



AGENDA

Visit SLO CAL Board of Directors

Visit SLO CAL Board of Directors Agenda

Wednesday, November 18, 2020

8:30am-10:30am

Video Conference – URL: <https://us02web.zoom.us/j/82060680124> Meeting ID: 820 6068 0124

Call-In Phone Number: (669) 900-6833

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

ANNOUNCEMENTS	C. Davison
----------------------	-------------------

CONSENT AGENDA - <i>motion required</i>	C. Davison
--	-------------------

3. Approval of September 16, 2020 Board of Directors Meeting Minutes
4. Approval of September Visit SLO CAL Financials
5. Approval of October Visit SLO CAL Financials
6. Approval of Kathleen Naughton's Marketing Committee Application
Staff will request Board approval of the September 16, 2020 Board of Directors Meeting Minutes, September Visit SLO CAL Financials, October Visit SLO CAL Financials, and Kathleen Naughton's Marketing Committee application.

CEO REPORT	C. Davison
-------------------	-------------------

7. CEO Report (15 min)
Staff will provide an update on current projects, reporting and areas of focus for the months ahead.

BUSINESS ITEMS	C. Davison
-----------------------	-------------------

8. Marketing Agency RFP Update (30 min) – *motion required*
Staff will provide an update on the marketing agency RFP process. The Board will hear a presentation from David Mering, CEO of Mering, and the Board will consider selecting and contracting with Mering as Visit SLO CAL's agency-of-record, as recommended by the Marketing Committee and Executive Committee.
9. COVID-19 Impact & Response Update (15 min)
Staff will provide an update on the impact of COVID-19 to the tourism industry and Visit SLO CAL's response to-date, as well as its planned efforts moving forward.
10. Operational Plan Update (10 min)
Staff will report out on Visit SLO CAL's progress on Strategic Direction 2023's Operational Plan.
11. FY2020-21 Budget Re-Forecast Update (20 min)
Staff will provide an update on the timeline for the budget re-forecast planning process, and review proposed significant changes for consideration.
12. Travel Trade & Marketing Update (15 min)
Staff will provide an update on key travel trade and 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 board to discuss or take action on issues not on the agenda, except that members of the board may briefly respond to statements made or questions posed by the person giving public comment. Staff may be directed by the board to follow-up on such items and/or place them on the next board agenda. The order of agenda items is listed for reference and items may be taken in any order deemed appropriate by the Board of Directors.

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



MINUTES

Visit SLO CAL Board of Directors

Visit SLO CAL Board of Directors Meeting Minutes

Wednesday, September 16, 2020

8:30am

Video Conference – URL: <https://us02web.zoom.us/j/87121938572> Meeting ID: 871 2193 8572

Call-In Phone Number: (669) 900-6833

1. CALL TO ORDER: Clint Pearce

PRESENT (VIA VIDEO CONFERENCE): Alma Ayon, Jed Bickel, Kathy Bonelli, John Conner, Mark Eads, Aaron Graves, Jim Hamilton, Jay Jamison, Toni LeGras, Clint Pearce, Amit Patel, Hemant Patel, Nipool Patel, Victor Popp, Amar Sohi

ABSENT: Sam Miller

STAFF PRESENT: Chuck Davison, Lisa Verbeck, Derek Kirk, Brendan Pringle

Call to Order at 8:31 am.

2. PUBLIC COMMENT (On Non-Agenda Items)

None.

ANNOUNCEMENTS

None.

CONSENT AGENDA

3. Approval of July 15, 2020 Board of Directors Meeting Minutes
4. Approval of June/Year-End Visit SLO CAL Financials
5. Approval of July Visit SLO CAL Financials
6. Approval of August Visit SLO CAL Financials
7. Approval of FY 2019/20 Annual Report

Davison noted that once approved, the Annual Report will be finalized and sent to the County to meet our contract and MDP obligation.

Public Comment – None.

Board Discussion.

ACTION: Moved by Conner/N. Patel to approve the Consent Agenda as presented.

Motion carried: 13:0
H. Patel arrived after the vote.

CEO REPORT

8. CEO Report

Visit SLO CAL is pursuing a service mark for “The California Less Traveled,” but based on legal counsel, will start by using the “SM” mark on the brand for the next two years to stake its claim and understand any objections prior to applying for a service mark. Davison reported out on Visit SLO CAL’s local communication plan efforts and highlighted two local KCBX stories in the previous two weeks that featured Visit SLO CAL. He added that the Pacific Coast Business Times will also be running a story that features Visit SLO CAL this week. Derek Kirk, former Director of Community Engagement & Advocacy, met with a small group of vacation rental investors on September 14, 2020 to help them brainstorm advocacy strategies and best practices prior to his departure. On October 8, 2020, Kevin Bumen, the County Director of Airports will be resigning from his role, accepting an offer as the first Chief Commercial Officer for San Francisco International Airport (SFO). Davison noted that he has asked to be involved in the hiring process for the Director of Airports role, since Visit SLO CAL’s partnership with the new hire will be integral to the organization’s air service development efforts moving forward. All paid social and some SEM was paused due to the fire situation and resulting smoke in our communities. Visit SLO CAL will continue to monitor California’s fire situation and stay aligned in its messaging with Visit California. Davison reported out on TOT numbers by community for July 2020. Davison shared Visit SLO CAL’s Board Dashboard (Business Intelligence Report) and highlighted key insights. He noted that while cross-visitation has improved since quarantine, it’s not at pre-COVID levels. He provided a staffing update on recently filled and currently vacant roles at Visit SLO CAL. He also provided an update on the California Welcome Center, noting that South County Chambers of Commerce is actively working on an RFP for the redesign of the California Welcome Center, with the intention of re-opening that center before the holidays. On September 8, 2020, after a series of five planning meetings, Davison participated in a presentation to the City Council on proposed changes to the TBID structure (spinning back out of the city and establishing a new non-profit under the ‘94 Act, similar to Visit SLO CAL’s structure). During the meeting, the City Council publicly recognized the successes of Visit SLO CAL’s model, and voted unanimously to approve the recommendation. The start date of the proposed district, once approved, would be July 1, 2021, and prior to that, the TBID would pursue a national search for an Executive Director. Visit SLO CAL will be holding an Advisory Committee Meeting on October 1, 2020 from 3:00pm-4:30pm via videoconference, and all Board members are encouraged to participate. Davison noted that Visit SLO CAL is still waiting for feedback on the city managers desire to create a subset of the Advisory Committee to meet with the Executive Committee two to four times per year. He outlined some of the key agenda items for the meeting. The proposed date for the SPARTAN Race in SLO CAL is April 10, 2021, which would place the event during their National Series (one of five spots in their series, which begins in Jacksonville, FL and ends in Seattle, WA). Visit SLO CAL’s Board previously committed \$50k in sponsorship, and the date shifted due to COVID-19. SPARTAN is offering a potential upgrade to the existing program at a discounted rate of \$75k (\$25k additional). Visit SLO CAL presented the opportunity to the Marketing Committee to gauge their interest in a potential co-op to fund the additional \$25k. Some Committee members expressed concern at such a commitment with so much uncertainty for upcoming events and festivals, and some DMOs have stripped their events budget. Visit SLO CAL has a call scheduled with interested partners on September 22, 2020, and a decision is due prior to October 1, 2020. Davison reported out on key local and remote meetings and interviews.

Public Comment – None.

Board Discussion.

BUSINESS ITEMS

9. FY 2019/20 Audit

For the fifth year in a row, Visit SLO CAL received a clean audit from Burkart & Stevens with no material weaknesses. Management Advisory Comments were consistent with past years and were expected. The auditor recommended that another individual open the checks received via mail and make a listing prior to processing (which was in place prior to COVID-19 cutbacks, when an Office Coordinator was on staff), and he noted that checking accounts exceeded \$250k FDIC insurance limits. Davison noted that upon approval, documents will be signed and Visit SLO CAL’s tax return will be filed.

Public Comment – None.

Board Discussion. Hamilton noted that the Audit report was a stellar report card, and spoke to how well the organization is run.

ACTION: Moved by Hamilton/Jamison to approve the FY 2019/20 Audit as presented, and as recommended by the Executive Committee.

Motion carried: 14:0

10. COVID-19 Impact & Response Update

Based on the Governor's guidelines, San Luis Obispo County remains in the most restrictive purple tier. Visit SLO CAL is still following Visit California's lead on media flights, which has been impacted by the wildfires. Davison provided an update on national trends. Davison reported out on current air service, and noted that Labor Day Weekend, which reported under 1M air travelers across the US (33 percent of normal capacity) is expected to be the high point for air travel leading up to the holiday season. He also reported out on the latest STR report for the week ending September 12, 2020, and noted that Visit SLO CAL is working with STR to update reporting as 28 properties are currently missing from the countywide inventory. Davison outlined Visit SLO CAL's latest cash flow projection through June 2021, and noted that updates include current occupancy results from August.

Public Comment – None.

Board Discussion. LeGras noted that she would like to see TOT data broken down by lodging type so that vacation rental TOT income could be tracked separately. Davison responded that Visit SLO CAL has requested this previously and that he would add this to the Advisory Committee agenda. Visit SLO CAL will also encourage the destination partners on the Marketing Committee to work with their own communities to share that information.

11. FY2019/20 Year-End Satisfaction Survey

Davison reported out on the response rate and results from the FY 2019/20 Year-End Satisfaction Survey compared to FY 2018/19 response rate and results. He noted that some of the results need to be viewed from the lens of COVID-19's impact, as many taking the survey were noticeably influenced by their personal frustrations with the impact of COVID-19 on their businesses.

Public Comment – None.

Board Discussion.

12. Experience SLO CAL 2050 - Customer Service Update

As part of the Customer Service Recommendation in Experience SLO CAL 2050 (ESC 2050), which was prioritized by the Board for FY 2020/21 at their March 2020 meeting, and funded with the June Board approval of the FY 2020/21 budget, Visit SLO CAL staff has been working with Cal Poly, including Extended Education, Office of Research & Economic Development, SBDC and the Experience Industry Management Department to develop a program that could support the Travel & Tourism workforce through customer service and COVID-19 safety training. Cal Poly has been working with the Economic Development Administration regional team on the grant funding of an established Comprehensive Business Support Network (CBSN) of organizations to provide targeted support to the industry, including customer service training for the local workforce (Extended Ed), finance and operations support (SBDC), marketing and brand support (Visit SLO CAL), and local advocacy (Chambers of Commerce/economic development organization staff). The CBSN would bring together business support organizations in a coordinated response, leveraging their specific expertise. Travel & Tourism businesses

could “enter” this network through any of the partners and would be guided through the support of all partners. The EDA Grant could provide this initiative with \$500K in year one, of which Visit SLO CAL could receive financial support to fund the marketing and brand support efforts. Davison outlined what components each “spoke” of the CBSN would be managing as part of this partnership. As part of the partnership, Cal Poly Extended Education would be offering a three-course program, and the first course would be free of charge to participants. He noted that the CBSN expands beyond the initial Customer Service recommendation in ESC 2050 to provide additional support to the industry during the current pandemic and could provide incredible benefit to the industry. As the program is developed and the grant potentially funded, Visit SLO CAL would maintain a prominent seat at the table to cater this effort to what the industry needs. Since this does not accomplish the need for mass industry customer service training, additional programming would still be developed to solve for completion of the recommendation in ESC 2050. Davison noted that if the grant is not approved, Visit SLO CAL has no exposure on the program. On August 24, 2020, the Executive Committee approved allowing the President & CEO to sign a Memorandum of Understanding with Cal Poly and REACH and supporting Cal Poly submitting a grant application to fund the CBSN.

Public Comment – None.

Board Discussion. Pearce and Popp commended the CBSN partnership as important and one that will really help the industry. LeGras noted that she was excited about the program.

13. Public Policy Platform Review

Visit SLO CAL’s Advocacy Plan and Public Policy Platform, adopted by the Board of Directors in September 2019, commits to an annual review of the document to ensure the platform remained consistent with the organization’s values and priorities. Davison outlined the Core Pillars of the Public Policy Platform and the instances in which the Platform was activated over the last 12 months. Staff is recommending the following additional Core Pillar to the Public Policy Platform: “Support Public Policy Initiatives that Promote California’s Position as an Inclusive, Diverse and Welcoming Destination” with the note that “Visit SLO CAL is committed to equity and inclusion in all aspects of the industry and business and will support and advocate for policies that help SLO CAL and California become a more inclusive and welcoming destination for travelers.” Davison noted that the addition is not driven toward broad-scale equity and inclusion efforts, but rather toward ensuring that the destination is welcoming to travelers. The updated document (with edits highlighted) was included in the agenda packet.

Public Comment – None.

Board Discussion.

ACTION: Moved by Conner/Graves to adopt the updated Public Policy Platform, as presented and as recommended by the Executive Committee.

