aren't too shabby, either.

After such an active day, our guests deserve a little comfort food for dinner – and they'll get their fill at **Big Sky Café**, offering an ever-expanding selection of locally sourced organic fruits and vegetables, farmstead cheeses, olive oils, and vintage vinegars used to create market fresh dishes. Word to the wise: the lobster mac and cheese with smoked bacon and peas is pure heaven.

## DAY 3

The last day of our whirlwind SLO Motion tour begins with a trip to **Oceano Sand Dunes**. But we won't just be hiking these coastal dunes (the most extensive in California) – we'll zoom across them on ATVs. In between adrenaline rushes, our guests will learn about the unique ecosystem here.

Then it's time for some classic luxury at the **Spa at Dolphin Bay**, where our guests will bring their SLO Motion adventure to a close with a 90-minute hot stone treatment, as small stones are placed on key energy points while luxuriously warmed oils are massaged deeply into the body.

## SAMPLE INFLUENCERS TO INVITE ON PRESS TRIP



Garrett King [@shortstache](#)



Matthew Hahnel [@matthewhahnel](#)



Danielle & Laura Kosann [@thenewpotato](#)



Jana Williams [@janawilliamsphotos](#)



Gina Ybarra [@huntforstyles](#)

## SAMPLE MEDIA TO INVITE ON PRESS TRIP

**Andrea Bartz** — USA Today, Vogue, Cosmopolitan, etc.

**Jordi Lippe-McGraw** — Condé Nast Traveler, TODAY

**Stephanie Granada** — SHAPE, Brit + CO

**Chaney Kwak** — Bon Appétit, Saveur

**Daniel Duane** — Men's Journal, Food & Wine

## REACTIVE PR MANAGEMENT

- *Manage all in-bound media inquiries and opportunities.*
- *Thoroughly vet all inquiring media and recommend media opportunities that are viable for the SLO CAL brand.*
- *Manage all media visit requests and work with VSC staff on itinerary development, writer communications and overall story crafting for qualified media.*

## Step Five: News Bureau Basics

Our team has a detailed, proactive approach to ensuring that basic communications tasks are always two steps ahead of the media and our client's needs.

- 1. Develop and maintain comprehensive media lists.** We have a subscription to Cision, but our team's industry-specific background means that we have years worth of proprietary contacts across every vertical.
- 2. We monitor editorial calendars and regional and national leads** to ensure inclusion in key round-up stories. We are members of organizations including SATW, ATTA, TMAC, NATJA, and subscribe to media-based services like HARO, Media Kitty and MediaBistro.
- 3. Respond to media requests,** fulfilling all incoming media requests in a timely manner.
- 4. Develop and assist with crisis communications/issues management support.** We work with clients to strategically navigate through a variety of crisis situations from natural disasters and accidents to CEO discrepancies and product tampering.

- 5. Follow key journalists,** publications, bloggers & influencers on social channels, develop lists to filter conversations, uncover opportunities, generate interest and engage.
- 6. Create social media aspects to FAMs,** press events, activation events.
- 7. Integrate press hits into existing social platforms,** creating an additional online dialogue with the writer/outlet (when we have great placements, we recommend sharing them on Facebook & Twitter).
- 8. Press Material and Website Updates:** We compile new information, update press materials as needed and ensure timely updates for the media room. While press releases can be useful tools for pressrooms, SEO, and to support select pitch ideas, **we do not recommend creating and distributing monthly press releases on a broad scale.** Today's journalists are much more responsive to information catered specifically to their publications and interests.
  - **Quarterly What's New Releases:** Detailing new developments, packages, deals, offerings, activities, events, and happenings.

These include brief, bulleted descriptions of each new item with links and contact information.

- **News Releases:** Traditionally reserved for true news announcements (visitor studies, key partnerships, new flight routes, new campaigns, etc). We will also use a wire release supplement for narrative storytelling. For data-heavy items, such as the annual visitation report, we can create an infographic to help illustrate key findings.
- **Media Newsletter:** TURNER can create and maintain a newsletter for media contacts that have visited, cover relevant beats, or have expressed a specific interest in the destination's updates. The newsletter will highlight "What's New" and press release information, as well as upcoming events and press trip opportunities.
- **Themed Fact Sheets/Story Ideas:** With a focus on key niches, target audiences and messages, these evergreen documents will be utilized for story ideas internally and distributed individually to relevant journalists (with a personal pitch from us). Where applicable, these will be associated with a Pinterest Place Pin board, video or other social media platform.



## PUBLIC POLICY

- Collaborate with VSC's marketing department on messaging for any public policy issues affecting tourism.
- Assist with local media strategies to help promote Visit SLO CAL as tourism experts in San Luis Obispo County, California's Central Coast region and in the state of California.

TURNER is well-versed on DMO needs regarding public policy and will provide input, editing and perspective on messaging and strategy.

We can also provide ideas and best-practices for local media engagement (best handled by the in-house team).

### Local Media Engagement

In coordination with our news bureau program, it is important to keep SLO CAL-area media up-to-date with the latest information on tourism efforts to gain their support. It's key to have media on your side when it comes to voting on tax increases, infrastructure changes that affect tourism, bidding on major events and other major initiatives.

- **Local News Bureau:** Ensure press releases and pitches for local news and events are being distributed out to the appropriate channels and local media. This includes tourism initiatives, tourism numbers, domestic and international outreach efforts and special events that drive tourism throughout the year (major athletic events, festivals, etc.).
- **Quarterly Media Meet-Ups:** Allowing your team and select stakeholders to engage with these media, building relationships and providing them updates on news. These

meet-ups can range from more traditional cocktail style events at a new installation or gallery, to an interactive culinary experience.

- **An Ambassador Program:** Target bloggers and writers who are influential in their field and partner with them to help host inbound media. They could write blog articles for [visitsanluisobispocounty.com](http://visitsanluisobispocounty.com) talking about their favorite places in the state that inspire creativity, make videos on specific niches that fit their audience that can be used on your social networks, or just be an expert source with inbound media (in which payment might be in restaurant gift cards, etc.). Ambassadors also get:
  - VIP access to local events; dining gift cards or expense budget.
  - Produce content for SLO CAL's Instagram accounts.
  - Produce (more) SLO CAL content on their own blogs & social channels. Tag and link [visitsanluisobispocounty.com](http://visitsanluisobispocounty.com) in a measurable way.
  - Create custom itineraries around their niche for travelers and other bloggers to book.

## CRISIS COMMUNICATIONS

- *Understand, execute and update VSC's Crisis Communication Plan and assist in managing all crisis communications.*
- *Watch for signs of crisis in the media tracking and anticipate the needs of VSC, SLO CAL and their partners.*
- *Assist the VSC team in times of crisis in messaging, media monitoring, online chatter, cross-organization communications collaboration, talking points, etc.*

The TURNER team is fully trained in crisis management and has worked with clients to strategically navigate through a variety of crisis situations from natural disasters and accidents to CEO discrepancies and product tampering. TURNER will monitor all crisis situations and provide strategic communications plans and messaging that incorporates the use of social media channels to quickly and directly reach consumers and key constituencies. TURNER can provide crisis training to staff, board members and industry partners, and will also develop a clear stakeholder communications plan to make sure that in the event of a crisis, messaging is clear, concise and on point.

## TRACKING AND REPORTING

- Provide detailed monthly and annual reports for all resulting earned media, tracking both quantity and quality of articles/stories.
- Track production and results relative to the annual plan, reporting progress on a monthly basis.
- Report on stories to VSC within 24 hours of publication, and include details on quality and performance, providing links, clippings, social media information, etc.
- Develop an accurate and reliable system of measurement and reporting for all corporate communications activities undertaken on behalf of VSC.
- Submit programs and initiatives done for VSC for relevant industry awards and recognition.

We are meticulous in the reporting and measurement of our initiatives and results. We provide real-time digital copies and links to coverage for all placements including print, online, and broadcast, participate in regular status meetings and provide tailored, interactive monthly reporting.

### How We Measure

PR measurement is not just about counting clips. Our preference is to focus on outcomes over outputs. Our measurement system is based on the **Barcelona Principles**. We tailor this reporting system to:

- Set clear goals aligned with your business goals, which we track against.
- Measure quality of placements in addition to quantity.
- Evaluate message pull-through: are we reaching the right audience with the right message at the right time?

**TURNER monitors and measures monthly progress with TrendKite reporting tools**, which reports on what really matters. Brand mentions are just a small component of the PR measurement equation. We dig in deeper to understand if those mentions are making waves or just being drowned out.

#### Reports include:

- **Media Mentions:** How many times was your brand mentioned in the news?
- **Readership & Reach:** Which articles have the highest readership as well as feature the relevant keywords?
- **AVE:** While we see Ad Value Equivalency as an increasingly antiquated (and often inconsistent) tool of evaluation, we do provide industry standard numbers from third party sources (BurrellesLuce and TrendKite).

- **SEO Impact:** What is the SEO value of the links generated from earned coverage?
- **Web Traffic Integration:** Which articles resulted in the highest web traffic to your website?
- **Geographic Penetration:** Which country, states and cities are your mentions coming from?
- **Key Message Pull-Through:** What is the distribution of specific terms in your coverage?
- **Social Amplification:** How many times were articles shared on social media?
- **Sentiment:** What is the overall tone in your news coverage?
- **Share of Voice:** How does your brand compare to others in your industry?

**Qualitative results are analyzed and mapped to goals and presented with the following criteria in mind:**

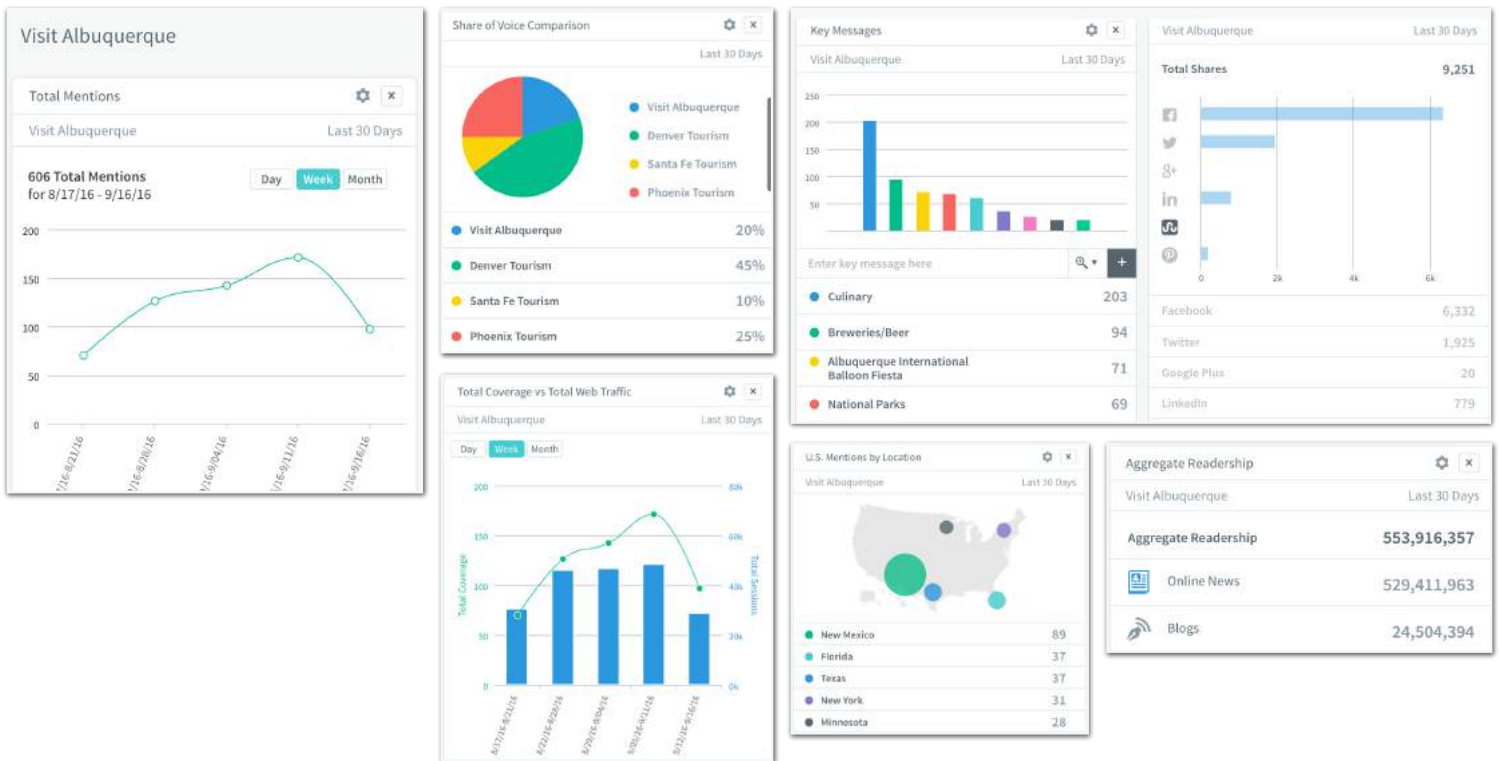
- **Quality of Reach:** How well did we penetrate our target media list and targeted audiences online?
- **Message Pull-Through:** TURNER will target key audiences and measure the quality and quantity of key messages that are conveyed. On digital, we measure the way in which people joined the conversation.

- **Influencer Conversions:** How many influencers we engaged and who shared our message.
- **Brand Building:** While subjective, did we feel the positioning was ideal and had the potential to be a major sales tool?

**Influencers**

We measure influencer performance not just by the number of social media posts they share or even how many likes their posts receive; we also look at the impact their activity and that of their similarly influential

followers have relative to business-driving, key performance indicators. This includes hard metrics that are more valuable than actions such as likes: referrals to specific web pages and blogs, newsletter sign-ups, social channel follow-backs, video views and content shares. We use a variety of tools such as native social analytics, Google Analytics, Rival IQ, Unmetric and Sysomos to obtain a holistic picture of activity and performance, and customize digestible monthly, quarterly and annual dashboards for our clients to share with key stakeholders.



# ACCOUNT MANAGEMENT

- Work with the VP of Marketing and/or the Communications Director on a daily basis to manage communications efforts, execute strategies and oversee tactics.
- Maintain positive relationships with the key communications contacts for industry partners, airlines, tour operators, travel agencies, promotional partners, online booking partners and other trade entities working in SLO CAL or with VSC.
- Represent VSC at key media events, such as SATW, PRSA or other industry events and conferences.
- All billing related to the agreed upon scope of work.

One factor that makes our team unique is that many of us have worked in-house for tourism offices. We understand the incredible demands that your team undertakes each week, and we also understand the politics that a tourism organization must navigate. Our job is to work as an extension of your team, providing leverage (and not creating more work for you). This is how we do it:

**Audit Process:** This helps us to become experts on the destination. During this phase we will hold detailed Q&A sessions with members of your staff, committee members, key stakeholders and other marketing partners in order to collect information on the tourism priorities, goals, business objectives, as well as determine the detailed plans and approach to marketing, publishing and web services. We invest this time up front and ask your team to do the same so once we hit go, we are well versed on priorities and destination details.

**Site Tours:** We participate in regular site/FAM tours (as budget allows), visiting key partners and attractions. Our goal is to know as much about your destination as possible so that we not only authentically represent you to the media, but so we do not waste your team's time with basic questions.

**Dedicated Account Team:** You will have a dedicated account team with a main day-to-day contact who funnels requests and information to the rest of the team. However, there are multiple senior level publicists on your account team so you can be sure to always reach someone to assist you.

**Coverage Announcements:** With each coverage announcement, we include a list of all stakeholders included in the story along with that outlet's social channels for easy sharing and tagging.

**Quarterly Brainstorms:** We recommend holding quarterly or bi-annual brainstorms with the full marketing team (in-house and vendors) to plan for bigger campaigns that touch multiple mediums and to discuss opportunities for collaboration.

**Google Docs:** Our team is a big fan of Google Docs, which allow us to work in real-time with your team on press visit itineraries/schedules, event planning logistics, media desksides/ appointments, etc.

**Video Calls:** When we cannot be with your team in person, we utilize tools such as Skype and Google Hangouts when possible so that we can talk face-to-face, creating better team engagement and creativity.

Thursday, January 21, 2016 at 7:54:06 AM Mountain Standard Time

**Subject:** Coverage: Dorado Magazine  
**Date:** Tuesday, January 5, 2016 at 3:59:23 PM Mountain Standard Time  
**From:** Jordan Gover  
**To:** Brenna Moore, Kalani Cropper, Tania Armenta, Erin Scott  
**CC:** Albuquerque, Campbell Levy

Good afternoon ABQ team,

Below please find the link to Albuquerque coverage which appeared in Dorado Magazine online. If the article is large feature in Albuquerque's NoHo Hill, it describes the history of the NoHo Hill, the build up of the neighborhood, and the current restaurants, shops and people found in the area. If this coverage is a result of the Jaime Moya's visit to Albuquerque in October 2015, we also expect this feature to be printed and will send you updated announcements when published.

The coverage includes the following partners and ABQ businesses:

- Zacatecas Tacos & Fajitas
- Kellys Brew Pub
- Matanza
- Ryde Shack
- La Montanita Co-op
- Gertrude Zachary
- Oloro Ogurt Studio
- Squeeze Juice Bar
- Chocolate Dude Coffee & Candy
- Flower Shop & NoHo Hill
- A Celebration of Love
- Hiway House Motel
- Sachs Body Modification
- Off Roadway Vintage Clothing & Costumes
- QB Burgers & Beer & Bistronomy
- Satellite Coffee
- Tractor Brewing Company

Dorado Magazine is so proud to share this article via Twitter @DoradoMag. We recommend that if any of our social media include Dorado Magazine and @JaimeMoya.

**Article:** Hill town  
<http://doradomagazine.com/hill-town/>

**Barcelona Principles Score:** 75

About Dorado Magazine: Celebrates the experience and culture of the Southwest, focusing on the greater Four Corners area. Content focuses on the region's landscapes, people, small towns, outdoor adventures and highlights the pleasures of luxury lifestyle in the rugged sensibility of the West. Unique Monthly Visitors: 50,000.

Please let us know if you have any questions regarding this coverage.

Thank you,  
 Jordan Gover  
 Jordan Gover  
 TURNER  
 NEW ORLEANS, CHICAGO & DENVER





## BUDGET

*All proposals must include proposed costs to complete the tasks described in the project scope of work. Please note any one-time or non-recurring costs. Program expenses should be estimated and listed in the right-hand column. These expenses will come from budget allocations separate from and in addition to the \$60,000 for agency services. Pricing should be listed for each of the following items in accordance with the format below.*

TURNER is compensated via monthly retainer and signs annual contracts with each client. This retainer fee is established and agreed upon by both parties based on the scope of work, size of PR team, depth of the media lists, number of FAM trips, desk sides or events, and so on. For contracting, we use a blended rate of \$150 USD/per hour (lower than the industry average). **You will never receive an hourly bill from us;** it's our team's job to work within the scope of the retainer and we generally overservice our accounts each month.

We have outlined our proposed mix of time below but can be flexible on the percent of allocation. We are suggesting that the entire \$60,000 goes toward retainer; this budget reflects approximately 34 hours of account time per month.

**Monthly Out-of-Pocket Expenses:** We use a flat expense fee to cover recurring costs such as basic postage, phones, supplies, copies and Cision media database at \$400 USD per month. This does not include expenses such as airfare, hotel or FedEx, which are billed without a mark-up fee.

CATEGORY	CONTRACT COST (\$)	CONTRACT PERCENT (%)	ESTIMATED EXPENSES (\$)
Account Management	\$9,000	15%	
Strategic Planning	\$3,000	5%	
Proactive Pitching & Media Relations	\$27,000	45%	
FAM Trips and/or Media Visits	\$12,000	20%	Flights, hotel, meals, transport for 20 media. Funding will depend on how much partners contribute at comp.
Deskside Visits and/or Media Events	Not included in base in proposed scope but can be added as projects.		
Reactive Efforts	\$3,000	5%	
Tracking & Reporting	\$3,000	5%	Included in flat exp fee (\$400/month)
Agency Team Travel & Administration	\$3,000	5%	Flights for 3 people from Denver (\$1,000) for audit; assumes hotel/meals are provided by partners.
Other			
<b>TOTAL</b>	<b>\$60,000</b>	<b>100%</b>	

## SCOPE OF WORK FOR SLO CAL

Based on a monthly retainer of \$5,000/month plus project-based expenses listed above, the TURNER team will provide an average of 34 hours per month to accomplish SLO CAL's public relations goals. We will closely monitor scope of work and hours to ensure we're delivering the most value within the contract terms.

### I. Development Phase

- Conduct team immersion and full audit in order to develop strategy and plan.
- Create integrated PR plan for the targeted contract period scope of work. Our plan will include approach, strategies and tactics.
- Create a targeted Top 100 publication list, with supplementary top 10 influencer list that directly relates to agreed upon priority outlets and focus initiatives.
- Draft tailored media pitches for our designated scope of work, including monthly editorial calendar of pitches with themes identified in the strategy document.
- Update internal pitch document featuring short-lead and long-lead angles, to be shared with VSC.

