

### Visit SLO CAL Executive Committee

### **Visit SLO CAL Executive Committee Agenda**

Thursday, September 9, 2021 3:00pm-5:00pm

The Kinney SLO, 1800 Monterey St, San Luis Obispo, CA 93401 **Video Conference Link:** https://us02web.zoom.us/j/87075417886 Meeting ID: 870 7541 7886

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

ANNOUNCEMENTS C. Davison

**CONSENT AGENDA** – motion required

C. Davison

- 3. Approval of August 19, 2021 Executive Committee Meeting Minutes
- 4. Approval of July Visit SLO CAL Financials
- 5. Approval of FY 2021 Annual Report

Staff will request Committee approval of the August 19, 2021 Executive Committee Meeting Minutes, the July Visit SLO CAL Financials and the FY 2021 Annual Report.

CEO REPORT C. Davison

**6. 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

7. Staffing Update (20 min) – motion required

Staff will provide an update on current open and recently filled positions, and request Committee approval of adjustments to a previously-approved role.

8. Amendment to Visit SLO CAL's 401k Plan (10 min) – motion required

Staff will seek Committee approval to amend Visit SLO CAL's 401k Plan enrollment eligibility period from the current one-year period to a 90-day period, creating stronger staff engagement in the plan, encouraging saving, and adding to the organization's recruitment tools, and request a recommendation for Board approval.

9. Public Policy Platform Review (10 min) – motion required

Staff will provide an update on activation of Visit SLO CAL's Public Policy Platform over the past 12 months, and request a recommendation for Board approval that the Public Policy Platform remain as is, without any additional changes.

10. Events & Festivals Strategy Phase I Consultant Approval (20 min) - motion required

The Committee will review staff's recommendation to divide the current SOW into two phases and a request to approve a consultant to facilitate the countywide Events & Festivals Strategy Working Group, and consider a recommendation for Board approval.

### 11. Customer Service Training Initiative Consultant Approval (20 min) – motion required

The Committee will review staff's recommendation of a consultant to develop a countywide Customer Service Training Initiative and consider a recommendation for Board approval.

### 12. Land of Campaign Update (15 min)

Staff will provide an update on the upcoming "Land of" brand campaign, including the hero brand spots and the logo lock-up component of the House of Brands strategy.

### ANNOUNCEMENT OF CLOSED SESSION ITEM(S)

C. Davison

### 13. Employee Dismissal (10 min)

**CLOSED SESSION REPORT** 

C. Davison

### 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, August 19, 2021 3:00pm

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

1. CALL TO ORDER: Hemant Patel

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

**ABSENT:** Aaron Graves

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 June 10, 2021 Executive Committee Meeting Minutes
- 4. Approval of June/Year-End Visit SLO CAL Financials

Davison noted that the June/Year-End Financials are draft stamped because they're still being audited.

Public Comment - None.

Committee Discussion.

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

Motion carried: 4:0

### **CEO REPORT**

### 5. CEO Report

Davison recognized the passing of Morro Bay Councilmember Red Davis in July. He noted that Councilmember Davis was one of Visit SLO CAL's strongest advocates and longest-running city liaisons on the Visit SLO CAL Advisory Committee. Davison attended the celebration of life on behalf of Visit SLO CAL. He also noted that Visit SLO CAL Board Member Kathy

Bonelli provided her official resignation letter on June 23, 2021, after serving six years. Her resignation will be effective following the September 29, 2021 Board Meeting. Davison recognized Kathy's time and service, and noted that Visit SLO CAL will be honoring her with a plaque at the September meeting. Designated vacation rental candidate applications will be reviewed as an agenda item in this meeting. Davison provided a follow up on Visit SLO CAL's advocacy efforts for increased state per diem rates following the discussion at the semi-annual owners meeting with Assemblymember Cunningham on June 9, 2021. Rates are part of the contract negotiation process between each state union bargaining unit and CalHR. Cunningham's office noted they do not get involved in union contract negotiations and suggested that we reach out to the County of SLO for contacts and details. Once we receive these contacts, we will work with CalTravel to lobby through the proper channels during the union contract negotiations cycle. Davison provided an update on the FY 2021 Audit process, which began on June 25, 2021. He noted that Glenn Burdette, Visit SLO CAL's auditor, is still reviewing documentation and financial narratives, and the audit report and tax return are expected to be delivered to staff the week of August 30, 2021. The Audit is due to the County no later than December 31, 2021. The FY 2021 Annual Report is in production, and is due to the County on October 31, 2021. The Executive Committee will review both the Audit and the Annual Report, and consider recommendations on September 9, 2021 for Board approval at the September 29, 2021 Board of Directors meeting. Davison provided an update on Experience SLO CAL 2050 initiatives. On the Customer Service Training initiative, a prospective agency has been identified, and final vetting and proposal review is set to be completed in early September. Staff will then identify investors and partners with customer service expertise for the Customer Service Training Work Group, which will help inform and drive the content development for the training program. Staff will prepare an agency recommendation for September's Executive Committee and Board Meetings. On the Events & Festivals Strategy (E&FS), after pushback from two communities on the MOU process, VSC will be pivoting to a two-phased approach. In Phase I, a third-party facilitator would lead a working group facilitation with an end goal of universal understanding on the importance, need and desire for a countywide E&FS, and why it is critical to SLO CAL's success as a destination. Davison noted that since initial buy-in and MOU sign off is a board directive, board members will need to advocate in their communities to garner buy-in and support from all local DMOs and cities. Phase II, the Scope of Work Development, would be defined from the Phase I facilitation results. He clarified that the cost of the E&FS is not changing; only the structure and steps are changing. He outlined next steps, and noted that the Executive Committee will review staff's recommendation of an agency for the E&FS facilitation at their September 9, 2021 meeting, and consider a recommendation for Board approval at their September 29, 2021 meeting. As part of Visit SLO CAL's contract and sponsorship agreement with the South County Chambers of Commerce, and the FY 2022 approved budget, Visit SLO CAL will require and fund a Mystery Shopper program to assess customer service and destination awareness of staff at the California Welcome Center through monthly phone and in-person shops. An agency has been selected and their contract is under review. Davison reviewed next steps, and noted that the program is set to begin October 1, 2021. He provided an update on the ESTO Conference, which he attended with Visit SLO CAL Director of Marketing Vanessa Rodriguez in Los Angeles on August 15-17, 2021. Davison outlined the State of California's new requirements on mega events, noting that effective September 20, 2021 and through November 1, 2021, vaccine verification or a negative testing requirement will be required in indoor mega events involving more than 1000 participants and self-attestation is no longer an acceptable form of verification. He provided statistics, at a national level, about travel spending and readiness to travel, noting that the COVID-19 delta variant is causing a number of changes and cancellations on travel. He reviewed the cash flow projection through December 2021, reviewed the STR for the month of July 2021, and shared key CEO meetings of significance.

Public Comment - None.

Committee Discussion.

### **BUSINESS ITEMS**

### 6. Board Member Selection

On June 23, 2021, Kathy Bonelli provided her letter of resignation from the Visit SLO CAL Board effective September 29, 2021, opening the vacation rental seat for applications. The application process opened on July 19, 2021, and closed on August 12, 2021. Three candidates applied, but one applicant did not actually contribute to the TMD assessment and was deemed ineligible. Davison reviewed the applications from Bryan Bonelli of Paso Robles Vacation Rentals, and Karen Tallent of The Groves on 41, noting their involvement with Visit SLO CAL and the industry, and outlining the regions they would represent. He added that both are engaged partners. Davison requested a recommendation from the Committee.

Public Comment - None.

Committee Discussion.

**ACTION:** Moved by <u>Pearce/Eads</u> to recommend that the Board elect Bryan Bonelli to the designated vacation rental seat on the Visit SLO CAL Board.

Motion carried: 4:0

### 7. Staffing Update

Davison provided an update on recently filled positions. Vanessa Rodriguez, formerly Digital Marketing Manager, was promoted to Director of Marketing, and Eric Parker, formerly Digital & Marketing Specialist, was promoted to PR & Communications Manager. Additionally, Catherine Cropp will begin as Visit SLO CAL's new Brand Marketing Coordinator on August 23, 2021, Riley Grim will begin as Brand Marketing Manager (formerly Digital Marketing Manager) on September 7, 2021, and Camille Silvera will begin as Content Marketing Specialist (formerly Digital & Marketing Specialist) on September 7, 2021. He provided an update on open positions, noting that staff has been sourcing candidates and conducting interviews for the Finance & HR Manager and Marketing Coordinator roles, and that he is in the final stages of the interview process for the Executive Assistant to the President & CEO role. Davison noted that at the last Board meeting, he shared his frustration with the delay and lack of activation of Experience SLO CAL 2050 (ESC 2050) recommendations and FY 2021 budgeted funds. He noted that this delay has been compounded by a six month reduction of staffing due to the Director of Community Engagement & Advocacy's leave of absence (she is scheduled to return November 9, 2021). As requested by the Board at the June meeting, he outlined a staffing plan to achieve the FY 2022 Business & Marketing Plan initiatives approved in the FY 2022 budget. The proposed plan includes hiring a Vice President of Community Engagement & Advocacy. This higher level role would assist in advancing ESC 2050 at a faster pace, in-line with Board-approved OKRs, and advance VSC's advocacy efforts, including the Oceano Dunes Economic Impact Study which has been stalled since Board approval in January. He noted that pursuing an additional staff member now will assure efforts do not fall further behind, and that this role would be similar to the original role Visit SLO CAL established, previously in this department. He noted that the estimated salary has not been accounted for in the FY 2022 approved budget.

Public Comment – None

Committee Discussion. The Committee agreed with the direction of the proposed plan, noting that hiring a higher level position would add additional structure and strategy to the work and would help Visit SLO CAL avoid losing time on these key priorities.

**ACTION:** Moved by **Sohi/Pearce** to approve the FY 2022 addition of a non-budgeted Vice President role to support the advancement of ESC 2050 and advocacy initiatives.

Motion carried: 4:0

### 8. Air Service & Airport Update

Davison noted that the SLO County Regional Airport's \$13.5M runway rehabilitation project is underway and scheduled to be completed October 8, 2021. He described the upgrade, and noted that the project has limited the operating hours of the airport, which has temporarily reduced the number of flights they can support. Significant increases in air service are expected after October 8. As part of Visit SLO CAL's air service reactivation strategy, Davison attended the Volaire Air Service Conference on August 11-13, 2021 in St. Augustine, FL, where he met with flight planners from United, Frontier, Flair (Canada), Sun Country, SkyWest and Contour. He provided an update on current and upcoming air service. Davison noted that in the effort to reduce duplication of efforts, Visit SLO CAL has been working with the San Luis Obispo County Regional Airport on a partnership to centralize marketing efforts and messaging for both outbound and inbound flight marketing. SBP would leverage the buying power and marketing expertise of Visit SLO CAL, who would partner with Mering to develop a media plan, manage all ad placement, and implement all campaigns and messaging, to achieve greater

efficiency, synergy and impact with air service marketing efforts. Costs would be reimbursed via a pass-through with no additional cost or revenue to Visit SLO CAL. He noted that the agreement is scheduled to be heard by the Board of Supervisors at their August 24, 2021 meeting, and that staff is seeking approval of the partnership agreement in concept from the Executive Committee.

Public Comment - None

Committee Discussion.

**ACTION:** Moved by <u>Pearce/Eads</u> to approve a marketing partnership agreement in concept between Visit SLO CAL and the San Luis Obispo County Regional Airport.

Motion carried: 4:0

### 9. Travel Trade & Marketing Update

Davison provided an update on upcoming travel trade programs. He also provided an update on the Future Visitor Profile and EDI Audience & Asset Alignment Studies, noting that the final reports and SMARInsights presentations will be delivered in August and presented to the Board at the September meeting. He outlined the destination partners participating in the co-op for each study, and noted that on the EDI Study, video interviews that are currently being conducted are probing factors like notions of safety and how news stories influence destination decisions. He added that the study's focus groups include Black/African American, Hispanic/Latinx, Asian and LGBTQ+ participants. Davison reported out on Visit SLO CAL's six-day House of Brands asset shoot (August 3-8, 2021). Footage was taken throughout the county, and rough cuts of new assets are due at the end of August, with the assets informing new creatifve that begins running September 20, 2021. He outlined the destination partners participating in the asset shoot co-op, and shared some snapshots of the film crew on location. Davison reported out on Visit SLO CAL's brand refresh, noting small updates to the logo and fonts, the addition of a locator phrase (The Center of California's Central Coast), and updates to the color palette to capture the natural essence of SLO CAL.

Public Comment - None

Committee Discussion.

### ANNOUNCEMENT OF CLOSED SESSION ITEM

### 10. Employee Dismissal

### **CLOSED SESSION REPORT**

No action was taken by the Committee during Closed Session.

Davison noted upcoming agenda items. He noted that based on the agenda, Visit SLO CAL will ask to extend the September Board meeting to two-and-a-half hours.

### **ADJOURNMENT**

Adjourned at 4:49pm.

### San Luis Obispo County Visitors & Conference Bureau 2021-2022 Financial Summary - July

Web & Ticket Revenue	170 252 (133)	Budgeted for Month \$ 800 \$ 252	МТ	ΓD Variance	% Variance	Total Income/ Expenses	FIS	SCAL YTD	Budget YTD	VT	D Variance	% Variance	Income/
Web & Ticket Revenue         \$           Co-op Revenue         \$           Interest Income         \$           TMD Income           Collected from Prior Year Assessments         \$           Arroyo Grande         \$	252		2 (								D variance		Expenses
Interest Income \$ TMD Income Collected from Prior Year Assessments \$ Arroyo Grande \$		\$ 252		(630)	-78.80%	0.02%	\$	170	\$ 800	\$	(630)	-78.80%	0.02%
TMD Income  Collected from Prior Year Assessments \$ Arroyo Grande \$	(133)		2 \$	()	0.00%	0.03%	\$	252	\$ 252		-	0.00%	0.03%
Collected from Prior Year Assessments \$ Arroyo Grande \$				(2,826)	-104.95%	-0.02%	\$	(133)			(2,826)	-104.95%	-0.02%
Arroyo Grande \$						1							
	-	\$ 108,641	\$	(108,641)	-100.00%	0.00%	\$	-	\$ 108,641	\$	(108,641)	-100.00%	0.00%
	23,052	\$ 23,052	\$	-	0.00%	2.77%	\$	23,052	\$ 23,052	\$	-	0.00%	2.77%
Atascadero ** \$	-	\$	- \$	-	0.00%	0.00%	\$	-	\$ -	\$	-	0.00%	0.00%
Grover Beach \$	8,110	\$ 8,110	\$	-	0.00%	0.97%	\$	8,110	\$ 8,110	\$	-	0.00%	0.97%
Morro Bay \$		\$ 77,139	\$	-	0.00%	9.25%	\$	77,139	\$ 77,139	\$	-	0.00%	9.25%
Paso Robles \$		\$ 116,612		-	0.00%	13.99%	\$		\$ 116,612		-	0.00%	13.99%
Pismo Beach \$	218,442	\$ 218,442		-	0.00%	26.20%	\$	218,442	\$ 218,442		-	0.00%	26.20%
City of San Luis Obispo \$	132,777	\$ 132,777		-	0.00%	15.93%	\$		\$ 132,777		-	0.00%	15.93%
Unincorporated SLO County \$	257,276	\$ 257,276	\$	-	0.00%	30.86%	\$	257,276	\$ 257,276	\$	-	0.00%	30.86%
Adjustment for Actual TMD Collected \$	-	\$	- \$	-	0.00%	0.00%	\$	-	\$ -	\$	-	0.00%	0.00%
Total TMD Income \$	833,409	\$ 942,050	\$	(108,641)	-11.53%	99.97%	\$	833,409	\$ 942,050	\$	(108,641)	-11.53%	99.97%
Total Income \$	833,698	\$ 945,795	\$	(112,097)	-11.85%	100.00%	\$	833,698	\$ 945,795	\$	(112,097)	-11.85%	100.00%
** District pays quarterly													
Expenses													
Contingency Reserve \$	41,679	\$ 47,142	2 \$	(5,464)	-11.59%	5.16%	\$	41,679	\$ 47,142	\$	(5,464)	-11.59%	5.16%
G&A \$	36,553	\$ 36,253	3 \$	300	0.83%	4.53%	\$	36,553	\$ 36,253	\$	300	0.83%	4.53%
Industry Research and Resources \$	29,592	\$ 26,000		3,592	13.82%	3.67%	\$	29,592	\$ 26,000	\$	3,592	13.82%	3.67%
Travel Trade \$	25,554	\$ 32,978	\$	(7,424)	-22.51%	3.17%	\$	25,554	\$ 32,978	\$	(7,424)	-22.51%	3.17%
Communications \$	9,739	\$ 17,002	2 \$	(7,264)	-42.72%	1.21%	\$	9,739	\$ 17,002	\$	(7,264)	-42.72%	1.21%
Advertising \$	587,993	\$ 627,489	\$	(39,495)	-6.29%	72.85%	\$	587,993	\$ 627,489	\$	(39,495)	-6.29%	72.85%
Promotions & Events \$	6,678	\$ 8,972	2 \$	(2,294)	-25.56%	0.83%	\$	6,678	\$ 8,972	\$	(2,294)	-25.56%	0.83%
Digital Marketing \$	55,386	\$ 55,053	3 \$	333	0.61%	6.86%	\$	55,386	\$ 55,053	\$	333	0.61%	6.86%
Film Commission \$	-	\$ 83	\$	(83)	-100.00%	0.00%	\$	-	\$ 83	\$	(83)	-100.00%	0.00%
Engagement & Advocacy \$	13,938	\$ 15,062	\$	(1,124)	-7.46%	1.73%	\$	13,938	\$ 15,062	\$	(1,124)	-7.46%	1.73%
Total Expenses \$	807,111	\$ 866,033	\$	(58,922)	-6.80%	100.00%	\$	807,111	\$ 866,033	\$	(58,922)	-6.80%	100.00%
Surplus(Deficit) \$	26,587	\$ 79,762	2 \$	(53,175)	-66.67%		\$	26,587	\$ 79,762	\$	(53,175)	-66.67%	
Prior Years' Surplus - FY16 to FY21							\$	2 200 000					
							Þ	3,366,000					
Total Cumulative Surplus							\$	3,392,587					
Cash Flow													
Surplus (Deficit) \$	26,587						\$	26,587					
Beginning Cash Balance \$	3,747,564						\$	3,747,564					
Change in Accounts Receivable \$	(534,913)						\$	(534,913)					
Change in Accrued Expenses \$	(85,244)						\$	(85,244)					
Change in Prepaid Expenses \$	231,928						\$	231,928					
Change in Accounts Payable \$	(67,002)						\$	(67,002)					
Change in Reserve Contingency \$	52,400						\$	52,400	·				
Visit SLO CAL Cash Balances \$	3,371,319						\$	3,371,319					
Contingency Reserve - 5% of Cumulative Rev. \$	(4 700 050)						e	(4 700 050)					
	(1,783,352)						\$	(1,783,352)					
Liability on Balance Sheet													
Net Available Cash \$	1,587,967						\$	1,587,967					