Motion carried: 14:0

14. Equity & Inclusion Measurement

In June 2020, the Visit SLO CAL Board directed staff to draft a formal Equity & Inclusion Statement. The Board formally adopted VSC’s Equity & Inclusion (E&I) Statement in July, which outlined a set of core values and action items to be taken. Since the adoption of the E&I Statement, staff has been working to implement the action items associated with it. Davison noted how the statement was shared with Destination Partners, and how staff has met with the National Blacks in Travel & Tourism Collaborative to understand the opportunities they have created to support DMOs in ensuring their marketing materials are inclusive and representative. Additionally, Visit SLO CAL’s marketing agency RFP, sent out on September 11, 2020, includes questions and understanding around diverse representation for participating agencies. As noted in the E&I Statement, staff has built out a draft matrix to track a variety of data points from organizational representation to media hosting and social posts. Davison noted that the end goal behind the matrix is to be mindful of where the gaps are in equity and inclusion, and understand how we can tell a broader story. The desire is not to be punitive, but rather to be “additive” in order to be more inclusive by expanding our efforts and reach. The matrix is a living document and will be updated with

additional segments and information as we move forward and learn more. He outlined the different metrics that Visit SLO CAL is currently tracking, and noted that as the organization onboards a new agency, staff will build out tracking for additional content and information about its agencies. He provided screenshots of the current matrix, a work in progress, and outlined next steps. Davison noted that staff will use the matrix to track representation of diverse populations and begin to benchmark itself year over year, providing updates to the Board throughout the year, and requesting feedback on these efforts.

Public Comment – None.

Board Discussion. Sohi asked if any of the destination partners or cities were going to document their own efforts in a similar way. Davison noted that Visit SLO CAL is an “info sharer” and has provided the statement and matrix as a resource for local destination partners as well as CalTravel at the state level to use as a template.

15. Travel Trade & Marketing Update

Davison reported out on recent and upcoming travel trade efforts. Verbeck reported out on earned, owned and paid media efforts, including an update on the timing of both Visit SLO CAL’s brand campaign and co-op campaign with Visit California. Verbeck also outlined the marketing agency RFP process timeline. The Board viewed Visit SLO CAL’s updated 90-second brand video.

Public Comment – None.

Board Discussion.

Davison reviewed the agenda items for the next Board Meeting, scheduled for November 18, 2020.

ADJOURNMENT

Adjourned at 10:30am.

San Luis Obispo County
Visitors & Conference Bureau
2020-2021 Financial Summary - September

Income	This Month	Budgeted for Month	MTD Variance	% Variance	MTD % of Total Income/ Expenses	FISCAL YTD	Budget YTD	YTD Variance	% Variance	YTD % of Total Income/ Expenses
Web & Ticket Revenue	\$ 2,440	\$ 700	\$ 1,740	248.59%	0.41%	\$ 2,645	\$ 2,100	\$ 545	25.95%	0.17%
Co-op Revenue	\$ -	\$ 1,000	\$ (1,000)	-100.00%	0.00%	\$ -	\$ 1,500	\$ (1,500)	-100.00%	0.00%
Interest Income	\$ 348	\$ 2,054	\$ (1,706)	-83.04%	0.06%	\$ 1,759	\$ 5,984	\$ (4,225)	-70.61%	0.11%
TMD Income										
Collected from Prior Year Assessments	\$ -	\$ -	\$ -	100.00%	0.00%	\$ 111,509	\$ -	\$ 111,509	100.00%	7.00%
Arroyo Grande	\$ 9,297	\$ 9,297	\$ -	0.00%	1.58%	\$ 30,388	\$ 30,388	\$ -	0.00%	1.91%
Atascadero **	\$ 36,426	\$ 36,426	\$ -	0.00%	6.19%	\$ 36,426	\$ 36,426	\$ -	0.00%	2.29%
Grover Beach	\$ 3,198	\$ 3,198	\$ -	0.00%	0.54%	\$ 12,941	\$ 12,941	\$ -	0.00%	0.81%
Morro Bay	\$ 31,146	\$ 31,146	\$ -	0.00%	5.30%	\$ 106,380	\$ 106,380	\$ -	0.00%	6.67%
Paso Robles	\$ 42,124	\$ 42,124	\$ -	0.00%	7.16%	\$ 127,700	\$ 127,700	\$ -	0.00%	8.01%
Pismo Beach	\$ 112,469	\$ 112,469	\$ -	0.00%	19.12%	\$ 410,589	\$ 410,589	\$ -	0.00%	25.76%
City of San Luis Obispo	\$ 53,753	\$ 53,753	\$ -	0.00%	9.14%	\$ 182,895	\$ 182,895	\$ -	0.00%	11.47%
Unincorporated SLO County	\$ 109,116	\$ 109,116	\$ -	0.00%	18.55%	\$ 382,989	\$ 382,989	\$ -	0.00%	24.03%
Adjustment for Actual TMD Collected	\$ 187,872	\$ -	\$ 187,872	100.00%	31.94%	\$ 187,872	\$ -	\$ 187,872	100.00%	11.79%
Total TMD Income	\$ 585,402	\$ 397,530	\$ 187,872	47.26%	99.53%	\$ 1,589,687	\$ 1,290,306	\$ 299,381	23.20%	270.27%
Total Income	\$ 588,191	\$ 401,284	\$ 186,907	46.58%	100.00%	\$ 1,594,091	\$ 1,299,891	\$ 294,201	22.63%	100.00%
** District pays quarterly										
Expenses										
Contingency Reserve	\$ 29,392	\$ 19,911	\$ 9,481	47.61%	6.16%	\$ 79,617	\$ 64,620	\$ 14,996	23.21%	8.76%
G&A	\$ 23,308	\$ 22,746	\$ 562	2.47%	4.89%	\$ 64,849	\$ 70,570	\$ (5,722)	-8.11%	7.13%
Industry Research and Resources	\$ 24,639	\$ 18,877	\$ 5,761	30.52%	5.16%	\$ 53,106	\$ 49,973	\$ 3,133	6.27%	5.84%
Travel Trade	\$ 17,098	\$ 16,202	\$ 895	5.53%	3.58%	\$ 43,488	\$ 54,351	\$ (10,863)	-19.99%	4.78%
Communications	\$ 20,980	\$ 24,412	\$ (3,432)	-14.06%	4.40%	\$ 51,225	\$ 68,085	\$ (16,860)	-24.76%	5.63%
Advertising	\$ 313,946	\$ 393,018	\$ (79,072)	-20.12%	65.81%	\$ 487,936	\$ 597,139	\$ (109,203)	-18.29%	53.66%
Promotions & Events	\$ 360	\$ 6,076	\$ (5,716)	-94.08%	0.08%	\$ 6,931	\$ 13,494	\$ (6,563)	-48.64%	0.76%
Digital Marketing	\$ 26,615	\$ 31,462	\$ (4,847)	-15.40%	5.58%	\$ 71,994	\$ 86,399	\$ (14,405)	-16.67%	7.92%
Film Commission	\$ -	\$ 3,500	\$ (3,500)	-100.00%	0.00%	\$ 300	\$ 4,825	\$ (4,525)	-93.78%	0.03%
Engagement & Advocacy	\$ 20,718	\$ 25,676	\$ (4,958)			\$ 49,919	\$ 57,358	\$ (7,439)		
Total Expenses	\$ 477,054	\$ 561,880	\$ (84,826)	-15.10%	100.00%	\$ 909,365	\$ 1,066,815	\$ (157,450)	-14.76%	100.00%
Surplus(Deficit)	\$ 111,137	\$ (160,596)	\$ 271,732	-169.20%		\$ 684,727	\$ 233,076	\$ 451,651	193.78%	

Cash Flow		
Surplus (Deficit)	\$ 111,137	\$ 684,727
Beginning Cash Balance	\$ 1,782,021	\$ 1,605,845
Change in Accounts Receivable	\$ 43,547	\$ (457,164)
Change in Accrued Expenses	\$ 217,142	\$ 272,921
Change in Prepaid Expenses	\$ (8,075)	\$ (25,965)
Change in Accounts Payable	\$ 38,192	\$ 53,276
Change in Reserve Contingency	\$ 29,392	\$ 79,617
Visit SLO CAL Cash Balances	\$ 2,213,356	\$ 2,213,256
Contingency Reserve - 5% of Cumulative Rev.	\$ (1,047,169)	\$ (1,047,169)
Liability on Balance Sheet		
Net Available Cash	\$ 1,166,187	\$ 1,166,087

Notes:

- \$111k surplus for September (\$272k larger surplus than budgeted). \$685k surplus year-to-date (\$452k larger surplus than budgeted).

- All TMD amounts accrued through July have been collected with the exception of City of SLO.

9:36 AM

10/12/20

Accrual Basis

Visit SLO CAL

Balance Sheet Prev Year Comparison

As of September 30, 2020

	Sep 30, 20	Sep 30, 19	\$ Change	% Change
ASSETS				
Current Assets				
Checking/Savings				
1010 · Bank of the Sierra - TMD	822,299.70	874,250.88	-51,951.18	-5.9%
1020 · Bank of the Sierra - Membership	285,999.94	269,598.09	16,401.85	6.1%
1030 · Morgan Stanley - TMD	868,595.70	691,574.56	177,021.14	25.6%
1040 · Morgan Stanley - Membership	106,856.16	104,649.74	2,206.42	2.1%
Total Checking/Savings	2,083,751.50	1,940,073.27	143,678.23	7.4%
Accounts Receivable				
1200 · Accounts Receivable	903,536.13	933,825.27	-30,289.14	-3.2%
Total Accounts Receivable	903,536.13	933,825.27	-30,289.14	-3.2%
Other Current Assets				
1320 · Prepaid Rent	4,369.95	4,369.95	0.00	0.0%
1340 · Workman's Comp Deposit	744.40	744.40	0.00	0.0%
1350 · Prepaid Expenses	119,390.34	250,033.98	-130,643.64	-52.3%
1330 · Employee Advances	7.26	7.26	0.00	0.0%
1499 · Undeposited Funds	129,604.61	75,403.90	54,200.71	71.9%
Total Other Current Assets	254,116.56	330,559.49	-76,442.93	-23.1%
Total Current Assets	3,241,404.19	3,204,458.03	36,946.16	1.2%
Fixed Assets				
1400 · Fixed Assets				
1405 · Computer Hardware/Software	37,349.33	37,349.33	0.00	0.0%
1410 · Furniture & Fixtures	101,040.00	101,040.00	0.00	0.0%
1415 · Leasehold Improvements	71,766.15	71,766.15	0.00	0.0%
1425 · Office Equipment	19,488.10	19,488.10	0.00	0.0%
Total 1400 · Fixed Assets	229,643.58	229,643.58	0.00	0.0%
1500 · Accumulated Depreciation				
1505 · Comp. Hdwr/Sftwr. Acc. Depr.	-21,231.17	-21,231.17	0.00	0.0%
1510 · Furn. & Fixt. Accum. Depr.	-14,984.00	-14,984.00	0.00	0.0%
1515 · Leasehold Imp. Accum. Depr.	-5,959.00	-5,959.00	0.00	0.0%
1525 · Office Equip. Accum. Depr.	-26,197.00	-26,197.00	0.00	0.0%
Total 1500 · Accumulated Depreciation	-68,371.17	-68,371.17	0.00	0.0%
Total Fixed Assets	161,272.41	161,272.41	0.00	0.0%
Other Assets				
1600 · Intangibles				
1605 · Trademark - Slocal	15,750.00	15,750.00	0.00	0.0%
Total 1600 · Intangibles	15,750.00	15,750.00	0.00	0.0%
Total Other Assets	15,750.00	15,750.00	0.00	0.0%
TOTAL ASSETS	3,418,426.60	3,381,480.44	36,946.16	1.1%
LIABILITIES & EQUITY				
Liabilities				
Current Liabilities				
Accounts Payable				
2000 · Accounts Payable	91,031.05	245,395.16	-154,364.11	-62.9%
Total Accounts Payable	91,031.05	245,395.16	-154,364.11	-62.9%
Credit Cards				
2060 · American Express Credit Card	6,216.19	4,134.99	2,081.20	50.3%
Total Credit Cards	6,216.19	4,134.99	2,081.20	50.3%
Other Current Liabilities				
2070 · Accrued Liabilities	272,355.00	147,649.01	124,705.99	84.5%
2010 · Deferred Revenue	0.00	3,000.00	-3,000.00	-100.0%

9:36 AM

10/12/20

Accrual Basis

Visit SLO CAL
Balance Sheet Prev Year Comparison
As of September 30, 2020

	Sep 30, 20	Sep 30, 19	\$ Change	% Change
2100 · Payroll Liabilities				
2115 · Company ETT Payable	0.00	2.19	-2.19	-100.0%
2125 · Company FUTA Payable	0.00	13.16	-13.16	-100.0%
2135 · Company SUI Payable	0.00	107.50	-107.50	-100.0%
2160 · Health Insurance Withheld	-600.39	-509.53	-90.86	-17.8%
Total 2100 · Payroll Liabilities	-600.39	-386.68	-213.71	-55.3%
Total Other Current Liabilities	271,754.61	150,262.33	121,492.28	80.9%
Total Current Liabilities	369,001.85	399,792.48	-30,790.63	-7.7%
Total Liabilities	369,001.85	399,792.48	-30,790.63	-7.7%
Equity				
3120 · Reserved Earnings	1,047,169.18	862,797.76	184,371.42	21.4%
3130 · Retained Earnings	1,317,528.76	1,586,777.19	-269,248.43	-17.0%
Net Income	684,726.81	532,113.01	152,613.80	28.7%
Total Equity	3,049,424.75	2,981,687.96	67,736.79	2.3%
TOTAL LIABILITIES & EQUITY	3,418,426.60	3,381,480.44	36,946.16	1.1%

