



AGENDA

Visit SLO CAL Executive Committee

Visit SLO CAL Executive Committee Agenda

Thursday, May 13, 2021

3:00pm-5:00pm

The Kinney SLO, 1800 Monterey St, San Luis Obispo, CA 93401

Video Conference Option - URL: <https://us02web.zoom.us/j/87521727683>

Meeting ID: 875 2172 7683

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

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

ANNOUNCEMENTS	C. Davison
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CONSENT AGENDA – motion required	C. Davison
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3. Approval of April 15, 2021 Executive Committee Meeting Minutes

4. Approval of March 2021 Visit SLO CAL Financials

Staff will request Committee approval of the April 15, 2021 Executive Committee Meeting Minutes and the March 2021 Visit SLO CAL Financials.

CEO REPORT	C. Davison
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5. CEO Report (20 min)

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

BUSINESS ITEMS	C. Davison
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6. COVID-19 Impact & Response (10 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.

7. Chief Marketing Officer Update (15 min) – motion required

Staff will discuss an adjustment to the compensation structure for the Chief Marketing Officer role, and request Committee approval.

8. Equity, Diversity & Inclusion Tracking (15 min)

Staff will report on Equity, Diversity & Inclusion efforts and tracking to-date.

9. Board Member Selection Process (20 min) – motion required

Staff will provide an update on the Board Member selection process and will request that the Committee recommend a slate of candidates for the Board's approval.

10. Executive Committee Seats (15 min) – motion required

The Committee will discuss the FY2020/21 Executive Committee seats and staff will request a recommendation for Board approval.

- 11. Travel Trade & Marketing Update (25 min)**
Staff will provide an update on Mering’s progress on their scope of work.

ANNOUNCEMENT OF CLOSED SESSION ITEM(S)	C. Davison
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- 12. Employee Dismissal (10 min)**

CLOSED SESSION REPORT	C. Davison
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ADJOURN.

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

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



MINUTES

Visit SLO CAL Executive Committee

Visit SLO CAL Executive Committee Meeting Minutes

Thursday, April 15, 2021

3:00pm

<https://us02web.zoom.us/j/82350395905>

Meeting ID: 823 5039 5905

1. CALL TO ORDER: Clint Pearce

PRESENT: Mark Eads, Aaron Graves, Hemant Patel, Clint Pearce, Amar Sohi

ABSENT: None

STAFF PRESENT: Chuck Davison, Brendan Pringle

Call to Order at 3:04pm.

2. PUBLIC COMMENT (On Non-Agenda Items)

None.

ANNOUNCEMENTS

None.

CONSENT AGENDA

3. Approval of March 11, 2021 Executive Committee Meeting Minutes

4. Approval of Submission of Cal Poly Letters of Support

Davison noted that the March financials were still being finalized and would be shared at the May Executive Committee Meeting. Cal Poly State University requested three letters of support from Visit SLO CAL to help bolster their application submissions for Community Funding Project Requests tied to their work with the California Cybersecurity Institute/Technology Park, Center for Coastal Marine Sciences, and Center for Innovation & Entrepreneurship. A brief on the letters were included in the agenda packet. The requests go directly to Rep. Salud Carbajal (D-24) and are due April 16, 2021.

Public Comment – None.

Committee Discussion.

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

Motion carried: 4:0
Sohi arrived after the vote.