### II. Implementation Phase

- Act as the VSC news bureau/press office for U.S. media ensuring all in-bound and out-bound media leads are handled in a timely manner. Fulfill information and image requests by journalists.
- Launch each strategic media announcement via a strong PR campaign to key journalists in the categories mentioned above. Our strategic plan will outline one theme per month as well as specific goals per category of media. TURNER will tailor personal pitches per each journalist.
- Write and distribute Search Engine Optimized press releases throughout the contract period. (Please note that TURNER does not recommend oversaturating the media with press releases, and should instead target media with proactive pitching--it has proven to deliver stronger, more relevant coverage.)
- Provide copywriting services for additional information needed for pressroom and media pitches (fact sheets, bios, etc.).
- Research and develop/edit a quarterly Hot Sheet to be delivered to VTC for distribution on a pre-set schedule.
- Arrange for 20-22 media and/or influencer visits during the length of the contract, in both group and individual formats.
- Organize 10-14 individual media visits pending available budget. Each visit will be thoroughly vetted with assignment/outlets, recommendations on hosting levels and itinerary suggestions.
- Organize and staff two group press tours (goal of 4-6 journalists per trip or as budget permits). Agency to handle invitations, coordination and travel logistics for journalists. NOTE: One or both of these trips can be replaced with another initiative (like a media tour in an additional market or more individual visits) if requested by the VSC team.
- Conduct all follow-up with the visiting media, including post-trip information, planned placement, images, interview needs. Provide forecast for coverage and copies of coverage once available.
- TURNER will provide crisis communications as needed, and within budgeted scope of hours.
- Comprehensive tracking, monitoring of media coverage for formal monthly PR report.
- Monthly meetings to review PR report, up-to-date budget, current priorities, upcoming initiatives, updates and brainstorming for upcoming pitches.



# THANK YOU

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## **NEW YORK**

250 W. 39th Street  
Suite 802  
New York, NY 10018  
212.889.1700

## **DENVER**

1614 15th Street  
Fourth Floor  
Denver, CO 80202  
303.333.1402

## **CHICAGO**

111 W. Illinois St.  
Chicago, IL 60654

# **TURNER**

a fahlgren mortine company



LIFE'S TOO BEAUTIFUL TO RUSH

# Visit San Luis Obispo County PR Proposal

*Presented by Mfa Marketing & PR*

August 2017



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# Introduction



# Letter of Interest / Executive Summary

To the Visit San Luis Obispo County Review Committee:

We are honored to present a proposal for public relations services from Missy Farren & Associates (Mfa Marketing & PR / Mfa). Mfa is a New York-based agency with 23 years of experience delivering dynamic communication success to brands, organizations and people that we believe in and admire. We are an innovative, passionate and creative team of adventurers, outdoor devotees, cyclists, cultural explorers, culinary enthusiasts, and travelers. We seek culture-rich experiences in our daily lives; our work aligns with what motivates us most, and we are thrilled about the possibility of working with Visit SLO CAL.

With the development of the new “Life’s Too Beautiful to Rush” campaign, VSC’s partnership with Visit California, and the implementation of the first countywide crisis communications plan, VSC has made significant PR strides to build awareness in key markets and nationally. If given the opportunity to work together, Mfa would build upon recent success through the development of dynamic PR programs, distinctive FAM trips, strategic management of reactive PR inquiries, and aggressive proactive media outreach to create even greater awareness of SLO CAL and increase the demand for overnight stays.

We understand that one of Visit SLO CAL’s goals is to be featured in unexpected, niche publications, and this is an area of specialty at Mfa. We consistently deliver national and regional feature coverage across a variety of spectrums, promoting our travel clients beyond the tourism industry – think culinary stories in *Outside*, wellness travel features in *Vogue*, fashion business segments on *CBS This Morning*, or family features in *The New York Times*. We take this creative and aggressive approach with FAM trips, partnerships and events, as well.

Mfa is eager to facilitate press trips to San Luis Obispo for travel, culinary and lifestyle media, leveraging our understanding of journalists’ professional demands and personal interests to craft truly immersive experiences. Every FAM is crafted so that resulting coverage drives measurable results, makes a positive impact on the destination, and influences consumer bookings. This is in our DNA. As representatives of tourism boards and the public sector, we have in-depth experience highlighting destination messaging and working closely with private sector partners to build itineraries that incorporate many aspects of the destination. We also have experience working with local and regional departments of tourism to ensure that our clients’ messaging is incorporated into destination-based trips hosted by broader tourism entities.

You’ll read in the following slides our proposed strategy for working with VSC’s existing partners, as well as our approach to exploring and solidifying new brand alignments for our clients. At the heart of every strategic partnership is the ability to drive media coverage and consumer demand for both brands, tapping new audiences for maximum impact. Our varied client roster enables strong connections with a variety of brands, and we excel at creating compelling partnerships for our clients both within and beyond Mfa’s client roster.



# Letter of Interest

We have forged relationships for Ski Utah with outdoor/adventure brands such as G-Form and Lifeproof; paired the Cayman Islands with Food & Wine to create a culinary experience now in its 10th year; aligned Westin Hotels & Resorts with indoor cycling mega-brand Peloton; and created a bike-rental program with Schwinn Bikes in Colonial Williamsburg, to name just a few of the highlights.

Our proposal also explores initial concepts and ideas to showcase VSC through annual events in key markets to grow brand awareness. From intimate cocktail parties, to “sweat sessions” (media workouts), every media event we plan is carefully crafted to align with clients’ priorities and aesthetics. We consistently set out to create event programming that stands out to media and influencers, integrating ‘instagrammable’ design components and including appropriate branding. Our event services comprise of the entire event process—from initial conceptualization, to styling, set-up, staffing and event breakdown.

Our agency expertise also extends beyond traditional media relations and we brainstormed a handful of potential social media ambassadors based on VSC’s aesthetic, brand and target audiences. We create, engage and manage influencer campaigns, implement blogger programs, build content calendars, and guide clients’ written contributions to various digital/written platforms. Mfa has experience creating hashtags, managing clients’ social channels, and finding ways to insert clients into topical conversations to reach key audiences.

The Mfa team thoroughly enjoyed diving into our proposal for VSC. Over the past two-plus decades, the agency has put departments of tourism and destinations on the map; launched hotel properties (independent, boutique and international brands); opened spas and restaurants; garnered international exposure for archaeological discoveries and cultural/heritage tourism; created social media campaigns; and implemented paid blogger programs. Simultaneously, we’ve facilitated exceptional brand and athlete campaigns at six Olympic Games and numerous other sporting events, worked with large- and small-scale sports/adventure product companies, and more. **We are confident in our ability to build awareness and demand for VSC and the destination’s assets, and would be honored to be your partners.**

Please let us know if we can provide additional information. Thank you for this opportunity, and for your consideration.



Samantha Lacher  
Vice President  
Mfa Marketing & PR



# Agency Snapshot

## Services and Expertise



# Why Mfa?



**Founded in 1994**

**Based in NYC**

**20 full-time staff**

**Full-service  
communications  
firm**

The Mfa Mindset is that every consumer is a traveler. This, paired with our diverse top-tier client roster, allows us to create excitement and exposure for our partners in both expected and unexpected places.

Our extensive database and deep media relationships are second to none.

20+ years in the tourism/hospitality industries, launching hotel properties into the mainstream, putting destinations and attractions on the map, and distinguishing brands in and out of the travel space as industry leaders and next generation innovators.

Long history of delivering of dynamic communications success to brands, organizations and people that we believe in and admire – including The Little Nell, Colonial Williamsburg, Ski Utah, The Cayman Islands, Westin Hotels and Resorts, and Chatham Bars Inn, for example.

# Core Practices

Varied passion points have built six pillars of expertise. Complementary practices provide clients with diverse and deep experience, allowing for creative thinking and vision, greater partnership opportunities and truly multi-tiered campaigns.



Travel & Tourism



Culinary



Wellness



Consumer Products



Outdoor & Adventure



Social Good

# Services



Campaign Development



Media Relations



Content Marketing



Social and Digital Media



Cause Marketing



Crisis Communication



Influencer Engagement



Launches and Openings



Blogger Programs



Corporate Communication



Lifestyle Marketing



Press and Consumer Activations

# Expertise: Travel Destinations & Hospitality

Our roots in hospitality extend back to Mfa's first days (and even earlier!). Our team specializes in drawing connections between consumer passion points and destinations, hotel brands and unique programs to build interest and drive demand. Mfa's robust experience in hospitality spans boutique hotel properties and independent restaurants to global destinations, hotel chains and multi-city restaurant groups. We've been known to create big news out of little news, conceptualize travel programming to tap new audience segments, infiltrate travelers from families and couples to solo adventure getaways, and keep our hospitality clients top-of-mind for media and consumers even in the most saturated marketplaces.





# Expertise: Outdoor Adventure

Our team of avid adventurers hikes, bikes, runs, skis, snowboards, meditates, practices yoga and surfs in New York and around the globe. Our personal passions also keep us connected with likeminded brands, advocates and influencers. In fact, we pioneered the movement to get media out of the office and active, and you'll most often find us foregoing the traditional lunch, coffee or cocktail hour appointment in favor of trying the latest boutique fitness class, an outdoor run or hike alongside media and influencers. This all translates to authentic success for our client partners.

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# Expertise: Family

Mfa prides itself on not only securing placements for clients within their respective industry, but for finding ways to introduce clients to new audiences, landing coverage in unexpected outlets. In the family market, we seek opportunities to incorporate journalists' children into storylines, events, activations and press trips so media can have authentic experiences with their families that translate into top-tier coverage. From business hotels to adventure products and gear, Mfa has succeeded at infiltrating family-centric storylines into publications such as *Parents*, *Family Circle*, *The New York Times*, *Travel + Leisure*, *Wall Street Journal*, *TODAY Show*, *Fit Pregnancy & Baby*, *POPSUGAR Moms*, *MomTrends* and more.



# Expertise in Key Markets

With an office in New York City and representatives in the Midwest, Colorado, California, and the Pacific Northwest, Mfa has the geographic diversity and national reach to create truly unique, cost-effective PR programs. Over the years, Mfa has facilitated media tours, coordinated FAM trips, and secured A-list placements in key markets including Los Angeles, Dallas/Fort Worth, New York City, Denver, Houston, Chicago, Washington DC, Baltimore, Miami, Vancouver, Montreal, and more. Please see below for a sampling of outlets where we have secured stories in key markets:



**austin360**

**5 hotel pools in Austin with passes or free hours for locals to have fun in the sun**

Hotels in the heart of Austin are providing for an outdoor retreat for their guests. From a handful of luxury hotels to more accessible options, there are five hotel pools in Austin that are worth a visit. From a handful of luxury hotels to more accessible options, there are five hotel pools in Austin that are worth a visit.

Hotels in the heart of Austin are providing for an outdoor retreat for their guests. From a handful of luxury hotels to more accessible options, there are five hotel pools in Austin that are worth a visit.



**Los Angeles Times**

**These three Utah ski resorts aren't just for locals anymore. Here's why they will intrigue you**

These three Utah ski resorts aren't just for locals anymore. Here's why they will intrigue you.

## San Francisco Chronicle



## Sunset



**San Antonio Magazine**

**Taste and Sea in Hamburg**

Hamburg's nautical roots influence every aspect of the city.

Hamburg's nautical roots influence every aspect of the city.

## Star-Telegram

**The itinerary: Utah's ski areas get ready for season**

By COMPILED BY SANDY GUERRA-CLINE  
scgline@star-telegram.com

Utah gears up for skiing

It's November, and that's a cue for Utah's many ski areas and resorts, from skip-only Alta Mountain to Robert Redford's Sundance Resort, to put out the welcome mat. Alta Mountain is scheduled to open Nov. 21; Sundance, which offers skiing, snowboarding, night skiing, cross-country skiing and snowshoeing, is to open Dec. 6; kid-friendly Brighton Resort, near Salt Lake City, is set to open Nov. 22; and the luxurious Deer Valley Resort opens Dec. 6. For updates and details on all of the state's many ski areas, go to [www.skicutah.com](http://www.skicutah.com).

—Sandy Guerra-Cline

# Crisis Communication Experts



When it comes to crisis and issues management, we are the best in the business. Our expertise is called upon time and again to mitigate and minimize crises, damaged images, and emergency situations. Throughout the last two decades, we have actively utilized our entire team, training and skills on behalf of various tourism organizations and corporations. Originally trained in crisis communications by El Al Israel Airlines, Mfa has worked successfully to handle natural disasters, weather emergencies, death and safety issues, CEO transitions, and company turnaround plans.

Our team is prepared to activate immediately and our practices continually expand as new and social media tools become important. Aside from our always-available culture, there is no one-size-fits-all approach to issues management at Mfa. We handle each and every circumstance aggressively, with personal attention, an individualized management plan, and compassion – and we have successfully navigated a positive outcome in every situation.

We would work with the Visit SLO CAL team to assess present communication plans, pinpoint areas for improvement, and establish an efficient and effective communications protocol.



# Visit San Luis Obispo County: Getting Started Public Relations Strategic Plan



# Visit SLO CAL+ Mfa: Recommendations

## Let's get right to it!

The strategy and ideas outlined in the following slides are designed to illustrate our initial thoughts for an aggressive, successful legacy PR program that focuses on story-telling, programming and partnerships.

In today's evolving media landscape, Mfa balances a carefully curated and creative range of earned, owned and paid media that **reaches your target demographic at every stage of the consideration set and booking process.**

Our strategy will **place Visit SLO CAL in the expected, 'have to be there' outlets, in addition to the unexpected places** that will broaden your audience.

Mfa does this time and time again for clients. Each PR program is personalized for our partners and geared to achieve maximize success. We very much hope to have the opportunity to work with you in the coming months – we are prepared to jump right in!

Parents

TRAVEL+  
LEISURE

Sunset

Condé Nast  
Traveler

Outside  
MAGAZINE – TELEVISION – ONLINE

WSJ.  
THE WALL STREET JOURNAL MAGAZINE

AFAR

Golf Digest



# Goals and Strategies

Increase visitation to SLO CAL by growing the audience and consumer base, with a particular focus on key feeder markets (CA, TX, WA, CO, AZ, IL) and through national media relationships.

Establish SLO CAL as a year-round travel destination with segmented positioning to targeted demographics.

Ignite consumers' awareness of and interest in the destination through an aggressive, creative, multi-channel campaign, building conversations in traditional and unexpected mediums.



Implement a multi-tiered and calendarized communications approach, leveraging seasonal and nearby events to create timely storylines that resonate with the target demographic year-round.

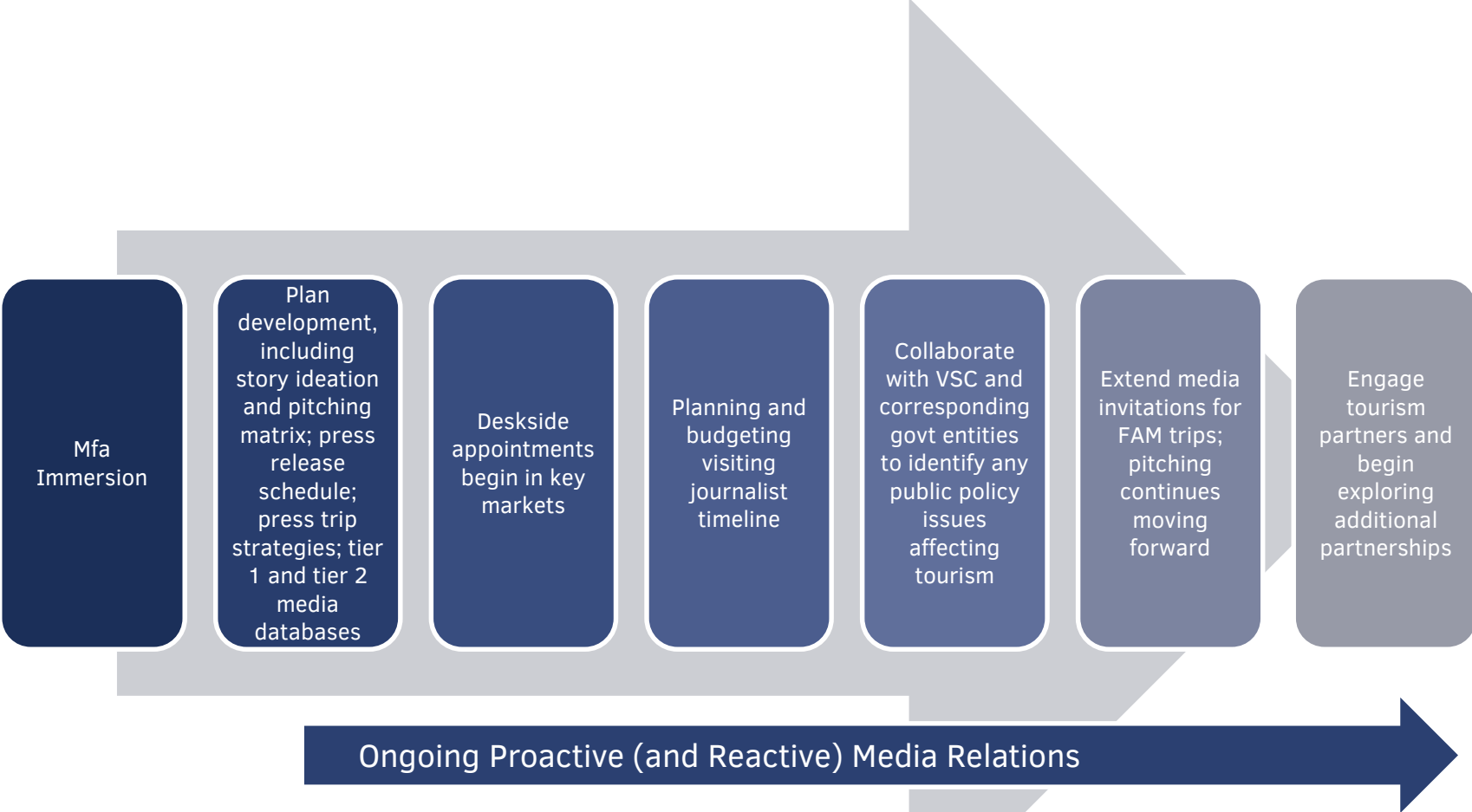
Further build the SLO CAL brand story, shaping the messaging of the Life is too Beautiful to Rush campaign to appeal to multiple key consumer segments: families, couples, culinary aficionados, history buffs, outdoor adventures, explorers, etc.

Ongoing pitching, press trip and individual visit coordination to showcase the destination while highlighting newsworthy initiatives and programming.

Activate media tours, events and influencer engagements in key media and consumer markets.

Assist in and support public relations programs including those conducted by Visit California and CTTC.

# Tactics Timeline



# Hit the Ground Running

## **Mfa Immersion**

Mfa will travel to San Luis Obispo County to immerse ourselves in the destination, should we have the honor of working with you.

## **PR Plan Development**

Post-immersion, the team would craft messaging and story ideas; develop the story matrix; brainstorm and deliver visiting journalist concepts and program ideas; build out the media tour strategy; and create a print, online and broadcast top-tier media database.

## **Media Tour – Meet the Faces of VSC**

Ideally, key members from Visit SLO CAL would be available to meet with target media in strategic high-yield markets in the spring. Mfa has just completed a dozen travel and lifestyle media tours in these markets, and they are ripe for new news and new faces.

## **Long Lead Pitching Spring/Summer 2018**

National high-end magazines and themed sections in key newspapers have long lead times, which require story ideas and information to be presented to editorial teams four to eight months in advance, on average. On day one of a partnership with Visit SLO CAL, Mfa will reach out to key contacts at top-tier publications to ensure that Visit SLO CAL is considered for annual issues.

## **Government Partners and Public Policy**

Once a month, Mfa will convene with Visit California and California's Central Coast Region to ensure messaging is consistent across organizations. Mfa will also work closely with VSC to assess government policy changes that could influence public perception of San Luis Obispo County and impact tourism regionally and nationally.

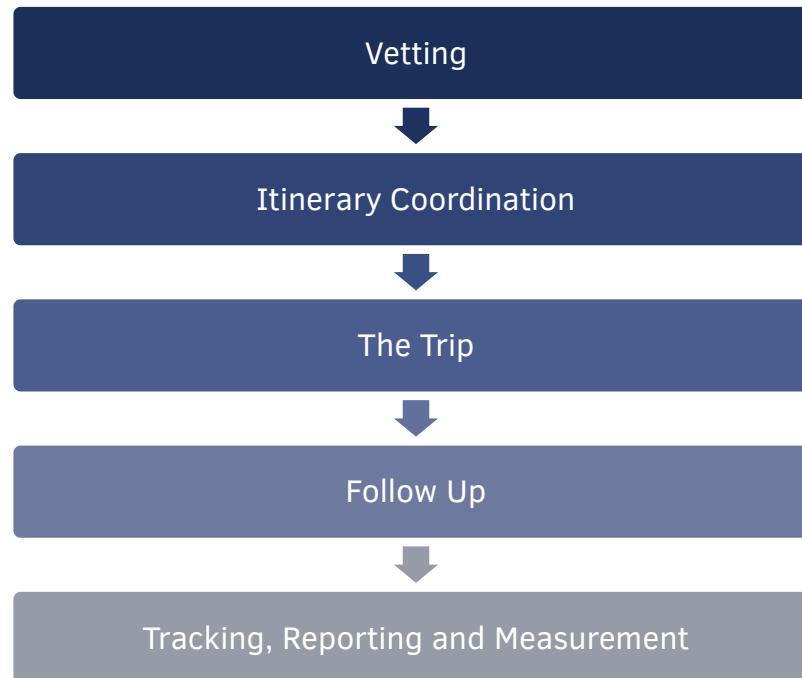
## **Strategic Partnerships**

Upon working together, Mfa will work with Visit SLO CAL to identify strategic partnerships in the outdoor adventure, culinary, and wellness sectors. Mfa will also explore additional partnerships with like-minded, mutually agreed upon brands and businesses in order to continue to generate media awareness.

# Visiting Journalist / Influencer Program

A creative, thoughtful, and organized visiting journalist and influencer program increases likelihood that a journalist or influencer will generate meaningful coverage and buzz for Visit SLO CAL, seed multiple stories, and become an informal ambassador for the destination.

