



**Unincorporated San Luis Obispo County
Tourism Business Improvement District Advisory Board (CBID)
Agenda**

Wednesday, May 24, 2017, 12pm – 2pm

Apple Farm ~ Harvest Room, 2015 Monterey Street, San Luis Obispo, CA 93401

Call to Order

Public Comment (limited to 3 minutes per speaker)

Administrative Items

- Roll Call
- Chairperson Report
- A-1** • Consent Agenda - Minutes
- A-2, A-3** • Financials, Administrator Report, and Partner Updates
- Upcoming Events/deadlines
 - Board Meetings: June 28th, July 26th. Confirm August meeting
 - 2018 BlendFest confirmed for February 9 – 11, 2018

Presentation/s (please limit to 15 minutes unless otherwise noted)

Additional discussion with AJ Fudge, #UnlockYourAdventure funding request

- B-1** Katie Sturtevant, Stewardship Travel annual recap and looking ahead

Discussion Items

- Strategy/Topic Discussion
 - C-1** ○ Strategic Plan next steps: Operation Plan development
- Core Marketing Team and Stewardship Program
 - C-2** ○ Marketing Results Overview
 - C-3** ○ Marketing Plan timeline and short-term milestones
- Governance and Marketing/Collaboration Reports & Recommendations
 - CAO Annual Review
 - Draft 2017 | 2018 budget

Action Items (each topic will allow for Board Discussion, followed by Public Comment)

- D-1** • Funding Applications
 - CBID Event Focus Funding: #UnlockYourAdventure (\$7,500)
- D-2** • Local funding requests
 - Cayucos: #UnlockYourAdventure (\$7,500)
- Funding approval: Operation Plan Development with Coraggio Group
- COLA approval for CAO

Future Agenda Items

- CMT contract (June)
- 2017 | 2018 Budget approval (June)
- Influence Survey data
- Continuing discussion about Local Fund Operations | Duplication of Effort

**Closing Comment
Adjournment**



**San Luis Obispo County
Tourism Business Improvement District Advisory Board
(CBID)**

Board Meeting Minutes

April 26, 2017

12:00 p.m.

Apple Farm ~ Garden Room
2015 Monterey Street
San Luis Obispo, CA 93401

DRAFT UNTIL APPROVED

SLO CBID Members Present:

Board: Laila Kollmann, Lori Keller, Matt Masia, Shirley Lyon, Bram Winter, Mike Hanchett
County Liaison: Nikki Schmidt; CAO Cheryl Cuming

Absent: John King (unexcused)

Guests: John Sorgenfrei, Bill Stansfield, Kaci Knighton, Michelle Wright (Core Marketing Team); Sarah Taylor Maggelet (SLO CAL); AJ Fudge (CC Art & Music Festival); Jessica Blanchfield, Carissa Schwabenland (Archer & Hound)

Call to Order

by Chair Laila Kollmann at 12:06 p.m.

Public Comment

Laila welcomed Archer & Hound, as well as Sarah and AJ.

Administrative Items

- Roll Call

Laila Kollmann, Mike Hanchett, Shirley Lyon, Lori Keller, Bram Winter and Matt Masia present. John King is absent.

- Chairperson Report

Laila noted the Highway 1 closure outreach efforts. Mike said their property is a bit off for same day walk-ins. Jessica summarized the outreach for Cycle Central Coast and the ability to ride Highway 1 when road is clear.

- Consent Agenda

A motion was made by Mike Hanchett, seconded by Bram Winter, to approve the March 22 minutes. With no further discussion, these minutes unanimously were approved by a voice vote of the Advisory Board.

- Financials

CAO Cuming reviewed the assessment progress against budget and noted \$144,000 in contingency.

- **Administrator's Report and Partner Update**

CAO Cuming reviewed the Local Fund Area (LFA) binders for new local fund board members. Sarah Maggelet provided the SLO CAL report including county process for bringing vacation rentals into compliance.

- Upcoming Events

Next board meetings will be May 24 and June 28.
SLO CAL Tourism Exchange is May 11.

Business/Presentations

- **BlendFest**

Jennifer Porter was unable to attend. CAO Cuming will confirm availability for May meeting.

- **#UnlockYourAdventure**

AJ Fudge presented the Art & Music Festival in Cayucos that will be held in August with the #UnlockYourAdventure shoulder season promotion from October through March. Mike asked about technology and who is handling. AJ confirmed that there are 2 potential vendors and the app will be custom created. Mike asked about marketing and AJ said she will deliver out-of-area messaging through mobile devices. Matt asked about percentage dedicated to marketing and AJ confirmed that a total of \$15,000 will be invested. Jessica asked about Cambria being involved and AJ said she is open to expansion in 2018. Lori inquired about lodging participation and AJ provided information about how properties can

offer an experience for #UnlockYourAdventure. Lori expressed her concern with the lack of participation in these types of offers in the past. Matt asked how it will integrate with **H1DR's winter ad campaign**. Nikki asked AJ what other festivals she has been involved in, and AJ confirmed her past involvement. Laila asked about having the photo and video assets shared, and AJ confirmed they would be shared, and noted the importance of sharing the email addresses gathered.

Discussion Items

- **Strategy/Topic Discussion**

None

- **Core Marketing Team & Stewardship Program**

Kaci shared results from the Roam campaign, noting 11,500 new names have been added to the database. She also touched on native advertising results and social media impressions (916,000+) with almost 250,000 video views. Spring campaign details were provided with the messaging evolution of "Our Roads are Open to Roam". John Sorgenfrei noted the details of the media plan, including SF Gate. Bill noted that the Roam campaign and H1DR map won a bronze Addy award, and the website won a silver Addy award. Bill also addressed the drone film effort to expand the asset library, and reviewed the web enhancement projects schedule through June. It was confirmed that the H1DR activity on TripAdvisor is now ranking #13.

- **Governance, Marketing/Collaboration & Events Sub-Committee Reports**

Governance: Discussion of next steps with the CMT and need to confirm. CAO Cuming confirmed 90-day timeline with RFPs submitted on 2/2 with deadline on 5/2. The board discussed the overall approach for 2017 | 2018 budget, planning and marketing. The board supports placing on the May agenda to extend CMT to June 2018. They seek to have all costs at net, including media and all other hard costs.

Marketing: Laila noted that the MSC recap was included in the board packet, and asked if there were any questions.

Events: No report

Action Items

Strategic Plan: Chair Laila Kollmann reviewed the overall process and CAO Cuming reviewed the final edits from the 3/22 board meeting. Matt asked if \$20,000 for the Operational Planning is within the budget and CAO Cuming confirmed that it would need to be funded through contingency. Lori asked Matt if there are areas we are missing and Matt indicated he felt overwhelmed by the details as the majority of the board just became involved last month. Lori noted the operational plan will bring it to life and provide an

action plan. Mike suggested the board focus on initiatives in order to understand if they support the direction and then in turn, support funding the operational plan.

A motion was made by Mike Hanchett and seconded by Shirley Lyon, **to approve the "draft" Strategic Plan as provided and agree that the plan will evolve as the operational plan develops. Matt Masia abstained indicating that he's not comfortable** based on the limited information he has been provided to date.

A motion was made by Laila Kollmann to approve \$20,000 from the contingency for the **operational plan as presented. Motion didn't carry. Laila re-motined**, and new motion was seconded by Shirley Lyon, to approve \$20,000 for the plan. Bram and Mike asked to see an example of **SLO CAL's operational plan before proceeding. Motion was withdrawn and** further discussion will be placed on May agenda following receipt of a sample operational plan.

Cambrian Opinion: Laila reminded the board of the conversation from the last meeting and asked whether CTB was going to respond. Bram recapped discussion from the CTB meeting about opinion letter written January 25, 2017. Shirley suggested they promote STP so locals are aware of what is being done. The board did not support a response at this time, and suggested PR efforts be explored at the local level.