### Notes:

- \$27k surplus for July (\$53k smaller surplus than budgeted).

- At our auditors' request, we have changed the method of booking May and June TMD revenue adjustments. They are budgeted in July, but effective now we will be holding the books open to recognize them in June (the correct fiscal year). \$214,413 in prior assessments were received in July - that amount is now included in the Prior Years' Surplus Line Item.

- -\$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.
- Interest Income for the month of July is negative due to market fluctuations in Morgan Stanley Certificate of Deposit accounts.
- All TMD amounts accrued through May have been collected.

Accrual Basis

# Visit SLO CAL Balance Sheet Prev Year Comparison

As of July 31, 2021

	Jul 31, 21	Jul 31, 20	\$ Change	% Change
ASSETS				
Current Assets				
Checking/Savings 1010 · Bank of the Sierra - TMD	1,635,533.68	335,700.36	1,299,833.32	387.2%
1020 · Bank of the Sierra - Membership	318,649.16	279,066.12	39,583.04	14.2%
1030 · Morgan Stanley - TMD	1,649,222.75	867,880.05	781,342.70	90.0%
1040 · Morgan Stanley - Membership	107,499.42	106,837.68	661.74	0.6%
Total Checking/Savings	3,710,905.01	1,589,484.21	2,121,420.80	133.5%
Accounts Receivable	4 050 745 70	740 550 00	4 404 400 04	450.00/
1200 · Accounts Receivable	1,850,715.73	716,553.39	1,134,162.34	158.3%
Total Accounts Receivable	1,850,715.73	716,553.39	1,134,162.34	158.3%
Other Current Assets	4 360 05	4 260 05	0.00	0.00/
1320 · Prepaid Rent 1340 · Workman's Comp Deposit	4,369.95 744.40	4,369.95 744.40	0.00	0.0% 0.0%
1350 · Prepaid Expenses	391,425.51	118,590.52	272,834.99	230.1%
1330 · Employee Advances	0.00	7.26	-7.26	-100.0%
Total Other Current Assets	396,539.86	123,712.13	272,827.73	220.5%
Total Current Assets	5,958,160.60	2,429,749.73	3,528,410.87	145.2%
Fixed Assets				
1400 · Fixed Assets	48.168.51	40 460 F4	0.00	0.0%
1405 · Computer Hardware/Software 1410 · Furniture & Fixtures	101.040.00	48,168.51 101.040.00	0.00 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	240,462.76	240,462.76	0.00	0.0%
1500 · Accumulated Depreciation				
1505 · Comp. Hdwr/Sftwr. Acc. Depr.	-27,186.17	-27,186.17	0.00	0.0%
1510 · Furn. & Fixt. Accum. Depr.	-20,705.00	-20,705.00	0.00	0.0%
1515 · Leasehold Imp. Accum. Depr. 1525 · Office Equip. Accum. Depr.	-8,931.00 -36,838.00	-8,931.00 -36,838.00	0.00 0.00	0.0% 0.0%
Total 1500 · Accumulated Depreciation	-93,660.17	-93,660.17	0.00	0.0%
Total Fixed Assets	146,802.59	146,802.59	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	6,120,713.19	2,592,302.32	3,528,410.87	136.1%
LIABILITIES & EQUITY				
Liabilities Current Liabilities				
Accounts Payable				
2000 · Accounts Payable	690,941.45	34,160.77	656,780.68	1,922.6%
Total Accounts Payable	690,941.45	34,160.77	656,780.68	1,922.6%
Credit Cards				
2060 · American Express Credit Card	11,537.10	3,883.83	7,653.27	197.1%
Total Credit Cards	11,537.10	3,883.83	7,653.27	197.1%
Other Current Liabilities 2210 · PPP Loan	454.056.00	0.00	154 056 00	400.00/
2070 · Accrued Liabilities	151,056.00 79,388.24	0.00 28,058.00	151,056.00 51,330.24	100.0% 182.9%
2010 · Deferred Revenue	120,274.20	0.00	120,274.20	100.0%

12:51 PM 09/02/21 Accrual Basis

# Visit SLO CAL Balance Sheet Prev Year Comparison

As of July 31, 2021

	Jul 31, 21	Jul 31, 20	\$ Change	% Change
2100 · Payroll Liabilities 2105 · 401K Deferred Savings Liability 2160 · Health Insurance Withheld	0.01 -994.57	0.00 -1,898.57	0.01 904.00	100.0% 47.6%
Total 2100 · Payroll Liabilities	-994.56	-1,898.57	904.01	47.6%
Total Other Current Liabilities	349,723.88	26,159.43	323,564.45	1,236.9%
Total Current Liabilities	1,052,202.43	64,204.03	987,998.40	1,538.8%
Total Liabilities	1,052,202.43	64,204.03	987,998.40	1,538.8%
Equity 3120 · Reserved Earnings 3130 · Retained Earnings Net Income	1,783,351.92 3,258,571.85 26,586.99	988,974.78 1,303,058.94 236,064.57	794,377.14 1,955,512.91 -209,477.58	80.3% 150.1% -88.7%
Total Equity	5,068,510.76	2,528,098.29	2,540,412.47	100.5%
TOTAL LIABILITIES & EQUITY	6,120,713.19	2,592,302.32	3,528,410.87	136.1%



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our local partners and our investors to promote SLO CAL® (San Luis Obispo County, California) to both domestic and international visitors. As the countywide non-profit 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 dynamic marketing and sales program while also enhancing the resident quality of life. Built on research with a strategy of continuous improvement, VSC aims to establish SLO CAL as a favorite West Coast destination known for

its signature slower pace of life and unique mix of incredible, immersive guest experiences.

### LETTER FROM THE PRESIDENT & CEO

### Dear Visit SLO CAL Investors, Partners & Stakeholders,

As we wrap up FY 2021, we'd like to take a moment to reflect on all that has been accomplished.

While this past year has had its own unique challenges, SLO CAL has outperformed its competitive set of Santa Barbara, Monterey, Napa and Sonoma in almost every way. Occupancy, average daily rate (ADR) and revenue per available room (RevPAR) all, on average, recovered better in SLO CAL than in those other markets. We advertised when the timing was right, launching a \$1.8 million campaign that included \$1 million in media placements from February to June.

Along the way, we actively supported the industry, weathering a sudden Highway 1 closure, supporting our investors, partners and stakeholders with directional resources for consumers; successfully advocating for vaccine allocations for hospitality workers; informing and assisting our investors and partners throughout the reopening process; and providing a unified voice to advocate for the needs of our industry. We partnered with Xplorit, an award-winning virtual site inspection company, to create a fully immersive destination experience that will launch in winter 2021 and will feature all of our local destinations. We also welcomed new direct air service from Portland and the relaunch of direct service from San Diego.

Equity, diversity and inclusion (EDI) efforts have remained a key priority for us as we work to build a more inclusive organization and destination and bring the authentic faces and stories of our community to life through our marketing efforts. In June, we initiated a combined EDI Audience and Asset Alignment Study and Future Visitor Profile Study with SMARInsights to inform our future work.

In preparation for FY 2022, we hired the gold standard in California tourism marketing—Mering—as our agency of record and added Cathy Cartier, one of the sharpest minds in destination marketing, as chief marketing officer. Mering will lead the evolution of the SLO CAL brand through a countywide asset production shoot as we work to capture new still images and video. These efforts will pave the way for the launch of our most ambitious advertising and marketing campaign to date, a \$2.6 million feeder market advertising spend, complementing an aggressive sales strategy.

We will also continue to advance key Experience SLO CAL 2050 initiatives, focused on maintaining and improving resident quality of life while increasing the positive impacts of tourism in SLO CAL.

Although we have faced challenges and uncertainties in the face of COVID-19, we are proud of the accomplishments of this past year. Together we are building a more resilient tourism industry and we are excited to partner with you in these efforts!

All the best,

cation ies of June, ament at to Chuck Davison, CDME President & CEO Visit SLO CAL

2

# BOARD, COMMITTEES & TEAM

### BOARD OF DIRECTORS

### **CLINT PEARCE**

Chair | Madonna Enterprises | Atascadero, San Luis Obispo Elected Designated At-Large Seat (-June 2022)

### **HEMANT PATEL**

Vice Chair | 805 Hospitality | Morro Bay, Paso Robles, San Luis Obispo, Unincorporated Area

Appointed Morro Bay Seat (—June 2023)

### MARK EADS

Secretary | SeaVenture Beach Hotel | Pismo Beach Elected Designated At-Large Seat (—June 2022)

### **AARON GRAVES**

Treasurer | EverlyGrove Hotel Brokers | Unincorporated Area Elected Designated At-Large Seat (—June 2023)

### AMAR SOHI

At-Large Member | Holiday Inn Express Hotel & Suites | Atascadero Appointed Atascadero Seat (—June 2023)

### **ALMA AYON**

Sundance Bed & Breakfast | Paso Robles Elected Designated Bed & Breakfast Seat (—June 2024)

### JEDIDIAH BICKEL

SeaCrest OceanFront Hotel | Pismo Beach Appointed Pismo Beach Seat (-June 2024)

### **KATHLEEN BONELLI\***

Paso Robles Vacation Rentals | Paso Robles Elected Designated Vacation Rental Seat (—June 2022)

### **JOHN CONNER**

Petit Soleil | San Luis Obispo Appointed San Luis Obispo Seat (—June 2023)

### JIM HAMILTON

County of San Luis Obispo Appointed County At-Large Seat (—June 2023)

### JAY JAMISON

Pismo Coast Village | Pismo Beach Elected Designated RV Park Seat (—June 2022)

### **TONI LEGRAS**

Beachside Rentals | Unincorporated Area Appointed Unincorporated Area Seat (—June 2022)

### **SAM MILLER**

Holiday Inn Express | Grover Beach Appointed Grover Beach Seat (-June 2024)

New Horizon Associates | Morro Bay | Pismo Beach | San Luis Obispo Elected Designated At-Large Seat (—June 2024)

### **NIPOOL PATEL**

Lamplighter Inn & Suites | San Luis Obispo Elected Designated At-Large Seat (—June 2022)

### **VICTOR POPP**

La Quinta Inn & Suites | Paso Robles Appointed Paso Robles Seat (—June 2024)

### Open Seat | Arroyo Grande

Executive Director | Travel Paso

**KATHLEEN NAUGHTON** 

LINDSEY ROBERTS

**JOHN SORGENFREI** 

**MICHAEL WAMBOLT\*\*** 

Executive Director | Visit Morro Bay

**STACIE JACOB\*\*** 

LORI KELLER

Appointed Arroyo Grande Seat (—June 2021)

President/Principal | Blu Hotel Management (-June 2024)

Executive Director | SLO Coast Wine Collective (-June 2024)

Director of Marketing | Martin Resorts (-June 2024)

President & Owner | TJA Advertising (-June 2022)

Executive Director | Paso Robles Wine Country Alliance (-June 2023)

Founder & President | Breakaway Tours Wine & Events (-June 2022)

\*Resigned September 2021 \*\*Destination Partner

### MARKETING COMMITTEE

### **ASHLEE AKERS**

Partner & VP of Client Services | Verdin (-June 2023)

### JIM ALLEN

Director of Marketing & Communications | Hearst Castle (-June 2022)

### **AUDREY ARELLANO**

Brand Manager | Cambria Inns Collection (-June 2023)

### TERRIE BANISH\*\*

Deputy City Manager—Marketing/Promotions/Events | City of Atascadero

### **JOCELYN BRENNAN\*\***

President & CEO | South County Chambers of Commerce

### **MOLLY CANO\*\***

Tourism Manager | City of San Luis Obispo

### **CHERYL CUMING\*\***

Chief Administrative Officer | Unincorporated CBID

### **GORDON JACKSON\*\***

Executive Director | Pismo Beach CVB



TEAM

CHUCK DAVISON President & CEO



**CATHY CARTIER** Chief Marketing Officer



**BRENDAN PRINGLE Director of Operations** 



VANESSA RODRIGUEZ Director of Marketing



**KYLA BOAST** Associate Director of Sales



**ASHLEY MASTAKO** Partner Engagement Manager



**MELISSA MURRAY** Project Manager, Destination Management



**ERIC PARKER** PR & Communications Manager

### NOT PICTURED

**ANNIE FREW** Director of Community Engagement & Advocacy KATIE LOVELACE **Brand Marketing Coordinator** 

### ADVISORY COMMITTEE

### **WADE HORTON**

County Administrative Officer | County of San Luis Obispo

### LYNN COMPTON

Supervisor, District 4 | County of San Luis Obispo

### WHITNEY MCDONALD

City Manager | City of Arroyo Grande

### LAN GEORGE

Councilmember | City of Arroyo Grande

### RACHELLE RICKARD

Mayor Pro Tem | City of Atascadero

City Manager | City of Grover Beach

### **DANIEL RUSHING**

### City Manager | City of Atascadero

**HEATHER NEWSOM** 

### MATTHEW BRONSON

Councilmember | City of Grover Beach

### **SCOTT COLLINS**

City Manager | City of Morro Bay

### **RED DAVIS** Councilmember | City of Morro Bay

GREG CARPENTER

### Interim City Manager | City of Paso Robles

STEVE MARTIN Mayor | City of Paso Robles

### JIM LEWIS

City Manager | City of Pismo Beach

### **SCOTT NEWTON** Councilmember | City of Pismo Beach

### **DEREK JOHNSON**

City Manager | City of San Luis Obispo

### **HEIDI HARMON\*\***

Mayor | City of San Luis Obispo

\*In memoriam \*\*Resigned August 2021

# STRATEGIC DIRECTION

202

In the spring of 2020, Visit SLO CAL partnered with Coraggio Group to develop Strategic Direction 2023 (SD 2023), the strategic plan and north star by which the organization will operate over the next three years. Following the success of Strategic Direction 2020, SD 2023 was advised by 170 survey responses, a dozen investor interviews, five regional engagement sessions and four half-day work sessions that included additional opportunities for investor, partner and stakeholder feedback.