San Luis Obispo County
Visitors & Conference Bureau
2020-2021 Financial Summary - October

Income	This Month	Budgeted for Month	MTD Variance	% Variance	MTD % of Total Income/ Expenses	FISCAL YTD	Budget YTD	YTD Variance	% Variance	YTD % of Total Income/ Expenses
Web & Ticket Revenue	\$ 1,344	\$ 700	\$ 644	91.99%	0.20%	\$ 3,989	\$ 2,800	\$ 1,189	42.46%	0.18%
Co-op Revenue	\$ -	\$ -	\$ -	0.00%	0.00%	\$ -	\$ 1,500	\$ (1,500)	-100.00%	0.00%
Interest Income	\$ 370	\$ 2,054	\$ (1,684)	-81.99%	0.06%	\$ 2,129	\$ 8,039	\$ (5,910)	-73.51%	0.09%
TMD Income										
Collected from Prior Year Assessments	\$ -	\$ -	\$ -	0.00%	0.00%	\$ 111,509	\$ -	\$ 111,509	0.00%	4.94%
Arroyo Grande	\$ 8,784	\$ 8,784	\$ -	0.00%	1.33%	\$ 39,172	\$ 39,172	\$ -	0.00%	1.74%
Atascadero **	\$ -	\$ -	\$ -	0.00%	0.00%	\$ 36,426	\$ 36,426	\$ -	0.00%	1.61%
Grover Beach	\$ 3,072	\$ 3,072	\$ -	0.00%	0.46%	\$ 16,013	\$ 16,013	\$ -	0.00%	0.71%
Morro Bay	\$ 28,702	\$ 28,702	\$ -	0.00%	4.34%	\$ 135,082	\$ 135,082	\$ -	0.00%	5.99%
Paso Robles	\$ 44,313	\$ 44,313	\$ -	0.00%	6.69%	\$ 172,013	\$ 172,013	\$ -	0.00%	7.62%
Pismo Beach	\$ 108,639	\$ 108,639	\$ -	0.00%	16.41%	\$ 519,228	\$ 519,228	\$ -	0.00%	23.01%
City of San Luis Obispo	\$ 58,105	\$ 58,105	\$ -	0.00%	8.78%	\$ 241,000	\$ 241,000	\$ -	0.00%	10.68%
Unincorporated SLO County	\$ 112,552	\$ 112,552	\$ -	0.00%	17.00%	\$ 495,540	\$ 495,540	\$ -	0.00%	21.96%
Adjustment for Actual TMD Collected	\$ 296,167	\$ -	\$ 296,167	0.00%	44.74%	\$ 484,040	\$ -	\$ 484,040	0.00%	21.45%
Total TMD Income	\$ 660,334	\$ 364,166	\$ 296,167	81.33%	99.74%	\$ 2,250,021	\$ 1,654,472	\$ 595,549	36.00%	339.86%
Total Income	\$ 662,048	\$ 366,921	\$ 295,127	80.43%	100.00%	\$ 2,256,139	\$ 1,666,811	\$ 589,328	35.36%	100.00%
** District pays quarterly										
Expenses										
Contingency Reserve	\$ 33,084	\$ 18,243	\$ 14,841	81.35%	7.87%	\$ 112,700	\$ 82,864	\$ 29,837	36.01%	8.48%
G&A	\$ 30,724	\$ 29,705	\$ 1,019	3.43%	7.31%	\$ 95,573	\$ 100,275	\$ (4,703)	-4.69%	7.19%
Industry Research and Resources	\$ 13,917	\$ 15,174	\$ (1,258)	-8.29%	3.31%	\$ 67,023	\$ 65,147	\$ 1,875	2.88%	5.04%
Travel Trade	\$ 13,897	\$ 22,915	\$ (9,019)	-39.36%	3.31%	\$ 57,385	\$ 77,266	\$ (19,881)	-25.73%	4.32%
Communications	\$ 17,565	\$ 30,667	\$ (13,101)	-42.72%	4.18%	\$ 68,791	\$ 98,752	\$ (29,961)	-30.34%	5.17%
Advertising	\$ 276,609	\$ 339,718	\$ (63,109)	-18.58%	65.82%	\$ 764,545	\$ 936,857	\$ (172,312)	-18.39%	57.50%
Promotions & Events	\$ 4,717	\$ 4,076	\$ 641	15.73%	1.12%	\$ 11,648	\$ 17,570	\$ (5,922)	-33.71%	0.88%
Digital Marketing	\$ 26,513	\$ 27,292	\$ (779)	-2.85%	6.31%	\$ 98,507	\$ 113,691	\$ (15,184)	-13.36%	7.41%
Film Commission	\$ -	\$ 500	\$ (500)	-100.00%	0.00%	\$ 300	\$ 5,325	\$ (5,025)	-94.37%	0.02%
Engagement & Advocacy	\$ 3,248	\$ 23,843	\$ (20,596)			\$ 53,166	\$ 81,201	\$ (28,034)		
Total Expenses	\$ 420,272	\$ 512,133	\$ (91,861)	-17.94%	100.00%	\$ 1,329,637	\$ 1,578,948	\$ (249,311)	-15.79%	100.00%
Surplus(Deficit)	\$ 241,775	\$ (145,212)	\$ 386,988	-266.50%		\$ 926,502	\$ 87,864	\$ 838,639	954.48%	

Cash Flow					
Surplus (Deficit)	\$ 241,775		\$ 926,502		
Beginning Cash Balance	\$ 2,213,356		\$ 1,605,945		
Change in Accounts Receivable	\$ 80,991		\$ (376,174)		
Change in Accrued Expenses	\$ (2,793)		\$ 270,128		
Change in Prepaid Expenses	\$ (4,691)		\$ (30,656)		
Change in Accounts Payable	\$ 177,049		\$ 230,325		
Change in Reserve Contingency	\$ 33,084		\$ 112,700		
Visit SLO CAL Cash Balances	\$ 2,738,771		\$ 2,738,771		
Contingency Reserve - 5% of Cumulative Rev.	\$ (1,080,253)		\$ (1,080,253)		
Liability on Balance Sheet					
Net Available Cash	\$ 1,658,518		\$ 1,658,518		

Notes:

- \$242k surplus for October (\$387k larger surplus than budgeted). \$926k surplus year-to-date (\$839k larger surplus than budgeted).

- All TMD amounts accrued through August have been collected.

8:25 AM

11/12/20

Accrual Basis

Visit SLO CAL

Balance Sheet Prev Year Comparison

As of October 31, 2020

	Oct 31, 20	Oct 31, 19	\$ Change	% Change
ASSETS				
Current Assets				
Checking/Savings				
1010 · Bank of the Sierra - TMD	1,337,720.03	883,890.97	453,829.06	51.3%
1020 · Bank of the Sierra - Membership	287,123.49	271,153.22	15,970.27	5.9%
1030 · Morgan Stanley - TMD	1,006,823.03	692,868.13	313,954.90	45.3%
1040 · Morgan Stanley - Membership	107,104.82	104,925.33	2,179.49	2.1%
Total Checking/Savings	2,738,771.37	1,952,837.65	785,933.72	40.3%
Accounts Receivable				
1200 · Accounts Receivable	822,545.53	936,377.61	-113,832.08	-12.2%
Total Accounts Receivable	822,545.53	936,377.61	-113,832.08	-12.2%
Other Current Assets				
1320 · Prepaid Rent	4,369.95	4,369.95	0.00	0.0%
1340 · Workman's Comp Deposit	744.40	744.40	0.00	0.0%
1350 · Prepaid Expenses	124,081.15	244,104.57	-120,023.42	-49.2%
1330 · Employee Advances	7.26	60.52	-53.26	-88.0%
Total Other Current Assets	129,202.76	249,279.44	-120,076.68	-48.2%
Total Current Assets	3,690,519.66	3,138,494.70	552,024.96	17.6%
Fixed Assets				
1400 · Fixed Assets				
1405 · Computer Hardware/Software	37,349.33	37,349.33	0.00	0.0%
1410 · Furniture & Fixtures	101,040.00	101,040.00	0.00	0.0%
1415 · Leasehold Improvements	71,766.15	71,766.15	0.00	0.0%
1425 · Office Equipment	19,488.10	19,488.10	0.00	0.0%
Total 1400 · Fixed Assets	229,643.58	229,643.58	0.00	0.0%
1500 · Accumulated Depreciation				
1505 · Comp. Hdwr/Sftwr. Acc. Depr.	-21,231.17	-21,231.17	0.00	0.0%
1510 · Furn. & Fixt. Accum. Depr.	-14,984.00	-14,984.00	0.00	0.0%
1515 · Leasehold Imp. Accum. Depr.	-5,959.00	-5,959.00	0.00	0.0%
1525 · Office Equip. Accum. Depr.	-26,197.00	-26,197.00	0.00	0.0%
Total 1500 · Accumulated Depreciation	-68,371.17	-68,371.17	0.00	0.0%
Total Fixed Assets	161,272.41	161,272.41	0.00	0.0%
Other Assets				
1600 · Intangibles				
1605 · Trademark - Slocal	15,750.00	15,750.00	0.00	0.0%
Total 1600 · Intangibles	15,750.00	15,750.00	0.00	0.0%
Total Other Assets	15,750.00	15,750.00	0.00	0.0%
TOTAL ASSETS	3,867,542.07	3,315,517.11	552,024.96	16.7%
LIABILITIES & EQUITY				
Liabilities				
Current Liabilities				
Accounts Payable				
2000 · Accounts Payable	265,385.58	213,026.71	52,358.87	24.6%
Total Accounts Payable	265,385.58	213,026.71	52,358.87	24.6%
Credit Cards				
2060 · American Express Credit Card	8,910.76	7,435.56	1,475.20	19.8%
Total Credit Cards	8,910.76	7,435.56	1,475.20	19.8%
Other Current Liabilities				
2070 · Accrued Liabilities	269,573.07	185,636.33	83,936.74	45.2%
2010 · Deferred Revenue	0.00	4,000.00	-4,000.00	-100.0%
2100 · Payroll Liabilities				
2160 · Health Insurance Withheld	-611.46	-1,126.04	514.58	45.7%
Total 2100 · Payroll Liabilities	-611.46	-1,126.04	514.58	45.7%
Total Other Current Liabilities	268,961.61	188,510.29	80,451.32	42.7%
Total Current Liabilities	543,257.95	408,972.56	134,285.39	32.8%
Total Liabilities	543,257.95	408,972.56	134,285.39	32.8%

8:25 AM

11/12/20

Accrual Basis

Visit SLO CAL
Balance Sheet Prev Year Comparison
As of October 31, 2020

	Oct 31, 20	Oct 31, 19	\$ Change	% Change
Equity				
3120 · Reserved Earnings	1,080,253.06	880,460.81	199,792.25	22.7%
3130 · Retained Earnings	1,317,528.76	1,586,777.19	-269,248.43	-17.0%
Net Income	926,502.30	439,306.55	487,195.75	110.9%
Total Equity	3,324,284.12	2,906,544.55	417,739.57	14.4%
TOTAL LIABILITIES & EQUITY	3,867,542.07	3,315,517.11	552,024.96	16.7%



Visit SLO CAL MARKETING COMMITTEE APPLICATION FORM

NAME OF APPLICANT: _____

COMPANY: _____

ADDRESS: _____

PHONE: _____ EMAIL: _____

TOTAL YEARS IN HOSPITALITY INDUSTRY: _____

TOURISM-RELATED MARKETING EXPERIENCE: _____

Employment History

CURRENT EMPLOYER: _____ YRS OF SERVICE: _____

TITLE: _____

PAST EMPLOYER: _____ YRS OF SERVICE: _____

TITLE: _____

Community/Board Involvement

ORGANIZATION: _____ TITLE: _____

DATES OF INVOLVEMENT: _____

ORGANIZATION: _____ TITLE: _____

DATES OF INVOLVEMENT: _____

ORGANIZATION: _____ TITLE: _____

DATES OF INVOLVEMENT: _____

Individuals interested in serving on the Marketing Committee should send this **Application Form**, along with a **cover letter** and any background (**resume or list of key accomplishments** – no more than two pages total) to demonstrate their active role in marketing, branding, public relations or digital media as it relates to tourism in San Luis Obispo County, to Jordan@SLOCAL.com. For more information, contact Visit SLO CAL at (805) 541-8000.