Local Fund and Matching Fund Applications

Cambria Olallieberry Festival:

A motion was made by Shirley Lyon, and seconded by Bram Winter, to approve \$1,000 in matching funds for Cambria Olallieberry Festival. With no further discussion, the motion was approved by a voice vote of the advisory board. Matt Masia opposed.

Avila Beach STP clean-up bags:

A motion was made by Mike Hanchett, and seconded by Shirley Lyon, to approve \$6,320 for the new STP clean-up bags. With no further discussion, the motion was approved by a unanimous voice vote of the advisory board.

San Simeon Gateway signage:

Mike Hanchett provided a history of the gateway sign and the progress to date. He will need to confirm final details and who will get the landscape contract.

A motion was made by Lori Keller, and seconded by Shirley Lyon, to approve \$24,999. With no further discussion, the motion was approved by a unanimous voice vote of the advisory board.

Oceano Nipomo TJA Marketing:

A motion was made by Mike Hanchett, and seconded by Bram Winter, to approve \$5,600 for social media and spring advertising with TJA. With no further discussion, the motion was approved by a unanimous voice vote of the advisory board.

Event Focus Funding | #UnlockYourAdventure:

The Board discussed at length and was concerned with AJ's ability to obtain 5,000 respondents, that AJ is the only person involved, and risk that this 'new' approach may not yield results promised.

A motion was made by Shirley Lyon, and seconded by Bram Winter, to approve \$7,500 for #UnlockYourAdventures shoulder season promotion. Lori asked about performance pay based on deliverables. Laila called for a show of hands: Shirley, Matt and Bram were in support; Lori and Mike were opposed; Laila abstained. Motion did not pass. Board requested additional information.

The board will invite AJ back in May to address questions.

Revamped Funding Guidelines & Application

The revamped funding guidelines and application will launch on May 1.

Future Agenda Items

Contract renewal for Admin & Financial services (May)

Influence survey data

Continuing discussion about Local Fund Operations | Duplication of effort

STP presentation

2017 | 2018 Budget

CMT: Budget, contract, marketing plan

Closing Comments

None

Adjournment

The meeting was adjourned at 3:09 p.m.

JAMES P ERB, CPA
SAN LUIS OBISPO COUNTY TREASURER - TAX COLLECTOR - PUBLIC ADMINISTRATOR

MONTHLY SLOCTBID RECONCILIATION
FISCAL YEAR 2016-2017
Month Ending: April 30, 2017

PREPARED BY :
Kindra Pauls

APPROVED BY : _____

DATE April 5, 2017

DATE : _____

SLOCTBID-Undistributed						
Account 3100500003-2601852 Balance :		1,625,758.37				
Adj for April 2017 Activity Deposited in May 2017		21,615.71				
Adj for 15/16 Activity Deposited in 16/17		(19,946.55)				
Subtotal:		1,627,427.53				
Prior FY Undistributed		(1,757,404.58)				
Prior Periods Undistributed		46,272.39				
Current Period Distributed		179,913.31				
Adjusted SAP Balance		96,208.65				
HdL TOT/BID System						
Monthly Cash Receipt Listing		96,208.15				
Difference of .50 cents pending correcting JE for #1001728522 posted for \$1818.16 s/b \$1818.66.						
	Difference	\$ 0.50				
	Total:	0.50				
HdL TOT/BID System						
Area Report	Total BID	2% Admin Fee	Dist to Vendor	Dist to TC	Interest Pd	Undistributed
Jul 2016	192,903.26	3,858.07	82,475.83	3,566.01		106,861.42
Aug 2016	277,451.19	5,549.02	191,923.60	3,858.07		81,669.52
Sep 2016	241,891.26	4,837.83	140,114.21	5,549.02		96,228.03
Oct 2016	168,831.61	3,376.63	185,631.60	4,837.83		(21,637.82)
Nov 2016	174,728.70	3,494.57	108,297.48	3,376.63		63,054.59
Dec 2016	143,242.13	2,864.84	112,520.72	3,494.57		27,226.84
Jan 2017	126,051.78	2,521.04	201,551.47	2,864.84		(78,364.53)
Feb 2017	99,715.36	1,994.31	242,101.55	2,521.04		(144,907.23)
Mar 2017	90,932.92	1,818.66	265,341.82	1,994.31		(176,403.21)
Apr 2017	96,208.15	1,924.16	178,094.65	1,818.66		(83,705.16)
May 2017		0.00				0.00
Jun 2017		0.00				0.00
Totals	1,611,956.36	32,239.13	1,708,052.93	33,880.98		-129,977.55
Diff SAP Bal less Undist						\$ 0.50

SLOCTBID
Profit & Loss Budget vs. Actual - General Fund
 July 2016 through April 2017

	<u>Jul '16 - Apr 17</u>	<u>Budget</u>	<u>\$ Over Budget</u>	<u>% of Budget</u>
Income				
BID Assessment Collection				
General Fund	805,978.35	920,000.00	-114,021.65	87.61%
Total BID Assessment Collection	805,978.35	920,000.00	-114,021.65	87.61%
Carryforward	380,800.79	380,800.79	0.00	100.0%
Total Income	<u>1,186,779.14</u>	<u>1,300,800.79</u>	<u>-114,021.65</u>	<u>91.24%</u>
Gross Profit	1,186,779.14	1,300,800.79	-114,021.65	91.24%
Expense				
Administration				
Office Rent	739.04			
Administration - Fin. Support	4,875.00	7,200.00	-2,325.00	67.71%
Administrator - General Fund	46,183.30	73,500.00	-27,316.70	62.83%
District Administration Fees	14,195.37	18,500.00	-4,304.63	76.73%
Events	500.00			
Meals	145.06			
Mileage	3,309.67			
Supplies	1,142.62			
Telecommunications	2,557.26			
Travel	1,342.19			
Total Administration	<u>74,989.51</u>	<u>99,200.00</u>	<u>-24,210.49</u>	<u>75.59%</u>
Marketing/Advertising				
Collateral / Brochure	26,707.17	46,000.00	-19,292.83	58.06%
Co-Op	37,645.64	40,000.00	-2,354.36	94.11%
Creative Development	44,204.78	67,000.00	-22,795.22	65.98%
Maps / Certified Folder	27,911.60	30,000.00	-2,088.40	93.04%
Media				
CDSM Campaign	11,021.21	18,000.00	-6,978.79	61.23%
Ordinance Renewal	0.00	1,200.00	-1,200.00	0.0%
PPC/Retargeting	28,132.76	36,000.00	-7,867.24	78.15%
Shoulder Season	108,340.74	110,000.00	-1,659.26	98.49%
Spring Season	43,988.00	110,000.00	-66,012.00	39.99%
Total Media	<u>191,482.71</u>	<u>275,200.00</u>	<u>-83,717.29</u>	<u>69.58%</u>
Total Marketing/Advertising	<u>327,951.90</u>	<u>458,200.00</u>	<u>-130,248.10</u>	<u>71.57%</u>
Memberships/Sponsorships				
Memberships				
CCTC	850.00			
Chamber	235.00			
Total Memberships	<u>1,085.00</u>			
Sponsorships / Events				
Event Focus/Matching Funds	1,000.00			
VSLOC/VisitCA co-op	68,725.00	70,000.00	-1,275.00	98.18%
Total Sponsorships / Events	<u>69,725.00</u>	<u>70,000.00</u>	<u>-275.00</u>	<u>99.61%</u>
Total Memberships/Sponsorships	<u>70,810.00</u>	<u>70,000.00</u>	<u>810.00</u>	<u>101.16%</u>
Project Management				
Project Management	18,000.00	24,000.00	-6,000.00	75.0%
Strategy	2,281.25	16,000.00	-13,718.75	14.26%
Total Project Management	<u>20,281.25</u>	<u>40,000.00</u>	<u>-19,718.75</u>	<u>50.7%</u>
Promotions	27,187.50	38,000.00	-10,812.50	71.55%
Public Relations				
Individual FAM Trips	17,000.03	26,000.00	-8,999.97	65.39%
Public Relations - Other	58,255.40	72,000.00	-13,744.60	80.91%
Total Public Relations	<u>75,255.43</u>	<u>98,000.00</u>	<u>-22,744.57</u>	<u>76.79%</u>
Research	7,500.00	20,000.00	-12,500.00	37.5%
Social Media				
Facebook, Blogging, etc.	48,129.06	72,000.00	-23,870.94	66.85%
Monthly E-Newsletter	7,803.33	28,000.00	-20,196.67	27.87%
Total Social Media	<u>55,932.39</u>	<u>100,000.00</u>	<u>-44,067.61</u>	<u>55.93%</u>
Stewardship/Sustainability				
Positive Futures Expenses	457.78			
CMT	16,390.07	27,000.00	-10,609.93	60.7%
Miscellaneous	4,934.82	5,000.00	-65.18	98.7%
Positive Futures	20,830.00	25,000.00	-4,170.00	83.32%
Total Stewardship/Sustainability	<u>42,612.67</u>	<u>57,000.00</u>	<u>-14,387.33</u>	<u>74.76%</u>
Web Development				
Content Management	10,906.44	18,000.00	-7,093.56	60.59%
Hosting & Maintenance	15,625.49	16,000.00	-374.51	97.66%
SEO/Content/Links	46,123.68	48,000.00	-1,876.32	96.09%
Total Web Development	<u>72,655.61</u>	<u>82,000.00</u>	<u>-9,344.39</u>	<u>88.6%</u>
Contingency				
BrandUSA Outdoors	2,365.35	4,000.00	-1,634.65	59.13%
BlendFest	5,000.00	5,000.00	0.00	100.0%
CD&S FAM	13,658.05	13,000.00	658.05	105.06%
Certified Folder	14,287.98	14,360.00	-72.02	99.5%
Coraggio Group	37,670.44	35,000.00	2,670.44	107.63%
Coraggio Group Travel	2,776.92			
Destination Photo Shoot	7,077.68	7,398.80	-321.12	95.66%
Promotions	8,841.29	7,199.00	1,642.29	122.81%
Strategy	656.25	375.00	281.25	175.0%
Contingency - Other	0.00	152,067.99	-152,067.99	0.0%