### VISION

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



### MISSION

Inspire travel and foster our unique experiences to create lifelong ambassadors and economic growth for SLO CAL



### VALUES

### **STEWARDSHIP**

We are mindful of our resources and seek to enhance the SLO CAL lifestyle

### **AUTHENTICITY**

We are attuned to our own well-being and strive to bring the SLO CAL brand to life

### INCLUSION

We engage and collaborate with an array of voices and perspectives

### DRIVE

We bring enthusiasm to our work and prioritize initiatives to achieve results

### **FUTURE FOCUS**

We deliver today with an innovative eye on tomorrow



### REPUTATION

- Visionary
- Creative
- Strategic
- Responsive
- Collaborative
- Essential



### POSITION

To best support SLO CAL's tourism economy, Visit SLO CAL provides:

- Strategic research and vital tourism knowledge to investors, partners, stakeholders and communities
- A long-term, collaborative and holistic road map that enables success for our community
- High-quality and high-impact marketing and sales initiatives tailored to reach regional, national and international target markets
- Leadership in destination management and community engagement to enhance quality of life for residents and quality of experience for visitors



### IMPERATIVES

### **Enhance Our Organizational Capacity and Culture**

### **INITIATIVES**

- Assess and refine interdepartmental communication and processes
- Develop and enable our team
- Foster an engaged and focused team culture

### **OBJECTIVES**

- Increase mean Employee Engagement score to 3.85
- Return ratio of administrative cost to economic impact to 2019 level or higher
- Increase Team Net Promoter score to 11 or higher, and maintain
- Increase Whole Systems mean score on Systems and Processes and Capabilities and Talent sections to 3.25

### Amplify and Steward the SLO CAL Brand Through Unified Efforts

### INITIATIVES

- Execute a "house of brands" strategy that honors the experiences of our individual destinations
- Increase share of voice and intent to travel through targeted media strategies
- Target and nurture marketing partnerships that increase our brand awareness

### **OBJECTIVES**

- Increase SLO CAL brand awareness year over year, as measured by advertising effectiveness and ROI (Return on Investment) study
- Increase length of stay by 0.2 days over 2019, as measured by Arrivalist
- Increase cross-visitation to 2 communities per unique arrival, as measured by Arrivalist
- Achieve mean MPV (Marketing Partnership Value) score of 4

### Lead the County Tourism Industry in a Collaborative Resilience Planning Effort

### INITIATIVES

- Define and activate pathways to accelerate recovery for our tourism industry
- Develop mechanisms to quickly gather, report and leverage crisis-related data
- Foster long-term resilience for our tourism industry

### **OBJECTIVES**

- Restore annual visitor volume with growth 10% or more above statewide growth, per Visit California numbers
- Restore total air service to 80% of 2019 baseline or higher
- Outperform California tourism recovery by 5%, per Dean Runyan Economic Impact Report

### Demonstrate Value to Investors, Partners, Stakeholders and Communities

### INITIATIVES

- Build local awareness of Visit SLO CAL and its positive impacts
- Increase opportunities for engagement with our investors, partners and stakeholders
- Innovate in development of data resources for our tourism community
- Advance advocacy efforts to promote the value of tourism

### **OBJECTIVES**

- Foster balanced year-over-year growth of engagement in Visit SLO CAL opportunities
- Increase investor/partner/stakeholder Net Promoter Score by 5% year-over-year
- Secure at least two local media articles annually that receive a perfect score of 10 using the Barcelona Principles scoring rubric
- Maintain community acceptance of tourism survey score at or above 2018 baseline



# COVID-19 RESPONSE



As the industry navigated the impact of the COVID-19 pandemic, Visit SLO CAL worked closely with their investors, partners and stakeholders, keeping them informed with the latest guidelines and data insights and advocating on their behalf. When the county reopened, VSC boosted their spring media spend to position the industry for success.

### INVESTOR, PARTNER & STAKEHOLDER COMMUNICATION

VSC closely monitored San Luis Obispo County's COVID-19 reporting metrics and state guidelines in order to provide immediate email updates to investors and partners as tier changes were announced by the governor, and continued to offer resources throughout the phased reopening process. VSC hosted regular SLO CAL Tourism Task Force calls with local destination partners and wine association leaders to communicate key updates and to ensure that countywide marketing, communications and advocacy efforts were fully aligned. VSC also developed a jobs board for investors and partners to get the word out in the face of a critical hospitality labor shortage.

### DATA INSIGHTS

VSC worked with Tourism Economics to develop and refine a new monthly report focused specifically on the SLO CAL tourism industry's recovery and how it compares with the destination's competitive set. The COVID-19 Recovery Tracker is accessible to investors, partners and stakeholders through their SLO CAL Connection portal.

### ADVOCACY

VSC continued their regular contact with county leadership regarding the impact of the pandemic on the tourism industry and worked diligently over the course of several months on designated vaccine prioritization and appointments. In January, VSC partnered with CalTravel to advocate for the development of a statewide reopening plan for meetings and conferences, contributing to the sponsorship of a strategic communication consultant. In April, VSC reached an agreement with the County to offer 1,200 lodging-employees-only vaccine time slots, which was later extended to employees of wineries, breweries, distilleries, attractions and other hospitality partners. Staff aggressively advocated for a tourism recovery stimulus at the state level, which was ultimately added to the state budget in the form of a \$95 million stimulus.

### RELAUNCH & RECOVERY

VSC communicated closely with county officials as the organization relaunched paid media efforts, aligning this relaunch with that of Visit California. As part of the FY 2021 budget reforecast, and in an effort to advance tourism recovery, VSC reallocated \$600,000 in surplus funds conserved during the pandemic to increase their total spring media budget, spending over \$1 million on media from February to June. Additionally, VSC applied for and received more than \$151,000 in PPP funding to offset operational expenses, allowing the organization to shift additional revenue toward recovery efforts.

# EFFLORE SLO CAL PLACESTO STAY THINGS TO DO EAT & DRINK EVENTS & TESTIVALS PLAN YOUR TRIP Q SLO CAL COVID—19 UPDATE

Green Names and California Dipartment of Public Reads (CDPF) amounted that face covering will be received in the State of California. CDPF) significant manufacts that face covering will be received in the State of California. CDPF) significant manufacts that face covering will be required to the State of California. CDPF) significant manufacts that face covering will be required to CDPF. State of California. CDPF significant manufacts that face covering will be required to CDPF. State of California. CDPF significant manufacts that sign with the covering will be required to CDPF. State of California. CDPF significant manufacts that sign with the covering will be required to CDPF. State of California. CDPF significant manufacts that sign with the covering will be required to CDPF. State of California. CDPF significant manufacts that sign with the covering will be required to CDPF. State of California. CDPF significant manufacts that sign with the covering will be required to CDPF. State of California. CDPF significant manufacts that sign with the covering will be required to CDPF. State of CDPF significant manufacts that sign with the covering will be required to CDPF. State of CDPF significant manufacts that sign with the covering will be required to CDPF significant manufacts that sign with the covering will be required to CDPF significant manufacts that sign will be required to CDPF significant manufacts that sign will be required to CDPF significant manufacts that sign will be required to CDPF significant manufacts that sign will be required to CDPF significant manufacts that sign will be required to CDPF significant manufacts that sign will be required to CDPF significant manufacts that sign will be required to CDPF significant manufacts that sign will be required to CDPF significant manufacts that sign will be required to CDPF significant manufacts that sign will be required to CDPF significant manufacts that sign will be required to CDPF significant manufacts that sign will be required to CDPF significant

cayoy an open a safe S.O.C.A.by exploring an array of outdoor activities such as history, softing, kayaking or experience extended on the Boy and Paro Bobis, Enjoy wine tasting in Faso Bobies or Fina Malay.

### WHAT'S ODEN

- Lodging Properties including hotels, motels, vacation rentals and RV Par Many restaurants are open for each
- Many wineries are open for an outdoor daining only, but we recommend calling in advance and.

  San Luis Object.
- Seaches
   Seaches
- Parks & preserves such as Pismo Preserve and Fiscalini panels.
   Golf courses
- Golf courses
   Retail & clothing stores

A Cooking stores

For suit to seel stroughout SLO CM, responsibly and R.E.S.P.E.CT our communities, our environment, our businesses
aveilars you meet along the way. Learn how you can stravel responsibly in California.

STILL TO COME

MacBook Ale



### LODGING DAYS: VACCINE APPOINTMENTS SPECIFICALLY Available for SLO County Lodging Employees to STAY Open and Safe

In an effort to ensure lodging workers can get the COVID.19 vaccine, Visit SLO CAL and the County are partnering to coordinate large blocks of free vaccine appointments specifically for the lodging community. Appointments will be available during designated days and times for lodging employees only. These lodging appointment events will include Spanish-language and Mixteco-language interpreters who work closely with Latinx and Indiaenay.





Lodging employees can register today for their free first vaccine dose at the QR Code above for one of the following dates and locations:

10ESDAY 4/13, 9-11am- at Cuesta College Clinic, Hwy 1, San Luis Obisp (400 appointments available) – Johnson & Johnson and July San Luis Obisp

WEDNESDAY 4/14, 9-11 am- at Arroyo Grande Clinic, 800 W. Branch St AG (400 appointments available) – Johnson & Johnson one does version

IUESDAY 4/20, 9-11am- at Paso Robles Events Center, 2198 Riversid Ave, Paso Robles (400 appointments available) – vaccine type TRD\*

WEDNESDAY 4/21, 9-11 am- at TBD (400 appointments available) =

reasa note: a medical form will be available to fill out when you register for your appointment. To make your appointment as efficient as possible, please fill out the medical form prior to your scheduled time and bring it to your appointment. If employees need help with the form, the on-site interpreters can help. For questions about the Lodging Days program, please call Visit SIO CAL at (805) 541-8000, 100

# WHY TOURISM MATTERS

CY 2020 IMPACTED BY



spending

\$136к



### **TOURISM PUTS**



### **TOURISM CONTRIBUTED**





IN TRANSIENT OCCUPANCY TAX REVENUE

WITHOUT TOURISTS **EACH SLO CAL HOUSEHOLD** WOULD NEED TO SPEND \$ **AN ADDITIONAL** 

TO CREATE THE SAME ECONOMIC BENEFIT for the community



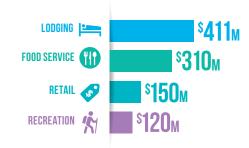
WITHOUT STATE & LOCAL TAX REVENUE **GENERATED BY TRAVEL & TOURISM EACH SLO CAL HOUSEHOLD WOULD PAY AN ADDITIONAL** 



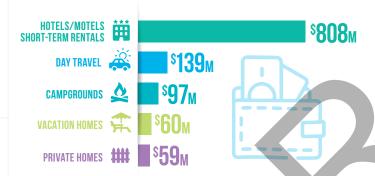
in taxes

earnings \$661M

### **DIRECT SPENDING BY SECTOR**



### **DIRECT SPENDING** BY ACCOMMODATION TYPE





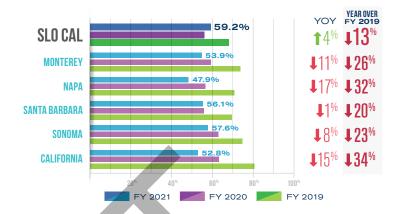


### HOTEL OCCUPANCY (OCC)

AVERAGE DAILY RATE (ADR)

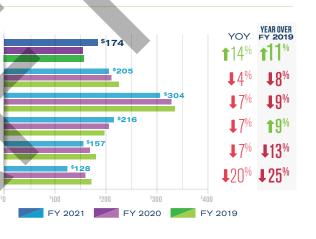
SŁO CAL

SANTA BARBARA



### REVENUE PER AVAILABLE ROOM (REVPAR)

COMPARISONS





### TRANSIENT OCCUPANCY TAX (TOT)





# SALES

# EARNED MEDIA

azcentral.

tripsavvy

Los Angeles Times

TRAVEL+ LEISURE

Chrillise

USA TODAY

**AFAR** 

The New Hork Times

**SFGATE** 

In FY 2021, Visit SLO CAL shifted their traditional sales strategy to a more in-state approach, targeting California state and regional associations and corporate businesses in SLO CAL's drive markets. Additionally, VSC shifted their international tour and travel sales efforts to focus on educating tour operators and travel advisers who sell domestic travel to California. VSC's partnership with Black Diamond in the UK and Ireland was put on hold as international travel remained closed.

In FY 2021, Visit SLO CAL worked hand in hand with Visit California, local destination partners, investors and partners to engage with members of the press through drive market and national media mailers, Instagram takeovers of editorial outlets, proactive pitching, individual familiarization (FAM) tours and a Portland influencer FAM. VSC partnered with TURNER PR domestically to increase SLO CAL's share of voice, generating more than \$5.5 million in earned media value. Earned media efforts focused on key regional drive markets due to the COVID-19 pandemic. As with sales, international PR efforts were put on hold as international travel was closed.

### **EVENTS**\*

SEPTEMBER 0 **GoWest Summit (Fall)\*\*** 

NOVEMBER

DECEMBER

MARCH

OCTOBER **AG & Culinary Destination Presentation** 

Travel Weekly's Western U.S. Travel Agent Trade Show

**National Tour Association's Travel Exchange** 

**Luxury Travel Forum (Winter)** 

**CalSAE Seasonal Spectacular** 

**APPOINTMENTS** 

VIRTUAL TRADE SHOWS

**GoWest Summit (Spring)** 

**UK Spotlight (Sales Mission)** 

APRIL 6 **Luxury Travel Forum (Spring)** 

**Mexican Buyers Spotlight (Sales Mission)** 

**UK Virtual Familiarization Tour AAA AdventureFest** 

**BUYERS TRAINED** 

**DIRECT ROOM NIGHT CONTRACTS** 

\*\*GoWest 2020 was rescheduled from March 2020 to September 2020 due to COVID-19.

\*\*\***Lead:** A connection or opportunity provided to local investors and partners to book business, promote their companies or host travel buyers and meeting planners to experience their products.

"Driving California Highway 1: Best Things to Do Near San Luis Obispo"

"The Best Small Town in Every State"

### **LONELY PLANET**

"Relax and De-Stress at These 9 Top California Hot Springs

### LOS ANGELES TIMES

"Stunning Views, Miles of Trails Greet Hikers at Pismo

### **TRAVEL + LEISURE**

"California's Rugged Central Coast Is a

"14 Reasons to Drive to San Luis Obispo"

"With Vaccinated Grandparents, Skip-Gen Vacations are Gaining Popularity"

### **AFAR**

"Why Cambria Is Central California's Most Relaxing Weekend Break"

### THE NEW YORK TIMES

"Immerse Yourself in Indigenous Culture"

### SFGATE

"A California Pasta Destination That's Breaking From the Old World Mold"

### NOTABLE ARTICLES

### **AZ CENTRAL**

### **TRIPSAVVY**

Beach's Newest Preserve"

Bird-watcher's Paradise"

### **THRILLIST**

### **USA TODAY**







### \*All FY 2021 trade programs were virtual.

# TOTAL

**156** ARTICLES \$5.6m AD VALUE EQUIVALENCY 1.4<sub>B</sub> IMPRESSIONS

To promote the new direct flight service from Portland

program saw great results. Combined social media efforts

increased both the visibility and positioning of SLO CAL as

an accessible destination for Portlanders.

totaled 174 Instagram posts, 226,000 impressions, a 12.82% engagement rate and 10,900 total engagements, which

to SLO CAL, Visit SLO CAL invited five select Portland influencers to be passengers on the June 17 inaugural flight and share their journey with their fans. The PDX influencer

**5.5**M AD VALUE EQUIVALENCY

**567**K AD VALUE EQUIVALENCY

**1.4**B IMPRESSIONS

7.3<sub>M</sub> IMPRESSIONS

Portland Influencer FAM

**22 ARTICLES** 

# OWNED MEDIA



In FY 2021, Visit SLO CAL leaned heavily on compelling visuals to inspire, educate and engage travelers. Video promotions using local, authentic storytelling were shared simultaneously across all social channels and included links back to SLOCAL.com to capture user engagement and facilitate partner handoffs. When faced with advertising restrictions at the peak of the pandemic, owned channels remained on and pivoted to dreaming of future leisure travel to SLO CAL.