KATHLEEN NAUGHTON

Paso Robles, CA 93446 | C: 559-977-6768 | katnaughton30@gmail.com

November 2, 2020

Visit SLO Cal

RE: Visit SLO Cal Marketing Committee

Dear Marketing Committee,

I would like to express my interest in joining the Visit SLO Cal Marketing Committee. I would be ecstatic for the opportunity to represent the SLO Coast Wine Collective and help to promote all our region and San Luis Obispo County has to offer.

The people and businesses within this community that I have worked with are some of the best that I have met in my career and possess a passion and drive that is unmatched. As we continue to move forward through the steps of reopening San Luis Obispo County, keeping our residents safe, and to promote tourism to the region again, the role of this marketing committee is paramount and I would be privileged to be a part of it.

Throughout the course of my career, I have honed my abilities in project management, execution, and company growth. I am an astute problem-solver capable of prioritizing and managing complex projects with proficiency. In previous roles, I exercised skills in collaboration, communication and marketing and consistently contributed to team efforts and organizational improvements. I have proven to be effective and motivational, with proficiency in interpersonal and collaborative work. I enjoy brainstorming and coordinating efforts to achieve a common goal.

Please take a moment to review my enclosed resume. I am looking forward to your response and thank you for your consideration.

Sincerely,

Kathleen Naughton

KATHLEEN NAUGHTON

Paso Robles, CA 93446 | C: 559-977-6768 | katnaughton30@gmail.com

Summary

Accomplished manager with extensive experience in wine and craft beer sales, marketing, distribution and DTC networks covering from California to Washington DC. Proven ability to maintain a professional environment while successfully growing brands and sales teams to their best potential.

Experience

Executive Director/Marketing Coordinator SLO Coast Wine Collective

10/2018 to Current
San Luis Obispo, CA

- Manage marketing and PR communications between Collective members and consumers through outlets such as the website, newsletters, consumer and trade events.
- Manage Collective meetings including Board, Owner's, Consumer Engagement, Marketing and Finance.
- Managed and executed the Harvest on the Coast Live Auction and Roll out the Barrels consumer events two years in a row.
- Played an active role in the Strategic Plan process and created milestones to meet goals set in three year plan.

Print Marketing Strategist Casey Printing

08/2018 to 09/2020
King City, CA

- Collaborated with owners to launch new print marketing opportunities with wineries, distilleries, and breweries.
- Manage sales territory spanning from King City to San Diego maintaining a current customer base of city municipalities, colleges, school districts, and locally owned businesses.
- Acquired additional new customers in my territory by providing solutions to their marketing needs and delivering high-quality service and products.
- Grew sales in my territory 10%-15% year over year.

Marketing Director and Human Resources Hearst Ranch Winery

08/2016 to 08/2018
Paso Robles, CA

- Worked with winery owners on yearly projections and create a marketing and sales plan for tasting rooms, DTC wine clubs, website, and distribution network.
- Created sales goals and incentive structure for the DTC sales team.
- Worked with Hearst Corp on a complete website rebuild with a focus on eCommerce and website traffic conversions.
- Launched a high-end wine club and built all marketing materials and sales plan from the ground up.
- Managed all HR responsibilities with the exception of payroll.
- Directly managed and supervised a team of 15 employees and two tasting rooms.

Office Manager LAW ESTATE WINES

06/2013 to 05/2016
Paso Robles, CA

- Part of opening team for a new world class winery and tasting room in December 2013.
- Hired and trained a sales and marketing team from the ground up.
- Managed a team of six including tasting room hosts, graphic designer, social media marketer and sales representatives.
- Responsible for building a story around our core brand by using online media marketing, unique and exciting collateral, quarterly newsletters, events, and local relationships to execute that story in the best way possible.
- Managed direct-to-consumer sales, wine club, fulfillment and compliance software.
- Lead a sales strategy that aided Law Estate Wines to sell out two consecutive vintages before projected dates.
- Built and successfully maintained a professional and fun company culture that attracted great applicants and limited company turnover.

Sales and Marketing Manager FLYING DOG BREWERY

02/2011 to 06/2013
Frederick, MD

- On and off-premise account management and sales in the home market of Maryland and DC.
- Created 30% sales growth in my market year over year.
- Developed and executed territory-specific promotions and sales programs with distributors and retailers.
- Worked successfully with distributors and customers in one of the only four-tier distribution systems in the US.
- Increased market presence by creating a series of unique and exciting events to promote our brands and cross-promote with wineries and distilleries in my territories.
- Worked closely with our design team to create customer-specific displays and collateral.
- Successfully grew my market presence through social media networks, i.e Twitter, Facebook and Instagram.

On and Off Premise Sales Manager Calypso Organics

08/2009 to 07/2011
Bethesda, MD

- On and off-premise sales of organic wine in Maryland, DC, New York, and Pennsylvania.
- Successfully built a customer base from the ground up and maintained profitable relationships with customers in a four-tier distribution system.

- Assisted in dealing with suppliers overseas and finding brands to build our distribution portfolio.

Sales Manager**06/2006 to 06/2009****Young's Market Company****Fresno, CA**

- Created sales presentations to present to off-premise buyers for upcoming holidays and advertisements.
- Merchandised products and built creative displays for off-premise accounts.
- Maintained a professional and personable relationship with buyers and my team. Managed large retail chain accounts i.e. Walmart, Target and Save Mart

Education**Bachelor of Science: Psychology**

California State University Fresno

Fresno, CA

Credentials

Level II Sommelier with the Court of Master Sommeliers

Cicerone with the Cicerone Certification Program

References

Personal and professional references available upon request.

CEO REPORT ***CEO MEETINGS***

- **Toni LeGras, Beachside Rentals (10/22)**
- **REACH (10/23)**
- **Claudia Vecchia, Sonoma County Tourism (10/23)**
- **Agency Presentations (10/26-27)**
- **Caroline Beteta, Visit California (10/26)**
- **CalTravel Executive Committee Meeting (10/26)**
- **Charles Crellin (10/28)**
- **EVC Board of Directors (10/28)**
- **VCA Outlook Forum Steering Committee (10/29)**
- **Emilia Doerr, Octa (11/3)**

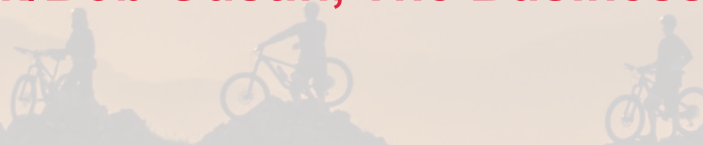
CEO REPORT

CEO MEETINGS

- Guy Savage, County of SLO & Nick Quincy, City of Pismo Beach (11/3)
- Jocelyn Brennan, South County Chambers (11/4)
- Mazen Bou Zeineddine, Beacon Economics (11/4)
- Barb Newton & Emellia Zamani, Cal Travel (11/4)
- Follow-up Virtual Meeting with Mering (11/5)
- Destinations International Governance Committee (11/6)
- Courtney Johnson, SLO County Regional Airport & Jack Penning, Volaire (11/6)
- Marketing Committee Meeting (11/10)

CEO REPORT ***CEO MEETINGS***

- Cal Poly Local Economic Development Council (11/10)
- Morro Bay TBID Meeting (11/12)
- Visit SLO CAL Executive Committee Meeting (11/12)
- REACH Executive Committee Meeting (11/13)
- Kevin Lemme, Alaska Airlines (11/16)
- Debbie Van Steenwyk/Bob Gustin, The Business Collaborative (11/17)





September 11, 2020

To All Prospective Bidders:

Visit SLO CAL, a nonprofit countywide Destination Marketing & Management Organization (DMMO), is seeking a qualified full-service marketing agency, with tourism experience, to grow the Visit SLO CAL brand and promote tourism to San Luis Obispo County.

The San Luis Obispo County Visitors and Conference Bureau, dba Visit SLO CAL, is a non-profit 501(C)(6). San Luis Obispo County tourism is marketed exclusively by Visit SLO CAL which renewed the countywide Tourism Marketing District (TMD), a 1.5% assessment on overnight lodging stays in San Luis Obispo County, in January 2020 for a 10-year term.

Visit SLO CAL oversees the production of a variety of activities, including marketing and advertising, travel trade and group sales, tradeshow, communications and public relations, research, visitor publications, cooperative programs, promotions and events – all designed to promote SLO CAL® to travelers, visitors and the travel trade both domestically and internationally.

The purpose of this request for proposal (RFP) is to seek and retain a qualified full-service marketing agency to promote the SLO CAL brand and San Luis Obispo County tourism. The results of these efforts will benefit Visit SLO CAL assessed lodging businesses, as well as seven in-county community Destination Marketing Organizations by increasing tourism revenue. There will also be secondary benefits to restaurant, craft beverage, transportation, activity, event and retail businesses as tourists partake in our county's assets.

The contract period for the Scope of Work contained within this RFP will be approximately January 1, 2021 to June 30, 2022, or 18 months with the option to renew annually for 2 additional years.

Visit SLO CAL's fiscal year runs from July 1st through June 30th. Therefore, the first 6 months of the contract will be funded on a project basis, based on the approved annual budget and current revenues and is subject to change. Moving forward, the budget for this contract could potentially scale to \$3 million annually over the next three years. We reserve the right to adjust this amount based on the content of the proposals, related factors and the economic environment of our industry.

Attached is an RFP to be filled out by those capable of meeting minimum requirements and carrying out the scope of work. All responses will be carefully reviewed and evaluated based on the criteria noted in the attached document. Any questions you may have to clarify this RFP are due to Visit SLO CAL, via email, no later than 12:00 p.m., Pacific Daylight Time (PDT) September 21, 2020.

Sincerely,

Lisa Verbeck
CMO

Table of Contents

Introduction	4
Purpose	5
Current Structure	5
Contract Term	5
Available Funds	5
Evaluation Process & Criteria	5
Tentative Schedule	6
Agency Objectives	6
Proposal Requirements	7
Minimum Requirements	8
Description of Proposer	11
Scope of Work	12
Innovation Case Study	13
Work Plan	13
Budget	14
Internal Control Structure	14
Billing & Related Requirements	14
Delivery of Proposal	15
Attachment A— Strategic Planning Resources	16
Attachment B— Intent to Bid	17
Attachment C— Proposal Evaluation Criteria	18

VISIT SLO CAL

Request for Proposal Marketing Agency

INTRODUCTION

San Luis Obispo County is a leading tourism destination on the Central Coast of California. Located halfway between San Francisco and Los Angeles the destination is home to more than 18 unique communities, 250+ wineries, hundreds of recreation trails, over 80 miles of coastal access and beaches in addition to the iconic Hearst Castle.

About Visit SLO CAL

Visit SLO CAL (VSC) is a team of destination marketing and management professionals who work with, and on behalf of, our community, our local investors and our partners to promote SLO CAL® (San Luis Obispo County, California) to both domestic and international visitors. As the countywide nonprofit destination marketing and management organization (DMMO) for SLO CAL, VSC's goal is to collaborate with partners to build the SLO CAL brand through a data-driven, efficient and innovative marketing and sales program while simultaneously enhancing the resident quality of life. VSC aims to establish SLO CAL as a favorite West Coast destination, it's the California Less TraveledSM, known for its signature slower pace of life and unique mix of incredible, immersive guest experiences.

Prior to 2017, the destination lacked a unified identity creating canalization between the seven municipalities and DMOs across the county. Research showed the destination was losing market share to its competitive set. In 2015 the first countywide Tourism Marketing District was established, authored and managed by Visit SLO CAL. In 2017, VSC launched the first-ever countywide destination brand, SLO CAL. SLO CAL united the entire county through a new logo, trademarked slogan, brand promise, iconic still images and engaging video, which were incorporated throughout VSC's marketing efforts, including advertising, public relations, social media, the SLOCAL.com website, promotional videos and email marketing. SLO CAL established a geographical location for the county while at the same time representing its unique pace of life and personality. The brand evokes feelings of relaxation and the freedom to experience life at your own pace (Life's Too Beautiful To RushTM) — the SLO CAL way of life.

Our marketing strategy will continue to focus on expanding the brand presence for SLO CAL; growing awareness of the SLO CAL brand and developing a house of brands approach to showcase the destinations that make up SLO CAL. We look to develop a stronger and deeper engagement with visitors and driving demand for visitation to the county. While SLOCAL.com was re-launched in Feb. 2018 to embody the SLO CAL brand through a more robust user experience, all-new content, video and imagery it is now time for a refresh.

In 2013 Visit SLO CAL began working to form a countywide Tourism Marketing District. The San Luis Obispo County Tourism Marketing District (SLOCTMD) is an assessment district that provides specific benefits to payors, by funding marketing, advertising, promotions, and sales efforts for assessed businesses. Each of the jurisdictions within the Tourism Marketing District (TMD) had benefitted for several years from local districts funding local marketing. This countywide TMD is a cooperative effort to collectively market all that the County has to offer for the benefit of assessed lodging businesses. The countywide TMD was approved in June 2015 and began operation July 1, 2015. Last January, the district was renewed for a 10-year term, beginning July 1, 2020 and extending through June 30, 2030 with a 50% increase in revenue.