SLOCTBID
Profit & Loss Budget vs. Actual - General Fund
 July 2016 through April 2017

	<u>Jul '16 - Apr 17</u>	<u>Budget</u>	<u>\$ Over Budget</u>	<u>% of Budget</u>
Total Contingency	92,333.96	238,400.79	-146,066.83	38.73%
Total Expense	867,510.22	1,300,800.79	-433,290.57	66.69%
Net Income	<u>319,268.92</u>	<u>0.00</u>	<u>319,268.92</u>	<u>100.0%</u>

Note> This excludes the April invoice from Mental Marketing



Administrator's Highlights May 2017

BID Infrastructure

Organizational planning process with Coraggio Group
2017 2018 Marketing Planning with CMT and coordinate 2016 2017 results presentation
2017 2018 budget planning with Mike H, and Governance Committee
Explore Kind Traveler as part of 2017 2018 STP planning and coordinate 2016 2017 results presentation
Launch influence survey with SMG
CAO review and address areas of improvement
H1 meeting and ongoing plan in partnership with SLO CAL

Collaborations

Tourism Stakeholders: All Agency outreach for H1DR map reprint
SLO CAL: attended Tourism Exchange
Wine Industry: BlendFest 2018 date confirmed

Local Areas/Constituent Outreach

Launch final RRT Destination effort
Local applications: 407 processed to date totaling over \$4.46 million;
Event Focus fund sponsorship with #UnlockYourAdventure; coordinate CBID presentation
Provide materials monthly for local fund board packets (stat summary, new programs, financials)
Support role with local admin: Avila, Cayucos, Cambria, LO/Baywood, Oceano/Nip, EV/AGV, San Simeon
Attended board meetings in 7 regions, plus Cambria Marketing Committee meetings monthly

Web Development/Advertising/PR

Web enhancement projects
Launch Spring campaign
Revise H1DR map
Planning

General Activities

Assist 5 local admins servicing 33 local fund board members and 500 constituents
Provide support to 7 Advisory Board members
Prepare monthly Advisory Board meetings
Marketing, Event and Collaboration Committee prep, support and follow up
Create Stat Summary report, Admin Report, 3 committee reports
Meet ongoing with County Liaison
Ongoing: Board minutes and agenda; reports including Admin, Local Board, Partnership, & Sub
Committee; Board packets; maintain Constituent master list; maintain and monitor Expense and Local
budgets; review and process all invoices; Postings on **member's site**; Monthly consumer newsletter
content review and approval; manage email inquires



Stewardship Traveler 2016-2017 End of the Year Recap & 2017-2018 Discussion

Desired Outcomes:

- Overall 2016-17 recap of Stewardship Traveler Program
- Review recommended priorities for 2017-2018 (further discussion in June MSC meeting)

Discussion Topics:

- 2016-2017 Shared Debrief
 - Regional Stewardship Traveler success stories
 - Coastal Discovery & Stewardship Traveler- continued success with Whale Trail Interpretive sign collaboration
 - Workshop/training/public education opportunities
 - Wildlife Viewing & Stewardship Tips life tips success as a promotional tool
 - Award winning – Visit California Poppy PR Award Commitment to Community
 - Continued to leverage the 4 years of development on STP brand for partners to use to market & promote the program



□ 2017-2018 Recommended Priorities for Discussion

- Expand Wildlife Viewing & Stewardship Tips as a lodging promotional tool – ie. Change to rack card format and consider focused circulation in Certified Folder
- Heritage Trail - develop a HWY 1 Discovery Route Heritage Trail along Hwy 1 Discovery Route for promotion use (where to stay...) Use as a promotional tool like Wildlife Viewing & Stewardship Tips.
- Explore ways to continue to partner with the Whale Trail for promotion.
- As we learn more, update STP Key Messaging. Such as integrate “caring travel” “impact travel” “kind travel”
- Kind Travel- Introduce Nicole Huertas Director Business Development of Kind Travel
- Explore beneficial partnership with #UnlockYourAdventure
- Maintain:
 - Current level of success of the Stewardship Travel Program - maintain relationships with constituents & partners
 - Coastal Discovery & Stewardship Celebration-Continue to maintain relationships & build each year. Assist on finding Hearst Theater movie feature for 2018: something around plastic in ocean to tie in with #UnlockYourAdventure.
 - Continue to work with all local regional boards on Stewardship Traveler Program announcements & ideas, keeping it fresh in their minds and how to utilize the Stewardship Traveler Program strategy in their marketing



Award Winning Highway 1 Discovery Route Stewardship Traveler Program An Ongoing, Successful, Newsworthy, and Sustainable Marketing Strategy

The Highway 1 Discovery Route's *Stewardship Traveler* Program (STP) was successfully launched in 2013. It continues to maintain promoting over 70 activities with 36 community partners (28 local non-profits, 8 businesses). The program is a key differentiating strategy that provides a unique platform to attract and retain visitors, and at the same time benefits our natural surroundings, historic assets, economy, and local communities.



The program inspires visitors and residents alike to deepen their SLO county experiences, learn more about their surroundings, and to help care for the region's natural and cultural heritage. The *Stewardship Travel* brand increases awareness while positioning the Highway 1 Discovery Route as a leader in tourism sustainability. Current and growing travel trends in hands-on eco-tourism, sustainable, green, volunteer, and geo-tourism provide additional support for the pursuit of this marketing strategy:

- Phocuswright's 2015 Good Travelers research found that 75% of travelers polled think it's important, somewhat important, or extremely important that their travel dollars benefit the communities they visit.
- 66% of people globally believe it is no longer enough for a company/brand to simply give money to a good cause; they need to integrate causes into their day-to-day business

Program Benefits

STP Attracts and engages an emerging, high profile visitor, alongside locals, who will help care for the region.