The following provides a breakdown of how Mfa would select, review, invite, and facilitate media visits for individual members of the media and social media influencers.



# Visiting Journalist / Influencer Program

## Vetting

A successful trip would start during the vetting process, when Mfa would work with Visit SLO CAL to identify target media outlets, journalists and social media influencers who should have an opportunity to experience SLO CAL firsthand. For those writers/influencers who are already planning visits to the area, Mfa would work with Visit SLO CAL and other key partners to discuss entitlements and work to create a memorable itinerary. Journalists with confirmed stories and clout-carrying influencers would receive priority, as would writers who could place stories in multiple outlets.

## Itinerary Coordination

Throughout the planning process, Mfa would be in regular dialogue with journalists/influencers to ensure that itineraries match their intended story ideas, while simultaneously containing aspects that would provide elements of surprise to engage them during their visit. Mfa would work with Visit SLO CAL, its members and various tourism partners to coordinate specifics about the visit, including lodging, dining, and special touches. All itinerary materials would include relevant hashtags and social media handles to encourage journalists to post throughout their travels.

## The Trip

Some journalists/influencers prefer to travel on their own, while others require accompaniment. Based upon story placement opportunities, editors/influencers' needs, and whether the journalist/influencer is traveling alone or with companions, Mfa would work with Visit SLO CAL to determine if a representative escort would be necessary. Either way, each visit will incorporate an in-person meeting with one of Visit SLO CAL's representatives, along with social media interactions with the visiting journalist/influencer.

## Follow-Up

Aggressive follow-up after a journalist/influencer returns to work is an essential piece of feature story development. From discussing components of the trip and answering questions, to providing photography and planting new ideas, follow-up is what turns stories into multi-page features. Mfa would maintain regular contact with every visiting journalist until the placement comes to fruition. Additionally, Mfa would monitor and report back on social media posts uploaded by the journalist/influencer from the trip and after to ensure maximum communications impact from each.

## Partner FAMs

Mfa will also work with Visit California, Black Diamond and CCTC to ensure VSC messaging is incorporated into press trips hosted by those organizations, and will vet opportunities to incorporate aspects of San Luis Obispo County into regional press trips when appropriate.



# Themed FAM Trips

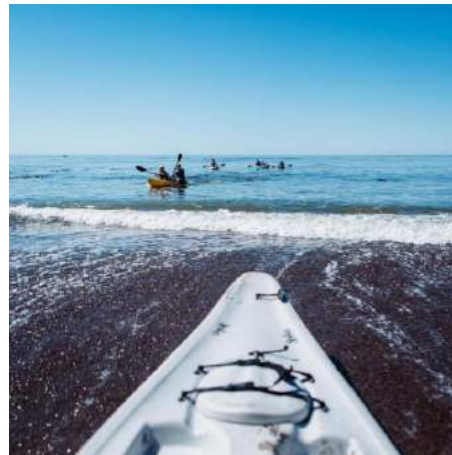
Certain programs are **better maximized** with **diverse group** familiarization trips. Mfa will facilitate group FAM trips throughout the year, and **build itineraries** that showcase the **breadth of offerings** available in SLO CAL. Select trips will be hosted in conjunction of seasonal events and activities.

## Culinary

Mfa will plan and host a press trip to discover SLO CAL's rich culinary landscape by exploring local farmers markets in Arroyo Grande, dining at farm-to-table restaurants in Edna Valley, visiting wineries in Paso Robles, and discovering the culinary culture through the eyes of a local chef. The trip will also highlight the new activations and initiatives associated with SAVOR—A San Luis Obispo County Experience. Target publications include *Saveur*, *bon appétit*, *Food & Wine*, *TastingTable*, as well as culinary social influencers such as @DevourPower, @TastesBetterHere, and @NoLeftovers.

## Rugged Adventure

Boasting countless miles of hiking and biking trails, epic bouldering, and pockets of unexplored wilderness areas, SLO CAL is the ideal destination for the outdoor enthusiast. Mfa will plan and host an outdoor adventure FAM trip highlighting the top experiences including ziplining in Santa Margarita, surfing Oceano's white sand dunes, hiking and biking along Cambria's breathtaking coast, and more. Target outlets include *Outside*, *Men's Journal*, *Gear Patrol*, *Popular Mechanics*, *Backpacker*, and more.



# Themed FAM Trips

## Family Fun

From jumping through waves at Moonstone Beach, to exploring the tide pools at Pismo Beach, SLO CAL is the ideal destination for family fun. Mfa will plan and host a family-focused FAM trip highlighting a variety of experiences perfect for the whole family to enjoy. Target publications include *Family Circle*, *Parents*, *Family Fun*, *MomTrends*, *Red Tricycle*, *Redbook*, and more.

## Wellness Retreat

According to a recent survey performed by the Global Wellness Summit, wellness travel is growing 50% faster than any other leisure travel segment, a trend that will continue in 2018 and beyond. Mfa will plan a wellness-themed FAM trip highlighting the swanky beach towns, off-the grid destinations, spas, and more. Target outlets include *Women's Health*, *Porter*, *VOGUE*, *Allure*, *goop*, *Well + Good*, and more.

## Arts and Culture

With unique galleries, museums and cultural attractions, SLO CAL is an lesser-known arts and culture destination. Mfa will work in tandem with Visit SLO CAL to develop an arts and culture-focused press trip for mainstream travel journalists.



# Storytellers

Mfa will promote Visit SLO CAL with a strategy that **captures** the **distinctive, sophisticated aesthetic** and the **rich history** of the destination.

SLO CAL has a strong story to tell. Mfa's goal is to communicate that story in new, meaningful ways to raise awareness and solidify SLO CAL as a multifaceted year-round destination.

The following slides will outline clearly defined story ideas, digital influencer program, strategy for reactive PR management, media desksides, events, and partnership management.





# Story Matrix Snapshot

A sampling of the types of story angles the team will consistently develop and share with media.

## Adventure Time:

Experience the great outdoors through hiking, biking, climbing, cycling and playing golf.



Target Outlets

**Outside**

**BACKPACKER**

**GEAR PATROL**

**San Francisco Chronicle**

## SLO CAL is for Lovers:

In need of a romantic weekend getaway, or planning a honeymoon? SLO CAL has you both covered.



Target Outlets

**GLAMOUR**

PureWow.  **REFINERY29**

MARTHA STEWART **weddings**

**BRIDES**

## Like a Local:

Surf the white sand dunes and see the sights that give SLO CAL its under-the-radar cool-factor.



Target Outlets

**COOL HUNTING**

**GQ**

**AFAR**

Condé Nast **Traveler**

**The New York Times**

## Refined Luxury:

Hearst Castle, Madonna Inn and other unparalleled experiences that guarantee a luxurious California lifestyle.



Target Outlets

**TRAVEL+ LEISURE**

Robb Report

**DEPARTURES**

**T THE NEW YORK TIMES STYLE MAGAZINE**

# Story Matrix Snapshot

## SLO CAL is for Families

Whether it's hiking, biking, surfing Pismo Beach, or relaxing, SLO CAL has something for each member of the family.



Target Outlets



## Wine and Dine SLO CAL

Boasting wineries, breweries, and unique dining experiences in Paso Robles, Edna Valley, and beyond, SLO CAL is a premier culinary destination.



Target Outlets



## Wake Up To Wellness

SLO CAL's spas and numerous off-the-radar locales like the Monterey Pine forests, make for the ultimate rejuvenating vacation experience.

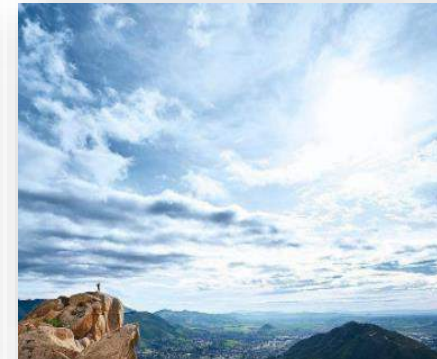


Target Outlets



## Ultimate Staff Retreat

Host your company's next big retreat in SLO CAL, where ample room and beautiful vistas come together to form an inspiring environment.



Target Outlets





# Digital Influencer Program

In today's rapidly evolving media landscape, digital influencers play an increasingly important role in growing brand awareness, shaping consumer perception, and portraying brand authenticity in a format that is visual, interactive, and immediate. We will identify social media influencers in the active lifestyle, family, and culinary segments that will help move the needle for Visit SLO CAL in the digital space and enhance the overall PR program. Influencers such as those below could leverage Visit SLO CAL's growing social media audience by using approved hashtags, executing daily posts, and leveraging promotional giveaways.

**@ChrisBurkard**  
2.7million followers



**@Taza**  
414k followers



**@CheatDayEats**  
354k followers



# Reactive PR Management

In addition to proactive PR pitching, Mfa will manage all in-bound media inquiries and opportunities on behalf of Visit SLO CAL.

## Process

Once we begin working together, we will establish a cohesive plan for handling reactive media requests. Mfa will work with Visit SLO CAL to determine protocols for when we should handle requests and when to pass off more localized, specific opportunities directly to partners.

## Vetting

Mfa will thoroughly vet all inquiring media and recommend media opportunities that are viable for the SLO CAL brand.

## Reliable Sources

We respond to inquiries in a timely fashion to take advantage of potential opportunities and process relevant leads for our clients, and specializing in turning smaller reactive opportunities into large-scale feature stories. Mfa receives hundreds of media inquiries each month because journalists trust us as reliable sources. Journalists often reach out to us when seeking cross-country examples to substantiate their trend features.

## Website Inquiries

We have found that numerous press leads come via website inquiries. For this reason, we suggest that our contact information is included on the Visit SLO CAL website for more efficient processing of those inquiries.

## Media / Influencer Visit Requests

Mfa will work very closely with the Visit SLO CAL team to respond to relevant media inquiries and take full advantage of media opportunities that will achieve VSC's goals.



# Media Desksides

Mfa suggests holding a series of deskside meetings where A-list media will be able to hear about the elements of Visit SLO CAL firsthand.

## Key Markets

Mfa will coordinate meetings with key destination executives in the following target markets, focusing on key destination messaging:

- Los Angeles
- San Francisco
- Seattle
- Phoenix
- Las Vegas
- Houston
- Dallas / Ft Worth
- Chicago
- NYC

## Media Training

Mfa works with several preferred partner companies who are adept in professional media training for media tours. These professionals are at our your disposal should media training be of interest.

## Sample Target Outlets (not limited to):





# Events

In addition to representing VSC at key media events such as SATW and PRSA, Mfa will plan two annual events in key markets to promote SLO CAL as a premier destination.

## A Taste of Visit SLO CAL

Mfa recommends holding two media events (one in Los Angeles and one in New York City) to leverage the presence of VSC representatives and bring SLO CAL's culinary offerings to life. These events would provide valuable facetime with media for destination spokespeople across industries (culture, golf, adventure, food and beverage, hotel/hospitality), allowing key message delivery and collaborative story ideation with key writers.

- Coordinate the events featuring vignettes from the different areas of the county, representing the many facets of the SLO CAL travel experience, and utilizing clearly branded with relevant social media handles and hashtags.
- Secure a private dining room at a sought-after New York City / Los Angeles-based restaurant to further entice media attendance.
- Tap a prominent SLO CAL chef to attend the event and create dishes highlighting local cuisine, adding an additional layer of education about the destination and a chance to experience the breadth of Visit SLO CAL's culinary offerings.
- Visit SLO CAL representatives would rotate seats with every course, ensuring media could mix and mingle with a variety of media.



# Partnership Management

With the assistance of VSC, Mfa will reach out to the organization's promotional, strategic, and local partners to ensure seamless communication for media outreach, press releases, press trips, events and other opportunities through the following:

- Constant contact with key tourism partners and their PR agencies through a monthly conference call where we will share destination updates and secure updates on upcoming events and initiatives.
- Work in tandem with Visit California, CCTC, Black Diamond, and other key partners to seamlessly integrate SLO CAL into their FAM trips and in-market events, ensuring inclusion of SLO CAL's partners and additional exposure for the destination.
- Maintain positive relationships with the key communications contacts for industry partners, airlines, tour operators, promotional partners, online booking partners, and other trade entities working in SLO CAL.

Looking beyond existing partnerships, Mfa will identify like-minded brands in the outdoor, adventure, culinary, and wellness sectors that could serve as strong partners for VSC. Whether through mutual marketing arrangements, combined press trips or integrated story lines, target partners will be selected with the ultimate goal of generating media coverage among new audiences.



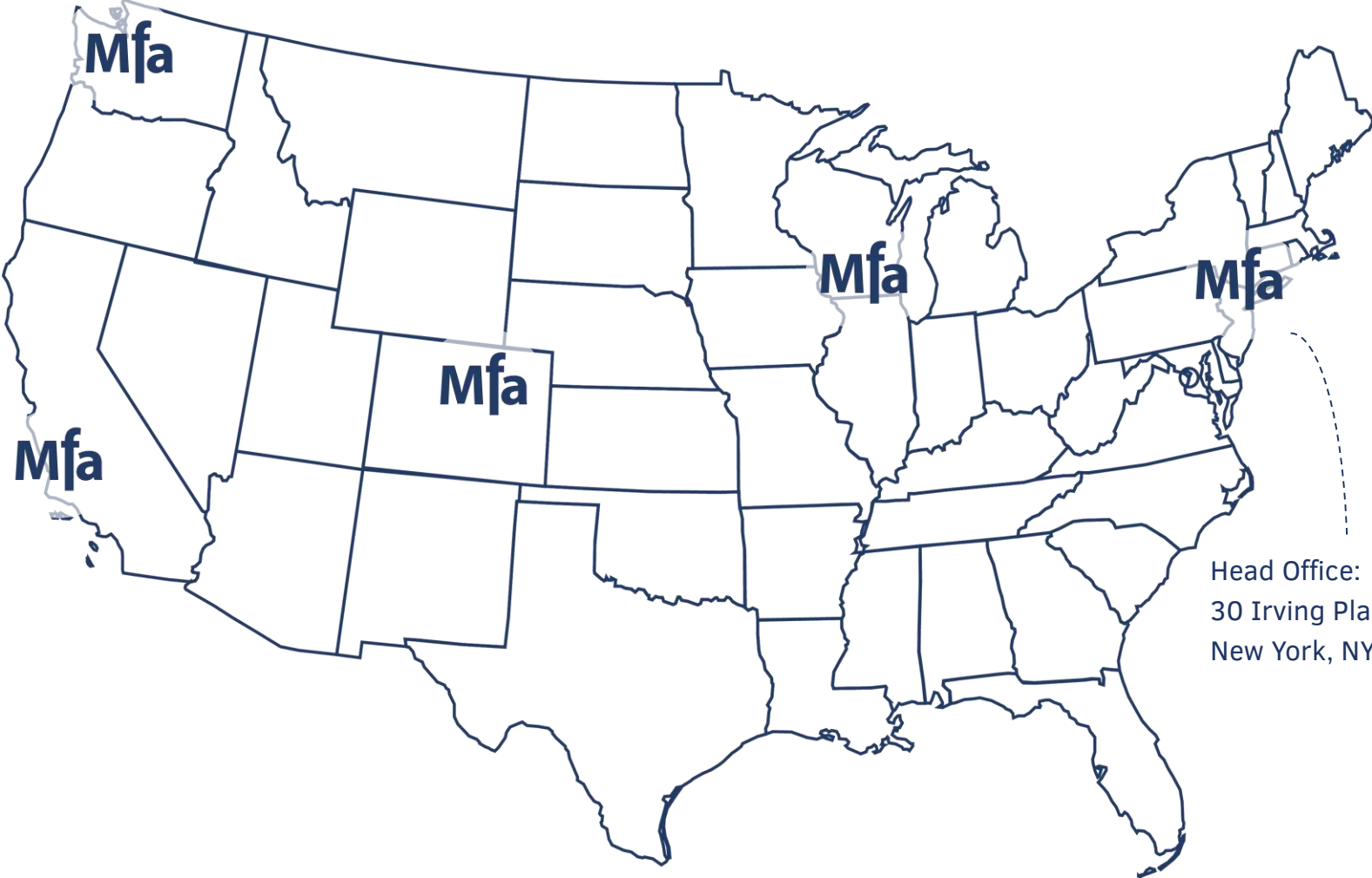




## About Mfa

Mission and Values, Your Team, Client List,  
Case Studies and References

**Headquartered in New York City**, Mfa has outposts in California, Colorado, the Midwest and the Pacific Northwest, maximizing our reach throughout the country.



Head Office:  
30 Irving Place, Floor 3  
New York, NY 10003

# Mission + Values

## Mission Statement

**Passion with purpose.**  
That's the backbone for delivering 20+ years of dynamic PR, digital and marketing communication success to brands, organizations and people that we believe in and admire.

## Company Values

S  
H  
I  
N  
E

Seize **OWNERSHIP**

Harness **POSITIVITY**

**INNOVATE** Every Day

Nurture **COLLABORATION**

Engage **PROACTIVELY**

“Psychedelic Walk in the Park” by Nathan Jurevicius is photographed above.

Our very own Central Park is filled with owls symbolizing wisdom, peace and creative thought, accompanied by sunflowers that evoke positive energy.

Commissioned by Mfa in 2008, the mural incorporates the colors and imagery meaningful to the core elements of Mfa.



# Meet Your Team



**Missy Farren, CEO**

Travel PR has been at the heart of Missy's career, from working directly with luxury hotels and travel destinations, to positioning consumer products as must-buys for travelers. Missy's holistic approach to PR strategy and media and influencer relations is rooted in the knowledge that every consumer is a traveler: a successful campaign infiltrates all stages of consideration and booking to drive results. Over the years, she has put The Little Nell's culinary program in the spotlight; brought the Cayman Islands back to global tourism prominence in the Caribbean; transformed Disneyland's 50th birthday into an 18-month celebration with consistent mainstream media coverage across travel and lifestyle publications; and through her work with the Aspen Skiing Company, helped to make Aspen a year-round vacation destination.

**Relevant client experience:** Too many to list! Highlights include more than a decade with the Cayman Islands Department of Tourism and longstanding partnerships with Aspen, The Little Nell, Colonial Williamsburg Foundation and Disney.

**Amount of experience:** 30 years

**Account role:** Missy will provide overall strategic direction.



**Samantha Lacher, Vice President**

As VP overseeing Mfa's Travel and Tourism group, Sam has a special talent for crafting distinctive brand stories by conceptualizing large-scale campaigns out of singular news. She has proven this over the last 12 years by driving the PR narrative for the 75th anniversary and renovations of the Williamsburg Inn; creating and implementing a PR and consumer engagement campaign connected with the current millennial-driven sweat-working trend for Westin Hotels & Resorts; leading a communications campaign driving visitation to Historic Jamestowne up 15%; and managing launch campaigns for hotels and restaurants from NYC and Berlin to Nashville and Milwaukee, among numerous other successful initiatives.

**Relevant client experience:** Westin Hotels and Resorts, Cayman Islands Dept of Tourism, The Little Nell, Sandals Resorts, Colonial Williamsburg, Ski Utah, Mountain Collective, Von Mandl Family Estates (winery group), Disney, Cayman Cookout, Colorado Ski Country, Chatham Bars Inn, The Ritz-Carlton Hotels of New York

**Amount of experience:** 12 years

**Account role:** Sam will serve as the contract manager and will oversee the strategic direction of campaign planning.

# Meet Your Team



**Betsy Carlson**, Senior Account Executive

Betsy has a vast rolodex of travel media, and expertise working with luxury hotels, resorts and destinations. She got her start working in the hospitality industry in-house at Rancho Valencia Resort & Spa, and since then has spearheaded luxury hotel openings, facilitated strategic partnerships with like-minded brands, and has created game-changing results for a variety of luxury resorts and global destinations.

**Relevant client experience:** Tourism Western Australia, Ojai Visitors Bureau, Visit Telluride, Alisal Guest Ranch & Resort, Rancho Pescadero, Langham Place, The Troubadour, Ferguson Crest, The Retreat at Blue Lagoon, The Cape Lodge, COMO The Treasury, and many more.

**Amount of experience:** 6 years

**Account role:** Betsy will be a day-to-day contact, creating and implementing the ongoing strategy, liaising with partners, managing media, running FAM trips, and pitching A-list media.



**Alexis Giua**, Senior Account Executive

Alexis' exceptional media relations skills are augmented by her ability to activate PR strategies and storylines across travel, wellness, culinary, sports and lifestyle national and regional outlets. She has led the charge on initiatives from producing large-scale media events, booking multi-day media tours/deskside visits, and conceptualizing and hosting property FAM Trips from Hawaii and Aspen to Chatham and Los Angeles.

**Relevant client experience:** The Little Nell, Ski Utah, Dart Real Estate's Kimpton Seafire Resort + Spa, Westin Hotels & Resorts, Charlie Bird (NYC), Squaw Valley, and more.

**Amount of experience:** 5 years

**Account role:** Alexis will be a day-to-day contact, managing media and influencer engagements, reporting and analysis, coordinating and securing tone setting results focusing on consumer and trade media.



**Krista Ritterhoff, Jr.** Account Executive

Krista brings a unique perspective to Mfa's travel/hospitality clients: Millennial media-consumption expertise. She excels at staying ahead of the news, creating thoughtful pitches and forging meaningful relationships with media. Krista also brings social media expertise to the team, developing strategic posts for clients and uncovering compelling influencers who align with clients' target audiences across industries. Her ability to craft powerful messaging and forge media connections has led to print and online placements in Cosmopolitan, MIC, Forbes, Parents, U.S. News & World Report and many more.