CEO REPORT

5. CEO Report

Davison provided an update on Visit SLO CAL's advocacy efforts for the Oceano Dunes SVRA. At the March 18, 2021 California Coastal Commission (CCC) hearing, Visit SLO CAL spoke during public comment to express the same sentiments that the organization provided in its letter. The CCC ultimately adopted the staff report, a three-year OHV phase out, limited camping, and closure of the Pier Avenue entrance. Visit SLO CAL, in partnership with South County Chambers of Commerce, is moving forward with an Economic Impact Assessment. At this time, Visit SLO CAL has support from the City of Grover Beach, and is in conversations with Arroyo Grande and Pismo Beach. On April 20, 2021, the Board of Supervisors will vote to partner on the report through their Consent Agenda. Pending litigation is expected around the Coastal Commission decision to adopt the staff report. On April 8, 2021 Caltrans announced it will reopen Highway 1 (closed due to the Rat Creek Slide since January 28, 2021) by April 30, 2021, two months ahead of the original target date of July 1, 2021. Davison highlighted Visit SLO CAL's success in advocating for lodging employees-only vaccines from the County. The County agreed to offer 1200 vaccine slots the weeks of April 12 and April 19. After limited sign-ups, appointment offerings were extended to wineries, breweries, distilleries and attractions, and Visit SLO CAL has been conducting outreach to lodging investors and hospitality partners to get the word out about this opportunity. Davison outlined the State's updated guidelines for events, meetings and gatherings (beginning April 15, 2021), and provided an update on the status of SB 285 (McGuire), the California Tourism Recovery Act. He noted that staff has reached out to Assembly Member Jordan Cunningham to encourage the Senate Appropriations Committee to advance the bill to the floor for a vote. He also noted that Visit SLO CAL received Paycheck Protection Program (PPP) funding in its account and is tracking usage of the funds, and that it applied for the targeted Economic Injury Disaster Loan (EIDL) advance of \$10k on March 23, 2021, and is awaiting next steps. Davison reviewed the Cash Flow Projection for April to December 2021. Visit SLO CAL has heard from several lodging investors that the most critical issue facing their businesses right now is an employee shortage and an inability to recruit front-line employees, and that at this time, applications are not even coming through. Davison noted that this could pose a major challenge during the summer, when guests are paying peak rates, but not receiving that level of service. Staff is working on a landing page for industry jobs, and has discussed promoting this page through paid geo-fenced social media targeting. Davison requested feedback from the Committee on putting dollars behind this initiative. Davison provided an update on upcoming meetings, noting that Visit SLO CAL would like to hold the May Board of Directors meeting in person (with videoconference access), and confirmed the date of the June Board of Directors meeting as June 16 (third Wednesday of June). He also requested Committee feedback on eliminating the July meeting so that there is not three monthly Board meetings in a row, as the new fiscal year's Business & Marketing Plan will just be kicking off. Davison noted that, in the past, Visit SLO CAL has held its annual Bash (recognizing the Board and Marketing Committee) in January, but that it was postponed due to COVID-19. He requested feedback on holding the event during National Travel & Tourism Week (week of May 3, 2021).

Public Comment – None.

Committee Discussion. The Committee recommended against investing dollars in-market to drive traffic to a local Jobs page, arguing that this would only create competition for the same workers among local properties. The Committee agreed with holding the May Executive Committee Meeting in person, and canceling the July Executive Committee Meeting. They also agreed with holding the Bash during National Travel & Tourism Week.

BUSINESS ITEMS

6. FY 2021/22 Budget Discussion

Using primarily CY 2019 numbers as a basis, and factoring in countywide ADR and demand YOY increases from 2018 to 2019, Visit SLO CAL is estimating TMD revenue for FY2021/22 at \$7.0M, not including previous year revenue carried over from May and June and carryover funds from FY2020/21. Davison outlined FY2021/22 Draft Objectives and Key Results (OKRs), aligned with the organization's Strategic Direction 2023 Imperatives, and noted that each department's and team member's OKRs are ladder up to these overarching organizational OKRs. Davison requested Committee feedback on the FY2021/22 items of focus for each department.

Public Comment – None.

Committee Discussion.