### FY 2021 SLOCAL.COM SNAPSHOT

1.3M 33% 166K\*

**BOUNCE RATE PARTNER REFERRALS** 



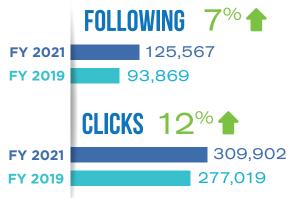






**VISITOR MAGAZINE REQUESTS** 

# 500/AL @ 0 0 0 0



### INDUSTRY TERMS

**Sessions:** A group of user interactions with a website that takes place within a given time frame

**Bounce Rate:** The percentage of sessions to the website that navigate away from the site after the user views only one page

**Engaged Session:** A website session (on SLOCAL.com) that has met the following criteria: Session duration is greater than 90 seconds, and user has done at least one of the following: 1) visited two or more pages during the session, 2) subscribed to the eNewsletter, 3) requested a Visitor Magazine, 4) clicked "Visit Website" or "Book Now," or 5) clicked on the phone number on a partner listing

Qualified Session: A website session (on SLOCAL.com) that has met the following criteria: User subscribed to the eNewsletter or requested a Visitor Magazine or clicked "Visit Website" or "Book Now" or clicked on the phone number on a partner listing

**Partner Referral:** A click on a partner link, or the "Visit Website," "Book Now," or phone number on the partner listing

Visit SLO CAL worked closely with Miles Partnership to execute an always-on and phased-recovery approach to paid advertising efforts during the pandemic. By shifting the focus away from targeting specific personas (Active Adventurer, Mom to the Max and Cultured Class), the campaign targeted a more qualified audience with the highest propensity to travel. To create greater cost-efficiencies while being mindful of recovery, target markets shifted to California drive markets and prioritized Los Angeles and San Francisco. VSC participated in fall and spring coops with Visit California (VCA) and incorporated VCA's trip motivators of Recharge and Immerse into all tactics of their overall campaign. As a preliminary phase in our House of Brands strategy, VSC added geotag locations in advertisements to showcase featured locations.

According to Arrivalist, in FY 2021, paid media resulted in an 85% lift in arrivals and a 18.2% lift in length of stay compared to the control group that was not exposed with the campaign.

### FY 2021 PAID MEDIA **SNAPSHOT**

**CLICKS** 

131<sub>K</sub> **IMPRESSIONS** 

**CONNECTED TV VIDEO** 

**COMPLETION RATE** 

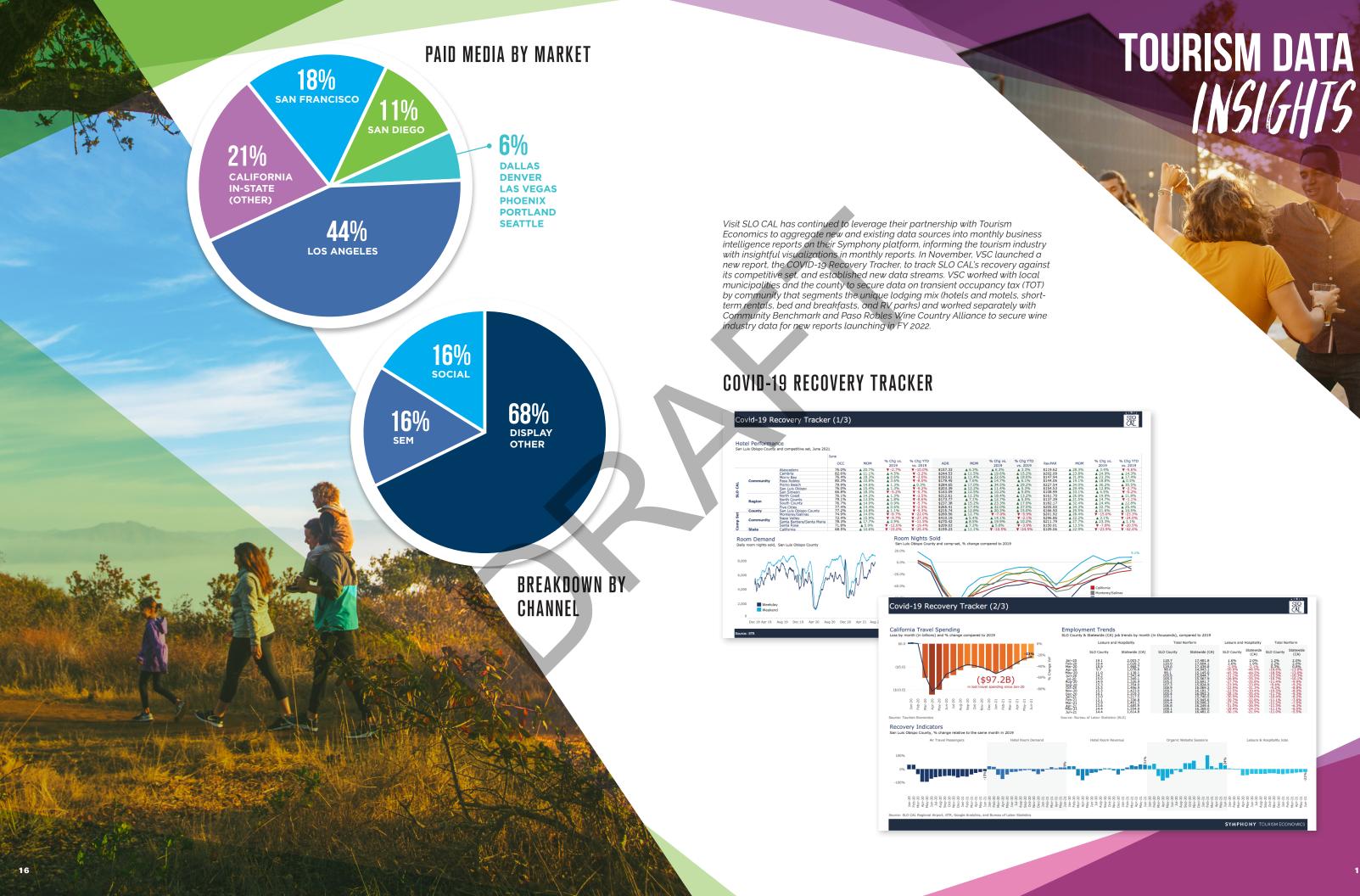
OVERALL COST PER LANDING PAGE ON SOCIAL

**SEM COST PER CLICK** 



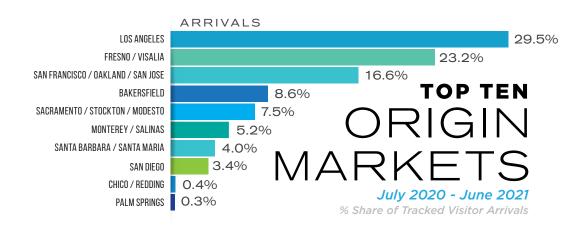
<sup>\*</sup>Tracking for engaged sessions was not implemented in FY 2019.

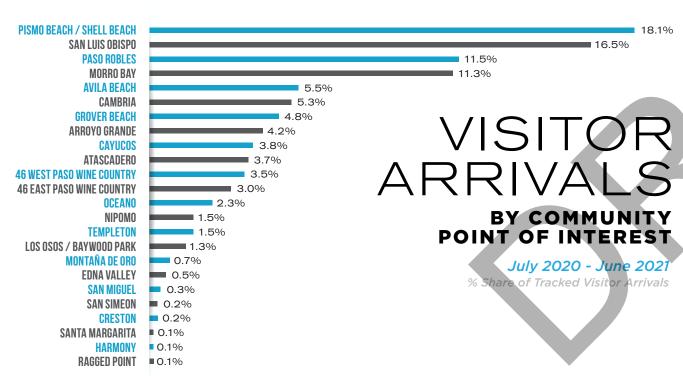
<sup>&</sup>quot;A scroll tracking issue in 2019 was artificially lowering the bounce rate, so there is not an accurate comparison to FY 2019. However, the bounce rate is in line with the destination marketing organization industry average.





VSC continues to track arrivals through their partnership with Arrivalist. The Arrivalist A3 platform offers insights on visitor arrivals to San Luis Obispo County and key points of interest (POI), arrival windows, arrival origins, cross-visitation, length of stay and campaign lift as a result of paid media and organic traffic, which informs VSC's advertising efforts.





CROSS-VISITATION

1.33 COMMUNITIES PER ARRIVAL

July 2020 - June 2021

LENGTH OF STAY

1.17 DAYS

# PARTNER ENGAGEMENT

Visit SLO CAL offered various engagement opportunities to investors and partners throughout the year, including tools and best practices to grow their business, exposure on SLOCAL.com, and opportunities to reach new visitors. In FY 2021, VSC expanded the reach and impact of Restaurant Month and their Google My Business co-op. They also supported investors and partners with resources during the closure of Highway 1 and provided sponsorship funds to support and maintain the California Welcome Center in Pismo Beach

### TOURISM ECOSYSTEM

Representing the voice of the larger community, Visit SLO CAL partners with organizations at the state and national levels to foster the greatest impact for local destination partners and tourism businesses. VSC reviews the broad array of opportunities offered, strategically identifying the initiatives that will create the strongest return on investment, and cascades those down to local communities.



### HIGHWAY 1 CLOSURE

When the Rat Creek mudslide closed Highway 1 just north of SLO CAL in January, the VSC team quickly reactivated Highway 1 closure information from our 2016-2017 closure playbook, distributing laminated navigational one-sheets to lodging investors, chambers and visitor centers, and adding multilingual resources to SLOCAL com. The scenic highway fully reopened on April 30.

SPONSORSHIP

CALIFORNIA WELCOME CENTER



### GOOGLE MY BUSINESS

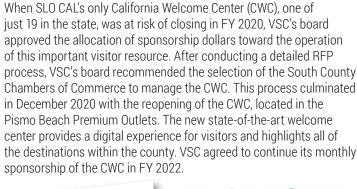
After hosting multiple educational webinars on Google My Business (GMB) in FY 2020, providing partners with valuable information and tools to claim and optimize their business listings, VSC took this program one step further by partnering with destinations to identify top-priority locations lacking GMB profiles for outreach and funding a five-

day, in-market shoot consisting of still shots and 360 photospheres.

GOOGLE MY BUSINESS PHOTOSHOOT HIGHLIGHTS

PHOTO SHOOT LOCATIONS **8** COMMUNITIES









pigmo beach

Source: Arrivalist



### RESTAURANT MONTH

Visit SLO CAL hosted Restaurant Month throughout January, highlighting SLO CAL's culinary experiences during the shoulder season. Restaurants offered a variety of different deals, including three-course prix fixe meals between \$30 and \$40 and other discounts. This year's campaign included an emphasis on takeout options, as well as a targeted local social campaign and additional advertising to support the restaurant community during the pandemic.



**RESTAURANT** MONTH

FY 2021



44%
CONVERSION RATE AVERAGE TIME ON LANDING PAGE\*



3.7 M PAID IMPRESSIONS 145K ORGANIC IMPRESSIONS

38k 275k CLICKS ENGAGEMENTS



1 M IMPRESSIONS

**6** IGTV "TAKEOVERS" FEATURING **5** COMMUNITIES

and visited 8.06 pages per session on averag

FILM SLOCAL

The film industry drives business to SLO CAL, with productions investing dollars locally and products showcasing the landscapes, lifestyles and experiences of SLO CAL. Film SLO CAL, a division of Visit SLO CAL and the film commission for San Luis Obispo County, promotes, facilitates and tracks filming throughout the county, working to increase the number of productions and

resulting economic impact. Many productions were

or canceled in 2020, resulting in a smaller econom

impact than in previous years.

24 PRODUCTIONS 47 FILMING DAYS



\$589K ESTIMATED SPEND



Visit SLO CAL activated their Advocacy Plan throughout FY 2021. focusing their efforts on ease of travel and recovery for the Travel & Tourism industry post-pandemic, ensuring that the industry's voice was represented on issues that mattered to investors and partners.

### INDUSTRY ADVISORY GROUP

The VSC team hosted biannual Industry Advisory Group meetings with Assembly Member Jordan Cunningham and Congressman Salud Carbajal, allowing lodging property owners from across the county to voice their priorities and keep the Travel & Tourism industry top of mind at the state and federal levels. Topics of discussion have included state and federal recovery efforts, the infrastructure challenges surrounding Camp Roberts' proposed designation as a migrant children facility, state and federal lodging per diem rates, and legislation impacting the industry.

### PARTNERSHIP WITH CALTRAVEL

VSC actively partners with CalTravel on statewide advocacy efforts. In FY 2021, VSC President & CEO Chuck Davison finished his two-year term as CalTravel's treasurer and served as an at-large executive committee director and as co-chair of their DMO Leader Roundtable.



### OCEANO DUNES

Visit SLO CAL advocated against the proposed closure of the Oceano Dunes State Vehicular Recreation Area (SVRA) in favor of a more balanced solution. VSC asked the California Coastal Commission (CCC) for a stay on the decision until a reliable economic impact assessment was available and the South Central Coast district commissioner was appointed. VSC conducted outreach to the Governor's Office and state representatives, rallied the tourism community and worked with their national PR agency to draft a crisis communications plan on the issue. Despite VSC's best efforts, the CCC decided to phase out OHV at Oceano Dunes in three years. However, at the direction of our board of directors, VSC gained the support of the county of San Luis Obispo and the cities of Arroyo Grande, Grover Beach and Pismo Beach to commission a third-party economic impact analysis, which will provide the community with the necessary data to help guide decision-makers on how to offset the economic losses from the closure of OHV.

# ADVOCACY



Industry Advisory Group meeting with Congressman Salud Carbaja

### MEETING WITH GOVERNMENT OFFICIALS

Staff introduced Visit SLO CAL, virtually and in person, to six newly elected officials and engaged government officials throughout the year on the key issues impacting the industry. As part of U.S. Travel's Destination Capitol Hill, VSC staff participated in virtual meetings with Rep. Salud Carbaial and Sens. Dianne Feinstein and Alex Padilla. In June, VSC co-hosted a tourism industry leader reception with newly appointed California Coastal Commissioner Meagan Harmon, providing an opportunity for coastal lodging owners, general managers, and government officials, to engage with the new commissioner.

### CAMP ROBERTS

In April, VSC received notification that Camp Roberts was being considered for a federal government project that would have required accommodations for thousands of proposed government workers for up to 12 months, potentially challenging the industry's recovery. VSC voiced their concerns over infrastructure with local, state and federal government officials, outlining the potential loss of revenue and subsequent impacts for each city and the county. In June, the federal government announced that it was no longer considering the site.

# EQUITY, DIVERSITY & INCUSION

Visit SLO CAL is committed to taking a leadership role in ensuring that their work helps SLO CAL become a more inclusive destination, so that all who travel into and through the county feel welcomed and embraced. Last June, the board approved Visit SLO CAL's Equity, Diversity & Inclusion (EDI) Plan, committing VSC to several actions affecting all facets of the organization, including building a more inclusive and diverse internal culture, observing commemorative months by featuring SLO CAL's faces and stories, and ensuring assets are authentically representative of SLO CAL's diversity. VSC holds themselves accountable to continuous improvement on equity, diversity and inclusion through a tracking matrix and reporting to the board of directors.

### ORGANIZATIONAL CULTURE

In February, three members of the Visit SLO CAL leadership team started a 12-month EDI Leadership Masterclass through Destinations International. Class topics have included emotional intelligence, microaggressions, unconscious bias and allyship. All effective change starts from the top, and the leadership team will leverage these important lessons to influence the organization's internal culture.





### OWNED FEATURES

Throughout the year, Visit SLO CAL spotlighted equity, diversity and inclusion on owned channels, with video profiles and promotions pointing back to SLOCAL.com. With the goal of bringing authentic faces and stories of SLO CAL to life, VSC worked with local EDI community-based organizations to promote inclusive cross-visitation opportunities for tourists looking to support Latinx Heritage Month, Women's History Month, Black History Month, Asian American and Pacific Islander (AAPI) Heritage Month, and Pride Month. All EDI-related profiles are featured on a new landing page as well as on highlighted Instagram stories.