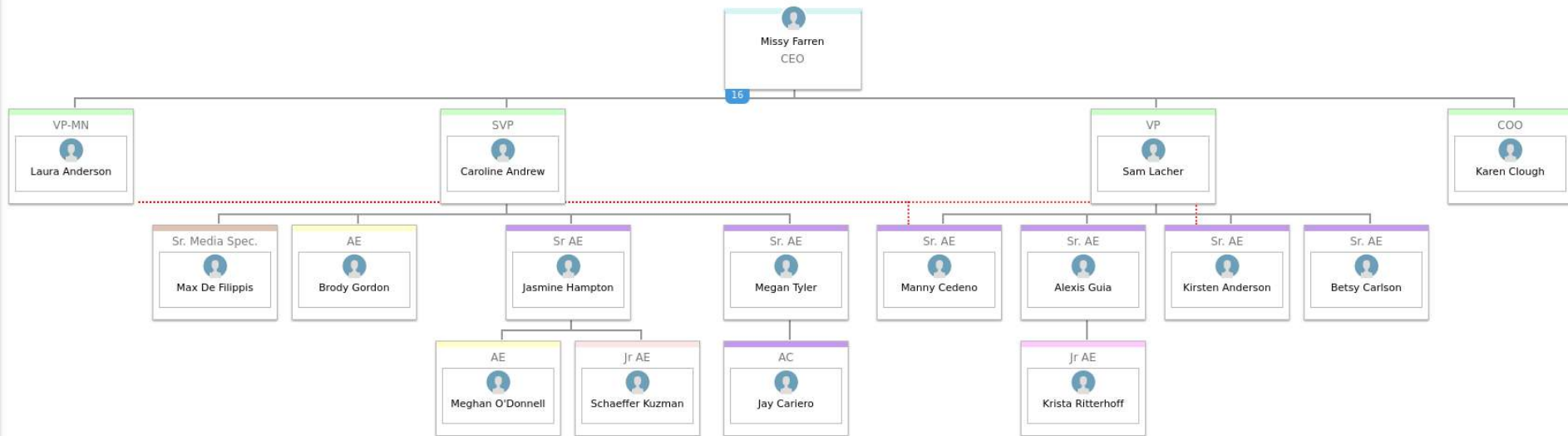
**Relevant client experience:** Ski Utah, Mountain Collective, Squaw Valley, Dart Real Estate's Kimpton Seafire Resort + Spa, Westin Hotels & Resorts, and Mission Hill Family Estates.

**Amount of experience:** 3 years

**Account role:** Krista will provide support for the ongoing strategy, pitching A-list media and securing tone setting results.



# Company Organization Chart



\*Account staff only; chart does not include admin / accounting staff.

\*Mfa is available and properly staffed to immediately execute the contract on behalf of Visit SLO CAL.

# Current & Recent Client List

Alex and Ani  
Anna Victoria  
Alli, Alliance of Action Sports  
Back on My Feet  
Burton Snowboards  
C9 by Champion for Target  
Cannondale  
Care 2  
Cayman Airways  
**Cayman Cookout**  
**Cayman Islands Dept. of Tourism**  
**Charlie Bird**  
Charles & Colvard  
**Chatham Bars Inn**  
Colorado Ski Country  
**Colonial Williamsburg, Va.**  
Cross Pens  
Cycling Sports Group  
**Dart Real Estate (Cayman Islands)**  
Dew Tour  
Disney  
Dorel Recreational / Leisure  
Endeavour  
G-Form  
Giggle

**Global Surf Industries**  
**Golden Horseshoe Golf Club**  
GT Bikes  
**Gunter Seeger**  
Historic Jamestowne  
Journeymen  
JUJA Active  
KaBOOM!  
**Kenton's**  
Learn to Ski and Snowboard Month  
LifeProof / Otterbox  
Library Foundation of Los Angeles  
**Limelight Hotel**  
lululemon athletica  
**Maysville**  
**Megpies**  
Michelin Food & Travel  
Mike's Hard Lemonade Co.  
**Mission Hill Family Estate winery**  
**Mountain Collective**  
No Kid Hungry / Share Our Strength  
**OluKai**  
OneWheel  
Participant Media  
**Pasquale Jones**

Peet's Coffee  
philosophy  
**Polaris**  
Rastaclat  
**The Ritz-Carlton Hotels of NY**  
**Roam Fitness**  
Roxy  
Sandals Resorts Royal Plantation  
Schwin  
**Snow Industries America (SIA)**  
**Ski Utah**  
Stance Socks  
**Squaw Valley**  
Target  
**The Little Nell / Aspen Ski Co.**  
**The Spa of Colonial Williamsburg**  
TheraGun  
Traeger  
Trapp Family Lodge  
Trek  
Quiksilver  
US Ski & Snowboard Association  
**Von Mandl Family Estates**  
**Westin Resorts & Hotels**

*\*Recent travel/hospitality clients in **bold**. Mfa has **no conflicts of interest**.*

# Destination Experts

Mfa has worked with numerous destinations, hotels and resorts in various capacities, including building increased brand awareness, implementing revenue generating programs, and expanding social media presence through impactful activations. Through our work with Ski Utah, Ojai Visitors Bureau, The Cayman Islands, Colonial Williamsburg and more, we have expertise working with marketing organizations that bring together multiple hospitality and tourism partners. Everyone is a traveler and we understand the importance of remaining top-of-mind throughout all stages of the planning process—from wanderlust to booking.

We approach each client on a holistic level, while simultaneously developing strategies for each unique component to maximize high-impact media coverage that supports brand positioning, builds awareness, and drives bookings.

These examples illustrate the strategic, results-driven approach our team takes to ensure every angle of a destination is exposed to media in a meaningful way.



# The Little Nell

## Challenge: Elevate a Snow Destination Beyond the Winter Months

Known for being an exceptional ski-in/ski-out property, since 1996, The Little Nell has tasked Mfa with garnering mainstream exposure for the property's year-round culinary offerings, as well as active spring and summer experiences available to guests.



### Mfa Way

- Worked with property team to develop an Adventure Concierge position, raising the bar for bespoke active experiences to appeal to high-end travelers.
- Capitalized on the presence of the annual *Food & Wine Classic* to interact with on-site media and build awareness for food and beverage personalities through media visits and in-person interactions.
- Facilitated media FAMs during the summer months so top tier journalists could write first-hand accounts of the destination beyond the snow.
- Redefined the luxury guest in order to reach new audiences and target unexpected publications.
- Launched The Little Nell's new restaurant through a phased approach, tapping trends and positioning the restaurant in front of aging millennials with money to spend on travel.
- Brought key hotel personnel to NYC to meet with journalists two seasons in advance, to capitalize on long-lead coverage opportunities.

### Impact

- Media and consumers awareness of The Little Nell's adventure offerings increased significantly, with the concierge team booking 20% more adventure experiences following the press push.
- Coverage of the opening of the new restaurant led to sell-outs over the first few months.
- Adventure and spring/summer outreach led to additional support for on-site cycling team through integrated messaging.
- Increased bookings among younger audiences throughout the year.

## DEPARTURES

## DUJOUR

## AD

ARCHITECTURAL DIGEST





# Westin Hotels & Resorts

## Challenge: Owning the Wellness Space with Adventure Trend Stories

With the wellness industry growing exponentially year over year, Westin Hotels & Resorts came to Mfa seeking stronger awareness of its global commitment to guests' wellbeing, while simultaneously maintaining the brand's leadership as the premiere hotel choice for leisure travelers and families. Upon learning of property-specific adventure offerings and 'adventure concierges' PR set out to tell a cohesive brand story that would leverage these offerings and tied them together under the umbrella of Westin's new crop of concierges who can now provide expert insight into surfing, skiing, hiking, tennis and golf experiences at and around properties.

### Mfa Way

- Gathered insights from properties about guest demand for active leisure experiences and the ways guest requests shaped the program; worked with the hotels to send their active concierge to NYC for a media launch.
- Brought media from across the country to NYC for a FAM trip hosted by the concierges, with an itinerary that brought to life multiple facets of the program (surf experience at Rockaway Beach, golf at Chelsea Piers, hike in Bear Mountain State Park, ski-focused dinner co-hosted by a ski/snow industry expert).
- Included NYC-based media in various aspects of the itinerary.
- Partnered with the Westin New York at Times Square to coordinate accommodations for out of town media and concierge team.



### The Boston Globe



### GRINDTV



### Impact

- Media participants in the FAM trip from outlets including Chicago Tribune, Travel + Leisure, Men's Journal, Wall Street Journal, GrindTV, The Inertia, VICE Sports, Greatist, Vogue, and more.
- Westin reached new audiences through inclusion in lifestyle/adventure outlets where Westin is not usually in the consideration set.
- Messaging extended beyond coverage of the launch and continued throughout the year, as Westin was at the forefront of trend pieces discussing the growth of adventure travel.
- Increased bookings among younger audiences throughout the year.



# Colonial Williamsburg

**Challenge:** Create a broader consumer base with diverse audiences, with an emphasis on the NYC and Washington D.C. metro areas.

## *Colonial Williamsburg*



### **Mfa Way**

- Created a Guest Artist program starring nationally-recognized talent (Mamie Gummer, Jesse Williams, among others) to draw a younger audience to the destination.
- Coordinated a Mormon Tabernacle Choir flash mob with 3,000 participants to drive social buzz.
- Implemented a luxury travel program rooted in golf and culinary experiences.
- Created a technology game that connected history to new family audiences.
- Program development with journalists Andrea Mitchell and Jim Lehrer, as well as Supreme Court Justice Sandra Day O'Connor.
- Facilitated the #historymeetshorsepower social media campaign in conjunction with NASCAR partnership.

### **Impact**

[Click here to watch The Colonial Williamsburg case study video.](#)

Password: MfaCWFCaseStudy

- Performances sold out at 1,000 tickets per artist.
- YouTube seeding resulted in Colonial Williamsburg's largest social media success to date.
- Spa and culinary events sold out.
- 80,000+ game plays over three summer seasons.
- Digital and social content development with NASCAR's Kyle Busch.
- Global trending topic on Twitter, major news coverage, increased visitation at Historic Jamestowne.
- Increased visitation from Washington D.C. metro area.

# Cayman Islands Department of Tourism

## Challenge: Help a Brand Break Through the Clutter

In a crowded region like the Caribbean, the Cayman Islands needed to differentiate itself. To stand out – both in the travel industry and to the appropriate consumer population – Mfa needed to change perceptions of the Cayman Islands, engage new audiences, and create programming that would drive visitation to all three islands, during all 12 months of the year.



## Mfa Way

- Built a dynamic strategy to bolster the destination's reputation and programming, targeting families, culinary enthusiasts, adventurers, romance seekers and the wedding industry.
- Incorporated partnerships and activations that sizzled with strong social media appeal, including Nickelodeon's SpongeBob, Shaun White, engage! luxury wedding summit, Grace Gealey, Food & Wine, and National Geographic Traveler, among others.
- Each year, adapted strategy and methods of communicating with media through Instagram takeovers, the Cayman Cookout culinary festival, partnerships with JetBlue, Delta, National History Museum, Shedd Aquarium and more.
- Created content for tourism ministers and directors through blogs, LinkedIn, travel trade events and media outlets.
- Counseled and created annual crisis protocols with Cayman Islands government entities for weather, social and emergency situations.
- Implemented a variety of social programs including comprehensive coverage of Cayman Cookout across Instagram, Twitter and Facebook.

## Impact

- Guided the development of a typical sun, sand and sea destination to a world class must-experience vacation, renowned for culinary, adventure, authenticity, romance and family.
- Record breaking visitor arrivals in 2014 and 2015.
- Award-winning press coverage in vertical media and mass consumer press, complemented by consistent growth in social media engagement.
- Revamped visiting journalist program increased ROI by more than 300%.
- Airline and hotel partners saw increased bookings resulting from targeted promotions-based outreach.
- A 17-year client relationship with four different Directors of Tourism.
- Seven years of sold out food festival Cayman Cookout with the biggest names in the food industry in attendance.

# Ski Utah

## Challenge: Identify Utah as a must-visit ski destination within North America

Leverage the Ski Utah marketing organization and the 14 participating resorts, to set Utah apart from other premier ski destinations in the U.S. Mfa generated awareness around the state's "Greatest Snow on Earth" and illustrated the variety of amenities offered across the organization's members.



### Mfa Way

- Working in tandem with Ski Utah, Mfa gathered details and leveraged exclusive offerings at each of Utah's fourteen resorts to position Utah as the ultimate ski destination.
- Facilitated six multi-resort media trips per year, organizing trips thematically and crafting itineraries that showcase various components of a Utah ski experience.
- Planned and executed two media events per year that highlighted different features at each of the fourteen resorts.
- Implemented partnerships for the organization with like-minded brands in the adventure space, creating opportunities to reach new audiences through financial and added-value partnerships.
- Coordinated social media content and influencer programs through fam trips and content agreements.

### Impact

- Increased occupancy at resorts, hotels, and sold out events.
- Leveraged strong relationships with popular travel publications to deliver timely multi-page feature stories.
- Secured opportunities for resort representatives and the Ski Utah team to meet with 200+ top tier media through desk-side appointments, media tours in feeder markets, events and immersive trips to Utah.

# Client References

Below please find contact information for three current contacts representing tourism destination/hospitality clients:

## Paul Marshall

Ski Utah Tourism,  
Communications Director

Phone: 435.647.6456  
Email: [paul@skiutah.com](mailto:paul@skiutah.com)  
2014-Present

## Ian Galbraith

Von Mandl Family Estates, Director of  
Corporate Communications

Phone: 604.269.7071  
Email: [igalbraith@markanthony.com](mailto:igalbraith@markanthony.com)  
2011-Present

## May Selby

The Little Nell, Director of  
Communications

Phone: 970.544.6269  
Email: [mselecty@thelittlenell.com](mailto:mselecty@thelittlenell.com)  
1996-Present





# Reporting and Budget



# Media Monitoring and Reporting

Ongoing PR monitoring will prove success in real-time and guide where to place future efforts.

## Our monitoring process:



Mfa would provide reporting services to the VSC team with real-time coverage alerts, regular PR calls and a program recaps, outlining key metrics and overall impact on business objectives.

### Weekly Calls

Focus on strategy, media updates, story development and content generation

### Monthly Recaps

Net result against goals; earned and social media coverage; metrics and strategy realignment

# Budget

Below is a suggested budget and start date based off of the scope of work outlined in the RFP document.

**Timing:** We're ready to engage!

**Fee:** \$6,600/month (\$59,400 over the 9 month period), or the equivalent of 33 hours of blended staff time per month.

Please note: the ideas outlined in this proposal are examples. Specific program components would be determined through follow-up discussion. The monthly retainer includes agency media outreach, strategy development, implementation of campaigns, partnership development and basic administration expenses.

Mfa does not mark-up expenses (i.e. that pesky 18% increase on pass-through invoices) and you'll never receive surprise 'hours overage' invoices. Once we commit to a budget, we stick to it. Adept at working within prescribed client budget parameters, Mfa strives to meet all agreed-upon goals.

Agency fees do not include out of pocket expenses including travel, meals with media, media mailings, promotions, events, partnership activations, influencer management program, experiential tactics, social media campaign execution, or newswire distributions. Event management fees are determined separately and based on size and scope of individual events.

**The line-itemized chart you provided in the rfp is included on the following slide.**

Please know that our team is very eager to work with VSC, and as such, we are flexible and will ensure we work within expense budget parameters.

# Budget - Chart

Category	Contract Cost \$	Contract %	Est. Expenses \$
Account Management	\$5,000	8%	n/a
Strategic Planning	\$9,000	15%	\$1,000
Proactive Pitching and Media Relations	\$13,000	22%	\$2,000
FAM Trips and/or Media Visits	\$12,000	20%	Mfa would work with lodging, attraction and hospitality partners to cover expenses for media visits whenever possible; goal would be for VSC to only pay for airfare and ground transport. Estimated airfare of \$500 per person.
Deskside Visits and/or Media Events	\$9,000	15%	TBD based on scope
Reactive Efforts	\$4,000	7%	n/a
Tracking and Reporting	\$4,000	7%	\$4,000
Agency Team Travel & Administration	\$3,400	6%	\$10,000 (flexible based on number of in-person meetings, how many press trips Mfa would escort, attendance at desksides, and travel to trade shows/events)
Other	n/a	n/a	n/a
<b>Total</b>	<b>\$59,400.00</b>	<b>100%</b>	<b>\$17,000 base. Out of pocket expenses are flexible based on the scale and scope of the contract agreement. Expenses are driven by the number of FAM trips and media tours, as well as by agency attendance at events and in-person appointments.</b>



# Appendix

## Resumes

# Mary Elizabeth Farren

206 Bon Air Avenue, New Rochelle, NY 10804

mfarren@mfaltd.com • 914-841-7050

## WORK EXPERIENCE

### **Missy Farren and Associates, Ltd.**

New York, NY, 1994 – Present

*President and CEO*

- Serve as a resource for clients seeking management counsel, C-suite support, creative thought leadership and crisis communications
- Advise on strategic marketing planning and client leadership during image management and crises issues
- Lead a team of dynamic PR professionals
- Keep the agency at the forefront of emerging media
- Oversee new business outreach efforts and business development initiatives
- Develop creative marketing and social media campaigns for clients and new business proposals
- Implement and maintain an environment of creativity, teamwork and focus for the agency

### **Swatch Group**

New York, NY, 1991-1994

*Director of Public Relations and Special Events (1991-1993)/ Vice-President (1993-1994)*

- Responsible for public relations programs and campaigns for Swatch, Omega, Rado, Tissot and Hamilton watch brands
- Successfully launched numerous Swatch collections including Chrono and Swatchetables
- Opened US Swatch-owned stores
- Created and launched the Swatch Collectors Club in the United States
- Established Swatch as a major player in the watch industry, leading to annual sales of \$10 million

### **Dorf and Stanton Communications**

New York, NY, 1987-1991

*Account Executive/Senior Account Executive (1987-1988)*

*Account Supervisor/Account Director (1988-1991)*

- Managed PR campaigns for Cunard and re-launched the Queen Elizabeth II
- Responsible for marketing and PR campaigns for all Cunard ships and resorts
- Implemented marketing and PR strategies for all travel accounts including Cunard, El Al Israel Airlines, National Ski Areas Association, and more
- Led the team that re-launched Mr. Peanut through work with RJR Nabisco

### **AJ Lazarus Associates**

New York, NY, 1983-1986

*Account Coordinator/Account Executive*

- Developed communication tools for PR campaigns including: press releases, talking points, coverage reports, speeches and presentations
- Managed account work, media outreach, and administrative tasks for travel clients
- Promoted to Account Executive within one year

---

## EDUCATION

Marquette University

Bachelor of Arts, Journalism

Milwaukee, WI, 1978-1982



ABOUT

PR professional specializing in strategic communications; guiding and crafting messaging that leads to compelling and meaningful media coverage; conceptualizing and implementing engaging social/digital campaigns; team leadership; and overseeing high level strategy for consumer products, global hotel brands, destinations, restaurants and nonprofits. Extremely detail oriented with ability to identify and focus on big picture goals to impact bottom line.