7. Executive Committee & Board Member Selection Process

Davison outlined the current (FY2020/21) Executive Committee structure and requested Committee feedback on FY2021/22 appointments, as well as the number of Executive Committee seats. He also discussed the Board of Directors seats up for renewal on June 30, 2021, noting he will be reaching out to the Board members (and later their respective municipalities) on the appointed seats up for renewal. He will also be reaching out to the two Board members whose elected seats were up for renewal (one B&B seat and one at-large seat). Davison noted that staff will launch the overall elected seat application process in the coming week. He reminded the Committee that two seats were originally left vacant last year to allow a larger pool of qualified candidates to apply at a time when they were not simply trying to survive the impact of COVID-19, and noted that the Committee can determine whether to fill the two additional seats (for a total of 4 elected seats this fiscal year) during this election or hold them until later in the fiscal year once applications are received.

Public Comment – None

Committee Discussion.

8. Travel Trade & Marketing Update

Due to lack of time, Davison noted that the update slides from this item would instead be sent via email to the Committee following the meeting.

Public Comment – None

Committee Discussion.

ANNOUNCEMENT OF CLOSED SESSION ITEM

9. Employee Dismissal

CLOSED SESSION REPORT

No action was taken by the Committee during Closed Session.

Davison noted upcoming agenda items.

ADJOURNMENT

Adjourned at 4:05pm.

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

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	\$ 595	\$ 700	\$ (105)	-15.05%	0.15%	\$ 8,220	\$ 8,300	\$ (81)	-0.97%	0.18%
Co-op Revenue	\$ -	\$ -	\$ -	0.00%	0.00%	\$ -	\$ -	\$ -	0.00%	0.00%
Interest Income	\$ (204)	\$ 500	\$ (704)	-140.74%	-0.05%	\$ 2,505	\$ 3,620	\$ (1,115)	-30.80%	0.06%
TMD Income										
Collected from Prior Year Assessments	\$ -	\$ -	\$ -	0.00%	0.00%	\$ 111,509	\$ 111,509	\$ -	0.00%	2.47%
Arroyo Grande	\$ 9,020	\$ 9,020	\$ -	0.00%	2.22%	\$ 72,929	\$ 72,929	\$ -	0.00%	1.61%
Atascadero **	\$ 23,348	\$ 23,348	\$ -	0.00%	5.76%	\$ 88,155	\$ 88,155	\$ -	0.00%	1.95%
Grover Beach	\$ 2,761	\$ 2,761	\$ -	0.00%	0.68%	\$ 28,650	\$ 28,650	\$ -	0.00%	0.63%
Morro Bay	\$ 22,524	\$ 22,524	\$ -	0.00%	5.56%	\$ 234,619	\$ 234,619	\$ -	0.00%	5.19%
Paso Robles	\$ 47,017	\$ 47,017	\$ -	0.00%	11.60%	\$ 350,972	\$ 350,972	\$ -	0.00%	7.76%
Pismo Beach	\$ 107,943	\$ 107,943	\$ -	0.00%	26.62%	\$ 926,088	\$ 926,088	\$ -	0.00%	20.49%
City of San Luis Obispo	\$ 64,574	\$ 64,574	\$ -	0.00%	15.93%	\$ 500,674	\$ 500,674	\$ -	0.00%	11.08%
Unincorporated SLO County	\$ 65,508	\$ 65,508	\$ -	0.00%	16.16%	\$ 886,334	\$ 886,334	\$ -	0.00%	19.61%
Adjustment for Actual TMD Collected	\$ 62,380	\$ -	\$ 62,380	100.00%	15.38%	\$ 1,309,628	\$ 1,159,597	\$ 150,031	12.94%	28.97%
Total TMD Income	\$ 405,076	\$ 342,696	\$ 62,380	18.20%	99.90%	\$ 4,509,558	\$ 4,359,528	\$ 150,031	3.44%	1112.19%
Total Income	\$ 405,467	\$ 343,896	\$ 61,571	17.90%	100.00%	\$ 4,520,283	\$ 4,371,448	\$ 148,835	3.40%	100.00%
** District pays quarterly										
Expenses										
Contingency Reserve	\$ 20,284	\$ 17,170	\$ 3,114	18.13%	3.24%	\$ 651,733	\$ 218,391	\$ 433,342	198.42%	18.30%
G&A	\$ 18,001	\$ 26,431	\$ (8,430)	-31.89%	2.87%	\$ 192,769	\$ 202,881	\$ (10,112)	-4.98%	5.41%
Industry Research and Resources	\$ 13,647	\$ 25,047	\$ (11,401)	-45.52%	2.18%	\$ 134,027	\$ 155,674	\$ (21,647)	-13.91%	3.76%
Travel Trade	\$ 30,788	\$ 22,337	\$ 8,451	37.83%	4.92%	\$ 130,666	\$ 122,306	\$ 8,360	6.83%	3.67%
Communications	\$ 11,292	\$ 24,509	\$ (13,217)	-53.93%	1.80%	\$ 135,213	\$ 154,352	\$ (19,138)	-12.40%	3.80%
Advertising	\$ 444,774	\$ 305,826	\$ 138,949	45.43%	71.02%	\$ 1,826,972	\$ 1,907,822	\$ (80,850)	-4.24%	51.29%
Promotions & Events	\$ 6,489	\$ 6,552	\$ (63)	-0.96%	1.04%	\$ 54,869	\$ 54,152	\$ 717	1.32%	1.54%
Digital Marketing	\$ 53,827	\$ 45,107	\$ 8,720	19.33%	8.59%	\$ 278,787	\$ 270,556	\$ 8,231	3.04%	7.83%
Film Commission	\$ 192	\$ 3,194	\$ (3,002)	-93.99%	0.03%	\$ 492	\$ 4,381	\$ (3,889)	-88.77%	0.01%
Engagement & Advocacy	\$ 26,977	\$ 37,259	\$ (10,282)	-27.60%	4.31%	\$ 156,727	\$ 182,608	\$ (25,881)	-14.17%	4.40%
Total Expenses	\$ 626,271	\$ 513,431	\$ 112,840	21.98%	100.00%	\$ 3,562,255	\$ 3,273,123	\$ 289,133	8.83%	100.00%
Surplus(Deficit)	\$ (220,804)	\$ (169,535)	\$ (51,269)	-30.24%		\$ 958,028	\$ 1,098,325	\$ (140,297)	-12.77%	