- The menu of hands-on and contribution opportunities helps differentiate the Highway 1 Discovery Route brand and unincorporated SLO County from other travel destination choices
- Delivers cost-effective media attention and high value content for all social media and online tactics
- Builds off-season and extended stay opportunities throughout the 10 regions
- Effectively provides one path towards long-term, countywide economic and resource sustainability

Examples of High Value Stewardship Travel Activities

The activities ensure opportunities for learning, authentic connection, natural and cultural heritage, and public participation in clean-ups and restoration activities such as: dive, beach, stream, lake, trail, meadow, campground, and parks. STP provides the visitor information on how and where to financially contribute to "make a difference" in the area that the visitor just enjoyed and connected with.

Activity examples include:

- Stolo Winery's Stewardship & Historical Walks, Talks & Lunches
- Montaña de Oro State Park Trail Restoration Days: draws over 150 enthusiastic participants annually



- Avila Beach, Cayucos, Cambria and San Simeon Stewardship Clean-up Kit and Appreciation Tote: Over 4,000 tote bags distributed to local lodging properties for distribution. Avila Beach just introduced a local artist component to their beach clean-up, this incentivizes guests to clean up the beach and share their experience on social media in order to receive a tote bag with local Avila Beach artwork.
- Coastal Discovery Center Hands-On Citizen Science in San Simeon Cove
- Weed Eradication and Native Plant Restoration at Fiscalini Ranch Preserve
- Central Coast Aquarium Dive Clean-Up



Program Focus Areas and Updates Developed for 2016-17

The CBID has identified and refined the Stewardship Traveler strategic marketing approach into 3 prioritized and distinct times of year, focusing on "shoulder seasons":

- Coastal Discovery and Stewardship – January/February
- "Celebrate Earth Day Along the Highway 1 Discovery Route" – April
- California Coastal Clean Up – September

2015-16 program focus/goals included:

- Maintain the ongoing stability of STP activities and assets
- Continue to maintain strong STP marketing and PR efforts
- Continue to deepen and integrate STP in all 10 regions
- Create more in-county awareness, education and promotion of STP
- Manage and support our strategic marketing partners effectively
- Create and maintain a Wildlife Viewing & Stewardship Tips sheet to be used in all 10 regions

California Highway 1 Discovery Route
Wildlife Viewing and Stewardship Tips

Great wildlife viewing encounters involve good timing, observation skills, and a little luck! California's Highway 1 Discovery Route offers some of the best wildlife viewing opportunities anywhere. Use these tips to improve your chances for a memorable wildlife experience!

Be outside during dawn, dusk, and incoming tides. Birds, fish, and mammals are active during these times. Look for churning water surfaces, diving birds, shiny double backs, seals and otters in bays and on open water. Listen for songbirds singing in bushes and trees, especially during spring and early summer.

Be calm and stay awhile. Adopt an unobtrusive, "vacator" state of mind. A state of relaxed alertness is the best way to see wildlife.

Blend in. Animals react to movement. So quietly rest to a bush or tree and practice the "art of invisibility."

Identify the pair or nature, but respect a distance.* – Bill Cramer

Keep it steady. When looking, keep a slow, steady panning rhythm. You're more likely to have curious seals, otters, or dolphins approach you.

Zoom in. Use binoculars, spotting scopes, and zoom camera lenses to see wildlife without getting too close at a distance that is less likely to disturb natural animal behaviors.

Look and listen for signs of wildlife. Look for animal tracks and droppings (called scat). Large birds like ospreys, hawks, vultures, and condors are more noticeable while droppings (pellets) on bushes, trees, sea cliffs and rocks. When you see this, look up to find where birds roost or feed.

Low tide appears fascinating and fragile life on the rocks. Venture carefully on rocks for a close-up peek into the exciting tidal world of animals feeding, interacting or waiting for the incoming tide.

Look for whales when seas are calm. Look for whale spouts or blows, tail flukes, and dorsal fins. Big splashes may indicate a whale has just breached. Look for The Whale Trail nesting sites along the Highway 1 Discovery Route <http://thewhaletrail.org/>.

Connect With Nature IN SAN LUIS OBISPO COUNTY

SLO County is known for its abundant wildlife season-to-season. Important natural occurrences can be observed annually. Plan your next trip around your favorite species or group of animals.

ELPHANT SEALS: December, January, February and May. Female elephant seals, ready to give birth, arrive in December at Point Pinos State Park. Thousands of pups are born in January. In February, elephant seal males fight for mating rights with females. In May, females return for the molt season.

BIRDS: December, January and February. San Luis Obispo County is considered a top birding spot in the US. Birds from northern climates spend winters in SLO County's mild climate. Bird and boat arrive in December to participate in the world-wide annual Audubon Christmas Bird Count. Enjoy Mono Bay Winter Bird Festival in January and Avila Beach Bird Sanctuary Day in February.

GRAY WHALES: March, April and May. Females and their young calves travel close to shore on their northeast passage from Mexico to Alaska. Sperm whales pass along the Central Coast from March through May. This is the best time for viewing gray whales. Follow The Whale Trail to watch them from several key vantage points south during October and November.

SEASON OF OCEAN ABUNDANCE: August, September and October. Marine animals linger along the Central Coast, feeding on schools of sardines, anchovies and other small fish. Although ocean productivity may vary from year to year, this is the most likely time to see humpback whales, dolphins, sea lions and seabirds feeding close to shore.

MONARCH BUTTERFLIES: November, December, January and February. Monarch butterflies spend winters in the mild climate of the Central Coast. The Monarch Grove in Pismo Beach, California, is the largest in the western US – each year millions of butterflies rest and mate in the tall windbreak trees.

SEA OTTERS: The Central Coast is one of the best places to observe sea otters! Look for them any time of year off the coast of LEO, Cayucos, Cambria and San Simeon.

Take Care - Be A Stewardship Traveler

Stay on trails. Going off trail may harm animal habitat or bird nesting areas. Keep dogs and children safe by staying on designated trails.

Watch where you step. In tide pools, walk on hard rock to avoid crushing fragile tide pool animals, and keep away from seaweed - it's slippery! Please leave tide pool creatures to their natural homes. Tide pools may be available in stores and real estate offices.

Stay at a distance, including drones. If birds and animals get nervous, they show it by looking at you, raising their heads and sleeping when they were doing. Any change of an animal's natural behavior is a disturbance.

Please do not feed wildlife. There is plenty of food available in the wild. Human food can create digestive problems and improper nutrition.

Stay away from animals that appear sick or abandoned. If you find an injured bird or land animal, you can help by calling Pacific Wildlife Care, 805-543-5453. If you suspect a marine animal is injured or in danger, call the Marine Mammal Center, 805-771-8300.

Be a stewardship traveler and lend a hand with trash removal. Human garbage is one of the greatest threats to wildlife. Get a Stewardship Traveler Clean-Up Kit to pick up litter on the trail, at the shore, and even in the water. Free Stewardship Clean-Up Kits and Appreciation Tote Bags are available in Avila Beach, Cayucos and Cambria visitor centers.

Getaway to 'Ah-ka' Moments!

Plan your next wildlife viewing adventure and make a difference through Stewardship Travel activities that protect wildlife, habitats, and cultural heritage sites.