WORK EXPERIENCE

Missy Faren & Associates (Mfa Marketing & Public Relations) Aug. 2006 – Present

*Vice President (2016-present)*

- Facilitate integrated marketing campaigns for brands including Westin Hotels & Resorts, No Kid Hungry, Dart Real Estate (Cayman Islands), von Mandl Family Estate wineries/wine labels, giggle, No Kid Hungry and more.
- Manage up to 6 accounts at once. Account management includes: overseeing strategy and consistent delivery of strong results; development of internal and external client messaging; spearheading media relations and social media/influencer campaigns; conceptualizing media/consumer events and activations
- Negotiate blogger partnerships, including editorial content, social media posts and attendance at events
- Ensure teams are working against KPIs
- Establish KPIs for new client accounts
- Identify and pursue new business opportunities, leading team through rfp and presentation processes.
- Grow existing client accounts, increasing von Mandl Family Estate and Westin accounts by 20% year over year.
- Supervise and mentor up to 7 staff including annual reviews, goal setting, compensation planning, ongoing training.
- Image management / crisis communications around layoffs, C-level transition, weather for clients including ALEX AND ANI, Colonial Williamsburg, Cayman Islands Dept. of Tourism, Ritz-Carlton Hotels of New York

*Director (2013-2016)*

- Drafted comm. strategies
- Led media and blogger outreach for campaigns spanning Westin's new visual identity and No Kid Hungry's Dine Out initiative, to destination features for the Cayman Islands Dept. of Tourism and Colonial Williamsburg.
- Supervised up to 4 staff at once, including ongoing training, goal setting, guidance
- Facilitated events, overseeing vendor research and relationships, media attendance, run of show, client prep, staffing, media follow-up, and more
- Managed tracking and reporting
- Identified KPIs for new client accounts
- Pursued new business opportunities, including working on proposals, creating presentation decks, and participating in pitch meetings
- Day-to-day client communications
- In addition to agency work, spent 2-3 days/week for 5 months working internally at Colonial Williamsburg Foundation headquarters, overseeing integrated marketing projects, leading marketing efforts across multiple business units, and managing agencies during staff transition

*Account Supervisor (2011-2013)*

*Senior Account Executive (2009-2011) / Account Executive (2007-2009) / Junior Account Executive (2006-2007)*

Colonial Williamsburg

Nov. 2010 – June 2011

*Marketing Manager for Hospitality*

SKILLS

Strategy development and execution  
Team leadership and mentoring staff  
Message and story idea creation  
Account management

EDUCATION

Amherst College, Amherst, MA

Sept. 2002 – May 2006

Dual Bachelor of Arts in Law, Jurisprudence and Social Thought and Psychology  
Recipient of the Samuel Bowles Journalism Award, May 2006

Completed UVA's Darden School of Business "Foundations of Business Strategy" class through Coursera

Nov. 2014

# Betsy Carlson

72 Barrow Street, Apartment 1U | New York, NY, 10014 | (970) 948-8092 | betsyncarlson68@gmail.com

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## Experience

**Missy Farren Associates, Ltd.—Senior Account Executive—New York, NY** **July 2017–Present**

- Manage a variety of travel, hospitality and real estate clients
- Pitch target media to generate feature story placements in print, digital and broadcast media outlets
- Draft and execute new business proposals for prospective clients
- Lead new client presentations, ensuring a successful onboarding process
- Develop and maintain strong relationships with media contacts in local, regional and national markets

**Wagstaff Worldwide—Account Executive—New York, NY / Los Angeles, CA** **October 2013–July 2017**

- Manage a variety of hospitality clients including Tourism Western Australia, Ojai Visitors Bureau Langham Place, New York, The Troubadour Hotel, Visit Telluride, and many more
- Prepare client agendas and lead monthly agenda meetings
- Pitch target media to generate feature story placements in print, digital and broadcast media outlets
- Plan and attend press trips and individual media visits, coordinating details related to the trip

**J Public Relations—Intern—San Diego, CA** **June–September 2013**

- Developed new story pitches, media opportunities and outlets for a variety of hospitality-focused clients
- Maintained social media pages for clients, posting weekly on Facebook, Twitter and Instagram
- Gathered necessary collateral to draft press kits, bios and fact sheets for clients

**San Diego Magazine—Intern—San Diego, CA** **June–August 2013**

- Directed a photo shoot and created the concept for the Oct/Nov 2012 issue of *Exquisite Wedding's Magazine*, *San Diego Magazine's* semi-annual bridal publication
- Worked closely with the editorial staff to fact-check content for editorial
- Executed daily blog posts for The Bride Suite, *Exquisite Wedding's* daily blog

**Rancho Valencia Resort & Spa—Sales and Catering Employee—San Diego, CA** **May–September 2010**

- Coordinated weddings and special events at Rancho Valencia Resort & Spa, a five-star resort in San Diego
- Evaluated resort availability and booked meetings and special event space
- Represented Rancho Valencia at weddings, meetings and corporate events

**Rancho Valencia Resort & Spa—Front Desk Employee—San Diego, CA** **May–September 2010**

- Served as the guest's liaison for both hotel and non-hotel related services
- Resolved problems arising from guest complaints
- Managed both the concierge and front desk phones

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## Education

**Occidental College—Los Angeles, CA** **Fall 2009–Spring 2013**

*Major in English and Comparative Literature Studies*

**University of Amsterdam—Amsterdam, The Netherlands** **January–June 2012**

*CIEE Study Abroad*

**Parsons Paris School of Art & Design—Paris, France** **May–August 2011**

*Photography Techniques Summer Course*

#### COMMUNICATIONS EXPERIENCE

**Missy Farren and Associates, Ltd.**

New York, NY, **September 2015 – Present**

*Account Coordinator(2015)/Account Executive (2016)/Senior Account Executive (2017)*

- Execute earned media relations for travel, culinary and hospitality clients
- Communicate daily with clients and partner agencies
- Establish strong media relationships with top-tier publications, bloggers and social media influencers
- Develop creative marketing and social media campaigns for clients and new business proposals

**Spanish Ministry of Education, CEIP María Martín**

Madrid, Spain, **September 2014 – June 2015**

*Language and Culture Assistant*

- Instructed bilingual classes (English, Art, Social and Natural Sciences) from first through fifth grade
- Collaborated with colleagues to develop and conduct lessons targeting various language skills

*Private English Tutor*

- Retained by six families to design and direct personalized English lessons, catering to students' specific interests

**WRL Advertising**

Canton, Ohio, **Summer 2014**

*Public Relations Specialist*

- Owned several aspects of client campaigns including: social media, marketing, video, web and print elements
- Exceeded deadlines for preparing requests such as: drafting proposals, survey design, speech writing, Power Point development, media training, advertisements, press releases talking points and website content
- Managed the internal and external operations of campaigns via campaign progress tracking and reporting, submission of materials, client communication and case study research

**The Advertising Council, Public Relations/Social Media Team**

Washington, D.C., **Summer 2013**

*Intern*

- Developed communication tools related to news for 20 campaigns including: press releases, talking points, coverage reports, speeches and presentations; wrote for the Ad Council's blog.
- Managed communication among campaign managers, agencies and sponsors on all aspects of campaigns

**Results Radio B94.5, Morning Zoo Radio Show**

State College, PA, **January 2011 - May 2011**

*Intern and Part Time Co-host*

- Content creation: Discovered and drafted editorial content and show topics to be broadcast
- Listener engagement: Updated social media, answered listener calls, hosted promotional events

#### EDUCATION

**CIEE Council on International Educational Exchange**

Madrid, Spain **2014**

Teaching English as a Foreign Language (TEFL) Certification with Distinction

**The Pennsylvania State University** 3.72/4.0 GPA

University Park **Class of 2014**

B.A. in Public Relations and Spanish; Minors in Business and International Studies

**The University of Seville**

Seville, Spain, **Spring 2013**

#### HONORS & AWARDS

**Silver Addie Award, Canton Advertising Association February 2015**

- Social media copywriting for the Ralph Hay public relations and marketing, awareness campaign

#### PROFICIENCIES

Simmons OneView and Cision Point; Adobe InDesign

Mastery of Microsoft Office programs (Word, Excel, PowerPoint)

Conversational in Spanish

**COMMUNICATIONS EXPERIENCE****Missy Farren and Associates, Ltd.**

New York, NY, September 2016 – Present

*Account Coordinator*

- Execute earned media relations for travel and hospitality clients
- Communicate daily with clients, partner agencies, and internal team.
- Establish a rolodex of strong media relationships
- Handle client administration and organizational tasks
- Execute client events and activations.

**South Carolina Aquarium**

Charleston, South Carolina, February 2014 – September 2016

*Marketing Outreach Assistant*

- Managed media presence at various high visibility events, including sea turtle releases
- Handled Aquarium's community outreach program, as well as marketing and public relations responsibilities
- Published several articles about Aquarium happenings
- Served as a community ambassador for the Aquarium's message of stewardship and sustainability.

*Public Relations Intern*

- Responsible for editing, press releases, media relations, social media marketing and blogging.

**Central Caribbean Marine Institute**

Little Cayman, Cayman Islands, Summer 2015

*Rutgers Summer Intern*

- Research intern studying human impact on environment.
- Presented finalized research project and data on the impact of plastic debris in the ocean.
- Gained experience crafting conversation messaging and designing communication plans for nonprofits.

**ParyLove Birds,**

Charleston, South Carolina September 2014- April 2015

*Communications Intern*

- Helped newly formed event planning company build online presence through blogging and social media marketing.
- Gained experience in event planning and management, serving as onsite support during events.

**CisternYard Media**

Charleston, South Carolina Spring 2013-2014

*Blog Editor and Contributor*

- Online blog editor for College of Charleston's student run publication, focusing on current events, politics and social issues.

**EDUCATION****The College of Charleston** 3.5/4.0 GPA

Charleston, South Carolina Class of 2016

- B.A. in both Political Science and Communications

**The University of Stellenbosch**

Stellenbosch, South Africa, Fall 2014

**EDUCATIONAL EXPERIENCE****William V. Moore Student Research Conference**

Charleston, South Carolina Spring 2016

- Student Thesis Presenter

**Model Organization of American States**

Washington, D.C. Spring 2015

- College of Charleston Delegate on panel concerning refugee interests

**PROFICIENCIES**

Cision Point; IQMedia; Trendkite

Mastery of Microsoft Office programs (Word, Excel, PowerPoint)

Conversational in French





# Mfa **MARKETING & PUBLIC RELATIONS**

30 Irving Place, Floor 3  
New York, NY 10003

[mfaltd.com](http://mfaltd.com)



[missyfarrenpr](https://www.instagram.com/missyfarrenpr)



[MissyFarrenPR](https://www.facebook.com/MissyFarrenPR)



[missyfarrenPR](https://twitter.com/missyfarrenPR)



[Missy Farren PR \(Mfa Ltd.\)](https://www.linkedin.com/company/MissyFarrenPR)



**VISIT SLO CAL**



**PUBLIC RELATIONS  
PROPOSAL**

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**THE  
BRANDMAN  
AGENCY**



# 1.0

## ABOUT TBA

| agency ethos

| our founder

| key team members

| capabilities

| current clients

| case studies

agency ethos.

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## **THE BRANDMAN AGENCY**

is a dynamic, results-driven public relations firm, specializing in luxury travel. We live and breathe the hospitality business, and, as a result, have earned a reputation as being a “one-stop-shop” for media and industry insiders looking for the best travel partners. We shape opinions - on a global scale - and we deliver what we promise. Our creative campaigns and forward-thinking strategies impact the bottom line.

Our clients are the best of the best, and therefore, lend themselves to incredible synergies across our portfolio. We have exceptionally high standards and we deliver exceptional results.

*We began our journey in 2000 and now reside at 261 Fifth Avenue in the world’s media capital, New York City. We are more than 40 members strong with successful offices in Los Angeles, London, and Sydney.*



our founder.

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MELANIE BRANDMAN | FOUNDER & CEO



Melanie’s clients are the “who’s who” in the luxury travel and lifestyle industries. Like most Australians (although she’s been a New Yorker for 17 years), travel is in her DNA –she’s traveled to 70+ countries and has called Sydney, London, and Tel Aviv home. In 2011 Melanie founded Travel Curator, a luxury travel and lifestyle editorial site and content distribution channel where she chronicles destinations, hotels, restaurants, art and culture stops worth traveling for.

**IN THE NEWS...**

In early 2017, Melanie was awarded the Winthrop W. Grice Lifetime Achievement Adrian Award for Public Relations. Presented by the Hospitality Sales & Marketing Association International (HSMIAI), the Adrian Awards celebrated the many great achievements in the hospitality industry honoring outstanding entries in the 2016 HSMIAI Adrian Awards competition. This multifaceted event celebrates lifetime achievement; award-winning approaches to advertising, public relations, and digital marketing; and the teams that make it all happen.

*Melanie oversees top-level strategy for all agency accounts along with President, Kristen Vigrass.*



## account leadership.



Ty Bentsen  
Managing Director

Bringing over 14-years of PR experience, Ty provides strategic oversight for some of the agency's most prestigious brand and tourism board accounts including Visit Victoria, and Experience Scottsdale. Under her guidance, both clients have experienced significant growth as a direct result of a strategic and tactful PR plan and execution. Ty has also served as the account lead on Discover Los Angeles, and was instrumental in implementing successful campaigns such as Car Free LA and helping to secure over \$6 million in annual EAV. Ty attended University of California, Los Angeles receiving a B.A. in Psychology

*Contract Manager and Lead Strategist*



Shelby Callas  
Account Supervisor

Shelby joins The Brandman Agency with extensive knowledge of top luxury hotel brands, working in in-house roles at both Morgans Hotel Group and SLS Hotel at Beverly Hills. During her time in these roles, Shelby had strong partnerships and regular collaborations with Visit WeHo and Beverly Hills CVB. At The Brandman Agency, Shelby managed and oversaw strategy and execution for Discover Los Angeles and currently oversees some of the agency's most prestigious accounts from Enchantment Group, and several properties under The Ritz-Carlton portfolio. Shelby received her B.A. in Public Relations from Fresno State University.

*Lead Strategist*



Daphne Barahona  
Account Manager

Daphne brings extensive experience in international lifestyle and travel brands including luxury hotels, destinations, airlines, and cruise lines to The Brandman Agency. Her tourism board experience includes leading The Agency's Visit Victoria (Australia) and Barbados Tourism Marketing Inc. accounts with previous experience working with the Dallas and Greater Fort Lauderdale CVBs. She prides herself in cultivating strong media relationships which have lead her to secure feature placements in top-tier media such as *The New York Times*, *LA Times* and *Conde Nast Traveler*. Daphne earned a B.A. in Journalism from Texas Tech University and commenced her PR career in New York City.

*Primary Contact specializing in client relations and management*



Hannah Townsend  
Account Executive

A valued member of The Brandman Agency since 2014, Hannah has extensive tourism board experience, having played a vital part on the agency's work with Discover Los Angeles for two years and Experience Scottsdale for three. Her family resides in Cambria, CA, so wine tasting and camping trips up the Central Coast are frequent and near and dear to her heart. An outdoor enthusiast and an avid foodie, Hannah enjoys exploring the world through the lens of adventure and enjoying each destination's vast culinary landscape. Hannah received her B.A. in Communications from University of California, Santa Barbara

*Media manager and account execution*

agency + account team organizational chart

CEO AND FOUNDER

PRESIDENT

MANAGING DIRECTORS/SVP

VICE PRESIDENTS

ACCOUNT DIRECTORS

ACCOUNT SUPERVISORS

ACCOUNT MANAGERS

SENIOR ACCOUNT EXECUTIVES

ACCOUNT EXECUTIVES

ASST. ACCOUNT EXECUTIVES

ACCOUNT COORDINATORS

TY BENTSEN  
Managing Director

SHELBY CALLAS  
Account Supervisor

DAPHNE BARAHONA  
Account Manager

HANNAH TOWNSEND  
Account Executive

capabilities.

---

HOTEL GROUPS

BOUTIQUE & LUXURY HOTELS

TRAVEL & TOURISM

CONSUMER PRODUCTS & EVENTS

REAL ESTATE & DESIGN

WINE & SPIRITS

**SERVICES**

---

brand development

---

openings, renovations, launches

---

social media

---

digital marketing

---

influencer engagement

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creative activations

---

partnership development

---

global media strategy

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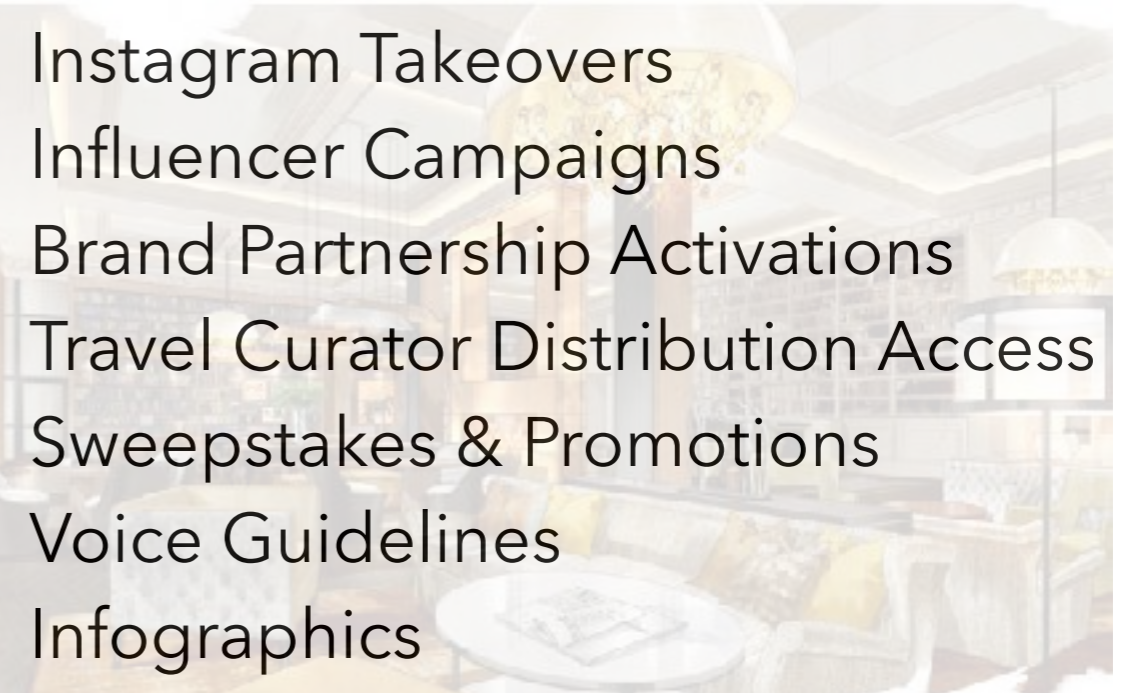
campaign development

---

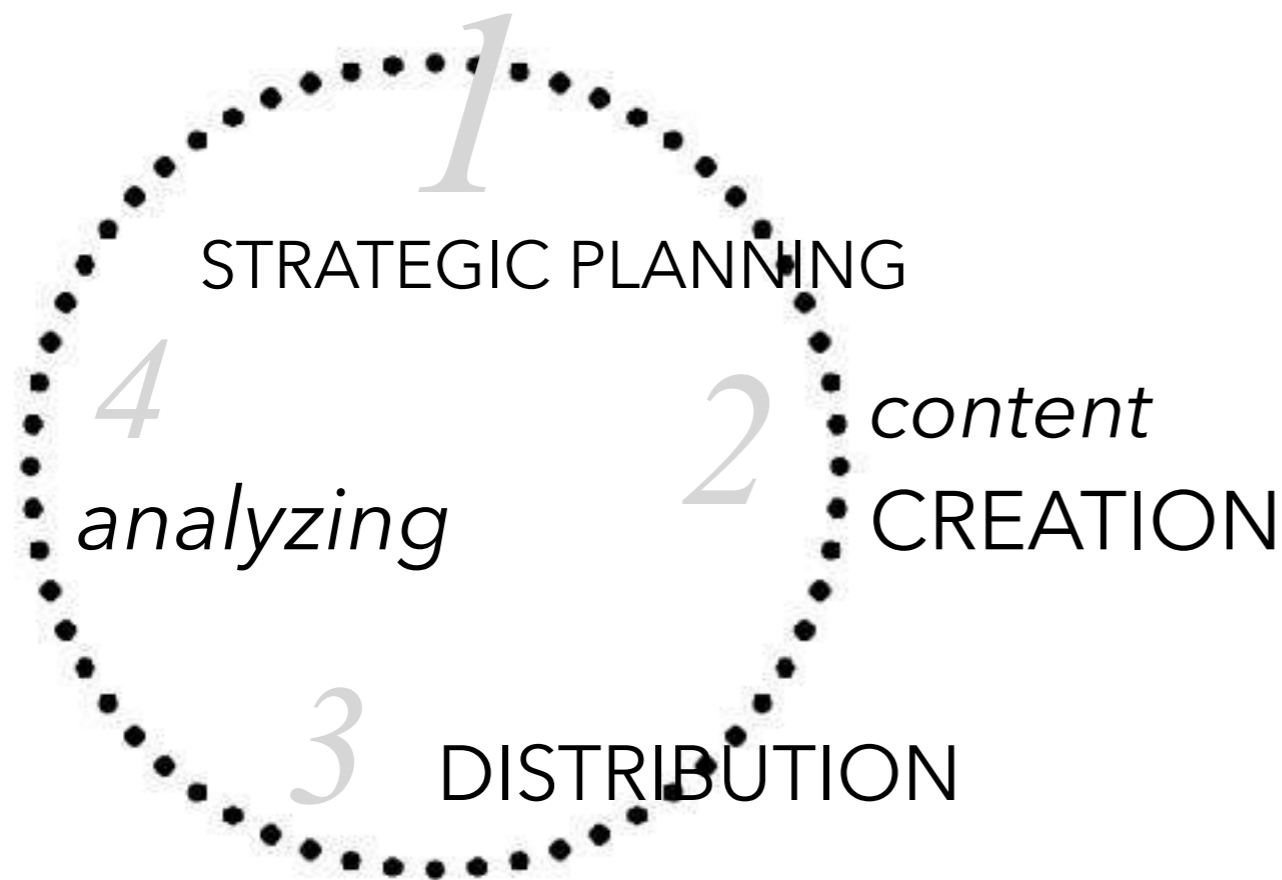
## ***We can develop digital strategies to help tell SLO CAL's story***



Audits  
Competitive Analysis  
Content Calendars  
Hashtag Campaigns  
Social-First Content  
Short-Form Video & Photography  
Social Media Training for Staff



Instagram Takeovers  
Influencer Campaigns  
Brand Partnership Activations  
Travel Curator Distribution Access  
Sweepstakes & Promotions  
Voice Guidelines  
Infographics



### **Sphere of Strategy**

Drive awareness and engagement with high-end lifestyle brands within travel, design, culture, arts, food and drink communities from the ground up.



## current global clients.

---

### **INDIVIDUAL HOTELS**

Andaz Peninsula Papagayo Resort, Costa Rica  
Atlantis, The Palm, Dubai  
Belmond El Encanto, Santa Barbara, California  
Blue Horizons Garden Resort, Grenada  
David Citadel Hotel, Jerusalem, Israel  
Grand Hotel Kronenhof, Pontresina, Switzerland  
Grand Wailea, A Waldorf Astoria Resort, Maui, Hawaii  
Hotel Indigo Los Angeles Downtown, California  
InterContinental Hong Kong  
Jamaica Inn, Ocho Rios, Jamaica  
Kulm Hotel, St. Moritz, Switzerland  
La Mamounia, Marrakech, Morocco  
Laucala Island, Fiji  
LUMA Hotel Times Square, New York, New York  
Moxy NYC Times Square, New York, New York  
Omni Berkshire Place  
Palazzo Victoria, Verona, Italy  
Palmer House Hilton, Chicago, Illinois  
Park Hyatt Aviara Resort, San Diego, California  
Park Hyatt New York, New York  
Rome Cavalieri, Waldorf Astoria Hotels & Resorts, Italy  
Round Hill Hotel & Villas, Montego Bay, Jamaica  
Spice Island Beach Resort, Grenada  
The Crane Resort & Residences, Barbados  
The Oberoi, Bali  
The Oberoi, Lombok  
The Ritz-Carlton, Bachelor Gulch, Colorado  
The Ritz-Carlton, Grand Cayman  
The Ritz-Carlton, Half Moon Bay, California  
The Ritz-Carlton, Kapalua, Hawaii  
The Ritz-Carlton, Key Biscayne, Miami, Florida  
The Ritz-Carlton, San Francisco  
The Ritz-Carlton Residences, Waikiki Beach  
Whare Kea Lodge & Chalet, Glendhu Bay, New Zealand

### **HOTEL GROUPS**

COMO Hotels & Resorts  
Enchantment Group  
Six Senses Hotels Resorts Spas  
The Ritz-Carlton Hotel Company, L.L.C.