Cash Flow

Surplus (Deficit)	\$ (220,804)	\$ 958,028
Beginning Cash Balance	\$ 3,506,607	\$ 1,605,945
Change in Accounts Receivable	\$ (22,149)	\$ (223,622)
Change in Accrued Expenses	\$ 183,919	\$ 388,153
Change in Prepaid Expenses	\$ 24,403	\$ 14,731
Change in Accounts Payable	\$ 171,063	\$ 268,355
Change in Reserve Contingency	\$ 20,284	\$ 651,733

Visit SLO CAL Cash Balances

\$ 3,663,322	\$ 3,663,322
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Contingency Reserve - 5% of Cumulative Rev.

\$ (1,619,285)	\$ (1,619,285)
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Liability on Balance Sheet

Net Available Cash

\$ 2,044,036	\$ 2,044,036
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Notes:

- \$221k deficit for March (\$51k larger deficit than budgeted). \$958k surplus year-to-date (\$140k smaller surplus than budgeted).
- \$151k in Paycheck Protection Plan Proceeds was received in March. It was recorded as a liability on the Balance Sheet until the loan is forgiven, at which time it will be recognized as Income.
- All TMD amounts accrued through January have been collected, with the exception of Morro Bay.
- March Interest Income is negative due to market fluctuations in Morgan Stanley investment accounts.