	January	February	March	April	May	June	July	August	September	October	November	December
Elephant Seals	●	●	●	●	●	●	●	●	●	●	●	●
Gray Whales	●	●	●	●	●	●	●	●	●	●	●	●
Humpback Whales	●	●	●	●	●	●	●	●	●	●	●	●
Migratory Birds	●	●	●	●	●	●	●	●	●	●	●	●
Monarch Butterflies	●	●	●	●	●	●	●	●	●	●	●	●
Sea Otters	●	●	●	●	●	●	●	●	●	●	●	●
Oceans (Seabirds, Seals, Dolphins, Whales)	●	●	●	●	●	●	●	●	●	●	●	●

MEET THE STP: Monarch Butterfly Grove, Central Coast Aquarium, Coo Pines Natural Area, NODA's Monterey Bay National Marine Sanctuary Coastal Discovery Center, Morro Bay National Seabird, Sea Otter Preserve, Pismo Beach Elephant Seal Sanctuary, Pismo Beach Preserve

Special appreciation to Mono Bay National Estuary Program, NODA's Monterey Bay National Marine Sanctuary, The Seabird Protection Network, Westcoast Wildlife, Inc., The Marine Mammal Center, Pismo Coast Audubon Society, Pacific Wildlife Care, and Friends of the Sea Otter!

For More Wildlife Viewing Tools & Resources:
Visit Highway1DiscoveryRoute.com/Stewardship-Travel

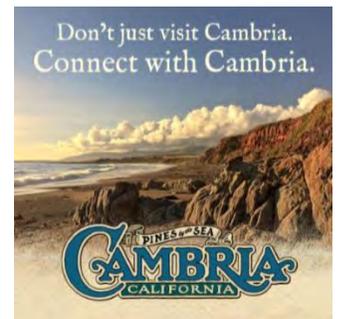


Stewardship Traveler Strategic Results

The Program continues to exceed its goals laid out in its original 2-year plan of development and implementation. It inspires fresh ideas and unprecedented positive countywide tourism collaboration and innovation. We take pride in the fact that this program has proven to be ahead of the tourism trend.

Key Results in Support of 2016 Program Focus/Goals:

- **Stewardship Travel was requested and honored** to provide the keynote topic for the Bay Area Travel Writers conference at Fisherman’s Warf in San Francisco. Articles generated.
- **Cambria was provided with its first Stewardship Travel public awareness community meeting** to assist in partner education and reduce public conflict around tourism.
- **A regional 2-year Stewardship Travel Strategic plan worksheet/template was created.**
- **Continued Stewardship Travel Regional Training**, which included Avila Beach, Los Osos, Cambria and Cayucos. Trainings have been well received by each community and their partners. Training outcomes include:
 - Front line employees can connect in a real way with visitors in a short amount of time
 - Provide unique and compelling regional guest service information & activities
 - Lengthen visitor stays with high investment activity choices
 - Tap into new niche markets and retain existing guests
 - Respond effectively to media interested in Stewardship Travel
 - Engage front line employees with the representatives from the Stewardship activities, given them a better understanding of the activity so they can better share with visitors
- **The Whale Trail interpretive signage** project completed with <http://thewhaletrail.org/>. This 2-year project, working with State and County Parks, NOAA, Avila Harbor District and others, placed 6 interpretive signs to be enjoyed by visitors and residents alike. These signs are located in our unincorporated communities of San Simeon, Cambria, Cayucos, Los Osos, Avila Beach and Oceano.



“The California central coast is a spectacular place to watch marine mammals from shore. The Whale Trail makes it easier for visitors and residents alike to know where and when to look for gray whales, dolphins, otter and seals. The six locations in Coastal San Luis Obispo County are the biggest cluster of Whale Trail sites out of our 50 sites along the Pacific Coast from Washington state to Mexico.” ~ Donna Sandstrom, Whale Trail founder





- **Developed and executed the Wildlife Viewing & Stewardship tips.** Regions, partners and guests have all provided positive feedback and there is continued research into how to expand the program.
- **Los Osos|Baywood continues with the 2nd annual Earth Day Los Osos|Baywood Stewardship Traveler Weekend**, featured on the Highway 1 Discovery Route website
- **Integrated H1DR slides** in the ongoing Marine Protected Area's public presentation slide shows.
- **Successfully assisted the 3rd Annual Avila Beach Bird Sanctuary Day** with Supervisor Adam Hill participating in the event, speaking about the importance of Stewardship Travel in our region.
- **Formed a new promotional alliance with State Parks** through lead interpreter. Created the STP and State Park Inventory. 19 STP activities on State Park lands.
- **The prestigious Visit California Poppy Award for 'Contribution to Community' was awarded to the H1DR** for its Stewardship Travel program. It was judged by its creativity in strategy and execution, achieving its program objectives, affecting positive change through sustainable practices, and infrastructure improvements and other contributions to the community. Our Stewardship program was also awarded the **SLO CAL 2016 Tourism Exchange Environmental Award.**



Coastal Discovery and Stewardship Promotion (January 15 – February 28, 2017)

The 4th annual Coastal Discovery and Stewardship Celebration's purpose is to increase awareness and sustain visitation to our ten destinations during the slower shoulder season period. The 7-week promotion combined Stewardship Travel activities, events and lodging specials.

- o 40 activities and events took place throughout January and February, which included:
 - o February proclaimed 'Coastal Discovery & Stewardship' month by the Board of Supervisors
 - o BBC "Ocean Giants" film at the Hearst Castle Theater shown free to over 850 attendees (420 in 2016)
 - o Whale Trail Dedication and Journalist FAM
 - o Paso BlendFest on the Coast with 409 tickets sold with 59 overnight stays (72% out of area).
 - o Avila Beach Bird Sanctuary Day with 55 attendees vs 37 in the 2015 event launch
 - o ...just to name a few!

THERE'S A SHIFT HAPPENING:

// NEARLY 75% OF TRAVELERS POLLED THINK IT'S IMPORTANT, SOMEWHAT IMPORTANT OR EXTREMELY IMPORTANT THAT THEIR TRAVEL DOLLARS BENEFIT THE COMMUNITIES THEY VISIT. //

- Phocuswright's 2015 'Good Travels' research study on behalf of Tourism Cares

59%

of people globally (61% in the U.S.) have a better opinion of corporations that integrate good causes into their business, regardless of the reasons why they do

82%

agree that supporting a good cause makes them feel better about themselves

73%

would switch brands if a different brand of similar quality supported a good cause

63%

of consumers want brands to make it easier for them to make a positive difference in the world

66%

of people globally believe it is no longer enough for corporations to simply give money to a good cause; they need to integrate causes into their day-to-day business

65%

of people have more trust in a brand that is ethically & socially responsible

72%

of consumers are more likely to recommend a brand that supports a good cause than one that doesn't

64%

of consumers say they expect brands today to do something to support a good cause

61%

have bought a brand that supports a good cause even if it was not the cheapest brand



Cayucos Front Line Script for Guests: STP Activities & Beach Clean Up Kits

Introducing the clean up kit and showing that you are a lodging property that cares....

New trend in travel: 54 million Americans are inclined to select travel companies that strive to protect and preserve the local environment of the destination - 61% of those believe their experience is better when their destination preserves its natural, historic, and cultural sites.

"75% of travelers polled think it is important that their travel dollars benefit the community they visit"

To Visitor:

“And...if you want to feel extra good, and help care for the beach & wildlife while you are here...we have Stewardship Travel activities & Clean Up Kits (here or at the Cayucos Visitor Center).

Grab a free kit at any time and pick up little bits of plastic and trash on the beach to protect birds and wildlife. Thank You!”

Provide Visitors:

1. Hand out Cayucos Maps, Wildlife Viewing & Stewardship Tips, HWY1 Discovery Route Maps

Cayucos Land Conservancy Bluffs & Nature Walks, Estero Bluffs State Park & Clean-Ups, Cayucos Beach Free Clean-up Kit & Tote Bag, Cayucos Wildlife Kayaking Tours, Celebrate Coastal Clean Up Day on the 3rd Sat. in Sept. - <http://www.visitcayucosca.com/stewardship/>

For More Information: <http://www.visitcayucosca.com/stewardship/>

For more clean up kits supplies please contact Melissa Kurry at (805) 471-4305 - melk921@yahoo.com



STP Workshop Follow Up Notes

Cayucos Stewardship Travel Workshop for Guest Services Training & Partners Collaborations

Thursday, April 20, 2017 ~ 12:30 to 2:00 pm ~ Cayucos Visitor Center, 41 S. Ocean Ave., Cayucos

Facilitator/Trainer: Di Strachan

Attendees: Thank You for Showing Up!