### **DESTINATIONS**

Experience Scottsdale  
Visit Victoria

### **ARCHITECTURE + DESIGN**

Champalimaud  
Hart I Howerton  
Tzelan

### **REAL ESTATE**

Christophe Harbour  
Wanda One Sydney

### **CRUISE**

Wiltrans International

### **AVIATION**

Qantas

### **TOUR PROVIDERS**

Walk Japan

*\* The Brandman Agency sees no conflict of interest with existing clients*

references.

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Visit Victoria  
Diana Morgan  
Manager of  
International  
Markets  
+61 3 9002 2264  
*Current Client*  
*(Since July 2016)*



Experience  
Scottsdale  
VP of  
Communication  
Laura McMurchie  
+1(480)429.2253  
*Current Client*  
*(Since July 2012)*



Discover Los  
Angeles  
VP of Global  
Communication  
Jamie Foley  
+1(213)236.2315  
*Past Client*  
*(Jan. 2012-June  
2016)*

## RELEVANT CLIENT HISTORY

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Barbados Tourism Authority

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Gold Coast Tourism

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Tourism Council of Bhutan

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## Discover Los Angeles

*Brandman Helped Overcome #1 Barrier to Visitation Via Creation of Award-Winning "Car Free L.A." Campaign*

### THE ISSUE

After commissioning an extensive consumer survey, Discover Los Angeles reaffirmed what it knew, anecdotally, to be true - that the city's notorious traffic was not only a problem for locals, but was a true barrier for travel to the destination.

### THE APPROACH

Challenging the perception head-on that "Nobody Walks in LA," The Brandman Agency developed a campaign entitled Car Free LA - a series of six, self guided itineraries around the city - encouraging travelers and locals alike to explore the city's distinct neighborhoods and iconic heritage (including its connection to the music, film, and LGBT history) via foot, bike, and METRO.

### THE RESULTS

Launched on Earth Day 2013, Discover Los Angeles' Car Free L.A. campaign remains one of the city's most successful and well-received marketing programs to date. Winner of an HSMIA Silver Award in Tourism Marketing, the program also resulted in numerous pieces of A-list coverage in *The New York Times*, *USA Today* and *AFAR* to name a few, successfully sharing the message that travelers can easily navigate the City of Angels without a car.





## **Barbados Tourism Marketing Inc.**

*Brandman Secured Feature-Length Coverage, Highlighting Lesser-Known Island Attributes*

### **THE ISSUE**

Barbados had become a victim of its own media success. During The Brandman Agency's 15 year tenure with the island destination, we achieved broadranging success including multiple broadcast segments, feature stories in major newspapers and magazines, and hosted top media and influencers to experience Barbados firsthand. Media and consumer awareness of the destination was high and newer, more under-the-radar destinations were starting to capture media headlines.

### **THE APPROACH**

Re-engage media who we had hosted in the past and highlight lesser-known aspects of the Barbados travel experience, while offering a chance to re-visit some of the island's most beloved treasures.

### **THE RESULTS**

The Brandman Agency secured a COVER STORY and accompanying 12-page feature entitled "Back to Barbados" in the January 2017 issue of Conde Nast Traveler by Horatio Silva, who had previously visited the destination via The Brandman Agency in 2008. The estimated advertising value for this story exceeded \$2 million USD and included tips from historians, island photography, and painted a compelling picture of the authentic Barbados experience as told from the perspective of a returning traveler.





## **Experience Scottsdale**

*Brandman Strengthened Media Relations Through an Aggressive Media Mission & Visiting Journalist Program Strategy*

### **THE ISSUE**

Experience Scottsdale's Communications Team wished to expand and strengthen their media relationships in the US market - in particular in the greater New York area and the Southern California market.

### **THE APPROACH**

Experience Scottsdale retained The Brandman Agency to proactively work with media in the two identified markets via proactive pitching, creative pitch development, one-to-one media meetings, media missions and media events and finally a robust visiting journalist program. The agency was tasked with introducing new media to the client and strengthening existing media relationships.

### **THE RESULTS**

Over the last five years, the Brandman Agency has, through proactive and aggressive media outreach activity:

Personally introduced Experience Scottsdale to 573 media in the greater New York and Los Angeles markets through one-to-one meetings, small-group lunches and events

Secured visits to the destination from 124 individual media and influencers, resulting in feature coverage from each visit (negotiated and secured in advance)



## Visit Victoria

*Brandman Leveraged High-Profile Event To Reinforce Key Destination Driver: Culinary Tourism*

### THE ISSUE

Anecdotally known as Australia's foodie capital, Visit Victoria had an opportunity to further cement this reputation - while appealing the lucrative culinary tourism market - during the World's 50 Best Restaurant events, being held in Melbourne in March 2017.

### THE APPROACH

To showcase the depth and breadth of culinary experiences on offer in the destination and share this prestigious event in real-time, The Brandman Agency targeted three high-profile food bloggers from Victoria's key domestic markets (NYC and LA) to join the worldwide media and high-profile chefs descending on the destination for World's 50 Best Restaurants. The Agency created signature hashtags for attendees - to unify efforts and messaging across each of their individual audiences - and worked closely with airline partners, to ensure their messaging was conveyed alongside the destination and event.

### THE RESULTS

Over the course of the five-day event, the three attending influencers reached a combined audience of 805,000 with 87 dedicated Instagram posts along with complimenting blog posts. These efforts generated 287,638 likes and over 6 million total social impressions, reinforcing Victoria as the ultimate foodie destination.



**noleftovers**  
Melbourne, Victoria, A... [Follow](#)

2,765 likes

**noleftovers** In Melbourne for @theworlds50best Awards! ☺☺☺ Landed early this morning & immediately hit the ground running- Thanks to everyone who's been messaging me you! recommendations (keep 'em coming!) and huge shoutout to @Qantas-flow their business class here and it was beyond incredible. Full layflat beds, pj's, specially curated menu & Australian wine list, the works! From the second I got on the plane I felt like I was already in #Australia. SO EXCITED for what's in store! #noleftoverstravels #visitmelbourne #Seeaustralia

[View all 37 comments](#)

**noleftovers**  
Royal Exhibition Build... [Follow](#)

1,192 likes

**noleftovers** No better way to round out my #Australia trip than at @theworlds50best awards in Melbourne. Incredibly grateful to have spent the past couple of days getting to know some of the worlds most legendary culinary superstars & celebrating their much deserved successes! ☺☺☺ Definitely making it a priority to go visit as many as I can throughout my travels...Who wants to join? wearing @zimmermann #australia #worlds50best #noleftoverstravels

[View all 25 comments](#)

**stastecofoko** Me! ☺☺☺ looking beautiful Jackie!

**noleftovers** #melbournatoodandwine #melbourne #melbournatoodie #foodies #melbourneats #food #australiagasm #visitvictoria #seeaustralia #bloggers

[Add a comment...](#)





case studies.

## **Gold Coast Tourism**

*Helped Drive Key Destination Awareness*

### **THE ISSUE**

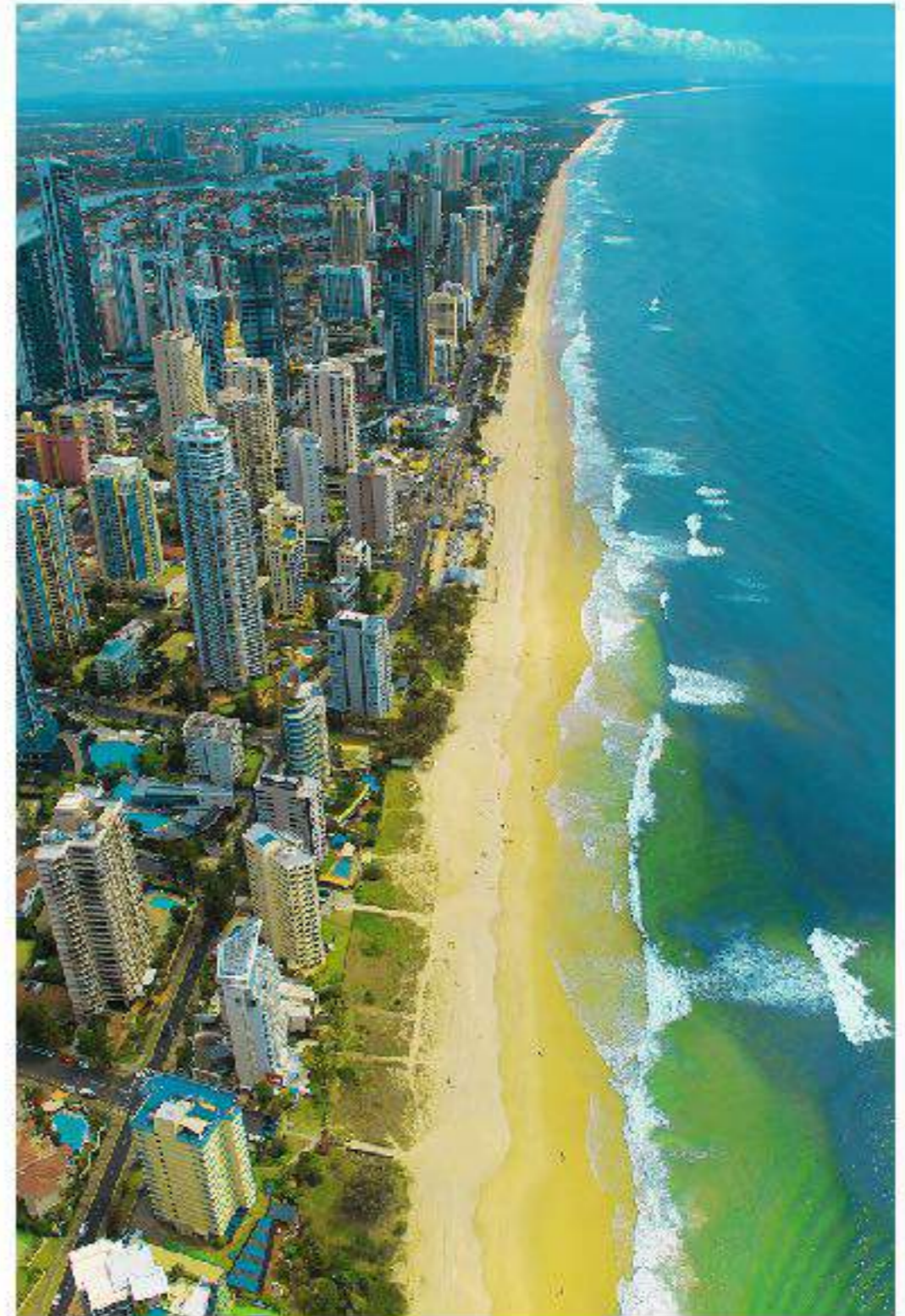
The Brandman Agency was brought on to fully introduce and promote this heretofore unknown destination in the North American market.

### **THE APPROACH**

In order to maximize limited resources, the Agency undertook an aggressive and comprehensive pitch campaign and targeted visiting journalist program. Via ongoing communication with top media and two top tier group press trips, the Agency was able to achieve the following results.

### **THE RESULTS**

Through this campaign, the Agency was able to put Australia's Gold Coast on the map with US travelers via a wide array of targeted press placements and feature stories including prestigious inclusion with Travel + Leisure's list of the best up-and-coming destinations and a destination story on National Geographic Traveler online.





## Crisis Management

### *Brandman's Strong Issues Management Helps Mitigate Corporate Crises*

#### THE ISSUE

Major travel and hospitality brands are often highly regarded for their systems of management and organization, having clear strategies in place for handling day-to-day matters. Their buttoned-up and pristine approaches to hospitality help them achieve top global status and acclaim. However, despite the best planning unforeseen crises arise at a moment's notice and the need for a well-conceived issues management strategy and strong crisis communications team remains a top priority to alleviate any negative situations that develop.

#### THE APPROACH

Brandman is well-versed in issues management, acting as an extension of a crisis communications team and working strategically to mitigate any negative communication on behalf of our clients. Our crisis communication strategy is on-going for our clients and adaptable to suit any individual crisis so we can be prepared at a moment's notice.

#### THE RESULTS

Brandman was part of the team that managed the crisis with One57 and the crane collapse during Hurricane Sandy. Brandman has also worked closely with hotel clients including The Setai, Miami Beach and the Waikiki EDITION to handle unforeseen ownership/management changes and create targeted global media strategy plans to assist the hotels in moving forward after these major disruptions. Additionally, The Agency has overseen crisis communication regarding a fleet-wide grounding of QANTAS aircrafts and other crises, and a shooting at LAX via Discover Los Angeles. We are also currently advising Caribbean clients on strategic crisis communications as the Zika virus epidemic continues.



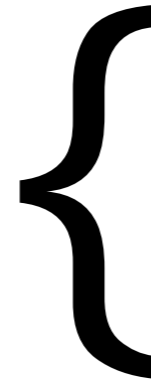


we build

# executive profiles



Kathy Smits, Vice President, Tourism



## Discover Los Angeles

Secured four minute live segment on Fox Business on how to market and sell tourism in Los Angeles to the rest of the world during international Pow Wow



Secured Ian Schrager on the cover of Surface Magazine among other outlets including Bloomberg Businessweek, Financial Times and The New York Times

**EDITION Hotels & Resorts**

Ian Schrager, Hotelier

Following the acquisition of FRHI, drove broadcast coverage to announce the deal and position Bazin as a leader in shaping the future of travel



Sebastien Bazin, CEO

**ACCOR**

we have access to

# a-list media

Relationships are everything. We have access to the best of the best and deliver for our clients.



“Do you know that yours are the only media lunches I leave the office for? I otherwise have a strict no-lunch policy.”

Pavia Rosati, Founder of [EathomAway.com](http://EathomAway.com)

*Nathan Lump, Editor-in-Chief, Travel + Leisure*

*Pilar Guzman, Editor-In-Chief, Conde Nast Traveler*

*Bruce Wallin, Editorial Director, Robb Report*

*Brekke Fletcher, Managing Editor, CNN Travel*

## editors on speed-dial

*Meg McGuire, Editor-in-Chief, Angeleno*

*Spencer Beck, Editor-in-Chief, LA Confidential*

*Catharine Hamm, Travel Editor, Los Angeles Times*

*Jennifer Flowers, Deputy Editor, AFAR*

*David Kaufman, Travel Editor, New York Post*

*Klara Glowczewska, Editor-at-Large, Town & Country Travel*

*Stephanie Rosenbloom, Travel Writer, The New York Times*

*Nick DeRenzo, Senior Editor, Rhapsody*





we are on the frontline of today's evolving

# influencer strategy

Influencers are the new editors and we can connect you with those that make an impact. We drive awareness and engagement with high-end lifestyle brands within travel, design, culture, arts, food and drink communities from the ground up.

## CAPABILITIES

Blogging  
Social First Content  
Influencer Campaigns  
Hashtag Campaigns  
Instagram Takeovers  
Sweepstakes & Promotions  
Follower Growth  
Reporting



Lindsey Calla of Calla in Motion  
@lindseycalla

## KEY INFLUENCER RELATIONSHIPS



Chiara Ferragni, The Blonde Salad, 6.1 Million Followers @ La Mamounia, Marrakech

## **The Ritz-Carlton, Kapalua**

Elevated profile of iconic resort by curating high-profile fitness experts for wellness retreat. Health-focused influencers brought the story to life.

*Chiara Ferragni, The Blonde Salad*  
*Meagan Morrison, Travel, Write, Draw*  
*Katie Rodgers, Paper Fashion*  
*Shay Mitchell, Celebrity*  
*Max Samis, Mister Spoils*  
*Athena Calderone, EyeSwoon*  
*Patrick Janelle, A Guy Named Patrick*  
*Sam Horine, Photographer*  
*Christina Caradona, Troup Rouge*  
*Julie Sarinana, Sincerely Jules*  
*Grant Legan, Photographer*  
*Lee Abbamonte, Explorer*  
*Marianna Hewitt, Life with Me*  
*Leo Chan, Levitate Style*  
*Annie Georgia Greenberg, Refinery 29*  
*Julia Engel, Gal Meet Glam*  
*Adam Gallagher, I am Galla*  
*Laura Brown, InStyle*



we create compelling

# brand partnerships

## who we've worked with recently

Ariana Rockefeller, Accessories Designer  
Temple St. Clair, Fine Jewelry  
La Perla, Lingerie  
Soludos, Espadrilles  
Barneys New York  
Sotheby's  
Rebecca Minkoff, Ready-to-Wear  
Onia, Swimwear  
Nina Runsdorf, Fine Jewelry  
Carnegie Hall  
Mount Gay Rum  
Bergdorf Goodman  
Cadillac  
Leica  
Harper's Bazaar

Noll Surfboards  
Tumi, Luggage  
Smythson, leather goods  
Audi  
Pure Wow, Lifestyle blog  
Reebok  
InStyle  
Henri Bendel  
Jared Dietch, Music Curator  
Colin Cowie  
Cartwheel Arts, Tour Company  
Manrepeller  
Guest of a Guest  
Racked

Faherty Brothers x Andaz Peninsula Papagayo Resort, Costa Rica



*Developed  
"Cultural Insiders  
Program"; yielded  
extensive coverage  
in FASHION, MEN'S  
INTEREST, FRINGE  
publications*

The Nomad  
Collection, inspired  
by La Mamounia



Temple St. Clair X La Mamounia

Onia Swimwear x Banyan Tree Lang Co





# 2.0

# A U D I T

| state of the industry + trends

| current situation

| swot

| objectives + strategy

| media strategy

state of the industry.

As fewer and fewer Americans are taking advantage of their annual vacation days, expectations are at an all time high. The majority of these trips are being booked digitally from smartphones, tablets, and desktops. While word of mouth continues to be a strong driver of destination consideration, content-rich social media channels are increasingly overshadowing magazines, newspapers, and broadcast - especially amongst millennials, whose spending power strengthens by the day.

Meanwhile, geopolitical instability has more and more Americans choosing to forego international travel in favor of exploring their own backyards. Residents of cities like Denver, Phoenix, Seattle, San Francisco and Los Angeles are searching for new and exciting destinations that feel far, but keep them close to home.

What does all this mean? Visit San Luis Obispo County is poised to take advantage of this increased demand. A recent AARP poll (across all age groups) noted that 51% will only be traveling domestically this year. Within that same group, nearly 85% of these trips are yet to be booked, meaning travelers are still in the planning phase of their journey and are primed for consideration.





**ART IS THE NEW FOOD**



Food was once a quintessential expression of local, a placemaking tool, a destination-maker, and a refuge for connoisseurs and the curious. Today, art is the new food. And travelers, wealthy and otherwise, are developing a taste for it.

**BEYOND LOCAL**



Beyond "local" like artisanal hand soaps or "locally sourced, free-range bacon," travel brands need to start thinking more about celebrating local community.

**CO-EVERYTHING**



(Communal, Community, Collaboration) – the rapid growth of industry disruptors (AirBnB, etc.) has led to the rise in travelers increasingly seeking authentic, homestay experiences during their travels.

**WELLNESS**



Wellness will go beyond the morning yoga routine, with new spiritual bathing exercises and meditation which connects travelers with nature and astronomy.

**MOBILIZING MOBILE**



Travelers are more likely to use a mobile device for choosing a destination, comparing or selecting a travel product or sharing trip experiences on social networks than for a travel purchase – a direct opportunity for the PR-impacted 'discovery' phase of the customer life-cycle

**INSTAGRAM-MUSTS**



Creating instagrammable moments for travelers is crucial. If it's not captured on instagram, were you really there?



## current situation.

---

SLO CAL boasts 25 distinct communities stretched across roughly 3,600 square miles and nearly 80 miles of pristine Central California coastline. The destination encompasses some of the state's most sought after locales including Paso Robles, Big Sur, Cambria, and the city of San Luis Obispo. With world renowned wine regions, countless miles of hiking and biking trails, and the ideology of a destination free of the frenetic everyday lifestyle, SLO CAL represents a place where travelers from all over can SLOW down and enjoy life's most cherished moments.

Located halfway between two major hubs, San Francisco and Los Angeles, SLO CAL is the ideal quick getaway for those looking to escape the hustle and bustle of a fast paced city. Building upon the momentum of a new marketing campaign and with SLO CAL tourism consistently on the rise, the destination has the opportunity to further to engage (or re-engage) key demographic and psychographic markets, generate awareness in new high-spend markets, extend length of stay, and increase overall tourist visitation by telling the story of this Central California gem.

Though traditional media is relatively strong, SLO CAL has an opportunity to strengthen and expand its presence in not only that space, but also emerging platforms on the digital front including influencer engagement and establishing connections with new audiences of potential travelers.

Now is the ideal time to engage with a results-driven partner to elevate awareness, create new programs and activations, and streamline PR strategy in order to clearly position the destination and truly illustrate and bring to the life the "Life's Too Beautiful to Rush" campaign.

With extensive experience in destination marketing, content creation, out-of-the-box events, and partnership activations, alongside unmatched traditional media and social influencer relationships, The Brandman Agency is uniquely qualified to help SLO CAL meet - and exceed! - its PR goals.