### EDI AUDIENCE & ASSET ALIGNMENT STUDY

Having a clear picture of the audience that SLO CAL is trying to attract, as well as the product available within the county, is paramount to marketing success. To that end, in June, Visit SLO CAL initiated an EDI Audience and Asset Alignment Study, in conjunction with a Future Visitor Profile Study, through SMARInsights. This study will inform priorities in developing specific EDI initiatives, enhance the visitor expectation by creating authentic marketing campaigns, and identify business and cultural gaps within the county. Six destination partners also took advantage of a co-op to gain access to more specific research about their individual destinations, and to better inform their marketing efforts in this area. Each destination partner had the option to add five unique questions to each questionnaire and/or 10 follow-up video interviews





# As Visit SLO CAL concentrated on addressing immediate concerns and needs affecting the county's Travel & Tourism industry during the COVID-19 pandemic, the momentum of the Experience SLO CAL 2050 recommendations, previously approved by the Visit SLO

### **EVENTS & FESTIVALS STRATEGY**

In spring 2021, Visit SLO CAL released an RFP to interested agencies skilled in strategic planning for events and festivals, and received several proposals. Staff met with destination partners and local stakeholders to build understanding of, and partnership on, the objectives of the strategy and countywide events calendar.

recommendations that have been prioritized and funded by the board.

CAL Board of Directors, slowed in FY 2021. As California and the nation advances toward

a post-pandemic mindset and travel steadily increases, VSC has doubled down on their

VSC hired a project manager to facilitate this scope of work and resume progress on the

commitment to advancing the Experience SLO CAL 2050 recommendations. In December,

### **CUSTOMER SERVICE TRAINING INITIATIVE**

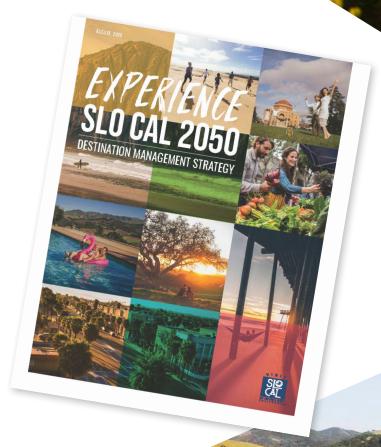
Visit SLO CAL moved forward with the Customer Service Training initiative by releasing an RFP to interested agencies specializing in program, development. Four agency proposals were received and are under review for consideration.

### INTERNATIONAL VISITATION

In anticipation of international travel reopening in FY 2022, Visit SLO CAL signed a renewal contract with Black Diamond for trade and public relations representation in the UK and Ireland beginning in July 2021, ensuring that SLO CAL remains top of mind in these markets.

### **PASO ROBLES & SLO COAST WINE**

Visit SLO CAL partners closely with the Paso Robles Wine Country Alliance (PRWCA) and SLO Coast Wine Collective through their representation on VSC's Marketing Committee. Additionally, VSC partnered with PRWCA to gain access to critical SLO CAL winery data that segments the SLO Coast and Paso Robles wineries, as well as data from its top competitors, Napa and Sonoma. This data will be integrated into VSC's monthly Community Business Intelligence Reports in FY 2022.



**EXPERIENCE SLO CAL** 



### **COUNTYWIDE TRAIL SYSTEM**

As part of VSC's advocacy efforts for a countywide connected trail system, they advocated for the extension and connection of the Bob Jones Trail from Avila Beach to San Luis Obispo, which was approved in March after receiving an \$18 million California Transportation Commission grant to fund the project. As part of the Experience SLO CAL 2050 recommendation for a countywide trails system, the Bob Jones Trail is a vital part of the transportation connectivity through our county and a visitor draw in our destination.

### **SPACE LAUNCH EVENTS**

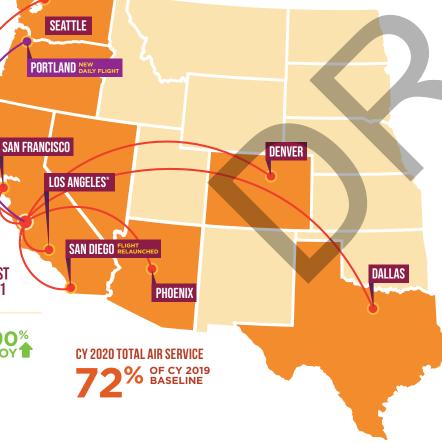
In the fall of 2020, VSC created a new landing page on SLOCAL.com to inform visitors about planned space launches from Vandenberg Space Force Base. This page is updated regularly as new launches are scheduled.

# **AIR SERVICE** DEVELOPMENT

As the county and state begin to reopen, Visit SLO CAL has been working closely with the San Luis Obispo County Regional Airport on a FY 2022 air service recovery strategy to reactivate fly markets, leveraging SLO CAL's competitive advantage as a leisure-heavy market. In June, SLO CAL celebrated the launch of daily service from Portland and the relaunch of daily service from San Diego through Alaska Airlines. While SLO CAL lost 225,000 seats over the last two fiscal years, it is projected to gain 197,000 seats in the first six months of FY 2022.

29K SEATS LOST 196K SEATS LOST IN FY 2021

197k PROJECTED 90% JUL-DEC 2021 YOY



IMPERATIVE 1

### Continue to build an engaged, best-in-class team

For FY 2022, Visit SLO CAL has defined four overarching objectives aligned with each of the four Strategic Direction

2023 imperatives, along with measurable key results for each objective. The efforts of each department for the coming year will ladder down from these objectives and key results.

VSC is actively recruiting for several former and new positions in order to build the capacity necessary to execute the organization's most ambitious scope of work to date. In building the team, VSC is working to ensure that candidates have a professional experience and that team members are engaged with the organization's mission and values, beginning with a great recruitment and onboarding experience.

### **IMPERATIVE 2**

### Activate a House of Brands strategy that creates a pathway for community adoption and increased visitation to and within the county

Working with Mering, VSC will activate the House of Brands strategy, a three-phase approach to achieve adoption by all local destinations. VSC will also apply findings from the Future Visitor Profile Study and the EDI Study, set to be completed in August, ensuring long-term success in attracting new and diverse visitors.

### **IMPERATIVE 3**

### Implement recovery and resiliency planning initiatives

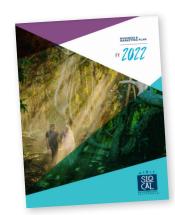
FORWARD

As the country moves toward a post-pandemic mindset, VSC will focus on advancing recommendations like the Events and Festivals strategy, Customer Service Training initiative and SLO CAL Crafted, and identifying other pathways that are integral to building and maintaining a resilient destination. VSC has partnered with Xplorit to launch a fully immersive virtual site inspection platform by winter 2021 that will help drive the recovery of meeting and conference business. VSC will also continue to position itself as a unified voice for the countywide Travel & Tourism industry.

### **IMPERATIVE 4**

### Increase engagement with investors, partners, stakeholders and communities

VSC will directly engage partners in opportunities to participate in programs that provide additional exposure to new audiences through advertising and owned channels. VSC will also evaluate resident sentiment for tourism in SLO CAL and will partner with stakeholders and local agencies to collaborate on and advocate for issues surrounding resident quality of life.



For more details on VSC's FY 2022 scope of work, be sure to download the FY 2022 Business & Marketing Plan, available here: http://bit.ly/vsc-plan-22.

\*Temporarily suspended; scheduled to return in FY 2022

Source: Volaire

# FY 2022 BUDGET

ESTIMATED COST OF PROVIDING ACTIVITIES IN THE NEXT FISCAL YEAR

\$9,073,050

ESTIMATED CONTRIBUTION FROM NON-ASSESSMENT SOURCES

\$229,028

ESTIMATED FY 2021 SURPLUS CARRIED FORWARD TO FY 2022

\$1,664,863

**ENGAGEMENT & ADVOCACY** \$712,079

TRAVEL TRADE \$544,096

ADVERTISING & DIGITAL MARKETING \$5,904,062

VISIT SLO CAL *BUDGET* \$9,073,050 INDUSTRY RESEARCH & RESOURCES \$506.422

GENERAL & ADMINISTRATIVE \$419,463

CONTINGENCY RESERVE \$376,192

COMMUNICATIONS \$298,159

PROMOTIONS & EVENTS \$291,681

FILM COMMISSION \$20.895

# APPENDIX

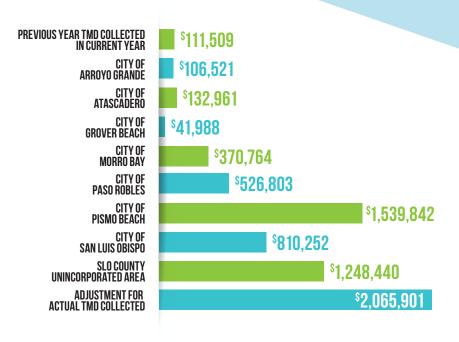
### METHOD & BASIS OF LEVYING ASSESSMENT

The annual assessment rate is 1.5% of gross short-term (stays 30 or fewer consecutive days) room rental revenue. The county and each city are responsible for collecting the assessment from lodging businesses within their respective jurisdictions on a monthly or quarterly basis, including any delinquencies, penalties and/or interest. Within 30 days of receipt, the county and each city then forward the assessments collected to the Tourism Marketing District (TMD) managed by Visit SLO CAL.

## PROPOSED BOUNDARY, ZONE OR CLASSIFICATION CHANGES

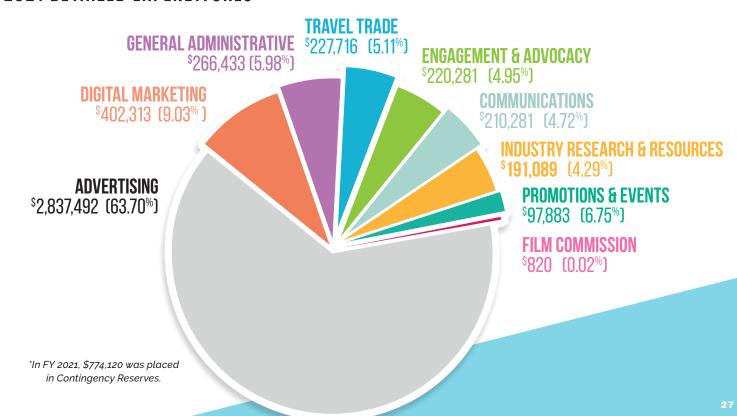
There are no proposed boundary, zone or classification changes for the coming year.

### ASSESSED FUNDS FROM FY 2021\*



\*Collections remitted from July 1, 2020 to June 30, 2021, including adjustments made for current year remittances that varied from accrued amounts.

### FY 2021 DETAILED EXPENDITURES\*







October 1, 2021

Principal Life Insurance Company Des Moines, IA 50306-9394 Fax: 866-704-3481

Atten: Kyle Smith

Client Services Representative Smith.Kyle@Principal.com

Re: Contract/Plan ID Number: 717146

Please accept this letter as a request to amend the Visit San Luis Obispo County 401(K) Plan, Contract/Plan ID Number: 717146 in the following fashion:

Beginning January 1, 2022, adjust the enrollment eligibility period from the current twelve (12) months to a revised three (3) months

We understand there to be a one-time cost of \$350 to make this plan amendment. Please confirm receipt of this request and let us know what other information you need in order to make this adjustment. Please note, Visit SLO CAL is the dba, of Visit San Luis Obispo County and the San Luis Obispo Visitors and Conference Bureau. Thank you.

All the Best,

Chuck Davison, CDME President & CEO Visit SLO CAL



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### **OVERVIEW**

### **Purpose for Advocacy**

The primary purpose of developing an Advocacy Plan is to promote the mission of Visit SLO CAL with respect to issues of public policy and community sentiment.

Visit SLO CAL's advocacy efforts are intended to ensure that the tourism industry's voice is represented on issues that matter to our community of investors and partners, and that the industry's views and wishes are genuinely considered when decisions are being made that impact our industry.

As part of Strategic Direction 2020, Visit SLO CAL set five initiatives focused on Advocacy.

- 1. Develop a plan for advocacy on behalf of stakeholders
- 2. Develop an engaged and high-functioning tourism culture for San Luis Obispo County
- 3. Develop and execute a local communications strategy
- 4. Inspire and active tourism ambassadors
- 5. Identify, develop, and activate relationships

In Strategic Direction 2023, the organization again reinforced these initiatives.

The Advocacy Plan is meant to deliver on the above initiatives.

Visit SLO CAL's advocacy efforts occur in concert with Board direction for items which impact tourism and hospitality in SLO CAL, the Central Coast region, the State of California and Nationally. The President and CEO along with the Director of Community Engagement and Advocacy will advocate for projects and programs that improve the quality of life for our residents while at the same time positively impacting the tourism and hospitality culture of SLO CAL.

As part of Strategic Direction 2020 and Visit SLO CAL's initiative to Develop a long-term Tourism Infrastructure Master Plan/Destination Management Strategy (DMS), this Advocacy Plan has been informed by the DMS and will serve as a tool for staff when implementing the DMS recommendations.



### Vision, Mission & Values

The Vision of Visit SLO CAL is: A vibrant and prosperous SLO CAL, fueled by a collaborative and flourishing tourism industry.

The Mission of Visit SLO CAL is to: Inspire travel and foster our unique experiences to create life-long ambassadors and economic growth for SLO CAL.

### The Values of Visit SLO CAL are:

- o Stewardship
- o Authenticity
- o Inclusion
- o Drive
- o Future Focus

### **ANALYSIS**

### **Objectives**

Visit SLO CAL's Advocacy Plan's primary objective is to increase the awareness, influence and unified voice of the SLO CAL Travel & Tourism industry among the general public, community leaders and stakeholders, while sharing the economic impact and quality of life enhancements that our organization and tourism contribute to the region.

### **Public Policy Platform**

### Promote SLO CAL as a Visitor Destination

Visit SLO CAL supports initiatives and policies that create opportunities to market SLO CAL as a premier destination for domestic and international travel while maintaining and enhancing the quality of life for residents.

### Advocate for Industry Needs that Demonstrate Tourism's Commitment to Local Values

Visit SLO CAL believes that a healthy and prosperous business climate is critical to support ongoing investments into the social, environmental and economic future of the region. Visit SLO CAL will advocate for policies that help the region's tourism businesses grow their impact. The organization will support policies that responsibly attract, develop and retain a qualified workforce, increase the availability of workforce housing and transportation options, increase the competitiveness of local business and increase the availability of people to travel to SLO CAL.



### Facilitate Travel to and Within SLO CAL and California

Visit SLO CAL supports efforts to facilitate travel to and within SLO CAL and California, including the enhancement, maintenance and repair of transportation infrastructure, the promotion of air travel to SLO CAL by domestic and international travelers, the dissemination of information that facilitates travel to SLO CAL, and the elimination of political, economic and regulatory barriers to travel. Visit SLO CAL also supports economic initiatives that will directly or indirectly attract and sustain travel to SLO CAL.

### Promote and Advocate for Resource Stewardship Initiatives that Positively Impact the Sustainability of the Destination and Enhance the Visitor Experience

Visit SLO CAL believes that our natural environment is a central tourism and economic asset in our region, and therefore supports policies, projects and programs that protect SLO CAL's natural resources and landscapes. Visit SLO CAL will advocate for equitable policies that maintain our oceans and beaches, watersheds, open space, water and air quality to meet the ecological, environmental and recreational needs of our visitors and residents.

### Promote and Advocate for Long-Term Development Projects that Positively Impact the Visitor Experience

Visit SLO CAL believes that public and private sector infrastructure and development projects that will enhance our ability to market SLO CAL as a visitor destination are critical to the organization's ability to accomplish its mission over the long term. Relevant projects include the development of meeting and conference facilities, improvements to transportation corridors, public transportation and parking, creation and expansion of arts and cultural institutions, and public path and trail systems for biking, equestrian and hiking access.

### Support Public Policy Initiatives that Promote California's Position as an Inclusive, Diverse and Welcoming Destination

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.

### **Enhance Quality of Life Issues**

Visit SLO CAL believes that quality of life issues significantly impact the visitor experience. The organization will support initiatives that maintain and enhance both the quality of the visitor experience and quality of life for local residents with respect to the safety, cleanliness and well-being of SLO CAL's neighborhoods and communities.