Steve Foland, Cayucos Land Conservancy (sffoland@yahoo.com), James Prange, Cayucos Vacation Rentals (cayucosjp@yahoo.com); Diane Strachan, STP (di.positivefutures@gmail.com); Laila Kollman, Shoreline Inn/CBID (waveheart@gmail.com); Kristen Scovell, Shoreline Inn (Kristen@cayucosshorelineinn.com); Mike Baxter, Cayucos Land Conservancy (sfbaxter1977@yahoo.com); Melissa Kurry, VAC/SeeLyon Beach Rentals (melk921@yahoo.com); Katie Sturtevant, STP (sturt.events.co@gmail.com); Richard Shannon, On the Beach B&B (peabodyplum@gmail.com); Mike Toke, On the Beach B&B (mika@californiaonthebeach.com); Katie, On the Beach B&B (katierb7@gmail.com); and Debbie Richards, SeeLyon Beach Rentals (drichards1@seelyon.com)

Workshop Outcomes

- Business and Non-Profit org. collaborated and shared interests/possible next steps together
- Effective use of the ST Program to connect in a 'real way' with visitor values in a short amount of time
- Lengthen visitor stays and return visits with Stewardship Travel
- Provide unique and compelling regional guest service information
- Tap into new niche markets and retain existing guests
- Respond well to media interested in Stewardship Travel

Next Steps: Group Suggestions for Stewardship Travel Cayucos Program

- "Cayucos-ize" the front desk script, laminate, and distribute to lodging properties;
- have signs at beach accesses: "Look for beach cleanup kit decals" and provide decals to businesses:
- "Free Beach Cleanup Kits available here";
- Host a community wide workshop for stewardship promotion, community relations, and invite "people who care"

Comments: Why and How was this workshop valuable to your business, organization, and the community?

- Bringing staff to workshop will help them explain the program to other staff members and guests;
- Created a better understanding of the program;
- Provided a good connection with the business community;
- good to see attention given to the Land Conservancy and the creation of future relationships;
- good to hear feedback from staff and tourism & stewardship partners on how to make the process simpler; inspired to meet with stewardship leaders and partners;
- provided content to supply to guests and create a symbiotic relationship – "let's care together";
- provided a more clear idea about the program, how to connect with guests, how to structure meetings, and inspiration to have a town hall meeting with connection to the Chamber; will add Stewardship and promotion of beach cleanup to lodging app.

"I really like the Cayucos beach clean-up kit. It's nifty that it has a pencil too for the checklist of what you find. It gives me a way to put back into the community while I am here. I love this beach - been visiting for years. This is my beach!"

Wendy Livingston, Teacher, Cayucos HWY 1 Discovery Route Visitor

Agenda

- Welcome & Start Up & Introductions
- What Do We Know About Visitors Who Have Great Vacations?
- What is Cayucos Stewardship Travel? And the role of the Cayucos Land Conservancy.
- Who is Interested in Stewardship Travel, How Do We Talk with Them and Why?
- Cayucos Marketing Brainstorm and more...
- Wrap Up and Thank You!

For More Stewardship Travel Information

Cayucos Workshop Leadership: Richard Shannon & Melissa Kurry. Diane Strachan and Katie Sturtevant are Stewardship Travel Specialists for SLO CBID ~ Country Business Improvement District ~

For More Information on Stewardship Travel: Katie Sturtevant, STP Director, sturt.events.co@gmail.com



Coraggio Group Operational Planning Options Presented on May 24, 2017

Overview of our approach to operational planning

Operational planning serves as the bridge between your strategic plan and your day-to-day operations for the year, highlighting your strategies as well as assigning responsibilities, defining timelines, identifying budget implications, and setting priorities. Our primary objective in operational planning is to develop the skills in your organization to foster the discipline of ongoing operational planning. While the vehicle for this development is the creation of your first-year operational plan, the real work is to build that long-term capacity.

Optional Approaches

Option 1: \$5,200

This five- to six-hour workshop will bring together Cheryl Cuming, key board members, and other collaborators to learn about the discipline of Operational Planning and to engage in some initial planning in order to build understanding of the tools and discipline of Operational Planning.

The team will use “design thinking” methodology to undertake iterative development and refinement of action steps for one or two Initiatives of the Strategic Plan. For each of these Initiatives, we will also identify key risks that could threaten the Initiative, and will identify some responsive actions we will use if the risks come to pass.

For each action step, we will identify a timeline, any significant budget impacts, its priority level, and an owner.

The goal of the meeting will be to build capacity for Cheryl and her team to complete the Operational Planning work without the assistance of Coraggio Group.

Option 2: \$7,500 (\$5,200 + \$650 each per quarterly check-in)

Same as above plus Three Quarterly Check-Ins via Phone and Webex

We anticipate that you will complete the operational plan by the beginning of your fiscal year. Accordingly, we will schedule quarterly check-ins at the end of the first, second, and third quarters. These will be held with all Operational Planning Team members, and will be facilitated via phone/webex. These meetings will be an opportunity to review progress and make course corrections as necessary—whether that is because some initiatives have progressed more quickly than expected, or because additional changes in the environment have forced a change in priorities. Our goal for each meeting will be to ensure that everybody is aligned on what has been accomplished so far, what is slated to be worked on next, and where changes have become necessary.

Option 3: \$5,200 (\$3,250 + \$650 each per quarterly check-in)

In lieu of facilitating an operational planning process with a group, Coraggio Group will act as an “Operational Planning Team” and will draft action steps for each of the Initiatives in the Strategic Plan. For each of these Initiatives, we will also identify key

risks that could threaten the Initiative, and will identify some responsive actions for the CBID to use if the risks come to pass. For each action step, we will identify a timeline, any significant budget impacts, its priority level, and an owner.

Through a series of check-in phone calls with Cheryl Cuming, we will adjust and finalize the draft Operational Plan before turning it over to her for implementation.

The option will also include three Quarterly Check-Ins via Phone and Webex as noted in option 2.

Initial Proposal: \$20,000 (\$18,500 + \$650 each per quarterly check-in)

We propose the following tasks, detailed in the descriptions below:

- Operational Planning Kickoff & Action Step Planning
- Action Step Planning & Trade-Off Discussion
- Quarterly Check-Ins via Phone and Webex

Operational Planning Kickoff & Action Step Planning

The operational planning kickoff meeting will bring together all those who will be working on the operational plan to introduce them to the discipline of operational planning, and begin some of the planning work together.

Over paired half-day workshops, and using “design thinking” methodology, we will guide the Operational Planning Team through iterative development and refinement of action steps for each Initiative in the Strategic Plan. For each Initiative, we will also identify key risks that could threaten the Initiative, and will identify some responsive actions we will use if the risks come to pass.

For each action step, we will identify a timeline, any significant budget impacts, its priority level, and an owner.

Action Step Planning & Trade-Off Discussion

We will come together for another half-day work session to complete our action planning, then will use a second paired half-day session to have the trade-off discussion, where we will identify how many of our initiatives and tactics have been ranked as top priority, and will adjust according to the realistic capacity of the organization. We will also look at timelines to determine whether we have properly phased our work, or whether we need to make adjustments. The outcome of this session will be a finalized operational plan that takes personnel, budget, and timing restrictions into account—and prepares your organization for the effective execution of your strategies.