Visit SLO CAL

Balance Sheet Prev Year Comparison

As of March 31, 2021

	Mar 31, 21	Mar 31, 20	\$ Change	% Change
ASSETS				
Current Assets				
Checking/Savings				
1010 · Bank of the Sierra - TMD	1,702,854.37	631,455.41	1,071,398.96	169.7%
1020 · Bank of the Sierra - Membership	294,425.83	261,642.21	32,783.62	12.5%
1030 · Morgan Stanley - TMD	1,558,656.08	851,061.19	707,594.89	83.1%
1040 · Morgan Stanley - Membership	107,385.31	106,504.34	880.97	0.8%
Total Checking/Savings	3,663,321.59	1,850,663.15	1,812,658.44	98.0%
Accounts Receivable				
1200 · Accounts Receivable	669,994.22	644,411.48	25,582.74	4.0%
Total Accounts Receivable	669,994.22	644,411.48	25,582.74	4.0%
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	78,626.46	153,617.81	-74,991.35	-48.8%
1330 · Employee Advances	74.85	7.26	67.59	931.0%
Total Other Current Assets	83,815.66	158,739.42	-74,923.76	-47.2%
Total Current Assets	4,417,131.47	2,653,814.05	1,763,317.42	66.4%
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	4,594,153.88	2,830,836.46	1,763,317.42	62.3%
LIABILITIES & EQUITY				
Liabilities				
Current Liabilities				
Accounts Payable				
2000 · Accounts Payable	306,355.07	240,948.37	65,406.70	27.2%
Total Accounts Payable	306,355.07	240,948.37	65,406.70	27.2%
Credit Cards				
2060 · American Express Credit Card	5,970.54	6,878.79	-908.25	-13.2%
Total Credit Cards	5,970.54	6,878.79	-908.25	-13.2%
Other Current Liabilities				
2070 · Accrued Liabilities	236,960.00	88,584.03	148,375.97	167.5%
2010 · Deferred Revenue	0.00	5,120.00	-5,120.00	-100.0%
2100 · Payroll Liabilities				
2160 · Health Insurance Withheld	-1,029.92	-1,657.75	627.83	37.9%
Total 2100 · Payroll Liabilities	-1,029.92	-1,657.75	627.83	37.9%

7:53 PM

04/14/21

Accrual Basis

Visit SLO CAL
Balance Sheet Prev Year Comparison
As of March 31, 2021

	Mar 31, 21	Mar 31, 20	\$ Change	% Change
2200 · Coast National Line of Credit	151,056.00	0.00	151,056.00	100.0%
Total Other Current Liabilities	386,986.08	92,046.28	294,939.80	320.4%
Total Current Liabilities	699,311.69	339,873.44	359,438.25	105.8%
Total Liabilities	699,311.69	339,873.44	359,438.25	105.8%
Equity				
3120 · Reserved Earnings	1,619,285.45	952,837.39	666,448.06	69.9%
3130 · Retained Earnings	1,317,528.76	1,586,777.19	-269,248.43	-17.0%
Net Income	958,027.98	-48,651.56	1,006,679.54	2,069.2%
Total Equity	3,894,842.19	2,490,963.02	1,403,879.17	56.4%
TOTAL LIABILITIES & EQUITY	4,594,153.88	2,830,836.46	1,763,317.42	62.3%



VISIT SLO CAL BOARD APPLICATION FORM

NAME OF APPLICANT: *Alma Ayón*
COMPANY: *Sundance Bed & Breakfast*
ADDRESS: *7735 Sundance Trail, Paso Robles, CA 93446*
PHONE: *(805) 226-2888* EMAIL: *info@SundanceBandB.com*
TOTAL YEARS IN HOSPITALITY INDUSTRY: *5*
BACKGROUND EXPERIENCE: *Owner / Chef / Innkeeper*

Employment History

CURRENT EMPLOYER: *Sundance B&B* YRS OF SERVICE: *5*
TITLE: *Owner*
PAST EMPLOYER: *NBC / Telemundo / Algo Más Entertainment* YRS OF SERVICE: *20+ years.*
POSITION: *TV Producer*

Community/Board Involvement

ORGANIZATION: *The Wellness Kitchen* TITLE: *Cook*
DATES OF INVOLVEMENT: *winter of 2017*
ORGANIZATION: TITLE:
DATES OF INVOLVEMENT:
ORGANIZATION: TITLE:
DATES OF INVOLVEMENT:

Kevan Douglas Beall

2710 Meadow St. San Luis Obispo, CA 93401
kbeall@prgim.com c: (805) 550-6445

Thursday, April 30, 2020

Dear Mr. Brendan Pringle,

My passion for hospitality and continued development within the industry has motivated me to apply for one of the open seats on the Visit SLO CAL Board of Directors. It would be a pleasure to serve our community through supporting the mission of the organization, and living the authentic expression of inspiring travel and unique experiences in San Luis Obispo County.