## **STRENGTHS**

---

Stunning 3,600 square miles and nearly 80 miles of sought after coastline made up of 25 unique communities

Appeals to a wide variety of leisure travelers, outdoor adventure seekers, couples, family, and more

Proximity to Los Angeles, San Francisco and other draw markets

Two new nonstop flight routes from key feeder markets (Seattle and Denver)

Geographic variety including beaches, mountains, vineyards, cliffs

Consistent tourism growth for San Luis Obispo County

## **OPPORTUNITIES**

---

Help elevate overall awareness of destination and further unify the SLO CAL brand and marketing campaign through proactive and strategic media relations

Create fresh, unique, and creative programming that speaks to each of the communities as well as the overall destination

Design and implement destination-specific experiential offerings and partnerships with likeminded brands to develop compelling reasons to visit (and revisit) SLO CAL

Utilize carefully selected influencers and tastemakers to help uniquely tell the story each community as well as the overall destination

Capitalize on the fact that SLO CAL is a more-or-less undiscovered destination without crowds, lines, or traffic

## **WEAKNESSES**

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High cost of airfare for small-scale airports and difficulty getting to the destination from large airports

Lesser known communities and overall minimal media knowledge of SLO CAL

Misconception of inaccessibility to the Central Coast

## **THREATS**

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Consumer economic climate

Changes in traveler tastes and demand

Media and consumers' stronger knowledge and identification of other parts of California (e.g. Napa Valley, Sonoma County, Southern California, etc.)

## objectives + strategies.

### OBJECTIVES

To establish SLO CAL as a premiere Central Coast tourism destination, and a leader in the California tourism community by securing media coverage across travel, lifestyle, niche market media, broadcast, online, blogs and social media

Develop strong and deeper engagement with visitors through creative programming and memorable experiences unique to the Central Coast

Drive demand for visitation to the county through a comprehensive results-driven public relations strategy

Work as a synergistic partner to support CVB, marketing partners, and other existing communications efforts



### STRATEGIES

Create compelling narratives around the diverse experiences and signature touch points offered in SLO CAL in order to inspire and convert target market travelers (culinary, coastal, cultural)

Utilize strategic PR communications, in-person meetings and events to demonstrate key destination attributes in local, regional, and national media markets

Implement a robust editorial calendar strategy to continually feed destination news into the market via traditional media, digital, broadcast, and via influencers/social channels

Leverage SLO CAL's existing relationships with relevant CVB's and DMO's to ensure that interested media and influencers are invited to experience specific destination touch points

Create, Implement and Measure Annual Strategic PR Plan

Strategic Partnerships with Likeminded Brands

Media Roadshows in New York and Los Angeles

Thematic Visiting Journalist Program

Destination Story + Pitch Calendar Development

Press Releases and Proactive Targeted Pitching

Reactive PR Management

Public Policy and Crisis Communications Support

Position key Visit SLO CAL representatives as destination industry thought leaders

Represent Visit SLO CAL at key industry events

Submit Visit SLO CAL for relevant awards and recognition

Ongoing key media cultivation

Competitor + Trend Tracking

Press Kit and Materials Development





media targets.

# The Brandman Agency will target the right outlets to help tell SLO CAL's story.

## TRAVEL

Conde Nast Traveler  
Travel + Leisure  
American Way  
CNN Travel  
Hemispheres  
Delta Sky  
AFAR  
Elite Traveler  
Forbes  
Town & Country Travel  
Ultra Travel



## BRIDAL + HONEYMOON

BRIDES  
Destination Weddings  
Premiere Bride  
T&C Weddings  
Inside Weddings  
Martha Stewart  
Weddings  
Bridal Guide  
Wedding Style

## FAMILY

Good Housekeeping  
Mommy Poppins  
Cup of Jo  
Family Magazine  
Redbook

## NICHE + LIFESTYLE

Architectural Digest  
Bloomberg Pursuits  
DuJour  
LUXURY  
ForbesLife  
Private Air Luxury  
Homes  
Robb Report  
T: The New York Times  
Style Magazine  
Wine Enthusiast  
WSJ Magazine  
Wine Spectator  
Men's Journal  
Time OUT  
GQ  
Esquire  
bon appetit  
Surface  
Golf Digest  
Trendland  
Fathom  
PureWow  
ELLE  
Marie Claire  
New York Magazine  
Vogue  
Saveur  
Food & Wine  
American Spa



## DIGITAL

CoolHunting  
Create + Cultivate  
Departures Dispatch  
Electrify  
FATHOM  
Inside Hook  
Miles + Miles  
Mister Spoils  
PureWow  
Refinery29  
Stella Spoils  
The Manual  
Thrillist  
Tiny Atlas  
Travel.Dose  
Trendland  
Eater  
Grub Street  
Daily Meal

## TRADE

Global Traveler  
HOTELS  
Hotel Business  
Luxury Travel Advisor  
Premier Traveler  
Recommend  
Travel Agent  
TravelPulse  
Travel Weekly  
Vacation Agent  
Bizbash  
LODGING  
Meetings & Conventions  
Skift

## REGIONAL + NEWSPAPERS

Wall Street Journal  
The New York Times  
USA Today  
Los Angeles Times  
New York Post  
Modern Luxury Media  
360 West  
The Dallas Morning News  
The Chicago Tribune  
The Washington Post  
Prime Living  
Ranch & Coast  
Haute Living  
C Magazine  
Los Angeles Magazine  
Sunset  
D Magazine  
Los Angeles Travel  
Bask  
Coast Magazine  
San Diego Magazine



## BROADCAST

4 NY News Weekend  
ABC News  
After the Bell - FOX  
Business Network  
America This Morning  
Bloomberg TV  
CBS Sunday Morning  
CBS This Morning  
CNN  
FOX & Friends  
Fox News Channel  
Good Afternoon  
America on ABC  
Good Day New York  
Good Day Wake Up  
Good Morning America  
Good Morning America  
Weekend  
KTLA  
MSNBC Morning Joe  
News All Morning  
One On 1  
The TODAY Show  
TODAY with Kathie Lee  
& Hoda  
Travel with Val (NY1  
News)  
Squawk Box





# 3.0

## BIG IDEAS

| moms unplugged

| journey through nature's gym

| SLO giving

| SLO viticulture + culinary FAM

# moms unplugged

*72 hours in SLO CAL catering to the ever-important matriarch*

## **OVERVIEW:**

According to current studies and sources (e.g. Harvard Business Review, Forbes, etc.) women consumers now drive the world travel economy. Women are earning more, spending more and influencing all levels of the travel industry. Women's purchasing power in the travel segment has never been higher.

The Agency recommends targeting the destination's "Mom to the Max" demographic through an ongoing visiting journalist program geared toward American matriarchs looking for curated experiential travel with their families.

## **FORMAT:**

- The Brandman Agency would select key freelance writers and influencers that have families of their own to experience SLO CAL in 72 hours, and explore the best of the region. From outdoor adventure (think Harmony Headlands State Park), to fun food and drink (think Pismo Beach's Splash Cafe), and arts & culture (think Hearst Castle), we would help curate the ultimate family road-trip.
- As an added layer to this idea, we suggest seeking a partnership with one of the latest ride-sharing companies taking off in the marketplace - Turo - the Airbnb of cars, which allows you to rent the car of your dreams for an affordable price.

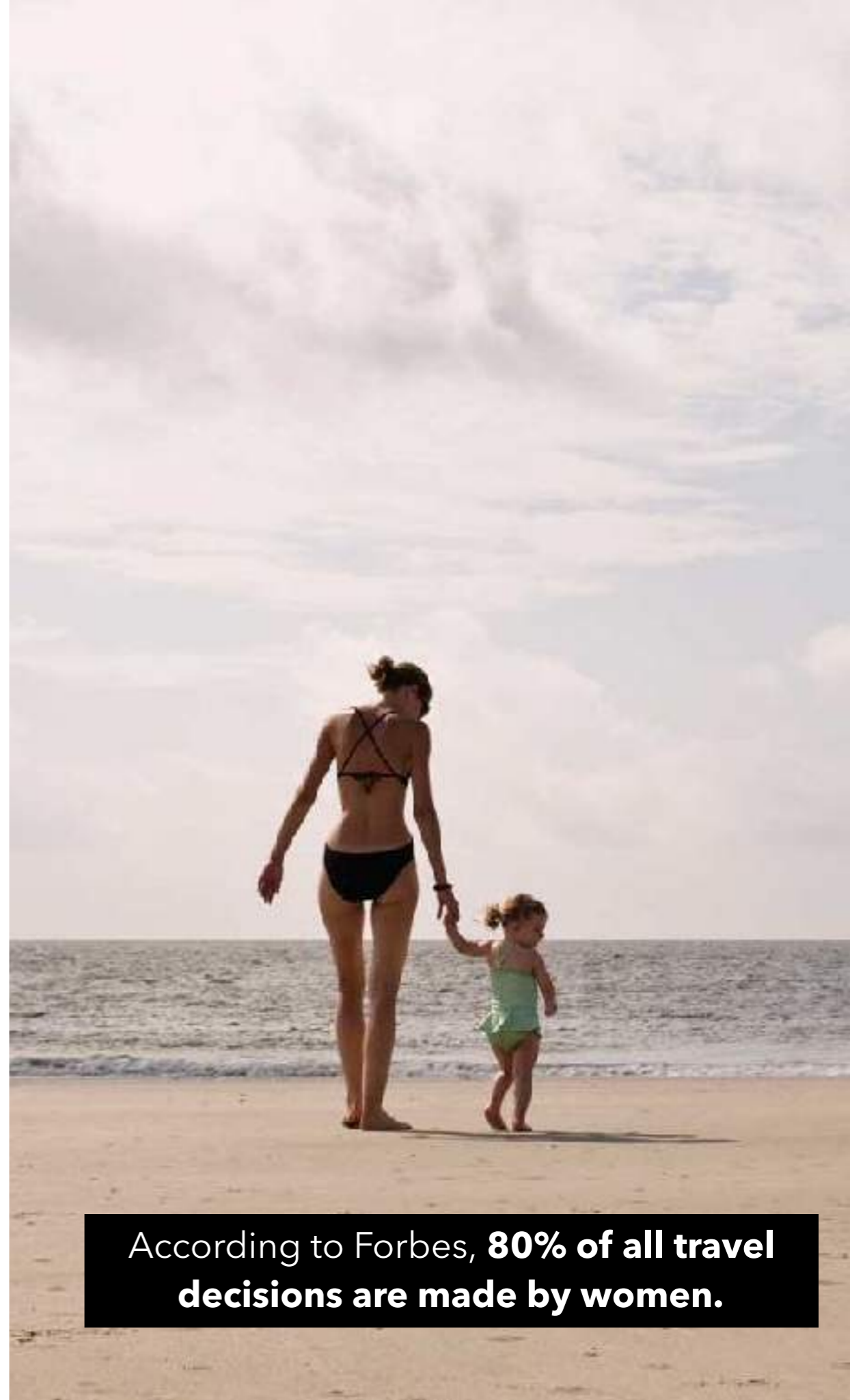
The Agency also sees an opportunity to leverage this partnership as a unique offering and way to cross-promote the destination with the service's growing number of users.

## **BUDGET CONSIDERATIONS:**

- RT flights, accommodations, F&B, activities for 5 media and their children (8-10 total guests); approximately cost: \$9,600

## **EXPECTED RESULTS:**

- Extensive media coverage across travel, lifestyle, and family outlets
- Increased awareness of the destination by utilizing the Turo partnership as a cross-promotional tool



According to Forbes, **80% of all travel decisions are made by women.**

# journey through nature's gym

*experience a taste of SLO Cal outdoors in LA's famed Griffith Park*

## **OVERVIEW:**

Adventure and the great outdoors come together perfectly in SLO CAL providing a much needed escape for city dwellers in search of repose and relaxation. The Active Adventurer is a key target audience for the destination and also connects directly with the Los Angeles market audience. In an effort to connect the outdoor adventure lifestyle of SLO CAL with some of Los Angeles' top wellness focused media and influencers (who are often caught up in a fast pace and can't take trips) we propose bringing the SLO CAL outdoor experience to their doorstep via a media cultivation event in one of LA's iconic nature oases - Griffith Observatory Park.

## **FORMAT:**

- The Agency suggests bringing some of SLO CAL's adventure and wellness experts from its top state parks such as Montaña de Oro State Park, along with key tourism board representatives, to give first-hand accounts of the major offerings in this domain within the county.
- During the event we will utilize nature's gym (Griffith Park) to reenact some of the outdoor activities visitors can enjoy in SLO CAL such as hiking, mountain biking, and horseback riding led by Visit SLO CAL spokespeople. We would also provide local and healthy SLO CAL refreshments throughout the journey to bolster SLO CAL food and beverage product and further tell the healthy-living story, which Angelenos place significant importance in. The media cultivation event will provide a dynamic, exciting vehicle to immerse media in the product while educating them on the overall destination of San Luis Obispo County.

## **BUDGET CONSIDERATIONS:**

- Activities, F&B costs and potential parks & recreation fees for activation in Griffith Park for 5-6 media; approximate cost \$800
- RT travel and accommodation in Los Angeles for 2-3 SLO CAL adventure and wellness experts; approximate cost \$2,000

## **EXPECTED RESULTS:**

- Elevated awareness for SLO CAL's adventure and outdoor products within travel, lifestyle, and health & wellness publications
- After gauging the success of the LA activity, The Agency would look into mimicking this event in other key market cities such as San Francisco, Denver, Seattle, Phoenix and Las Vegas which also have similar urban oases.





# SLO giving

*media gifting campaign in key markets with the best of SLO Cal*

## **OVERVIEW:**

An extension of the Visiting Journalist Program, “SLO Giving” would be a targeted media gifting campaign whereby The Agency would identify a list of A-List editors, freelancers and social influencers to receive curated packages filled with items that showcase the vibrancy of the destination. From delicious Paso Robles wines, to sweet delights from the Brown Butter Cookie Company and unique crafts from local farmers’ markets, the gifted items will distinctly connect the destination’s key message points while inspiring the SLO lifestyle.

The final touch? A beautifully-designed mock airplane ticket with an invitation to visit in the calendar year.

## **FORMAT:**

- The Agency recommends coordinating the package deliveries ahead of key events, holidays and other major SLO CAL festivals such as Paso Robles’ California Wine Month, Morro Bay’s Avocado Margarita Festival and Pismo Beach’s Billabong Surf Festival in order to provide ample lead time for media to cover these events.
- Additionally, we would provide social media tool kits to encourage social postings along with a suggested itinerary of things to see/do/experiences based on the theme of their news beats and which audience segments they speak to: active adventurers, moms to the max, and cultured class.

## **BUDGET CONSIDERATIONS:**

- Hard costs shipping & handling to media; approximately \$500
- Potential costs for package items; The Agency would seek donations from partners first

## **EXPECTED RESULTS:**

- Brandman anticipates widespread awareness across travel, lifestyle, food & beverage, and family media





# viticulture + culinary FAM

*cultured class fam through SLO CAL's vineyards & eateries*

## **OVERVIEW:**

Exploration and education continue to be major factors in today's travel decision making. Whether venturing into a new frontier or revisiting a beloved destination, today's discerning traveler is in search of immersive and transformative experiences. In an effort to further engage and capture the attention of the "cultured class" audience we suggest a unique and upscale FAM with traditional writers and social influencers that leads them through the vineyards of Paso Robles, and top dining experiences in Morro Bay and Arroyo Grande while taking in the scenic routes of the Pacific Coast Highway.

## **FORMAT:**

- The FAM, which would target luxury travel media in our key markets (e.g. Seattle, Las Vegas, Los Angeles, Denver, etc.), would include stops in vineyards where media could meet with and learn about wine from local viticulture experts, taste the best of local ingredients and cuisine, and discover the ease and beauty of road tripping the Central Coast.
- Plan and execute a pop-up al fresco dining experience in Paso Robles or another scenic SLO CAL locale inviting one or two of the county's top restaurants (such as Paso Robles' Thomas Hill Organics, Morro Bay's Windows on the Water, and Cambria's Centrally Grown) to curate an elevated dining experience amongst the breathtaking scenery.

## **BUDGET CONSIDERATIONS:**

- Hard costs for RT flights for 5-6 media; approximately \$2,500
- Potential F&B, activities, alternative hotel accommodations for 5-6 key media.  
Please note we would seek no-cost partnerships first to provide experiences

## **EXPECTED RESULTS:**

- Extensive media coverage across travel, lifestyle and food & beverage titles
- Share-worthy content for social channels and word-of-mouth marketing
- First-hand experience and elevated awareness of lesser known points of interest within SLO CAL



# 4.0

## ADDITIONAL TACTICS

- | media roadshows
- | thematic visiting journalist program
- | thought leadership
- | aligning earned and paid media
- | best practices



# bi-coastal roadshow

*media missions in NYC and Los Angeles*

One of the best tactics to keep the destination top-of-mind and forge new media and influencer relationships is via face-to-face meetings. The Brandman Agency recommends tapping into two of Visit SLO CAL's domestic draw markets - and the country's two biggest media markets - New York and Los Angeles- to host a series of deskside meeting and small events.

The goal of this roadshow will be to educate and cultivate media - whose editorial policies and/or demanding schedules will not allow them to visit SLO CAL firsthand via hosted FAM trips - through an in-depth destination storytelling session and destination product. This is an extremely valuable tactic to build meaningful long-term relationships, and personally engage with over-taxed and over-pitched domestic media.



By nurturing a multi-city presence for Visit SLO CAL we will cement destination identity and **build preference with key media, influencers, and partners.**



# visiting journalist program

*seeing is believing*

## **OVERVIEW:**

Firsthand experience remains extremely important in generating larger, feature length pieces as well as influencer integration and ambassadorship.

## **FORMAT:**

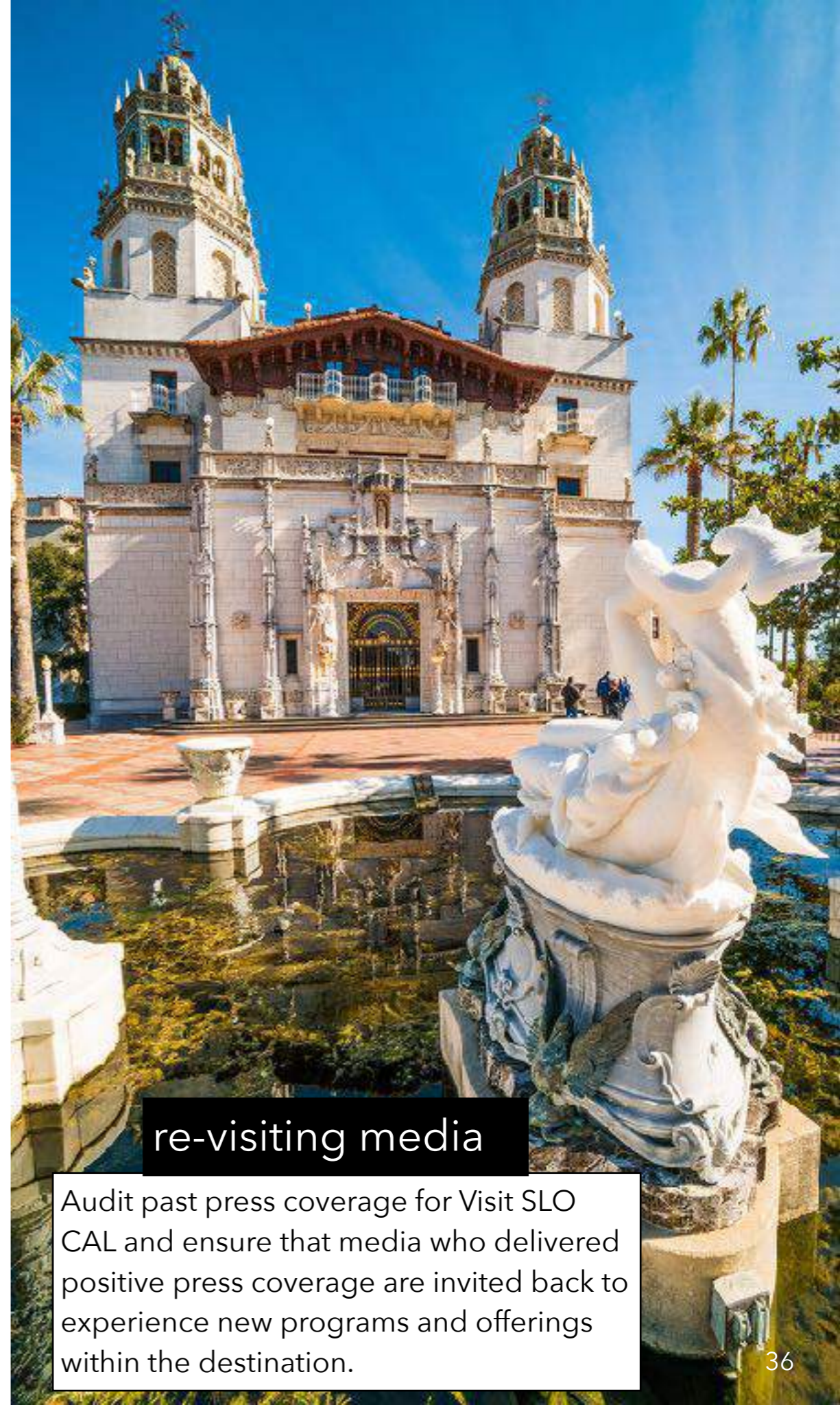
Through a combination of individual visits and thematic group press trips, The Brandman Agency will deliver a steady pipeline of print/online/social media results. An ongoing element of The Agency's brand-level support, these trips are designed to foster ongoing excitement and awareness for Visit SLO CAL - underscoring key destination attributes. Our approach would be two-pronged:

### Group Press + Influencer Trips

Targeting on-staff, freelance writers, and influencers that Visit SLO Cal would consider a "win," curate targeted group press trips around major themes such as culinary, arts & culture and adventure & outdoors travel.