Quarterly Check-Ins via Phone and Webex (as outlined in options 2 and 3)

<i>Imperative</i>	<i>Initiative</i>	<i>Action Steps</i>	<i>Priority Level</i>	<i>Person Responsible</i>	<i>Year</i>	<i>Timing: Start</i>	<i>Timing: End</i>	<i>Budget Impact</i>	<i>Status</i>	<i>Updates/Next Steps</i>
Optimize our organizational capacity	Align our organizational structure with our strategic plan	Identify an audit company to analyze staffing. - possible development of RFP	1 - Must Do	6-Helen		3: Q3-16/17	3: Q3-16/17		On Track	Helen to reach out to M&G
Optimize our organizational capacity	Align our organizational structure with our strategic plan	Audit of staffing (right people for right roles). Gaps? Analysis of capacity and future needs.	1 - Must Do	9-Contractor		3: Q3-16/17	3: Q3-16/17	\$ 12,500	On Track	contractor=outcome of Helen's research
Optimize our organizational capacity	Align our organizational structure with our strategic plan	Revise job descriptions. Evaluate resources/staff	1 - Must Do	1-Chuck		3: Q3-16/17	3: Q3-16/17		On Track	
Optimize our organizational capacity	Align our organizational structure with our strategic plan	Develop an operational organizational plan - action plan based on the results; budget implications -- define and prioritize	1 - Must Do	1-Chuck		4: Q4-16/17	4: Q4-16/17		On Track	
Optimize our organizational capacity	Align our organizational structure with our strategic plan	Budget approval on action plan from Board.	1 - Must Do	1-Chuck		4: Q4-16/17	4: Q4-16/17		On Track	
Optimize our organizational capacity	Align our organizational structure with our strategic plan	Put action plan in place, hire resources -- to align with strategic plan. Ongoing evaluation of impact.	1 - Must Do	1-Chuck		5: Q1-17/18	On-Going		On Track	
Optimize our organizational capacity	Establish a continuous learning program for the VSLOC Team	Managers activate plan for current fiscal budget/prioritize future needs	2 - Should Do	4-Brendan		2: Q2-16/17	2: Q2-16/17	\$ 9,500	On Track	Brendan to provide budget and reach out to each department to request information
Optimize our organizational capacity	Establish a continuous learning program for the VSLOC Team	Research what other DMOs are doing	2 - Should Do	4-Brendan		3: Q3-16/17	3: Q3-16/17		On Track	Define "continuous learning program"; compile list of DMOs to be sample set: ask DMA West; DMAI; US Travel (or call San Francisco)
Optimize our organizational capacity	Establish a continuous learning program for the VSLOC Team	Develop SOPs	2 - Should Do	4-Brendan		4: Q4-16/17	4: Q4-16/17		On Track	
Optimize our organizational capacity	Establish a continuous learning program for the VSLOC Team	Define educational needs for each department and evaluate the education staff already has	2 - Should Do	4-Brendan		5: Q1-17/18	6: Q2-17/18		On Track	
Optimize our organizational capacity	Establish a continuous learning program for the VSLOC Team	Research programs that fit staff needs and solve for gaps	2 - Should Do	4-Brendan		7: Q3-17/18	7: Q3-17/18		On Track	
Optimize our organizational capacity	Establish a continuous learning program for the VSLOC Team	Develop educational curriculum path for each department and budget accordingly	2 - Should Do	4-Brendan		7: Q3-17/18	8: Q4-17/18		On Track	
Optimize our organizational capacity	Establish a continuous learning program for the VSLOC Team	Execute educational process (year-round)	2 - Should Do	4-Brendan		9: Q1-18/19	93: Q4-18/19		On Track	
Optimize our organizational capacity	Establish a continuous learning program for the VSLOC Team	Evaluate success and impact of educational programs; identify value and future needs	2 - Should Do	4-Brendan		94: Q1-19/20	94: Q1-19/20		On Track	
Optimize our organizational capacity	Evaluate and develop the tools, systems and technologies we need to succeed	Define categories and perform gap analysis	1 - Must Do	4-Brendan		2: Q2-16/17	2: Q2-16/17		On Track	whiteboard session
Optimize our organizational capacity	Evaluate and develop the tools, systems and technologies we need to succeed	Create process for vetting new tools and systems (i.d. tool, etc.)	1 - Must Do	4-Brendan		2: Q2-16/17	3: Q3-16/17		On Track	based on development of categories and gap analysis
Optimize our organizational capacity	Evaluate and develop the tools, systems and technologies we need to succeed	Research available options, assess counterpart solutions	1 - Must Do	4-Brendan		3: Q3-16/17	3: Q3-16/17		On Track	based on development of categories and gap analysis
Optimize our organizational capacity	Evaluate and develop the tools, systems and technologies we need to succeed	Prioritize procurement or development, plan/budget	1 - Must Do	4-Brendan		3: Q3-16/17	3: Q3-16/17		On Track	based on development of categories and gap analysis
Optimize our organizational capacity	Evaluate and develop the tools, systems and technologies we need to succeed	Approval of budget	1 - Must Do	4-Brendan		4: Q4-16/17	4: Q4-16/17		On Track	
Optimize our organizational capacity	Evaluate and develop the tools, systems and technologies we need to succeed	Deploy systems or tools	1 - Must Do	4-Brendan		5: Q1-17/18	6: Q2-17/18		On Track	
Optimize our organizational capacity	Evaluate and develop the tools, systems and technologies we need to succeed	Evaluate results	1 - Must Do	4-Brendan		7: Q3-17/18	7: Q3-17/18		On Track	



Q3 Update: Optimize our organizational capacity

Initiatives

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

Current Challenges

- Finalizing Collaboration Consulting agreement, review of staff strengths and opportunities – **90-day engagement** (3/31/17) CD
- Continuous learning – Managers activate plan(12/30/16) BP
- Evaluate & develop tools, systems
 - Define categories & perform gap analysis (12/31/16) BP
 - Create process for vetting new tools & systems post gap analysis (03/31/17) BP
 - Research available options, assess counterpart solutions post gap analysis (03/31/17) BP
 - **Can this be pushed to Q4 (would need to be completed by 4/30/17 for budgeting)? YES, but at risk.**
 - Prioritize procurement or development, plan/budget post gap analysis (03/31/17) BP
 - **Can this be pushed to Q4 (would need to be completed by 4/30/17 for budgeting)?**

Planned Responses

- Receive, review & finalize agreement and start date – adjust delivery to **5/31/17** –CD
- Management team suggestions submitted for consideration; need recommendations from VP of Marketing; is further action or deeper review of suggestions needed? –BP
- Need to finalize gap analysis and put all components into Asana. This will help to stay organized as I work through next steps – BP
- Need to develop a one-sheet outlining process and details (references, cost, on-boarding, timing) – BP
- Need to compile all research (online and into spreadsheet
- Once everything is in Asana or organizational tool that includes a column for budget and priorities, procurement/development of non-zero cost items can be prioritized and budget impact can be outlined - BP

Objective

(leave blank until end of Q4)

Actual

Looking Forward

- Develop an operational organizational plan – action plan based on staff audit results – CD
- Develop SOPs for continuous learning program and research what other DMOs are doing, but I need assistance in defining what continuous learning program is as I have these conversations – BP
- Figure out which tools/systems/technologies have an expense associated with them and note this before the budget planning process. – BP



**Core Marketing Team
Marketing Plan
July 1, 2016 – June 30, 2017**

ORGANIZATION GOALS & MARKETING PRIORITIES

The scope of work assigned to the Core Marketing Team (CMT) will be refined to address targeting and messaging opportunities identified by current marketing analytics and research, prior to fall winter campaign. The final tactical plan will include: annual promotion calendar, fresh brand content and creative and final budgets aligned with the approved organizational goals, described below by marketing priority:

- Generate incremental awareness and engagement in the CAH1DR and the 10 assessed destinations
- Enhance economic well-being through an increase in overnight stays and length of stays within the assessed destinations
- Enhance collaboration with state, regional, county-wide and local tourism partners
- Guide and support the evolution of local funds

Shoulder Season Destination Campaigns

Measurements:

- *Database Growth*: Increase by 50%
- *Website Growth*: Increase annualized visitor sessions by 30%
- *Increase baseline awareness determined by post-analysis research*

Earned Media PR Strategies

Measurement:

- *Ad/Publicity Value of Feature Coverage*: Increase by 10%
- *Impressions*: Increase by 20% from all earned media sources using new data platform
- *Website and Social Linkage Growth*: Increase linkages by 20%
- *Awareness from current base point (research findings) to post awareness studies*

Social Media Programs

Measurements:

- *Engagements*: Increase engagements from all channels 30%.
- *Facebook*: Increase Page Likes by 20% from 59,440 to 71,328.
- *Instagram*: Increase followers by 20% from 3,961 to 4,754.
- *YouTube*: Increase video views by 20% from 431,549 to 517,859.
- *Twitter*: Increase followers by 15% from 2,318 to 2,666
- *Google Adwords*: Increase search rankings and increase URL clicks by 15% from 47,709 to 54,866.