Since moving to the Central Coast at the end of 2017, I've been fortunate to work for PRG Hospitality Group in representing three distinct hotel properties; Cambria Beach Lodge, White Water, and San Luis Creek Lodge. As the acting General Manager, and now Regional Director, I've been fortunate to fully whiteness the power of our vibrant tourism industry and the meaningful impact we have on guests, employees and the local community as a whole.

Serving on the Visit SLO CAL Board of Directors, and in collaboration with all hospitality partners, would be a privilege. It will be my full duty to act as a valued contributor and deliberator of future-focused initiatives, as a representative and steward of our natural resources, and as a stakeholder representative of our community. As with all personal and professional engagements in my experience, I take great pride in maintaining strong integrity and serving from a place of positive intention. Serving as a representative of the Board would be no different, as these values are in alignment with the organization.

I am truly excited about the opportunity to meet with you and discuss the value, experience and commitment I will bring to your organization. As a self-proclaimed ambassador of the county, I look forward to remaining engaged with Visit SLO CAL regardless of how this year's open seats are appointed and hope to ensure positive strategic collaboration amongst all stakeholders.

Sincerely,



KEVAN BEALL

Central Coast Regional Director



PRG Hospitality Group, LLC
1750 14th St., Suite E, Santa Monica, CA 90404
Email: kbeall@prgim.com | Mobile: 805-550-6445
www.prghospitalitygroup.com



VISIT SLO CAL BOARD APPLICATION FORM

NAME OF APPLICANT: Tom Halen

COMPANY: La Lomita Ranch/Harmony Valley Creamery/Town of Harmony

ADDRESS: 1985 La Lomita Way, San Luis Obispo, CA 93401

PHONE: 805.706.8018- EMAIL: tom@lalomitaranch.com

TOTAL YEARS IN HOSPITALITY INDUSTRY: 20+

BACKGROUND EXPERIENCE:

President/GM/COO for La Lomita Ranch B&B, Event Venue & Winery, Harmony Valley Creamery, Town of Harmony (Harmony Chapel & Gardens)
CowParade SLO - Executive Director

Employment History

CURRENT EMPLOYER: La Lomita Ranch/HVC YRS OF SERVICE: 7

TITLE: President/GM/COO

PAST EMPLOYER: Kruse Investment Co. YRS OF SERVICE: 4

POSITION: Executive VP

Community/Board Involvement

ORGANIZATION: Cal Poly SLO TITLE: Advisory Council Member / EIM

DATES OF INVOLVEMENT: 09/2015 - Present

ORGANIZATION: Edna Valley/AG TBID TITLE: Board Member

DATES OF INVOLVEMENT: 07/2019 - Present

ORGANIZATION: TITLE:

DATES OF INVOLVEMENT:

For more information, contact Visit SLO CAL at 805-541-8000.

Tom Halen

La Lomita Ranch, Harmony Valley Creamery, Harmony Town, LLC
1985 La Lomita Way
San Luis Obispo, CA 93401
tom@lalomitaranch.com / tom@harmony.town

Dear Visit SLO CAL and Board Members,

This letter is to express my interest in applying for the upcoming B&B board seat and/or one of the at large seats of Visit SLO CAL. Below is my biography outlining my current position and prior tenures.