Visit SLO CAL's Board of Directors is comprised of 19 members, 18 of which are from the lodging industry. A Marketing Committee, made up of destination managers and marketing professionals, also provides

input in developing the strategic marketing plan and direction through their recommendations to the Board.

PURPOSE

The purpose of this request is to seek and retain a qualified full-service marketing agency to expand the current brand platform into a house of brands model and promote San Luis Obispo County tourism. The results of these efforts will benefit Visit SLO CAL's assessed lodging businesses, as well as in-county DMOs by increasing tourism revenue.

CURRENT STRUCTURE

Visit SLO CAL currently operates without a creative agency of record. If the current project-based agency does not successfully bid, a transition period for the outgoing agency and successful proposer will be established. The intent is to have an agency in place to assist in the evolution of the brand. Selected agency must work closely with our existing digital and PR agencies to ensure an integrated marketing approach. The marketing agency will work collaboratively with all necessary partners.

CONTRACT TERM

The successful proposer will enter into a contract for services with Visit SLO CAL. The duration of the initial contract between Visit SLO CAL and the successful proposer is expected to begin January 1, 2021 and terminate on June 30, 2022 unless renewed. Visit SLO CAL reserves the right to renew its agreement prior to the end of each contract term for a total of two (2) years, providing funding to do so as appropriated for this purpose in subsequent budgets. There will be reviews annually in each year the contract is renewed. Proposed renewals are also assessed according to program direction, funding, and consistency of price and scope of work continuity.

AVAILABLE FUNDS

Visit SLO CAL will initially fund this contract up to \$1.5 million for services rendered for the 18-month term.¹ Funding at this level is dependent on the overall approved Visit SLO CAL budget. This budget figure is based on brand evolution, creative production, strategy execution, media planning and placement (both offline and online), social strategy and execution account management fees, and out-of-pocket expenses. However, Visit SLO CAL reserves the right to adjust both the budget and related services.

EVALUATION PROCESS & CRITERIA

Visit SLO CAL will form a committee to evaluate the written proposals. The criterion for the scoring of the proposals is included as Attachment C. The committee may at any time during the evaluation process seek clarification from Proposers regarding any information contained within their proposal. Final scores for each Proposer will reflect a consensus of the evaluation committee. Any attempt by a Proposer to contact a member of the evaluation committee outside the RFP process, in an attempt to gain knowledge or an advantage, may result in disqualification of Proposer.

¹ The budget for this contract could potentially scale to \$3 million annually over the next three years. Funding for Jan-June 2021 is to be negotiated.

The top three to five finalists chosen by the evaluation committee will be asked to provide in-person oral presentations, to include a small assignment, to the evaluation committee in San Luis Obispo County. After the oral presentations, there will be a question-and-answer period. In addition to Proposer management, key personnel performing day-to-day activities will be requested to attend.

As a quasi-public agency, Visit SLO CAL is subject to the Brown Act and California Public Records Act. As such, if you are a finalist, your response will appear in our Marketing Committee agenda packet which is a document of public record.

TENTATIVE SCHEDULE

This tentative schedule may be altered at any time at the discretion of Visit SLO CAL. All times are PDT.

09/11/20	RFP dissemination
09/21/20, 12:00pm	Q & A and Notice of Intent to Bid (if not already submitted) due
09/28/20	Q & A response sent to agencies
10/5/20, 12:00pm	Proposals due
Week of 10/12/20	3-5 finalists chosen and notified of final presentation dates and times
10/26 & 10/27	Marketing Committee reviews finalists' proposals (10/13)
11/10	Oral presentations by finalists, Marketing Committee invited to join, scorecards reviewed, final recommendation made
11/18	Marketing Committee approves final recommendation to Board of Directors
Week of 11/23/20	Board of Directors Approval
12/2020 – 1/1/2021	Selected proposer announced & contract negotiations begin
	Start date / transition – Mid-December to early January 2021

AGENCY OBJECTIVES

- Build awareness of the SLO CAL brand while educating consumers on the unique destinations that make up the county
- Drive demand for visitation to the county
- Develop stronger and deeper engagement with visitors
- Execute and track results for Visit SLO CAL's brand marketing programs

Evaluation for depth and execution of a brand refresh:

Visit SLO CAL will engage in consumer research for its core target markets (Primary DMAs –Los Angeles, San Francisco – Secondary DMAs based on direct air service in place or scheduled for 2021 – Dallas, Denver,

Phoenix, Portland, San Diego, Seattle). Agency would need to establish a timeline and deliverables for research.

Website Redesign:

Visit SLO CAL's site is outdated and provides a limited experience for consumers interested in traveling to our region. The winning proposer shall conduct a review, provide a timeline, design concepts and wireframes for a new and mobile-optimized website experience in this FY. Simpleview will develop the new website and may also take part in the redesign. The new site will include maintaining lodging booking functionality. The website is geared towards consumers; however, both Visit SLO CAL lodging investors media and tourism partners will utilize the Visit SLO CAL site to gather member information and update their consumer facing business pages. Visit SLO CAL staff will use a CMS to keep content current.

Marketing and Advertising Planning: Develop recommendations for a Marketing and Advertising Plan that supports the strategies set forth by Visit SLO CAL. Includes Strategic Direction, Creative Strategy, Brand Refresh and Stewardship, Media Plan and Cooperative Plan.

Media Buy: By April 2021, develop and plan a FY21/22 campaign, to be approved in May and executed at the start of FY21/22. Execution includes placement, optimization, cancellations, auditing, payment to vendors and billing.

Concept Development/Production: Concept creative materials/campaign elements (online, print, broadcast, etc.) As an example, from this year, please see the 2020/21 Marketing and Advertising Plan in Attachment A. Once approved, produce and bring to final form the approved advertising materials to run/air on behalf of Visit SLO CAL. Specifically VSC is looking to develop a house of brands (HOB) approach that honors the experience of our individual destinations. Once developed, agency will develop a co-op framework that allows partners to use the HOB assets.

Social Strategy and Implementation: Develop and execute a paid social strategy that aligns to VSC's brand messaging and takes into account organic channels and builds upon the existing content calendar.

Secondary:

Account Stewardship: Attend Visit SLO CAL's marketing committee meetings (monthly via teleconference and quarterly in person), prepare monthly reports, periodic reports and a monthly recap for marketing committee meetings, including budget, and arrange for storage and shipment of materials and documents as directed by Visit SLO CAL.

Miscellaneous: Provide creative input and support for other projects, and work collaboratively with other partner agencies.

Brand partnership: Target and nurture marketing partnerships that align with our brand and target audience to increase SLO CAL brand awareness.

PROPOSAL REQUIREMENTS

Proposals must address each item listed within the following sections, giving specific details of

techniques to be used in meeting these requirements. The proposal should describe how the Proposer intends to perform the scope of work during an 18-month period and shall be subject to negotiation between Visit SLO CAL and the Awardees' for the initial contract period. The information provided will be used to negotiate the contract scope of work, and to score proposals as described in Attachment C, Proposal Evaluation Criteria.

Proposals must be based on a funding level of \$1.5 million per fiscal year. If additional funding becomes available, this budget may increase. See Attachment A for links to Visit SLO CAL's public documents related to strategic planning.

Minimum Requirements

Questions: All Proposers wishing clarification of this RFP must submit questions via email to: Lisa@SLOCAL.com by the date and time referenced in the Tentative Schedule and note "Agency RFP Questions" in the subject line. Questions must be categorized based on scope of work.²

Notice of Intent to Bid (non-binding): All Proposers interested in responding to this RFP must submit Attachment B, Notice of Intent to Bid by the date and time referenced in the Tentative Schedule.

Annual Billings: Proposers must have 2019 annual revenue over \$7 million. Include clients and budgets.

Experience: Domestic media planning and buying experience – both online and offline – in at least five markets, one of which must be major metropolitan media markets with populations of two million plus. Please list markets in which your agency has experience and what media vehicles were planned and purchased. If using a subcontractor, provide a signed letter of commitment that includes the name of the subcontractor, their annual billings and the information requested above regarding domestic media planning and buying. All media planning/buying subcontractors must also meet the stated minimum requirements.

References: Provide three client references. At least two of the three must be current clients and at least one of the three must be tourism-related. Include client name, contact information, and the engagement start and end dates.

Organizational structure – Provide an overview of your agency ownership as well as any diversity and inclusion policy you have in place and how you are managing to that.

Sample reporting - Provide sample reporting out documents for weekly and monthly status updates, project management, media performance and billing.

Financial Statements: Proposers are required to demonstrate financial viability for maintaining an account of this size. Provide GAAP compliant financial statements, including but not limited to:

- Statements of Financial Position
- Statements of Activities
- Statements of Cash Flows

All of the above Financial Statements must be the most recent statements available, but no more than

² Costs for developing proposals are entirely the responsibility of the proposer and shall not be reimbursed by Visit SLO CAL. This RFP is not subject to and State or County government contracting rules and regulations and Visit SLO CAL reserves the right to modify any and all terms and conditions in its sole and absolute discretion.

12 months old. Financial statements are to be submitted in a sealed envelope. After review, all financial statements will be destroyed or returned to Proposer. If Proposer would like a Non-Disclosure Agreement (NDA) signed, the NDA request must be received along with the Q&A by the date specified in the Tentative Schedule. VSC reserves the right to use its own NDA.

Contract Requirements: Winner of RFP will be required to abide by Visit SLO CAL contracting requirements.

Coverage must be at least as broad as:

- i. Commercial General Liability Insurance Policy ("CGL"). Insurance Services Office (ISO) Form CG 00 01 covering CGL on an "occurrence" basis for bodily injury and property damage, including products-completed operations, personal injury and advertising injury, with limits no less than **\$1,000,000** per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.
- ii. Business Automobile Liability Policy ("BAL"). ISO Form Number CA 0001 covering, Code 1 (any auto), or if Agency has no owned autos, Code 8 (hired) and 9 (non-owned), with limit no less than **\$1,000,000** per accident for bodily injury and property damage.
- iii. Workers' Compensation and Employers' Liability Insurance Policy ("WC/EL"). Insurance as required by the State of California with statutory limits, and Employer's Liability Insurance with limit of no less than **\$1,000,000** per accident for bodily injury or disease. If Agency will provide leased employees, or, is an employee leasing or temporary staffing firm or a professional employer organization (PEO), coverage shall also include an Alternate Employer Endorsement (providing scope of coverage equivalent to ISO policy form WC 00 03 01 A) naming the Client as the Alternate Employer, and the endorsement form shall be modified to provide that the Client and the County will receive not less than thirty (30) days advance written notice of cancellation of this coverage provision. If applicable to Agency's operations, coverage also shall be arranged to satisfy the requirements of any federal workers or workman's compensation law or any federal occupancy disease law. If Agency maintains higher limits than the minimums shown above, Client shall be entitled to coverage for the higher limits maintained by Agency.
- iv. Professional Liability/Errors and Omissions. Insurance covering Agency's liability arising from or related to this Agreement, with limits of not less than **\$1,000,000** per claim and **\$2,000,000** aggregate. Further, Agency understands and agrees it shall maintain such coverage for a period of not less than three (3) years following this Agreement's expiration, termination or cancellation.
- v. Additional Insured
The County of San Luis Obispo (the "**County**"), and Visit SLO CAL, and each of their officers, officials, employees, and volunteers are to be covered as insureds on the auto policy with respect to liability arising out of automobiles owned, leased, hired or borrowed by or on behalf of Agency and on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of Agency including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to Agency's insurance (at least as broad as ISO Form CG 20 10, 11 85 or both CG 20 10 and CG 20 37 forms if later revisions used).
- vi. Primary Coverage
For any claims related to this Agreement, Agency's insurance coverage shall be primary insurance as respects the County and Client. Any insurance or self-insurance maintained by the County or Client shall be excess of Agency's insurance and shall not contribute with it.
- vii. Waiver of Subrogation

Agency grants the County and Client a waiver of any right to subrogation which any insurer of the Agency may acquire against the County or Client by virtue of the payment of any loss under such insurance.

viii. Deductibles and Self-Insured Retentions

Any deductibles or self-insured retentions must be declared to and approved by the County or Client. Client may require Agency to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.

ix. Acceptability of Insurers

Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, unless otherwise acceptable to Client.

x. Claims Made Policies

If any of the required policies provide coverage on a claims-made basis:

- i. The retroactive date must be shown and must be before the date of the contract or beginning of the contract work.
- ii. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the contract work.
- iii. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a retroactive date prior to the contract effective date, Agency must purchase "extended reporting" coverage for a minimum of five (5) years after completion of the contract work.

xi. Separation of Insureds

All liability policies shall provide cross-liability coverage as would be afforded by the standard ISO (Insurance Services Office, Inc.) separation of insureds provision with no insured versus insured exclusions or limitations.

xii. Verification of Coverage

The Agency must furnish original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this Section.

xiii. Special Risks or Circumstances

The County of San Luis Obispo reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

All proposals submitted shall become the property of Visit SLO CAL and shall not be returned, with exception to aforementioned financials, to the Proposer. Visit SLO CAL also reserves the right to:

Reject any and all bids;

Waive any or all mandatory requirements, if no Proposers meet one or more of those requirements;

Cancel this RFP;

Revise the amount of funds available under this RFP;

Amend this RFP as needed³; and

³ If RFP is amended, Visit SLO CAL will send an addendum to all Proposers.