### Identify Strengths, Weaknesses, Opportunities & Threats (SWOT)

### Strengths:

- Unanimous direction from the Visit SLO CAL Board, as outlined in Strategic Direction 2020, to advocate for the industry and destination
- Sole unified tourism voice for SLO CAL
- Financial resources to support community engagement and advocacy
- Trailblazing approach to solving big challenges
- Willingness to initiate change
- Relationships and influence with other advocacy groups like CalTravel
- Positive, and in some cases, strong relationships with local, state and federal elected officials
- Increased staff capacity with experience in policy, advocacy and community engagement
- Destination Management Strategy providing key recommendations, approved by community leaders and board of directors, outlining areas requiring countywide advocacy and support

### Weaknesses:

- Lack of awareness of organization outside of community leaders and tourism industry
- Lack of deep, team member organizational experience in the advocacy space
- Lack of meaningful and proactive relationships with local and regional media
- Lack of any substantial relationship or engagement with residents

### Opportunities:

- Elevate the visibility and influence of the Travel & Tourism industry and the leaders that represent Travel & Tourism amongst local regional, state and national decision-makers
- Foster increased access and relationship between elected officials and Visit SLO CAL investors
- Collaboration with like-minded organizations to accomplish bigger goals and create an environment where it is difficult for others to say "no" when the Travel & Tourism industry is engaged
- Establishing deeper community and resident relationships that grow awareness of the organization and lead to greater influence

### Threats:

- Lack of understanding amongst industry or community leaders of the purpose of advocacy efforts on behalf of the tourism and destination
- Diminished value for the tourism industry, its efforts and quality of life and economic impact to the community
- Frustrating the elected officials who don't agree with Visit SLO CAL's advocacy efforts or positions leading them to be less supportive of Visit SLO CAL initiatives

•



- Investors who think our efforts should solely be spent on marketing, not understanding the "Why" behind advocacy
- On-going changes of elected officials

### **Targeted Audiences**

In an effort to make the plan more efficient and effective, key influencer and stakeholder groups need to be determined and prioritized. An example of these groups likely includes:

- Elected Officials
  - o Local
  - o Regional
  - o State
  - o Federal
- Civic and Nonprofit Leaders
- Industry and Community Leaders
- Residents
- Local/Regional Media Outlets

Based on the groups, mentioned above, determine whether they have a:

- 1. Positive attitude with much power (nurture these)
- 2. Negative attitude with much power (convinces, communicate, confront, convert)
- 3. Positive attitude with little power (seed to empower them through information)
- 4. Negative attitude with little power (keeps them informed, do not burn any bridges, do not waste unnecessary energy)

### **Strategies**

In order to achieve the most successful results, the following strategies have been developed:

- Advise and assist the Board of Directors of Visit SLO CAL with respect to public policy
  issues that could significantly affect the interest of Visit SLO CAL, its investors, its partners
  and the greater SLO CAL tourism community;
- Take positions consistent with the purpose and guidelines set forth in the Advocacy Plan on public policy issues, including legislative and ballot measures and regulations, at the local, state and federal level;
- Educate elected officials and other key decision makers about the importance of the tourism industry to the well-being, quality of life and economic vibrancy of SLO CAL;
- Obtain a "seat at the table" to influence outcomes;
- Cultivate and engage local relationships and work with like-minded organizations to generate word-of-mouth support for the industry; and
- Collaborate with other organizations whose public policy objectives coincide with the goals of Visit SLO CAL



### **Execution & Tactics**

### Procedures for Action on Public Policy Platform

Consistent with the Public Policy Platform, the President & CEO and Director of Community Engagement and Advocacy will identify issues at the local, state and federal level where engagement will enhance the effectiveness and contributions of the SLO CAL tourism industry.

• Visit SLO CAL staff may take action on issues prior to a vote by the Executive Committee if that issue: meets the criteria listed below, is consistent with the Public Policy Platform, or Visit SLO CAL has taken a prior position that established a guiding precedent for future actions. Prior to action being taken, Visit SLO CAL staff will work to receive feedback from the local BIDs and strategic partners to allow for alternative opinions to be heard and ideas to be presented. If the timeline for taking action on the issue allows the item to be presented to the Executive Committee at a regularly scheduled meeting, the Visit SLO CAL staff should wait to allow for their vote. If the timeline does not allow the item to be on an Executive Committee agenda, the committee should be notified prior to any action being taken to allow for a request of staff to delay action. Any formal actions taken shall be reported out by the President & CEO and/or Director of Community Engagement and Advocacy at the following Executive Committee and Board of Directors meetings.

	Answer Must Be
Does the issue affect more than one community in SLO CAL?	Yes
Is there reasonable belief that our lodging investors may hold divergent opinions?	No
Does this issue have a direct impact on the Travel & Tourism industry?	Yes
Is the outcome likely to change if Visit SLO CAL takes a position on the issue?	Yes

• For advocacy in support of or opposition to specific legislative or regulatory measures that do not meet the criteria listed above and/or are not clearly articulated within the Public Policy Platform, the President & CEO and/or Director of Community Engagement and



### Advocacy Plan

Advocacy will first bring the issue to the Executive Committee for a vote on a support, neutral with comments, oppose, or no action position. The issue and the decision of the Executive Committee, along with any subsequent public actions taken by the organization

will be reported out for discussion and further positioning at the following meeting of the Board of Directors.

For each issue brought to the Executive Committee for action, the Visit SLO CAL staff will prepare a policy brief for the Executive Committee that will summarize merits of the issue, considering key questions such as:

- 1. Who/what organization brought forward the issue (Visit SLO CAL Board, investors, a coalition partner, government, industry association such as CalTravel, etc.)?
- 2. What is the relevant background, stated objective and precedent for this issue?
- 3. How does the issue relate to the Public Policy Platform?
- 4. How is the lodging community impacted by this issue?
  - a. Which segments are impacted?
  - b. Does this policy create an environment of winners and losers within the industry?
- 5. What is the benefit to the organization or industry if we engage on this issue?
- 6. What is the risk to the organization or industry if we do not engage on this issue?
- 7. Does engagement on this issue strengthen or detract from our organization and industry reputation?
- 8. Who is on the other side of the issue, and what is the risk to the organization of taking a competing position?
- 9. Are there key partners, influencers or decision-makers who will object to our engagement on the issue? Who are they and what are their objections? Can these concerns be resolved or mitigated?
- 10. Is there an existing coalition of stakeholders we would be joining, or are we the lone voice? Do we own the advocacy or are we are partner in it?
- 11. In what venue would we be advocating, and are there alternative strategies that might be considered?
- 12. Who is the most effective messenger to deliver the advocacy message (Visit SLO CAL staff, board member(s), industry representatives, coalition partner, etc.)?
- 13. What finances are needed and what will they be used for?
- 14. What is the timeline?

### Establish targeted messages based on unique issues and audience

Each issue will require a number of detailed target messages based on the audience they are designed to reach. In order for those messages to be effective, they need to solve for the "why" for each audience. Why should they care and how will this information assist them going forward? From there, all messages and audiences should be prioritized.

# Identify key influential groups/messengers assigned to each audience and issue

In order for the plan to be effective, it is important to determine what key influential groups/messengers are available and willing to help advance Visit SLO CAL's advocacy initiatives and which messages they are most prepared to advocate on. Groups/Messengers could include:

- Staff
  - O To the extent possible, all team members are encouraged to engage in Visit SLO CAL's advocacy efforts. Staff will receive regular briefings on current advocacy efforts and, where appropriate, resourced with background and messaging to serve as effective ambassadors for the policy and community engagement objectives. The following individuals will take the lead in executing this plan:
    - President & CEO
    - Director of Community Engagement and Advocacy
- Board of Directors
  - o Executive Committee
    - Board Chair
    - Board Vice Chair
    - Board Immediate Past Chair
  - O Participating in or leading the effort on controversial issues can often be problematic for the organization. As such the risk/benefit analysis outlined in the Procedures for Action on Public Policy Platform will be completed in advance to determine the probability of achieving the desired outcome and identifying the most effective messenger. In cases where the organization cannot take the lead, it will look to engage and impower industry investors and leaders.

### **Message Training**

In order to assure effective communications each messenger will need to be provided current policy positions and talking points to effectively convey individual issue messaging to the appropriate audience. Messengers include:

- Staff
- Board

### **Desired Results**

### **Establish Metrics to Measure Success**

As we determine our path forward, it is important to understand the "headlines" and define the success of our Community Engagement and Advocacy efforts through the establishment of key



### Advocacy Plan

metrics that can be used to track outcomes of our endeavors. The metrics should be defined by the phrase "we will know we are successful when there is/are ...."

- Broad overall awareness of Visit SLO CAL as a DMMO
- Influence of/with elected officials
- Organizations partnering with us to promote common goals
- An increase in the number of presentations regarding the DMS recommendations or the public policy platform given by Visit SLO CAL staff annually
- Positive local and regional media placement annually
- An annual review/update of the plan

### Review and Update Plan

Areas of focus are subject to change based on new issues that develop. As such, the public policy platform should be updated annually prior to the start of the new fiscal year.





# Visit SLO CAL Customer Service Training Initiative Statement of Work

Version 4.5

### **Submitted to:**

Melissa Murray

Project Manager, Destination Management

### **Submitted by:**

Greg Surbey
Founder and Managing Partner - ICOM Productions Inc.

### **Submitted On:**

September 3rd, 2021

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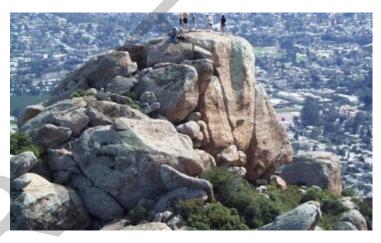
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# **Executive Summary**

ICOM Productions is excited to provide an additional proposal encompassing a broader range of customer service topics for the Visit SLO CAL educational portal.

Over the past several years, ICOM has honed our chops when it comes to developing trailblazing tourism programs designed to educate frontline hospitality professionals about the nature and nuances of the



communities where they live and work. In fact, our partnerships with top tourism organizations have resulted in award-winning initiatives and global recognition for their innovation and ingenuity. Tourism Calgary's leading-edge Whitehat Academy takes pride of place on our evergrowing roster, and it's this impressive program that led to our introduction to Visit SLO CAL.

Using Breaze, an avant-garde learning platform developed by our in-house team, we transformed Tourism Calgary's content, images, and videos into a state-of-the-art training program for frontline hospitality staff. Now, we're proposing to use this same platform to produce a forward-looking education program for Visit SLO CAL's Customer Service Training Initiative.

Imagine learning as a journey. Each student gets a boarding pass that ensures they take the right trip at the right time, with checkpoints along the way to make sure they're headed on the correct path. This is what Breaze can do for you. As Community Customer Experience Representatives progress along their learning journey through Breaze, they collect tokens for completing activities and reviewing content. These tokens eventually lead to certification and incentive rewards.

As an added bonus, Breaze collects data and creates reports about how Community Customer Experience Representatives interact with the platform, including completion rates and learner interest in the different sections of the Customer Service Training Initiative. Visit SLO CAL administrators can then use these performance indicators to measure the success of the program, tailor marketing initiatives to learner interests, and create new content that targets specific audiences. And because Breaze makes updating and creating content easy, Visit SLO CAL can adapt to changing strategies and market trends in real-time.

As we begin to emerge from the shadow of the COVID-19 pandemic, our top priorities continue to be the health and well-being of our employees and ensuring uninterrupted service to our customers and partners. At ICOM, we've had the good fortune to maintain our service integrity throughout lockdowns, and we even saw new growth across our organization. Our systems remain "tried and true" as we maintain our quality and commitment to learning.

I hope you choose ICOM as your travel partner and allow us to help build an amazing Customer Service Training Initiative.

Greg Surbey – Founder, Managing Partner ICOM Productions



# **About ICOM**

#### Who We Are

Since 1996, ICOM has been at the forefront of digital learning. With more than 20 years of experience partnering with some of the world's largest and most dynamic organizations, ICOM has cultivated a unique perspective on the development of online education. Using fundamental learning methodologies to create high-impact solutions, we define ourselves as a learning company first and a technology company second. ICOM has more than 50 staff between our offices in Toronto, Vancouver, and Calgary.

#### Mission and Vision

It's ICOM's mission to challenge and inspire the world to learn differently. Our vision is to create better ways to improve our clients' performance through learning. Each one of our innovative learning solutions, products, and platforms supports this vision. From modifying behaviors to

driving business objectives, ICOM helps produce real on-

-the--job results.

# **Market Opportunities**

Focused on delivering online solutions to diverse audiences worldwide, ICOM has had the opportunity to work with a large array of organizations, educators, and institutions. Over the past five years, ICOM has collaborated with more than 175 unique organizations, developing more than 700 custom learning initiatives, videos, and programs. These projects have ranged in value from \$5,000 to more than \$2 million and include the development of online and classroom training, lesson plans, curriculum design, videos, marketing and communications tools, virtual reality and augmented reality training, and custom tracking and reporting technologies.



# **Competitive Advantage**

ICOM is unlike other marketing and video production companies because our primary focus is on education. While our products look great, the animations, 3D, and video always enhance the key learnings. We don't use graphics gratuitously. We do what is right for our clients to ensure the best learner engagement and learning transfer.

# **About Breaze**

Breaze allows your entire team to create, curate, and share all types of content—from videos and PDFs to eLearning, links, and more. Just like a traditional LMS, Breaze tracks and reports

on learner interactions, but it turns the paradigm upside down. Breaze puts the learner in the spotlight so you can easily create a meaningful experience for your entire team.

We challenged the ICOM team to think differently about the way we learn. The result is Breaze, and it's one of the first platforms of its kind. For most of us, learning is an event. We sit in a classroom, watch a video, or take a



course, and then it's over. But we believe it shouldn't end there. It's time to refresh the way we think about learning. Learning should be an ongoing journey—something that grows as you grow.

For years, we've sacrificed great learning in favor of tracking and reporting. But what if you could have both? What if you had the power to create an exceptional learning experience and still have access to meaningful data? Breaze lets you do just that. Learning shouldn't have to fit into a system. It should be dynamic and evergreen. Breaze empowers your experts to create and share their own content in whatever way results in the best experience for the learner.

### Organize Efficiently, Collaborate Effectively

With Breaze, there's no need to upload content into the system. Instead, you can link directly to

the content wherever it currently lives within your organization. If your videos are on YouTube, simply link them to Breaze. The same goes for documents and PDFs that live in a file-sharing platform like SharePoint. Breaze lets you create a carefully curated collection of content.

#### Flexible and Scalable

Breaze can grow to any size and assimilate to any environment. If you've got a big company with a lot of content, there's no limit to how big Breaze can grow. But it's also a great way for smaller organizations to keep their content organized. The best part is that Breaze grows when you grow.



# Just-in-Time, Mobile Learning

Breaze is completely mobile, so users can access materials any place, any time. The responsive format allows users to take training on any type of device, from traditional laptops and desktop computers to smartphones and tablets.

No matter where you are in the world or the type of device you're using, you can always get at all of the job aids, reference guides, and tools you need. Breaze's eye-catching, responsive design adjusts to your screen size, so you get the best experience every time you log on. And the best part is, you won't need any special training. Breaze is entirely intuitive to use.



### Always Up to Date

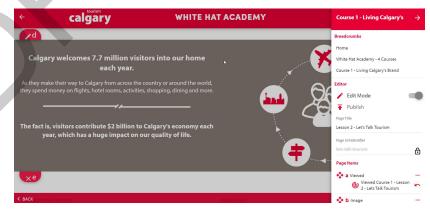
Never lose sleep worrying if everyone on your team has access to the most up-to-date content. With Breaze, you can rest assured the latest and greatest is always available. You can make changes to Breaze anytime, day or night. And with one click of a button, your updates are published in real time—no delays. Your changes are pushed out to your entire audience all at once.

# **Authoring Capabilities**

Creating content doesn't get any easier than Breaze. Thanks to Breaze's user-friendly authoring tools, you can instantly add, edit, or create new content with just a few clicks of a mouse. And

the whole process is completely collaborative—you can give anyone you want the power to help you create.

Breaze comes with easy-touse templates branded with your company logo and colors. It even has tools like surveys, evaluations, and rolling question banks for comprehensive learning



measurement. Simply select from a list of media-rich content options, add your unique details, and save your changes. It's that easy.

# **Robust Reporting and Analytics**

Breaze is much more than just a way to create and curate content. We know you want to develop great learning. But we also know you need to do your due diligence to track compliance and other data. Breaze gives you the flexibility to do both.