I am currently the President, COO and General Manager for La Lomita Ranch, Harmony Valley Creamery and Harmony Town, LLC. La Lomita Ranch is an eight-room bed and breakfast, event venue and winery in Edna Valley. Harmony Valley Creamery an artisan small batch ice cream company which scoops retail in the town of Harmony and at local weddings and events, as well as wholesale to local independent grocery store and Ralph's Markets in Southern California, and a newly opened food trailer in the town of Harmony service melts and raclette. I also oversee the town of Harmony and its wedding venue Harmony Chapel and Gardens and vacation rental property. Additionally, I currently serve as an Advisory Council Member for Cal Polys Experience Industry Management Department and am a Board Member of the Edna Valley/Arroyo Grande Local Fund Area/SLO Wine Lodging Alliance Board.

I have spent the last 25+ years in hotel/restaurant, and financial services management. During my prior tenures, I have worked as a regional food purchaser for six Southern California Hilton hotel properties (Los Angeles Downtown, Beverly Hills, Anaheim, LAX, Pasadena, and Whittier), and was the Director of Hospitality Sales for American Fish & Seafood Company. I attended the Los Angeles International Culinary Institute before transferring to the California Culinary Academy in San Francisco and cooked at Chez Mélange in Redondo Beach, CA, served as pastry chef for Hotel Sofitel in Redwood Shores, CA, Buffalo Grill in San Mateo, CA and was a Managing Partner and Executive Chef for the Restaurant Management Group in San Mateo, CA before joining Aurum Capital Management and Golden Gate Financial Group (a \$800 million financial services company in San Francisco, CA) as the General Manager and Principal. Most recently I served as Director and Executive Vice President of Kruse Investment Company a single-family investment office in San Luis Obispo, CA and was the Executive Director for CowParade SLO a San Luis Obispo County public art exhibit from April 2016 to May 2017 raising over \$250,000 for local non-profit organizations. I hold a Bachelor of Science degree from California Polytechnic University, Pomona in Hospitality Management and Culinary Degree from the California Culinary Academy.

Thank you for your consideration.

Sincerely,



Tom Halen



Visit SLO CAL BOARD APPLICATION FORM

NAME OF APPLICANT:

COMPANY:

ADDRESS:

PHONE:

EMAIL:

TOTAL YEARS IN HOSPITALITY INDUSTRY:

BACKGROUND EXPERIENCE:

Employment History

CURRENT EMPLOYER:

YRS OF SERVICE:

TITLE:

PAST EMPLOYER:

YRS OF SERVICE:

POSITION:

Community/Board Involvement

ORGANIZATION:

TITLE:

DATES OF INVOLVEMENT:

ORGANIZATION:

TITLE:

DATES OF INVOLVEMENT:

ORGANIZATION:

TITLE:

DATES OF INVOLVEMENT:

For more information, contact Visit SLO CAL at 805-541-8000.



Visit SLO CAL BOARD APPLICATION FORM

NAME OF APPLICANT: Amit Patel

COMPANY: NEW HORIZON ASSOCIATES Inc.

ADDRESS: 1095 Main St, Morro Bay, CA 93442

PHONE: 805-748-8217

EMAIL: hotelsoncoast@gmail.com

TOTAL YEARS IN HOSPITALITY INDUSTRY: 12+

BACKGROUND EXPERIENCE:

12+ Years as Hotel Owner and Operator

Employment History

CURRENT EMPLOYER: NEW HORIZON ASSOCIATES YRS OF SERVICE: 12 Years

TITLE: OWNER

PAST EMPLOYER:

YRS OF SERVICE:

POSITION:

Community/Board Involvement

ORGANIZATION: AAHOA

TITLE: AMBASSADOR

DATES OF INVOLVEMENT: April 2015- April 2019

ORGANIZATION: Community Promotion Committee TITLE: Board Member

DATES OF INVOLVEMENT: 2013-2014

ORGANIZATION: Morro Bay TBID

TITLE: Board Member

DATES OF INVOLVEMENT: 2015-2016

For more information, contact Visit SLO CAL at 805-541-8000.