Not select a vendor and award a contract from this RFP.

All Proposers agree that budget costs submitted with their proposals are valid for 180 days from the date Visit SLO CAL receives their proposal.

Proposals may be rejected if minimum requirements are not met.

Description of Proposer

Services & Activities:

- Provide a letter of interest and an executive summary of your proposal.
- Provide a description of the nature of the Proposer's services and activities. Provide the year in which your company was formed. Note your company's history and expertise in travel and tourism advertising. List the address from which the primary work on the contract would be performed and size of agency by headcount. List the number of full and part-time employees. Do not list any subcontractors in this section.

Conflicts 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 or a direct competitor such as Santa Barbara, Monterey or Sonoma County.**

Personnel/Management:

Identify those individuals on the Proposer's account team who will manage the contract work. Identify specific individuals who will be conducting day-to-day activities. Identify all personnel assigned to this account by position title and their role as staff or contractor. Include a description of the duties for each position title.

Note who will be the contract manager and primary contact.

- For all individuals, please document overall 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, and length of time in any previous related positions. Do not exceed two pages per person.
- 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, and their role as staff or contractor.
- Please indicate availability and accessibility of agency resources and staff devoted to this campaign.

Subcontractors:

- Identify all proposed subcontractors for work that exceeds \$25,000 annually and document which portions of service will be performed by subcontractors and their ability to perform the work. Additionally, Proposer should submit signed letters of commitment for all proposed subcontractors and resumes/biographies of proposed subcontractor's key personnel, including those conducting day to day activities. Resumes/ biographies should detail education, experience, and key timeframes for all individuals on the account. Do not exceed two pages per person.
- The use of subcontractors is subject to approval by the President and CEO of Visit SLO CAL. Therefore,

not all work recommended by the Proposer will necessarily be approved and not all subcontractors listed in the proposal will necessarily be selected. The Proposer must make it clear to any subcontractors included in the proposal that even if the Proposer is selected, the subcontractors may not necessarily be selected. In the case subcontractors are approved, their costs will be the responsibility of the agency and should be included in the proposal and Scope of Work (SOW).

Scope of Work

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 brand in a global marketplace, and the shifting dynamics of how consumers receive and use information today.

Evaluation for depth and execution of a brand refresh: Given recent 2020 target consumer data will be available to the winning Proposer, provide an overview of how your team determines the depth of a refresh, and a work plan for a house of brands approach.

Website Redesign: Provide an overview of how your agency approaches website design. Discuss a strategy to develop a desktop and mobile-optimized design that not only meets the technical and communication requirements for Visit SLO CAL, its lodging partners and members, but ensures an engaging, memorable experience to consumers, encourages repeat visits over time and incorporates current technology, customer experience and trends.

Strategic Planning: Discuss your strategic media and communications planning process. What goes into the development of a plan? What type of research do you do? Etc.

Advertising Campaign Development: Demonstrate how your agency develops a holistic approach to client brand advertising, integrating interactive, including social, into the overall strategy. Include how your media planning has changed due to barriers effecting traditional frequency/reach via TV – e.g. video on demand, recording devices, etc. How does your agency approach extend beyond the 30-second spot? Exemplify how your agency has evolved based on the way consumers receive and use information today.

Production/Creative: Do you do production in-house? If not, how do you manage production? Is your creative team located in the office that this account will be managed? Show current and/or past client examples of how your brand development moves across all mediums. Provide a rate card for your production services.

Media Planning & Buying: Provide us with your process in deciding where, when, and how to purchase media. What tools or analytics do you use? What elements determine your purchasing decisions? Optimization strategy? Monthly reporting examples? Co-op strategy and concepts (please provide examples or case studies of big picture co-op productions facilitated in the past)? Give us an overview of your philosophy as it relates to planning and buying media domestically for a budget of our size and tracking/optimizing to metrics.

Promotional and Strategic Partnerships: Where do strategic partnerships or alliances fit into your overall approach? How have you used strategic partnerships to extend a client's budget and exposure? Please

provide examples or case studies of big picture strategic partnerships you have facilitated in the past.

Social Media: Show us how you integrate social media into a brand strategy and how you would approach a social strategy. Visit SLO CAL currently manages all social profiles internally but is interested in hearing your thinking on how a brand our size should resource to efficiently manage a global social footprint. At a minimum, we would look to the winning Proposer to provide the overarching social strategy and guidance on implementation.

Research & Analytics: Provide an overview of how you determine success. What are the analytic tools or services that you use, and what type of information will you be reporting back to Visit SLO CAL monthly as it relates to meeting our objectives? Please define how your analytics can be converted into insights, and how the insights will help guide us in making decisions on how we market in the future. What research will you require to execute the work?

Travel and Administration: The Proposer should estimate travel (attend multi-day Visit SLO CAL Marketing Committee meetings twice a year), monthly meetings, communication and postage/shipping expenses expected to incur during contract period, and any additional reserve funds to be held for marketing contingencies. Travel and per diem expenses shall not exceed rates authorized by Visit SLO CAL's Travel and Expense Policy.

Innovation Case Study

Visit SLO CAL is constantly seeking new opportunities to connect with our target audiences and build and leverage the power of the SLO CAL brand. Provide a case study that demonstrates how your agency has pushed a client beyond the norm for their industry and achieved success. The example does not have to be tourism specific but ideally would show how you successfully developed an integrated campaign or developed co-operative marketing platform.

Work Plan

Please submit a preliminary work plan or schedule for the completion of the following project tasks based on a contract period of January 1, 2021 – June 30, 2022. The objective of the work plan is to give Visit SLO CAL an opportunity to study how Proposers would schedule various elements and distribute the workload among staff.

The Work Plan should include a schedule for completion of the following project tasks:

- Evaluation for depth and execution of a House of Brands strategy;
- Website Redesign;
- Strategic Communications and Content Planning;
- Advertising Campaign Development;
- Production/Creative Services;
- Media Planning & Buying;
- Social Media Strategy;
- Promotional & Strategic Partnerships; and
- Research & Analytics.

Budget

Proposer shall provide an overview of how they would allocate Visit SLO CAL's budget using percentages. These allocations will be used to demonstrate your firm's philosophy on resource allocation and compensation. If commission or other fees are part of the media or production breakdown, Proposers must list the percentage rates of those commissions and fees. Please also provide your point of view on compensation – commission, retainer, hourly fees or any hybrid approach.

Budget Format

The table presented below is the minimum acceptable budget format. Additional detail may be provided if applicable.

CATEGORY	% OF TOTAL BUDGET	COMMISSION % OR HOURLY RATE (if applicable)
REBRAND		
WEBSITE REDESIGN		
STRATEGIC COMMS PLANNING		
ADVERTISING CAMPAIGN DEVELOPMENT		
PRODUCTION / CREATIVE		
MEDIA BUYING / PLACEMENT		
PROMOTIONAL & STRATEGIC PARTNERSHIPS		
RESEARCH & ANALYTICS		
TRAVEL & ADMINISTRATION		
AGENCY FEE		
OTHER		
TOTAL		

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;
- Reconciliation of pre-paid media;
- Media performance reconciliations; and
- Expense approvals.

BILLING & RELATED REQUIREMENTS INVOICES

Please identify any discounts you offer for payment within certain timeframes. For example, 'payment within 10 days of invoice' or something similar.

Please identify all acceptable methods of payment.

DELIVERY OF PROPOSAL

Each bidder is required to deliver six typed copies in addition to an electronic version of the proposal.

Electronic versions of the proposal must be in BOTH Word and PDF formats and delivered on a digital storage device or emailed to Lisa@SLOCAL.com. Any print or brand creative samples should be submitted with proposal.

Proposals may be sent by courier such as FedEx or UPS to:

Visit SLO CAL

Marketing Agency Request for Proposal

ATTN: RFP Submissions

1334 Marsh Street

San Luis Obispo, CA 93401

Proposals must be received by the date and time referenced in the Tentative Schedule. Late submissions will not be accepted.

ATTACHMENT A
STRATEGIC PLANNING RESOURCES

2020/2021 Business & Marketing Plan:

https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/Business_Marketing_Plan_FY2020_21_digital_spreads_single_page_da06c0a1-ae16-419a-8f11-e1ca1f3425f1.pdf

Brand Guidelines

https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/Brand_Style_Guide_2018_with_Tra_demarks_compressed_c45d73a1-ef2d-44b7-88b4-754b468244b2.pdf

Management District Plan:

https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/VSC_MDP_8_5_19_c34892a9-b860-4600-b341-7afb8912fa59.pdf

18/19 Annual Report:

https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/VSC_AnnualReport_18_19_WEB_afc3c97a-a626-41a2-a55e-64f837310815.pdf

Diversity & Inclusion Statement:

<https://www.slocal.com/partners/equity-inclusion/>

Strategic Direction 2023

https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/SD2023_Mat_ea7967d0-7879-467f-9382-55e0b1e79160.pdf

ATTACHMENT B

INTENT TO BID

Marketing Services
Due: September 21, 2020
12:00 PM Pacific Time

Send to: Lisa Verbeck
Chief Marketing Officer
Lisa@SLOCAL.com

Name of Proposer:

Contact Person:

Mailing Address:

Agency URL:

Telephone:

Fax Number:

Email Address:

Signed:

ATTACHMENT C

PROPOSAL EVALUATION CRITERIA

Proposals will be reviewed, evaluated and scored by an evaluation committee. Evaluation of proposals will be based on the following criteria for each component. Each criterion will be scored according to the degree of responsiveness present in the proposal being evaluated.

	Max. Points	Score
1. OVERALL EXPERIENCE OF COMPANY & DEMONSTRATED RESULTS	10	
Our evaluation will include an assessment of the history of your company, your experience as it relates to the requirements within this RFP including tourism marketing, evidence of past performance, quality and relevance of past work, and references.		
2. CREATIVITY	20	
Our evaluation will include an assessment of the quality of proposed strategies, and creativity as demonstrated by the required project and past work.		
3. FAMILIARITY WITH VISIT SLO CAL & TOURISM INDUSTRY	15	
Our evaluation will include our assessment of your understanding of our organization, SLO CAL as a destination and the landscape of the countywide tourism industry and the industry as a whole in addition to how you integrated this knowledge into your proposal.		
4. QUALIFICATIONS OF PERSONNEL	10	
As reflected through the Overall Experience of Company & Demonstrated Results, our evaluation will also include an assessment of the qualifications and experience of your managerial team, staff, subcontractors and those managing our account day-to-day.		
5. PLANNING & INNOVATION	20	
Ability of firm to think beyond the now and set San Luis Obispo County up to be at the forefront of the changing destination marketing landscape.		
6. STRATEGIC THINKING/PLANNING APPROACH	15	
Philosophy/approach to account planning, media planning and campaign development.		
7. BUDGET APPROACH/COST EFFECTIVENESS	10	
Effective and efficient delivery of quality services is demonstrated in relation to the budget allocation. The allocation is reasonable and appropriate. Approach to compensation structure is balanced and structured to maximize marketing investment.		
TOTAL POINTS	100	



SEO REPORT

October 2020

TABLE OF CONTENTS

1	2	3	5
COVID-19 Impact Update	Visitor Geographic Data	Engagement Goals	Organic Traffic
Executive Summary	Overall Traffic Drive Market	Top Content	Organic Performance
Traffic Overview	Overall Traffic Fly Market	Site Engagement vs Industry	Organic Partner Referrals
	Overall Traffic UK		Search Ranking Performance
	In-Market vs Visitor		

COVID-19 Impact On Industry-Wide Website Traffic

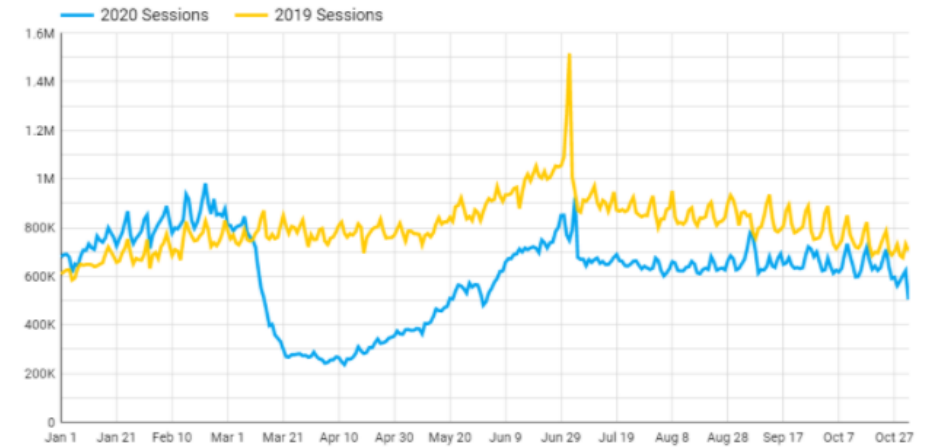
A three-and-a-half-month trend of almost perfect flatness (once you back out weekly fluctuations) in DMO industry sessions finally broke in the last week of October. 2019 sessions fell during that period, as they do every year with the waning of the summer in the northern hemisphere, so that steadiness saw the industry climb almost all the way out of the quarantine hole it had languished in all year. Unfortunately, the shift came in the form of a rather sharp downturn. However, we are predicting that this is only a brief and temporary decline whose effects will pass.