Because Breaze leverages secured LMS data structures, it launches and tracks SCORM-compliant products. This means your administrators can gather all the data they need to make sure you're creating a team of active—and compliant—learners.

# The Customer Service Training Initiative

Our vision for the Customer Service Training Initiative is to develop a compelling and exciting informational learning experience for SLO CAL's frontline workers. We will start with a self-registration Breaze portal that opens to a well-designed learning path. The portal includes:



- Options for privacy and anti-spam regulations
- The domain name as part of the licensing services
- Availability on iOS and Android, including cell phones, tablets, Macs, and Intel devices

Inside, the portal has the ability to support multiple curriculum offerings. You can have as many modules and learning paths as you would like. The portal is evergreen, so you can continually add, remove, and edit content as needed. You can grow and expand your offerings at any time. As part of this scope of work, we have proposed a learning outline for the program; however, Breaze can hold an unlimited amount of content. You can choose to divide this content into as many modules as needed for the learner experience.

Learners will be able to work through the experience on their own schedule. As their progress is tracked, they can pick-up where they left off. The modules will be treated in a mandatory and optional manner. For example, Modules 1 and 2 can be locked so learners must complete them in sequence, while other modules can be unlocked and viewed at the learner's own pace or used as a refresher tool. Once unlocked, the learners will have ready access to that content for easy reference.

Each of the learning modules will be uniquely branded using the Visit SLO CAL brand, colors, and logo and will include custom graphics and templates that are similar in look and feel to those used in the Tourism Calgary Whitehat Breaze portal. The modules will contain key features to ensure learner engagement and learning measurement.

#### Content

- Since Breaze is designed to be consumed while scrolling, the subject matter is selfcontained to each page.
- Third-party materials, such as courses, websites, PDFs, videos, and other details, can be easily incorporated into the Breaze platform in their existing format.

# **Learning Measurement**

 As this is a certification module, learning can be measured using a number of engaging methods, such as drag-and-drop, matching, and multiple-choice questions.

#### **Certification and Achievements**

- As the learner completes sections of the course, they can unlock "Achievements" or "Badges" to reward their progress.
- Upon successful completion of the program, the candidate will achieve certification.
   They can then print a wall or wallet certificate and post their achievement on social media.

#### **Feedback**

• Breaze provides built-in feedback registers that allow us to poll our audience and track and report on each learning module.

### Reporting

- We collect a vast amount of learning data with Breaze, tracking everything from completion to compliance. Our work with Visit SLO CAL is not to decide what data to collect, it's to decide what is relevant to show. We will work with your team to create a meaningful and purposeful dashboard, but our recommendation for data includes:
  - Overall completion
  - Completion by user
  - Completion by segment (e.g. hotel, restaurant, winery)
  - Knowledge check performance, pass/fail, number of attempts
- Please note: User collection data such groups will be established during the Job Application Development phase (JAD). We will work to understand and suggest group types for Visit SLO CAL.

# **Our Approach**

### **Analysis and Design Phase**

Over the years, ICOM has built many custom solutions for clients looking to resolve the same concerns Visit SLO CAL faces with an online learning portal. ICOM has achieved success for these clients because we strike a unique balance in the amount of education, technology, and client input we infuse in our products. ICOM uses Bloom's Taxonomy of Learning, a trusted and proven learning methodology, in every product we develop. Before any of our learning solutions are put into production, they first go through a planning phase where the existing content is examined and learning objectives are determined based on what the target audience is expected to know, feel, and do when they have completed the training.

As part of ICOM's development process, we start every project with a Learning Outcomes Session. During this session, we identify how best to present Visit SLO CAL's learning outcomes to the targeted group of learners. After the Learning Outcomes Session, ICOM solidifies a Project Outline. As part of this phase, the curriculum will be developed by ICOM's instructional design team in collaboration with Visit SLO CAL's subject matter experts (SMEs), the CST Working Group. Together, they will organize the learning objectives and assessments to create a high-level overview of the Breaze content.

#### Local Expert

We will look to the Visit SLO CAL team to provide existing video, graphics, pictures and core content for the local expert portion of learning. Our instructional design and graphics teams will take it from there.

Once Visit SLO CAL is confident the product outline meets the learning needs, ICOM will use the outline to create the course script, or design document. The instructional designer will work closely with Visit SLO CAL's SMEs to flesh out the details of the script until a final draft is approved.

#### **Customer Service**

ICOM has a tried and tested Customer Service program that will be utilised for Visit SLO CAL. The outline of which is provided here:

#### **CUSTOMER SERVICE:**

**Foundations of Customer Service** 

- · Relationship between service quality, customer experience, and business objectives
- Tailoring service to meet and exceed customer expectations
- · Communication etiquette and service recovery techniques
- Using metrics to assess customer experience and service quality
- Role of front-line employees in businesses success

#### **Destination Ambassador:**

- Make a great first impression with visitors
- Establishing consistent community health and safety practices
- Rebuilding customer confidence to travel safely post-COVID
- Understanding the importance of tourism and how it benefits your local community
- Identifying different visitor profiles and reasons they visit your area
- · Understanding how to best promote products and services your community has to offer
- Enhance the visitor experience so guests want to return

#### Service for All:

- The origin of stereotypes and how to avoid them through empathy and sensitivity
- · How to use professionally appropriate language when delivering diverse service
- Practical tips and information to help you adjust your customer service delivery to meet diverse customer needs including different generations, persons with disabilities, individuals within the LGBTQ/2S community, Indigenous peoples, immigrants, and more

ICOM will work with Visit SLOCAL to ensure the Customer Service program meets their needs and is customized should it differ.

# **Development**

Once our script enters into the development phase, we will already have a clear idea about how the product will look and how the content will be delivered using iconography, images, motion graphics, custom video, and more. In addition to building an outstanding product with plenty of bells and whistles, we know it also needs to be an effective learning tool. For this reason, ICOM has built in client review points throughout our development process to ensure the product meets—and exceeds—your learning objectives.

The first step in our development stage is to deliver an Alpha product. This is a vertical slice of your product, showcasing the look and feel of both the interface and content. Here, you'll get a chance to see how we've incorporated your branding and visual elements with the script. Once the Alpha is approved, we begin the Beta development process. Using the Alpha as our guide, the first Beta product provides the client with a look at the product as a whole, in a fully functional state. Typically, we consider the Beta to be 90 to 95 percent complete and expect minor tweaks.

Once we receive your feedback, we will develop the Final Beta product that is ready for approval and sign-off. At this stage, you'll have a chance to ensure we've accurately input your feedback and that the product is ready for deployment. Using metrics from Breaze's reporting features, we will establish which components of the program are successful and which ones may need to be altered to increase user engagement.

### **Development Phases for the Breaze Solution**

A detailed and structured Project Plan will be developed by the ICOM project manager. It will contain all necessary components, milestones, and deliverables for this project. The overall phased approach will include the following steps:

- Conversations will be held between both teams to determine and confirm all necessary components required for the Breaze solution. This phase will include the Visit SLO CAL branding team. The focus of these sessions and conversation is to ensure the technical and branded aspects of the solution align with Visit SLO CAL's requirements
- 2. A Breaze initialization session will be conducted to confirm all technical aspects of the project and define the needs and goals of Visit SLO CAL in regard to:
  - General concepts, topics, information, and delivery methods
  - Technical requirements
  - Competency checks and evaluation tools
  - Reporting requirements
  - Document management
- 3. ICOM will then develop Breaze as specified.
- 4. User acceptance testing is conducted before the portal goes live to your learners.
- 5. The Visit SLO CAL Breaze portal is deployed, and the system is set to "Live" status, which enables Visit SLO CAL employees to use the system.

### **Implementation**

The Breaze solution will pass through a series of Alpha and Beta phases before the product is launched. ICOM's thorough quality-assurance process ensures the Breaze is fully functional before it ever reaches end users.

The Breaze offers numerous options for users to log on to the system and can be rolled out in phases. To begin, ICOM recommends implementing a self-enrollment option. This will make the tool available to anyone who wishes to enroll in the system. Stricter control features can be added in future phases. For example, the enrollment option can be changed to allow Visit SLO CAL more control over who accesses the system.

# **Project Staffing**

ICOM will provide a dedicated project team and ensure the most effective resources are put in place to meet SLO CAL's business and learning objectives. The following provides an overview of the team members' skills and experience. These individuals will oversee the project and ensure the deliverables are completed on time and budget.

# Loren Basque, Project Management

As Associate Director of Operations, Loren Basque is responsible for several operational tasks, such as contractor management, operational sales support, and Statement of Work standardization. She brings over 5 years of project management experience to her role with PMP Continued Education courses beyond University. Along with her operational duties, Loren is also the specialist project manager for a number of ICOM's high-profile clients, such as Edmonton Tourism, Utah Office of Tourism and Ottawa Tourism. As part of her dual role at ICOM, she expertly controls a number of challenging projects and ensures their success. We believe her experience in DMO clients will make her ideally suited to project manage Visit SLO CAL.

# Jennifer Burnell, Instructional Design

With more than 20 years of educating and training people, Jennifer applies tried and true skills, humour, creativity, and a continued drive for excellence to bring positive change for learners, teams, and businesses. As a seasoned instructional designer, Jennifer has a significant background in developing high-end training solutions, including E-Learning, instructor- and virtual instructor-led training, and blended learning programs. Be it creating training for 10 people or rolling out training for 10,000 employees, Jennifer is known for jumping into the trenches with the client to understand their challenges and identify the right learning solutions. Experienced in handling large review groups, Jen applies numerous techniques to make sizable stakeholder groups feel heard and to synchronise multiple pieces of feedback. In addition, Jen has been the Instructional Designer for DMO's, such as Utah Office of Tourism.

# Colin Bittner, Content Development

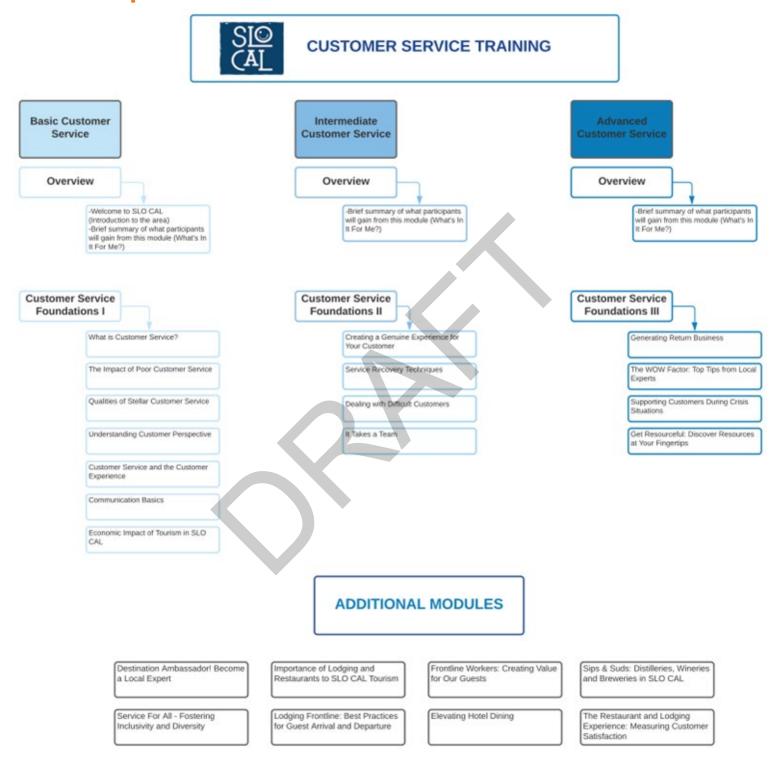
As senior lead of content development, Colin brings instructional design to life in the form of E-Learning, interactive components, and other products, such as mobile and classroom learning. Colin is a seasoned graphic artist and computer expert, specializing in Storyline and web-based training products. He has been responsible for the successful design, development, and deployment of over 400 SCORM CBTs in his 7 years at ICOM, for over 100 individual clients, including Fortune 500 companies in oil and gas, mining, transportation, food service, and entertainment. In addition Colin has led the team that built Edmonton Tourism and Utah Office of Tourism. Colin aims to deliver accurate, high-quality products that exceed client learning goals, while looking and operating at an industry-leading standard.

# Heather Hudak, Quality Assurance

As the team lead of quality assurance, and seasoned tourist, Heather brings more than 20 years of experience as a writer, editor, and instructional designer to each project. Heather joined the ICOM team as a project manager, writer, and instructional designer nearly a decade ago and has since become an integral member of the leadership team. Heather ensures top-quality results for our clients by overseeing script, content, and functionality reviews for every product. Prior to working at ICOM, Heather spent 10 years in educational publishing as the managing editor for Weigl Publishers. It is this experience that makes her the ideal team member to ensure the quality of the Visit SLO CAL experience. In addition, Heather led the QA on Travel Alberta, White Hat Academy, Edmonton Tourism and Ottawa Tourism.



# **Proposed Outline**



In our curriculum brainstorm session, we discussed a graduated approach, scaffolding the learner from basic to more nuanced levels of knowledge. All sections are valuable and viewable on their own, ensuring a modularity that hits all learner types.

It breaks down as follows:

#### **BASIC CUSTOMER SERVICE**

#### **Overview**

This is the landing page designed specifically for SLO CAL tourism industry. In addition to exceptional branding and engagement, this is the hook for the rest of the program, where the learner gets an instant understanding about the learning on which they will embark. It will introduce participants to the SLO CAL area, the value of tourism and the important role that customer service plays in SLO CAL tourism. Finally, the overview will firmly set the "What's in it for Me?" proposition for the participant.

#### **Customer Service Foundations I**

This is built as a comprehensive and practical introduction to customer service best practices. With the foundational elements laid out in its core components, this unit will be an essential first step for all customer service professionals.

**What is Customer Service?** - Think of this as Customer Service 101: we want to set up the foundation for our learners about the value of customer experience. and how it services our needs.

The Impact of Poor Customer Service – Tourism thrives on positive customer experiences. But, did you know that customers are twice as likely to share a negative experience than about a positive experience? Take this module to understand the impacts of poor customer service and how good customer service is critical for the success of our SLO CAL region.

**Qualities of Stellar Customer Service** – From being courteous and flexible to being a quick problem solver, discover what it takes to deliver stellar customer service every time.

**Understanding Customer Perspective** -- When we put ourselves in our customer's shoes, we naturally deliver better customer service. Find out how to understand a customer's perspective through practical scenarios that you can use with your customers.

**Customer Service and the Customer Experience** – Participants will develop an understanding of the relationship between customer service and the customer

experience. Participants will also refine skills to effectively promote products and services to support the client experience. It's not about promoting everything – it's about identifying customer needs and selecting the right products and services that will enhance the customer's SLO CAL experience.

**Communication Basics** – Communication skills are essential for creating exceptional customer experiences. This unit will look at the etiquette and differences for in-person, phone and electronic communication.

**Economic Impact of Tourism in SLO CAL** – 1 out of 6 SLO CAL jobs depend on travel and tourism, and travel spending results in millions of dollars being invested directly into our communities. This module will explain the importance of tourism to the SLO CAL region and citizens.

#### INTERMEDIATE CUSTOMER SERVICE

#### Overview

The overview will firmly set the "What's in it for Me?" proposition for the participant for the intermediate level training.

# **Customer Service Foundations II**

This program introduces intermediate level customer service best practices, focusing on elevating the customer experience through customer service communication and conflict resolution.

**Creating a Genuine Experience for Your Customer** – This module explores what it means to create a genuine customer experience. Participants will develop their skills by building rapport and tailoring services or experiences to meet and exceed customer expectations.

**Service Recovery Techniques -** We all make mistakes. Take this module to learn about communication etiquette and service recovery to bring the quality back to your customers experience

**Dealing With Difficult Customers –** Difficult customers are inevitable, so gain practical skills and confidence to turn a grumpy customer into a grateful customer.

**It Takes a Team** – Exceptional client experiences are rarely created by one individual. It takes a team of highly skilled and passionate people who foster a customer-centric culture. This module will help develop participants' enthusiasm, appreciation and respect for teamwork and how it is essential for excellent customer service.

#### ADVANCED CUSTOMER SERVICE

#### Overview

The overview will firmly set the "What's in it for Me?" proposition for the participant for the advanced level training.

#### **Customer Service Foundations III**

The advanced level of customer service best practices focuses on polishing and enhancing the participants' skills, enabling them to offer the best customer experience and generate return business.