Co-op Marketing

Measurements:

- *Participation levels in the co-op program*
- *The ability to secure value added advertorial and discounted volume rates*
- *Incremental impressions and cost savings through participation*
- *Incremental destination awareness*

Mobile Web Owned Media

Measurements:

- *Visitor sessions*: Increase by 30%
- *Referrals to Destination and Lodging Content*: Increase by 20%
- *Search Rankings*: Increase SEO page ranking and increase URL clicks by 15%
- *Email Opens and Clicks*: Increase 50%



Key Deliverables & Timeline

May 2017 - September 2017

May

- Define key short-term deliverables - May 8th MSC meeting
- Updated Dashboard / Reporting - May 8th MSC and May 24th Board meeting
- Co-op review - May 8th MSC meeting
- Fiscal Year Marketing Recap - May 24th Board meeting
- CBID discussion and pending approval of draft budget
 - Marketing Budget from CBID for CMT planning
- Late Spring Campaign continues:
 - Paid Advertising
 - Social Media
 - Public Relations
 - Video (15 second)
 - Native Advertising

June

- Summer plan and approval of PR and Social Media - June 8th MSC
- CMT scope and draft budget - June 8th MSC and June 28th Board meeting
- June newsletter issued - Complimenting Spring Campaign

July

- 2017|18 Media Flowchart for Paid Advertising & Co-Op
- Detailed Budget Allocation and New 2017-2018 Marketing Plan
 - Final media plan flowchart
 - Website, Social Media, PR and promotions goals and budget
 - Co-op with SLO CAL and CBID LFAs
 - Creative Direction and budget (print, video, newsletters, map)
- Creative Brief for Fall Campaign
- July newsletter issued

August

- Fall Media Campaign & plan
- Release reprinted H1DR map
- August newsletter issued

September

- Fall Media Campaign launch
- First Rural Road launch (destination TBD)
- September newsletter issued



SAN LUIS OBISPO COUNTY BUSINESS IMPROVEMENT DISTRICT

EVENT FOCUS FUND POLICY

- 1) The primary goal of the San Luis Obispo County Tourism Business Improvement District (CBID) is to increase occupancy and room nights across all lodging types (motel, hotels, bed and breakfast, vacation rentals) that pay the business improvement assessment (BID) within the SLO CBID region while placing particular emphasis on programs that positively impact the slower lodging periods (shoulder seasons) and/or expand the impact of the higher occupancy times.
- 2) The Local Areas of the CBID have been designated as:
 - Avila Beach
 - Arroyo Grande unincorporated/San Luis Obispo Unincorporated
 - Cambria
 - Cayucos
 - Los Osos/Baywood/Morro Bay Unincorporated
 - Nipomo/Oceano
 - San Simeon/Ragged Point
- 3) The CBID Event Focus Fund has been created to support the following benefits:
 - a. Impact on multiple CBID regions
 - b. Opportunity for future visitation growth, keeping in mind our focus is to protect and maintain our County assets (focus on sustainability and stewardship)
 - c. Opportunity to extend our brand – *the H1DR logo will need to be included on event promotional materials.*
- 4) Events supported shall effectively promote tourism in a way that optimizes the scenic qualities, geography, history, recreation, attractions and ambiance of the unincorporated areas within the CBID. Event funding will be provided based on the following criteria:
 - a. Must be within the 10 unincorporated areas (listed above)
 - b. A regional (more than 1 region) or countywide focus with special consideration taken if the event has the possibilities of impacting multiple regions
 - c. Contribute to increasing room nights by providing measureable results
 - d. Funds must specifically be used for marketing out of area to draw more overnight stays
- 5) Proposals will be evaluated based on the following:
 - a. Delivering tangible benefits associated with the partnership
 - b. Opportunity to create long-term value with a sustainable event
 - c. Ability to reach targeted audiences
 - d. Positive exposure for the brand
 - f. Potential to be leveraged with additional resource investment
- 6) The organization requesting the Event Focus Funds must submit a media plan, including a definition of the core target audience, as well as a PR plan on how they will generate publicity outside of the county. The organization must also agree to provide access to the email list, so that a retargeting effort can be implemented by the CBID following the event.
- 7) Within 45 days of the close of the event that received event funds, you will be required to provide measurable data that shows that your event did support our mission of bringing more overnight visitors to the CBID region.



Local Fund Applications for January 2017 – December 2017 (updated 5/17/2017)

Total Funds Requested: \$4,467,195 (+\$600,000)

Total Projects Funded: 407

Cambria:

~~Farmer's Market St Patrick's Day Celebration (\$2,000)~~

~~Sunset Rotary Wine Festival Dinner Gala (\$2,000)~~

Chamber Olallieberry Festival sponsorship (\$2,000)

Matching Fund request for \$1,000

American Legion July 4th Fireworks (\$8,500) – see San Simeon

ScareCrow Festival Sponsorship (\$15,000) – see San Simeon

A&H 2-year Marketing contract (\$600,000 for 2 years) – June CBID meeting

Avila Beach:

Constituent mixer (\$1,500)

SLO Ultra at Wild Cherry Canyon (3-year sponsorship \$15,000/\$12,500/\$10,000)

RaceSLO GranFondo Sponsorship (3-year sponsorship \$27,500/\$22,500/\$17,500)

BubblyFest sponsorship (\$9,000)

VIP Package giveaway for 2 Race SLO events (\$1,000)

Stewardship Clean-up kits (\$6,320)

Cayucos:

Chamber Visitor Center (\$8,500)

Big Big SLO Pocket Planner (\$1600)

July 4th Beach Clean-up (\$2,500)

Eroica CA 2017 (\$2,500 rest stop & \$2,499 for sponsorship = \$4,999)

Art & Music Festival and #UnlockYourAdventure promo (\$7,500)

San Simeon:

Solterra Strategies Media/PR additional expenses (\$1,500)

Solterra Strategies extension to PR/Marketing efforts (\$14,000)

SS Chamber Tradeshow for China and UK (\$10,025)

FES Beach Combing bags and STP clean up kits with wildlife tips (\$1,500)

Coastal Discovery Center Ocean Fair (\$2323)

American Legion July 4th fireworks (\$6,000)

ScareCrow Festival Sponsorship (\$4,750)

Gateway Signage project (\$24,999)

Los Osos/Baywood/uninc. MB:

Stewardship clean up kits partnership with Grocery Outlet (\$3,000+\$2,500)

Big Big SLO MailChimp annual account (\$800)

Oceano/Nipomo:

TJA Social Media and Spring Advertising (\$5,600)

Edna Valley/AG:

Local administrator (10 hours/month at \$250X12months = \$3,000)

SLO Chamber VC membership (\$260)

SLO Chamber Visitor Guide ad (\$1,200)

FreshBuzz additional marketing & promotions (\$4,000)