Total Sessions: Two things lead us to believe that the shift will pass. One, the patterns around Halloween last year were also slightly anomalous, with the weekly tide of sessions clearly disturbed. Two, the US Presidential election occurs on Tuesday, and its effect needs little explanation. People are likely taking the weekend off from travel planning and will soon go back to it. We saw a similar pattern with the coming of the anti-brutality protests at the beginning of the summer.

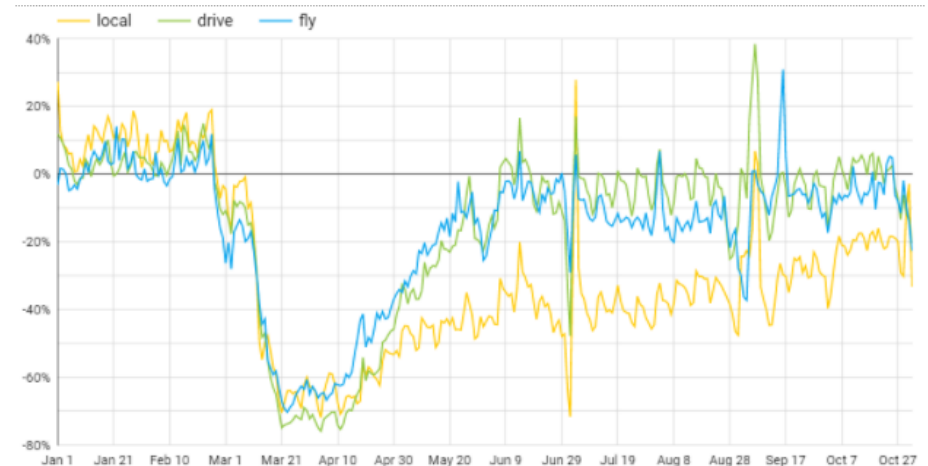
Organic Sessions: Another indication of the passing nature of the downturn is that it has occurred across regions and user markets, with people from all distances reducing their interest in DMO sites over the weekend. Furthermore, locals did spike the day before Halloween, as they were likely looking for holiday event information. This indicates that the recent rise in coronavirus cases in many areas is not yet depressing travel interest.

Google Trends: Hotel booking searches on Google have remained steady since the middle of the year, exhibiting perhaps a slight decline in the most recent week, but interest in travel remains present in sufficient levels to warrant active outreach and promotion to target audiences.

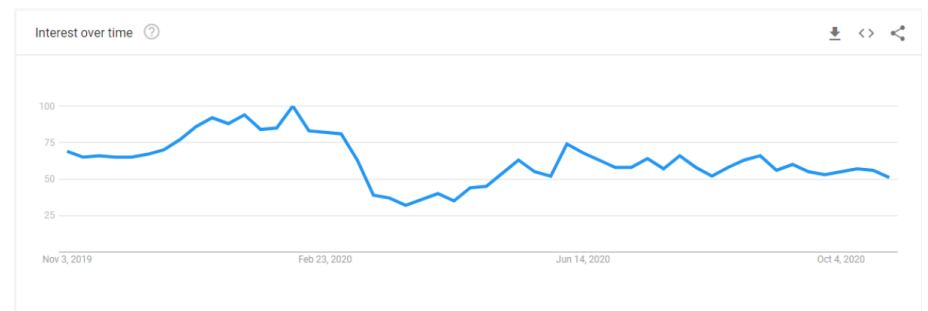
General Recommendations: The main trend to watch going forward is 1) whether the rise in coronavirus cases continues, and 2) whether the trend from the spring and summer, of travel interest, and infection rates moving in inverse directions on a destination by destination basis, holds up. Winter may bring more infections or not, and people may become more used to living with some risk of coronavirus or not. Given that people tend to become less fearful as a threat becomes more familiar, we expect interest in safe forms of travel to remain strong even if infection rates tick upward, so long as they do not strain local healthcare systems to emergency levels.



YTD YoY All Sessions All DMOs



YTD YoY Organic Sessions All DMOs by Visitor Segment



Google Trends search terms include "book" and "hotel"

SEO EXECUTIVE SUMMARY - October 2020

Organic Traffic Analysis

COVID continues to have an impact on Organic Traffic.

Organic traffic is still following the seasonal trends of last year with YoY numbers very near to last year. The Iconic Eats blog continues to perform well, bringing in almost 4% of organic users to your site. As users continue to shift toward more normal search patterns, continue to focus on seasonal and outdoor activities. For winter, focus content about outdoor activities with stops after various places to eat to warm up along the way. Last month, city-specific keywords were very popular. The absence of COVID-related phrases indicates that users are shifting back to a more normal search pattern so new content should continue to focus on city-specific outdoor and other safe activities.

Recommendations

Content Development and Improvement:

- **Low CTR Keyword Phrases:** Pismo Beach and Shell Beach could perform better if they had their own /explore/ pages. The Santa Margarita and Atascadero /explore/ pages could use 150-200 more words each. The /explore/san-luis-obispo/things-to-do/ would perform better if the keyword phrase "things to do in San Luis Obispo" was added to the content. When adding/creating new content keep in mind the importance of organizing the content in easy-to-read sections and the importance of using related keyword phrases.

- **Content Inspiration:** Below are some great content ideas based on the upcoming "National Days" in January.

01/3 National Chocolate Covered Cherry Day - Great way to promote local candy and dessert shops

01/4 National Spaghetti Day - Great way to promote local places to eat

01/13 National Gluten-Free Day - Great way to promote local gluten free places to eat

01/21 Museum Selfie Day - Great way to promote local museums

01/26 National Spouses Day - A great way to promote date-night related activities, events, or content

01/27 National Chocolate Cake Day - Great way to promote local bakeries and dessert spots

01/31 National Hot Chocolate Day - Great way to promote local coffee shops and cafes

SEO Activity Highlights

- Google Analytics Monitoring
- Site Health Scan (Broken Links, Crawl Errors, No-Index Pages) - Issue identification and correction
- Special Report Blog by Sessions - Blog Writing Tips & Tricks
- Report Preparation and Delivery

Traffic Overview - October 2020

Total Traffic

YoY Comparison

Sessions 127,711 ↑ 40.3% ↑ 36,652	Bounce Rate 60.20%	Pages / Session 1.63	Avg. Session Duration 00:02:05
---	-----------------------	-------------------------	-----------------------------------

Organic Traffic

YoY Comparison

Sessions 37,288 ↓ -0.5% ↓ -180	Percent of Total Sessions 29.20% ↓ -29.0%	Bounce Rate 46.83%	Pages / Session 1.93	Avg. Session Duration 00:03:03
--------------------------------------	---	-----------------------	-------------------------	-----------------------------------

Organic Traffic and Top Landing Pages

by Section YoY Comparison

Stay 1,035 ↑ 154.3% ↑ 628	Stay (Including City Stay pages) Sessions ▾ /stay/rv-parks-campgrounds/ 472 /stay/vacation-rentals/ 205	Blog 6,452 ↑ 61.5% ↑ 2,456	Blog Sessions ▾ /blog/post/iconic-eats-every-visitor-s... 1,272 /blog/post/dog-friendly-beaches-abo... 544
Things to Do 4,178 ↑ 54.7% ↑ 1,478	Things to Do Sessions ▾ /things-to-do/ 748 /things-to-do/outdoor-activities/moun... 368	Explore 7,711 ↑ 57.6% ↑ 2,819	Explore Sessions ▾ /explore/cambria/ 1,033 /explore/paso-robles/ 555
Listings 4,889 ↑ 49.4% ↑ 1,616	Listings Sessions ▾ /listing/cypress-rv-&-mh-park/2197/ 853 /listing/bruce-munro:-field-of-light-at-... 288	Event Pages 1,427 ↓ -85.7% ↓ -8,545	Explore Sessions ▾ /event/pumpkins-in-the-park/2470/ 300 /event/34th-annual-vine-street-victor... 151



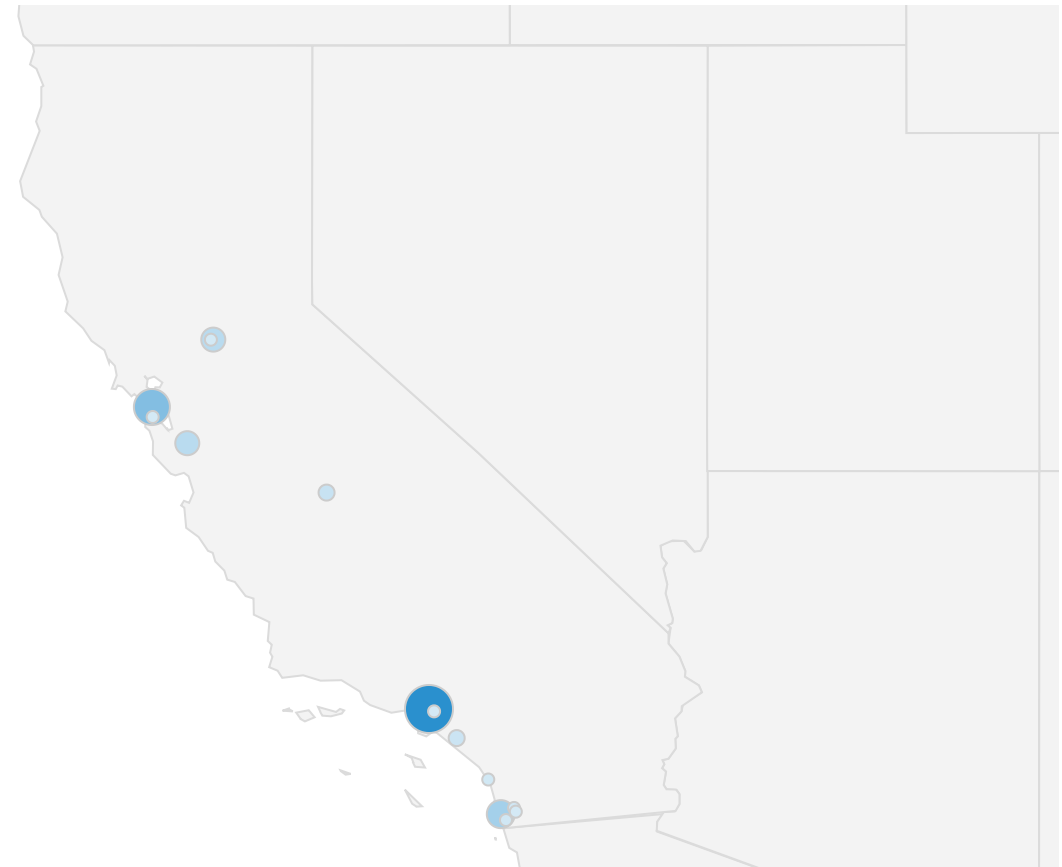
Visitor Geographic Data

How many sessions are coming from my drive market?

by City, Sessions, and % Change Year over Year

City	Sessions ▾
Los Angeles	18,753
San Francisco	8,971
San Diego	5,267
Sacramento	3,004
San Jose	2,961
Fresno	1,456
Irvine	968
Chula Vista	432
El Cajon	335
Carlsbad	298
West Sacramento	104
South San Francisco	91
East Los Angeles	26
Rancho San Diego	17
San Jose del Cabo	4