**Generating Return Business** - The best testament of a visit is someone who wants to return! This will be the tips and techniques to enhance someone's visit to that level.

**The WOW Factor** – We'll hear from local experts on top tips to help participants exceed customer expectations every time and ensure that all customers discover that SLO CAL is just their speed.

**Supporting Customers During Crisis Situations** –When a crisis happens, customers need fast, factual and fluid customer service more than ever. Be ready when unforeseen circumstances arrive and learn how to remain calm and collected and prioritize your customer relationships during difficult times.

**Get Resourceful!** – Resourcefulness is a secret weapon that will elevate your customer service. Last minute changes, unusual requests, or emergencies demand quick thinking. This module will help participants identify what resources they have at their disposal and how to tap into them when they need it.

### **ADDITIONAL MODULES**

**Destination Ambassador/Local Expert** - Even if a team knows the right things to say, they need to know what to say it *about*. Built in conjunction with the Visit SLO CAL team, this program is designed to develop our people into experts on the region and as a resource tool to revisit in the future should the reference be needed. It will include:

- Overview of the area/geography of Visit SLO CAL (a map of some kind)
- An open menu to look at each respective region. Each region's content will be influenced
  by those who work in it and own it. Below is a general outline, but the concept is to make
  it feel as though these sections are written by those who know them best. Each
  selectable region will feature maps, locations, and links to go along with the locations
  talked about in each section.

- Neighborhoods *Unique, notable areas of the town/region that are frequent interests for guests/tourists*
- · Attractions and Experiences *Places of high interest/cultural importance that draw in guest interest*
- Restaurants Wide range of notable places to eat; showcase exceptional local or signature cultural food
- · Shopping Mix of local businesses, handmade goods, and larger destination shopping
- Nightlife Bars, music venues, stadiums, or any other forms of evening entertainment the region is known for
- Annual Events and Festivals Specific to the city

**Service For All** - Whether locals or visitors, your customers are a mosaic of different backgrounds and identities, a "one-size-fits-all" service approach simply doesn't cut it. Our world and needs are changing and so too, should our service delivery. A personalized approach that is focused on meeting the unique needs of each customer is the marker of successful and inclusive customer service. We will build out our program for just that.

- The origin of stereotypes and how to avoid them through empathy and sensitivity
- How to use professionally appropriate language when delivering diverse service
- Practical tips and information to help you adjust your customer service delivery to meet diverse customer needs including different generations, persons with disabilities, individuals within the LGBTQ/2S community, Indigenous peoples, immigrants, and more

**Importance of Lodging and Restaurants to SLO CAL Tourism** - The backbone of the hospitality experience for a customer is often their accommodation and where and what they eat. This module will ensure participants put critical thought into where customers will stay and dine to enhance the customer experience.

**Frontline Workers: Creating Value for Our Guests** – Hospitality frontline workers play a key role in a customer's experience while visiting the SLO CAL region. This module focuses on creating awareness of their role as SLO CAL ambassadors and how happy customers often mean return customers.

**Lodging Frontline: Best Practices for Guest Arrival and Departure** – Are your frontline staff prepared to make a guest's arrival and departure the best possible experience? This module will help ensure frontline staff know what it takes to even make a guest's departure a positive experience to remember.

**Elevating Hotel Dining** – Hotels are often married to a restaurant and as customers yearn for a unique experience, hotels are now looking at creating dining concepts that will attract both visitors and locals. This module allows participants to learn about elevated hotel dining experiences that offer customers something different from carbon-

copy restaurants, while also offering ideas and inspiration for hotels and lodging businesses who are looking to rethink their dining and drinking spaces.

**Sips & Suds!** – Distilleries, wineries and breweries are popular experience destinations. This module will have a customer service component and elevate participants' knowledge about SLO CAL distilleries, wineries and breweries and how to promote them effectively.

The Restaurant and Lodging Experience: Measuring Customer Satisfaction - This module introduces participants on how to use metrics to assess customer experience and service quality. Data is a powerful tool in marketing and this introduction will help SLO CAL businesses get a start in capturing important customer data.

#### Resources

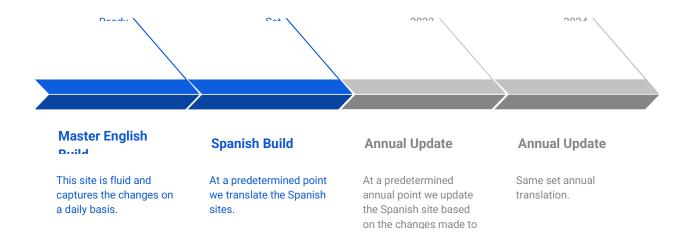
Finally, we will include a landing page for learners to revisit for quick reference and helpful tips. This is a one-stop resource for anyone lucky enough to go through this program for all things SLO CAL. It will include:

- Post-learning resources
- Up-to-Date research, as maintained by the Visit SLO CAL team
- Immediate desk-resources and helpful tools for everyday problems

# **Spanish Conversion**

For the Spanish version, we propose the following methodology:

- 1. We maintain the English in a real-time fluid manner.
- 2. The English version becomes the master copy for the Spanish version.
- 3. We will set up an alternate cloned version of the English program for the Spanish version.
- 4. At registration, the candidates can select which language they would like to use.
- 5. We anticipate the English and Spanish versions will be ready for the first quarter of 2022.
- 6. At a predetermined time (perhaps annually), we will copy the English version, translate it, and repopulate the Spanish site.
- 7. Since both the English and Spanish versions are hosted in Breaze, Visit SLO CAL's administration team can make revisions to either site at any time for urgent changes.
- 8. For future Spanish updates, we would propose budgeting \$8,000 annually to update the Spanish content, which sits distinct from the English version. This update would include re-cloning the English version and translating any additions, deletions and changes.



# **Marketing Support**

We propose to develop a 1-minute trailer to promote the Customer Service Training solution. This will be developed as a Youtube feature that can be emailed or hosted on social media sites and even added to the Visit SLO CAL industry support areas. We have ideas and suggestions about how to integrate this program into the onboarding programs of our client businesses.

# **Employee Recognition**

This is an awesome idea that we would propose hosting within the site. Because the site is easily modified in real-time, this could be updated on a monthly or quarterly basis. It could contain a picture, video clip, and short profile on notable Customer Service champions. The Employee Recognition "Shout Out" could be a feature resident on the opening access page.

# **Project Milestones**

The following is a representation of our process with typical durations of tasks. A more detailed project plan will be crafted upon project start date and will be best aligned to Visit SLO CAL's needs. Our Breaze projects tend to last from 6-8 months on average, shorter timelines are possible.

<u>Here</u> we have provided a templated link to a project plan for this type of project. Note that duration of tasks will be updated at project start and throughout. As this will be our first project with Visit SLO CAL we will use it as an opportunity to learn the typical duration of tasks for our partnerships.

### **Phase 1 - Initiation Milestones**

Milestone	Duration
SOW/Contract Signing	N/A

# **Phase 2 - Planning Milestones**

Milestone	Duration
Learning Outcomes Session     Meeting to discuss Visit SLO CALs learning and design needs for the content creation of Local Expert and content customization of Customer Service	2 half day sessions, with more if required
Joint Application Development Meeting     Meeting to discuss technical requirements for Visit SLO CALs Breaze instance e.g. single sign on/login requirements, registration details	30-60 Minutes

# **Phase 3 - Design Milestones**

Milestone	Duration
3a. Breaze Setup     Visual mock ups of Breaze instance based on Visit SLO CAL branding. Includes review cycles	10 days
Drafting of Local Expert Learning Outcomes and full script to prepare for course development. Will include review cycles and initial content from Visit SLO CAL. SLO CAL working	20 days

group and SMEs will be heavily involved here.	
3c. Customer Service Script  • Customization of ICOM Customer Service script. Working with Visit SLO CAL to edit our CS course to align closer to their requirements. SLO CAL working group and SMEs will be heavily involved here.	10 days

# **Phase 4 - Development Milestones**

Milestone	Duration
4a. Local Expert Development (30 Minutes)  Taking the script from milestone 3b we build out the course within the Breaze instance. Any Visit SLO CAL imagery can be used to further "brand" the course. As well as ICOM creation of custom and stock assets. Includes review cycles with Visit SLO CAL	12 days for initial build. Review cycles dependent on feedback
4b. Customer Service Development (60 Minutes)  • Taking the script from milestone 3c we build out the course within the Breaze instance. Any Visit SLO CAL imagery can be used to further "brand" the course. As well as ICOM creation of custom and stock assets. Includes review cycles with Visit SLO CAL	24 days for initial build. Review cycles dependent on feedback

# **Phase 5 - Deployment Milestones**

Milestone	Duration
5. Launch of Visit SLO CAL Breaze platform	1 day
Spanish Translation (90 Minutes)     With the English live we can move to the Spanish content.     This step can happen prior to Milestone 5 if launch should include Spanish. This is both courses included	20 days for initial build. Review cycles dependent on feedback

# **Phase 6 - Close Milestones**

Milestone	Duration
7. After a warranty period, project contact moves from Project Team to ICOM Client Support	10 days

# Costing

# **Content Development**

The table below outlines the costs associated for the instructional design and content creation for the English modules that will be deployed into the Breaze system.

Project Item	Hours	Totals
Project Management	50	\$7,000
Instructional Design	80	\$11,200
Creating and Editing Content	360	\$50,400
Interactive Programming	140	\$19,600
Quality Assurance	24	\$3,360
Estimated Effort	654	\$91,560

# **Spanish Build**

This table reflects the costs associated with the development and maintenance of a second language.

Project Item	Hours	Totals
Project Management	20	\$2,800
Translation		\$3,500
Editing Content	120	\$16,800
Hosting (integrated into main hosting)		
Quality Assurance	16	\$2,240
Estimated Effort	156	\$25,340

#### **Breaze**

As we have the framework of an existing Breaze platform, ICOM's costs focus on initialization of the Visit SLO CAL Breaze portal, which are reflected in the table below. In addition, the table outlines the annual fees associated with the Breaze license and hosting on our secured servers. The annual fee for these costs for both the English and Spanish sites is \$20,000 per year with an incentive reduction on the first year.

Project Item	Hours	Totals
Project Management	16	\$2,240
Analysis of User Management and Data Architecture	8	\$1,120
Breaze Initialization	80	\$11,200
Testing and Quality Assurance	16	\$2,240
Annual Breaze licensing, user data storage, and system hosting fee	\$20,000 per year after first year	\$10,000 for the first year
Estimated Effort	120	\$26,800

# **Summary**

Total Investment	Totals
Content Development	\$91,560
Spanish Build	\$25,340
Breaze Initialization, Hosting and Licensing	\$26,800
	\$143,700

# **Billing Considerations**

#### Please Note:

- Federal, state or provincial taxes are not included in the estimate. ICOM is now aware of Visit SLO CAL's 501c(6) status
- All costs are in USD
- 25% of total costing for the Breaze setup and Content Development is due upon start. A
  payment schedule associated with those deliverables will be defined by the Project
  Manager. Billing for the Spanish Build will begin upon completion of English.
- Visit SLO CAL operates on a fiscal year calendar (July 1-June 30), and applies an accrual basis accounting system. Invoices for the past month must be delivered on, or prior to, the 3rd of the month. If this timeline is impossible based on billing cycles, a clear

timeline must be noted and estimates for accruals must be provided by the 3<sup>rd</sup> of the month.

- Visit SLO CAL will be responsible for the fees associated with copyrighted music or graphics. If Visit SLO CAL requests particular music or graphics that are not in the public domain, ICOM will identify this prior to development of the product
- Travel expenses for the optional video hook portion, outlined below, will be invoiced in addition to this statement of work and will conform to Visit SLO CAL's travel and expense policy

# **Technical Dependencies and Project Assumptions**

- ICOM will have access to all systems as needed/requested for deployment needs
- ICOM will provide Visit SLO CAL's technical support team with sufficient technical information and lead time to complete the tasks
- Visit SLO CAL will be responsible for the implementation of the training to their employee base
- Visit SLO CAL will manage "user" support for the training
- Additional services may be requested at any point throughout the project and will be handled as a Change Request
- Visit SLO CAL will provide subject matter experts as needed to inform and verify content
- Visit SLO CAL to provide business owners for video hook portion



# Signature of Agreement

The client named below verifies the terms of this Statement of Work are acceptable. The parties hereto are each acting with proper authority by their respective companies.

Visit SLO CAL	ICOM Productions
Company Name	Company Name
Full Name	Full Name
Title	Title
Signature	Signature
Date	Date

# Appendix 1 - May 24th Clarification Questions

Thank you for the opportunity to clarify some sections of our proposal, we have chosen to address the questions in a 2 step approach. First we will present a general discussion where we hopefully address the core question. Then we will refer to the actual sections within the proposal that will reflect any changes that are needed.

1. Under "Development Phases for the Breaze Solution" -> #1 – We will be pulling together an CST working group to help drive content with their industry knowledge. Is it possible to include the working group as part of this step?

Our client's expert input is key to the success of this portal. The CST Working Group discussion will be integrated into the **Learning Outcome Session** element of our process. It may be conducted over a series of Zoom style meetings and one-on-one interviews. We look closely for input on structure, learning objectives, assessments, specific content, graphical assets, and approach. This allows us to build a comprehensive outline and begin to understand the personality of Visit SLO CAL. Thanks to your question we have increased the time spent in the Learning Outcome Session.

See "Learning Outcome Session" (highlighted in blue) on pages 12, 13, 19

2. Under "Proposed Outline" -> We would like to see a bigger build out. The EDI component alone should be about 15-20 minutes. We do want to keep the overall training to a reasonable amount of time but also want the crucial modules to be comprehensive and have the time that's needed for review and understanding.

Understood, Equity Diversity and Inclusion is a key topic. In fact, we had some disagreement on our team that this topic should be in the Basic section. We have developed this content for other clients and may have some useful tips. Our team looks forward to building the content outline **with you** and know emphasis will shift as we better understand the Visit SLO CAL approach. We look at the time more as a bank of 90 minutes that we can spread around and balance the content and learning experiences.

See "Proposed Outline" (highlighted in blue) on page 15

3. Under Marketing Support, can you clarify if we would need to build or create content for the 1 minute trailer?

We anticipate utilizing existing content from Customer Service Training overlaid with some additional graphical techniques from ICOM. ICOM will provide the creative expertise and content while working closely with Visit SLO CAL for additional inspirational direction.

4. Under Timeline -> Spanish Course, can you clarify further on the voice artist? You have it assigned to "client" but what does that look like? We would have to find a Spanish speaker for translation?

ICOM will manage the translation process and have professional Spanish artists on our team. Sometimes clients prefer their own artist which is why Client shows up in that line item. As that is a joint role, we have adjusted the Timeline Chart

We work to ensure that the site is as fully Spanish as possible. Sometimes video and other assets require post production editing to be acceptable for the Spanish version. Using Google Translate in Youtube is usually adequate but we may overdub a number of audio tracks if needed. We anticipate this will be minimal and there will be no additional costs for this service.

See "Timeline" (highlighted in blue) on page 20

5. Under Billing Considerations, would we be applicable to provincial taxes as a 501c(6)? \*this is only if you know. We can determine internally as well\*

The 501(c) business code is your Tax exemption status which we are happy to accommodate. ICOM will honour any applicable tax exemptions for Visit SLO CAL.

See "Billing Considerations" (highlighted in blue) on page 24

6. What is the range or budget for OOP travel costs?

We are confident that the solution as presented can be successfully achieved by operating remotely with no additional out-of-pocket costs. We leave an option open for a Video Hook (defined below) to bring a more customized feel for local businesses. We need to ensure we comply with the latest Covid protocols for travel etc. In normal circumstances a Video Hook budget is from \$5,000 to \$8,000 inclusive of travel expenses.

#### See "Billing Considerations" (highlighted in blue) on page 24

7. Can you clarify what you're referring to by "video hook"? Is that the aforementioned one minute marketing trailer?

ICOM defines a "Video Hook" as a custom video that generates emotional empathy to achieve a learning objective and compel the learner to stay on task. For SLO CAL we really aligned with the concept that a visit to the region is an opportunity to slow down and feel like part of the community. This generated the concept of having local business owners casually discuss what it is like to be part of the Visit SLO CAL community. By executing this as a video we really target the emotional part of a learner's brain and that feeling embeds itself, becoming part of everything they do as Customer Service agents.