In addition to thematic group press trips, The Agency will help vet and identify individual writers and influencers to visit the destination on an ongoing basis to ensure a steady stream of coverage

### Individual Press + Influencer Visits



### re-visiting media

Audit past press coverage for Visit SLO CAL and ensure that media who delivered positive press coverage are invited back to experience new programs and offerings within the destination.



# thought leadership

To further strengthen and solidify face-to-face relationships with key Visit SLO CAL executives and stakeholders, The Agency recommends strategic media interaction with press via desk side meetings and appointments, as well as broadcast and business/trade interviews. Ongoing media relations efforts would include pitching key Visit SLO CAL executives for expert comments or opinions on relevant travel trend stories, continually elevating destination awareness and position key executives as thought leaders within the tourism marketing industry.

In addition, The Agency would seek out speaking opportunities for executives at relevant industry events such as The New York Times Luxury Travel Conference, SKIFT Hospitality Conference, NYU Hospitality Conference and ILTM, among others, as well as leverage executive presence at these events by securing one-on-one meetings with key North American press whenever possible.



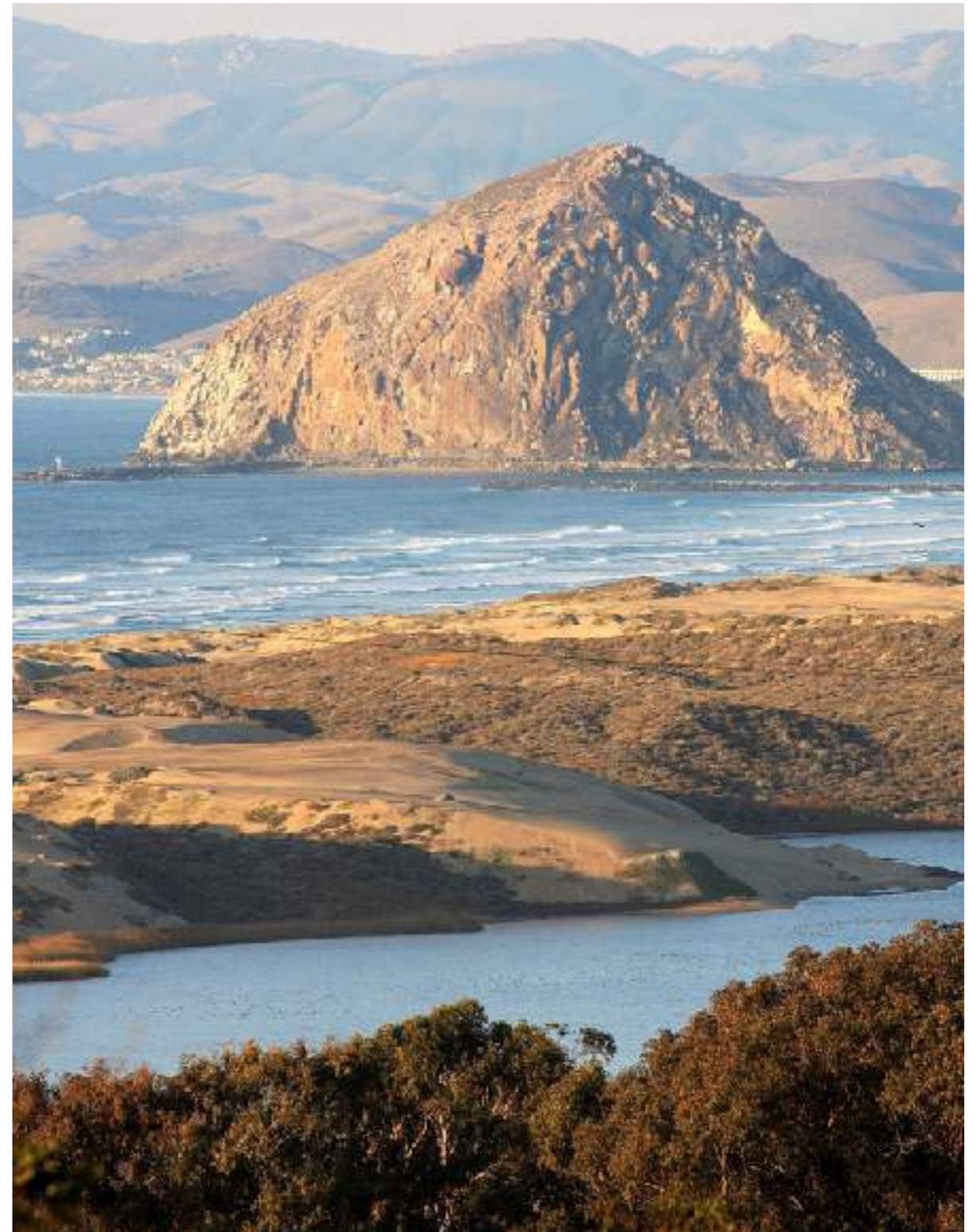


# aligning earned and paid media

*collaborative strategies to maximize impact*

No stranger to playing nice in the sandbox, The Brandman Agency would work closely with all of SLO CAL's partner agencies to ensure that communications are streamlined and effective.

We can also work closely with in-house marketing teams and with advertising and media planning partners, to ensure targets and timelines are aligned across all sectors of the marketing and communications mix. When applicable, The Brandman Agency would also utilize media buys to leverage editorial pitching and placements.



# 5.0

## TIMELINE + BUDGET

| 9-month broad scope

| best practices

| reporting

| budget

sample timeline.

The following is a sample timeline for Visit SLO CAL. The Brandman Agency would develop a tailored plan and timeline to incorporate key initiatives for Agency kick-off.\*

**SLO GIVING MEDIA CAMPAIGN**

during holiday season in order to stay top of mind with top-tier media

**JOURNEY THROUGH NATURE'S GYM**

focused on cultivating new and existing key media relationships in #1 draw market - Los Angeles

**HOST CULTURED CLASS PRESS TRIP**

focused on travel/ lifestyle and food & beverage journalists

**PLANNING**

2018/2019 planning session

OCT NOV DEC JAN FEB MAR APR MAY JUN

**PLANNING**

messaging session, identify goals and KPIs

**INITIATE MEDIA PITCHING + VISITING JOURNALIST PROGRAM**

press release development/ distribution and proactive pitch efforts; individual media/influencer visits

**MULTI-CITY ROAD SHOW**

ahead of high spring season

**ONGOING PARTNERSHIP DEVELOPMENT**

with Turo, select SLO CAL hotels, restaurants, artisans, tour operators, etc.

**HOST MOMS UNPLUGGED PRESS TRIP**

aligned with Spring Break to allow for media to attend with children

\*Note that this timeline is fluid and adjustable to specific needs established during initial planning session



Ongoing Media Entertaining Agency  
Wide

Targeted Pitching. 50,000+ media  
worldwide in Agency database

Agency-Wide News-bytes and Trend  
Roundups...a media favorite.

Reactive Media Leads

Vetting Media, Coordinating Photo  
Shoots, Fact-Checking, and more

Media Results Shared in Real Time  
with Circulation and Estimated Ad  
Value

Weekly PR Status Meetings with  
Agendas Shared in Advance

Crisis Communications Council





## reporting.

The Brandman Agency would supply Visit SLO CAL with a detailed monthly activity report outlining efforts undertaken, along with monthly media highlights showcasing coverage secured along with its circulation/reach and corresponding advertising equivalency value (EAV). This report also includes detailed results on ongoing projects and initiatives.

A wide variety of additional metrics remain at the disposal of the tourism board including reporting on tone of coverage, media tier rankings, inclusion extents, etc. The Brandman Agency will work with the marketing and sales team to identify the reporting methods that works best for key stakeholders.



Metrics typically include:

Finalized PR Plan

Development of a digital brand media kit

Monthly Activity Reports

Evaluations of frequency, size, tone and location of placements

Evaluation of share-of-voice among defined comp set

Annual report

## monthly retainer.

The Brandman Agency would bill at a monthly retainer on the first of each month for the duration of the contract agreement. Selected services covered under the retainer include the following:

### **PR Retainer \$6,000**

- North America proactive and reactive media and influencer relations for Visit SLO CAL
- Develop and execute 9-month PR plan
- Press release writing and distribution
- Account team immersion and messaging session
- Vetting of media requests and general counsel
- Ongoing individual media and influencer visits
- Editorial Calendar
- Media list development
- One agency-hosted press trip per year
- One bi-coastal roadshow per year in major media markets (Los Angeles and New York)
- Research and outreach to strategic partners
- Regularly scheduled PR meetings
- Media monitoring and tracking
- Strategic counsel
- Monthly media activity and clipping reports
- Year-end digital report
- Inclusion within Agency news-bytes and round-ups
- Development and maintenance of press kit
- Crisis Communication

### **Monthly Administration Fee \$650**

- Photo copies, couriers, phone bills, printing costs, taxis, media entertaining, clipping services in Los Angeles office

*The Agency retainer allows for the allocation of services against the above scope of work. Any hard costs (activations, editorial site development and management, social media and content development, partnership implementation, flights, event venues, etc.) above and beyond the aforementioned retainer will be approved in writing in advance by the client and billed back at cost without a mark-up.*





thank you

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CATEGORY	CONTRACT COST \$	CONTRACT %	EST. EXPENSES \$
ACCOUNT MANAGEMENT	\$3,000	5	
STRATEGIC PLANNING	\$6,000	10	
PROACTIVE PITCHING AND MEDIA RELATIONS	\$18,000	30	\$1,000
FAM TRIPS AND/OR MEDIA VISITS	\$12,000	20	\$20,000
DESKSIDE VISITS AND/OR MEDIA EVENTS	\$9,000	15	\$8,000
REACTIVE EFFORTS	\$6,000	10	
TRACKING AND REPORTING	\$3,000	5	
AGENCY TEAM TRAVEL & ADMINISTRATION	\$3,000	5	\$5,000
OTHER	N/A	0	
<b>TOTAL</b>	\$60,000.00	100%	\$34,000

NOTE: All costs and fees must be clearly described in each proposal.

**INTERNAL CONTROL STRUCTURE**

Please provide a discussion of your internal control structure for ensuring key controls are in place and operating effectively for such items as:

- Sales and use taxes



## Visit SLO CAL Board of Directors Guidelines

The Visit SLO CAL Board of Directors includes representatives from each community and type of lodging business, as described below. Each community defines the designated lodging constituent to serve as their appointed member of the Board, which makes up the first eight (8) seats, one (1) representative at-large is appointed by the County Board of Supervisors and the remaining six (6) seats are elected by the Board.

The Visit SLO CAL Board reviews key strategies throughout the year. Realizing this, and the busy schedules of all involved, we request that only lodging constituents who are able to attend the monthly meetings in whole apply for Board seats so that we may assure the business of the organization can be conducted. Board meetings are currently held on the third Wednesday of every other month from 8:30 – 10:00 am and rotate locations throughout the county. This format is expected to stay the same for the near future.

Board members must be currently working as part of the management team of an assessed lodging business in San Luis Obispo County in order to remain on the Board.

It is the responsibility of appointed Board members to liaison back to their community (i.e. the Unincorporated County Business Improvement District (CBID)) on a monthly basis regarding Visit SLO CAL's efforts. However, we also ask our elected members to do the same with their respective communities. Within one week of a Board meeting, you will receive a copy of the draft minutes to aid you in reporting.

The Board of Directors serve for staggered three-year terms. The initial Board shall serve for terms of one, two, or three years. **Seats up for election serve for 3 year terms.**

Any Board member who in a twelve-month period either does not attend three (3) successive Board meetings or who misses a total of three (3) meetings without an approved excuse will automatically be removed from the Board without Board resolution unless (i) the member requests a leave of absence for a limited period of time, and the leave is approved by the members at a regular or special meeting (if such leave is granted, the number of Board members will be reduced by one in determining whether a quorum is or is not present); (ii) the member suffers from an illness or disability that prevents him or her from attending meetings and the Board by resolution waives the automatic removal procedure of this subsection; or (iii) the Board by resolution of the majority of Board members must agree before a member who has missed three (3) successive meetings or three (3) meetings total may be reinstated.

The Board of Directors criteria and structure as defined in the [Management District Plan](#) is outlined on the following page.



## Criteria and Structure Defined in the Management District Plan:

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### Board of Directors

Visit SLO CAL shall have a fifteen-member board of directors. The Board will strive to ensure that each jurisdiction is represented in approximate proportion to the amount contributed by lodging businesses in that jurisdiction. Each Director must be a representative of an assessed lodging business, except for the County representative. The nominating committee will recommend a slate of six candidates to the Board of Directors that ensures diversity of geography and takes into consideration assessment contribution. The Directors will include the following:

- At least one representative of a lodging business in each jurisdiction
- One representative each from a vacation rental, a bed and breakfast, and an R.V. park
- One representative who is appointed by the County of San Luis Obispo
- Three-at-large members

The Board of Directors shall be selected as follows:

- One lodging business representative from each of the cities shall be appointed by the respective jurisdiction's city council or tourism organization, as each city determines
- One lodging business representative shall be appointed by the County Board of Supervisors
- One additional representative at-large shall be appointed by the County Board of Supervisors

**From:** Toni LeGras <[cayucahini@gmail.com](mailto:cayucahini@gmail.com)>  
**Date:** Wednesday, August 23, 2017 at 10:52 AM  
**To:** Chuck Davison <[chuck@slocal.com](mailto:chuck@slocal.com)>  
**Subject:** Re: TOT Tax Agreement with AIRBNB

Hi Chuck,

Thank you.

I did have a very good conversation with Justin Cooley and he explained the legal review that supported their decision to grant special conditions to Airbnb for paying TOT. However, I am not entirely convinced this is a solid argument and am doing some further research.

He is checking into the possibility of TOT reporting modifications for local Vacation Rental Managers, such as allowing us to return to reporting the monthly tax in Aggregate, rather than by license, address etc. This monthly report is time consuming to prepare and with allowing Airbnb to report TOT in Aggregate - it defeats the purpose of the detailed reporting required from the rest of us.

We plan to meet Mr. Gibson on Sept 5th at his Cayucos Meeting Time. The other supervisors deferred the response to Mr. Gibson.

I do think its great to collect the TOT and welcome additional funds CBID and TMD. My greater concern however, is that this action makes it less likely the county will continue to pursue unlicensed rentals.

I look forward to hearing any feedback from your September meeting and hope all is well with you.

Toni

On Aug 22, 2017, at 10:42 PM, Chuck Davison <[chuck@slocal.com](mailto:chuck@slocal.com)> wrote:

Toni,

Thanks for the update.

I'd like to thank and congratulate you on the detail and well written response to the BOS. I have added this item as a business item for our September Executive Committee meeting to gain feedback on how we can assist.

Have you received a response from any of your emails?

Chuck



Chuck Davison | President & CEO

Visit **SLO CAL**

<image001.png> [Chuck@SLOCAL.com](mailto:Chuck@SLOCAL.com)  
O: 805.541.8000 | C: 805.270.5005  
[SLOCAL.com](http://SLOCAL.com)

**From:** Toni LeGras <[cayucahini@gmail.com](mailto:cayucahini@gmail.com)>

**Date:** Monday, August 21, 2017 at 10:04 AM

**To:** Chuck Davison <[chuck@slocal.com](mailto:chuck@slocal.com)>

**Subject:** TOT Tax Agreement with AIRBNB

Hi Chuck,

Thank you for your reply this morning . . .

Here is my follow up to the previous email sent to the BOS outlining my concerns in more detail.

**From:** Toni LeGras <[cayucahini@gmail.com](mailto:cayucahini@gmail.com)>

**Subject:** TOT Tax Agreement with AIRBNB

**Date:** August 19, 2017 at 9:20:39 AM PDT

**To:** [jpeschong@co.slo.ca.us](mailto:jpeschong@co.slo.ca.us), Bruce Gibson

<[bgibson@co.slo.ca.us](mailto:bgibson@co.slo.ca.us)>, [ahill@co.slo.ca.us](mailto:ahill@co.slo.ca.us), [district4@co.slo.ca.us](mailto:district4@co.slo.ca.us), [district5@co.slo.ca.us](mailto:district5@co.slo.ca.us)

**Cc:** Justin Cooley <[jcooley@co.slo.ca.us](mailto:jcooley@co.slo.ca.us)>, John <[jcarsel@aol.com](mailto:jcarsel@aol.com)>

Dear Supervisors:

My name is Toni LeGras and I am the owner of a vacation rental company in Cayucos, Beachside Rentals Inc., which has been in business over 20 years.

I recently read in the New Times publication (see link at bottom of page), that an agreement with AirBnB to collect TOT taxes was approved on your Consent Agenda last Tuesday.

While I am very happy that they will be able to pay taxes, I have the following concerns with the language in the agreement:

Major concerns of Agreement (**with my comments in red and language concerns in Bold**):

*(A) Solely pursuant to the terms and conditions of this Agreement, including only for periods in which this Agreement is effective (defined below), and solely for Taxable Booking Transactions completed on the Platform, Airbnb agrees contractually to assume the duties of a TOT collector (hereinafter referred to as a "Collector") as described in the Code solely for the collection and remittance of TOT and TBID. **The assumption of such duties shall not trigger any other registration requirements to which Airbnb is not***

**otherwise subject.** *(I interpret this to mean they will not have to make sure the homes are legally licensed prior to tax collection - can you please clarify this for me? Will the Hosted homes listed on their site need to display or provide their Vacation Rental License?)*

(C) Airbnb agrees reasonably **to report aggregate information** on the tax return form prescribed by the Taxing Jurisdiction, including an **aggregate** of gross receipts, exemptions and adjustments, and taxable receipts of all TOT and TBID that are subject to the provisions of this Agreement. Airbnb shall remit all TOT and TBID collected from Guests in accordance with this Agreement and Airbnb's Terms of Service ([www.airbnb.com](http://www.airbnb.com)) (the "TOS") in the time and manner described in the Code or as otherwise agreed to in writing. *(Vacation Rental Managers are currently required to submit a detailed form breaking out the taxable income and TOT for each and every licensed Vacation Rental identified by address and license number- Why is Airbnb being relieved of this administrative burden? Will the other Vacation Rental companies also be granted these same terms? Is Airbnb required to submit TOT on a monthly basis, or has an "otherwise agreed to in writing" arrangement been made?)*

(F) The Taxing Jurisdiction **agrees to audit Airbnb on an anonymized transaction basis** for Taxable Booking Transactions. Except as otherwise agreed herein, Airbnb shall not be required to produce any personally identifiable information relating to any Host or Guest or relating to any Booking Transaction without binding legal process served only after completion of an audit by the Taxing Jurisdiction of Airbnb with respect to such users. *(Vacation Rental Managers in our county must send a list identifying the property and include the License Number for each one, our Owners/Hosts are not granted any form of anonymity -during audits the county has always inquired about property address and licensing. What exactly does **anonymized transaction basis** mean?)*

The Taxing Jurisdiction agrees that it **will not audit or issue an assessment against Airbnb more than once per any consecutive forty-eight month period** and that such audit or **assessment will be limited to a consecutive twelve-month period** within the forty-eight month period. *(As far as I know, no lodging Business gets this kind of exemption/limitation from audits and we are subject to a review of records 3 years or more in the past — will this now become the new Audit standard for all Lodging businesses?)*

I wonder, How do these clauses help with compliance of the the business license ordinance if these Airbnb Hosts are not identified and collection crosschecked with valid licenses?

My impression of the above language in the agreement is that the AirBnB Hosts are being offered a way to anonymously pay taxes for short term Hosts regardless of whether or not they are Licensed and the Hosts will be protected by this agreement with Airbnb in a way that other licensed rentals/Hosts are not. Where is the incentive/motive/language . . . to enforce the Vacation Rental Ordinance?

I question how this agreement helps with Compliance with the Vacation Rental Ordinance, and I also question how it is legal to offer Airbnb a different set of terms for TOT payment than the county is imposing on the rest of the local lodging industry.

Vacation Rental Managers who have been operating and complying with the current TOT and Ordinance rules should be offended that AirBnB is being offered what I would consider special treatment for TOT payments and will not have to follow the same Tax Paying requirements imposed on the rest of the lodging industry,

while the Hosts they are collecting taxes for remain anonymous. The article mentioned this agreement will ease the Administrative burden of the County and the Airbnb Hosts . . . . what about easing that same burden for lodging businesses who have been here for many years paying their TOT month after month?

Having local Vacation Rental Managers is good thing for the communities. This Agreement with AirBnb, while adding tax revenue for the County and TBIDs and helping to equalize the pricing field for us, still harms small local businesses by giving "special Treatment" to bigger business.

It appears that Our county has compromised us in order to collect these TOT dollars without evidence of each property being properly licensed. Airbnb should be required to comply with the Tax and Ordinance Laws the same way local businesses are expected to - or the County should ease the administrative burden on local lodging businesses and grant us the same special conditions for TOT payment that have been offered to AirBnb.

I look forward to your response to my questions above and sincerely hope that my interpretation of this agreement is not entirely accurate.

Many kind regards,

Toni LeGras  
Beachside Rentals Inc  
805-995-3680

RE: article

"SLO County works with Airbnb to ensure local vacation rental hosts are paying their fair share"

<https://www.newtimeslo.com/sanluisobispo/slo-county-works-with-airbnb-to-ensure-local-vacation-rental-hosts-are-paying-their-fair-share/Content?oid=3266720>

(To view the article, please click the above link.)