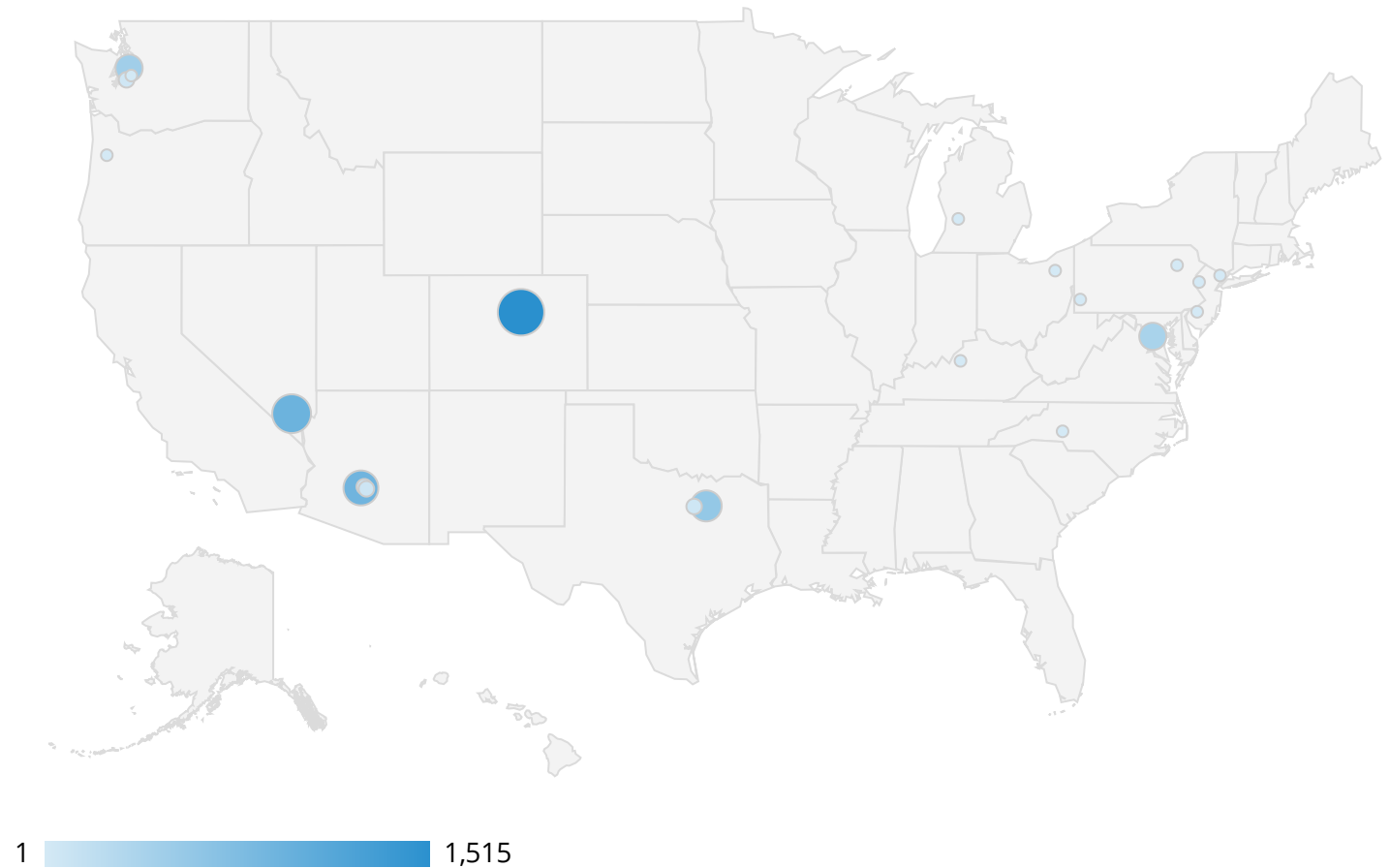
Grand total 42,687



What cities are users from?

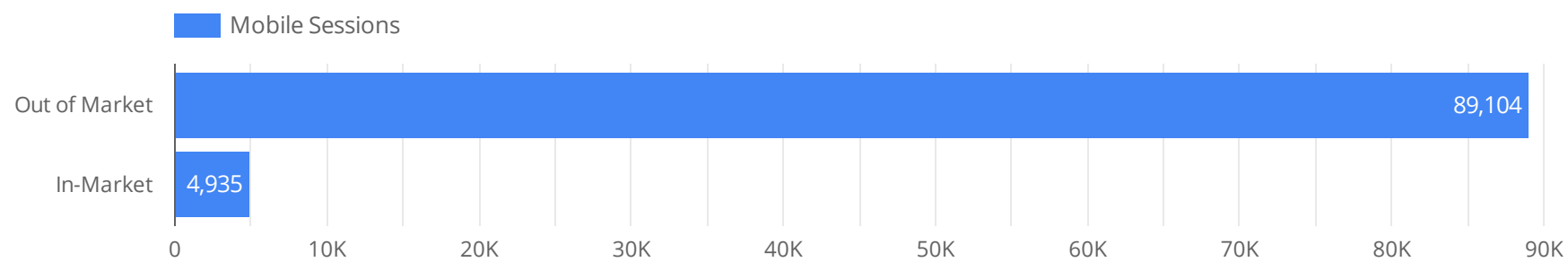
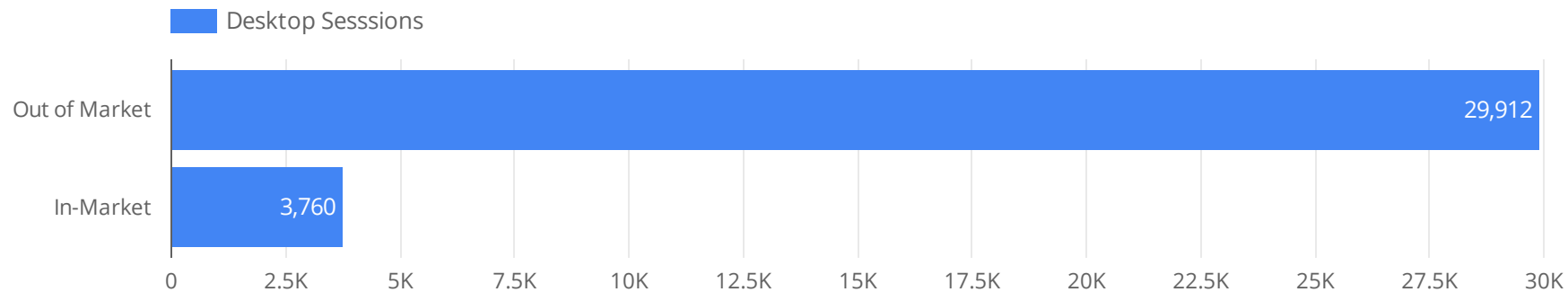
by City, Sessions, and % Change Year over Year

City	Sessi...
Denver	1,516
Las Vegas	928
Phoenix	895
Dallas	569
Seattle	455
Washington	384
Scottsdale	65
Mesa	62
Fort Worth	53
Tacoma	47
Kent	10
Washington Township	4
Kentwood	2
Mount Washington	1
Township of Washington	1



What are my sessions break down?

by Sessions, by Out of Market and In-Market, and by Desktop and Mobile



The background of the slide features a blurred image of hands interacting with a laptop. One hand is holding a pen, poised to write on a document, while the other is near the laptop's trackpad. The scene is overlaid with various digital graphics: a line graph with data points in the upper left, a network of interconnected nodes and lines in the upper right, a horizontal bar chart with multiple colored segments (orange, green, blue, red, purple, teal) across the middle, and a large, semi-transparent circular gauge or progress indicator in the lower right. The overall aesthetic is modern and tech-oriented, with a warm, slightly desaturated color palette.

Engagement Goals

What are my top pages?

by Sessions, Exits, and Pageviews

Top Landing Pages	Sessions
/	28,370
/explore/pismo-beach-shell-beach/	3,201
/explore/paso-robles/	2,391
/explore/san-luis-obispo/	1,811
/explore/cambria/	1,755
/plan/getting-here/covid-19/	1,506
/explore/atascadero/	1,426
/blog/post/iconic-eats-every-visitor-should-try/	1,370
/explore/morro-bay/	1,207
/events-and-festivals/events-calendar/	1,185

Page	Pageviews
/	47,169
/explore/pismo-beach-shell-beach/	4,732
/explore/paso-robles/	3,583
/explore/san-luis-obispo/	2,856
/blog/post/highway-1-in-slo-cal/	2,509
/things-to-do/	2,413
/explore/cambria/	2,378
/explore/atascadero/	2,361
/events-and-festivals/	2,173
/events-and-festivals/events-calendar/	2,069

Exit Page	Exits
/	24,962
/explore/pismo-beach-shell-beach/	3,069
/explore/paso-robles/	2,092
/explore/san-luis-obispo/	1,735
/blog/post/highway-1-in-slo-cal/	1,090
/things-to-do/	1,052
/explore/atascadero/	1,269
/events-and-festivals/events-calendar/	1,100
/explore/cambria/	1,274
/explore/morro-bay/	1,146

How does my website perform compared to the industry averages?

by Pages per Session, Avg. Session Duration, and Bounce Rate for All and Organic Traffic

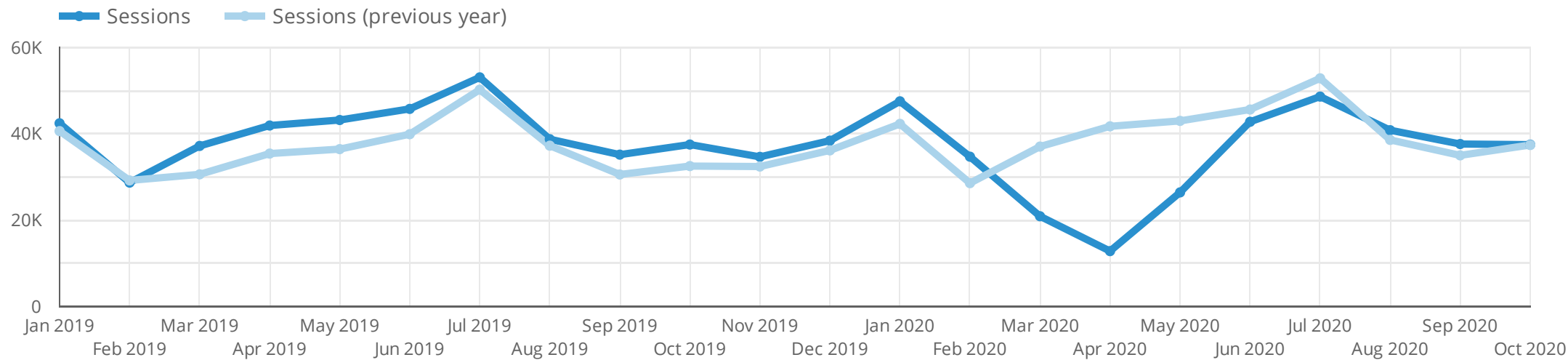
Metric	Industry Average	SLOCAL.com	% Difference
Total Pages Per Session	2.00	1.63	-18.35%
Total Avg Session Duration	00:01:55	00:02:05	8.95%
Total Bounce Rate	54.15%	60.20%	11.17%
Organic Pages Per Session	2.14	1.93	-9.73%
Organic Avg Session Duration	00:02:20	00:03:03	30.80%
Organic Bounce Rate	48.01%	46.83%	-2.46%



Organic Traffic

How are organic sessions trending?

by Sessions Year over Year



What pages are organic search visitors landing on?

by Landing Page, Sessions, and Percent of Total Sessions Year over Year

Landing Page	Sessions	% Δ	% of Total	% Δ
/	4,752	20.3% ↑	13.48%	22.8% ↑
/blog/post/iconic-eats-every-visitor-should-try/	1,272	211.0% ↑	3.61%	217.4% ↑
/plan/getting-here/covid-19/	1,137	-	3.22%	-
/explore/cambria/	1,033	413.9% ↑	2.93%	424.4% ↑
/events-and-festivals/	999	-63.5% ↓	2.83%	-62.8% ↓
/events-and-festivals/events-calendar/	969	-19.5% ↓	2.75%	-17.9% ↓
/listing/cypress-rv-&-mh-park/2197/	853	6,461.5% ↑	2.42%	6,601.7% ↑
/things-to-do/	748	12.5% ↑	2.12%	14.8% ↑
/explore/paso-robles/	555	25.3% ↑	1.57%	27.8% ↑
/blog/post/dog-friendly-beaches-abound-in-slo-county/	544	127.6% ↑	1.54%	132.3% ↑

Analysis:

Organic traffic is still following the seasonal trends of last year with YoY numbers very near to last year. The Iconic Eats blog continues to perform well, bringing in almost 4% of organic users to your site.

As users continue to shift toward more normal search patterns, continue to focus on seasonal and outdoor activities. For winter, focus content about outdoor activities with stops after various places to eat to warm up along the way.

Partner Referrals - Organic Traffic

Oct 1, 2020 - Oct 31, 2020



Partner Referrals are Defined as the sum of clicks on Visit Website, Book, and Phone links on Listing Detail page

Partner	Event	Total Referrals ▾
Cypress RV & MH Park	RV Parks & Campgrounds	532
Biddle Ranch Vineyard House & Tasting Room	Wineries & Tasting Rooms	110
See Canyon Fruit Ranch	Things To Do	97
Tolosa	Wineries & Tasting Rooms	90
Wolff Vineyards Edna Valley	Wineries & Tasting Rooms	77
Sunbuggy Fun Rentals	ATVs & Off-roading	69
SLO.TOURS	Tours	67
Pismo Preserve	Parks, Preserves & Natural Areas	62
Avila Lighthouse Suites	Hotels & Motels	60
Bob Jones Trail	Hiking & Trails	58
Hartley Farms	Food & Farm Tours	57
Charles Paddock Zoo	Aquariums and Zoos	57
Elephant Seal Vista Point	Animals & Wildlife	54
Pismo Coast Village RV Resort	RV Parks & Campgrounds	52
Morro Dunes RV Park	RV Parks & Campgrounds	52
Morro Strand RV Park	RV Parks & Campgrounds	50
Oceano Dunes State Park	ATVs & Off-roading	49
Bay Pines RV & Travel Trailer Park	RV Parks & Campgrounds	46
Moonstone Beach	Things To Do	45
Cava Robles RV Resort	RV Parks & Campgrounds	44