



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

**Wednesday, February 28, 2018, 12pm – 2:30pm**

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

**Call to Order**

**Public Comment** (limited to 3 minutes per speaker)

**Administrative Items**

- Roll Call
- A-1** • Consent Agenda - Minutes
- A-2, A-3** • Financials|Balance Sheet, Administrator Report, and Partner Updates
  - Carryforward
- Upcoming Events/deadlines
  - Board Meetings: April 25 and May 23
  - Strategic Marketing Presentation with Coraggio Group and LFA feedback session: April 25
    - Confirm meeting with SLO CAL Executive Committee on 4/25
  - Annual Renewal Sequence of Events – ROI April 17 and Public meeting May 15

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

- Jen Porter, BlendFest 2018 follow up report

**Discussion Items**

- Strategy/Topic Discussion
  - Strategic Marketing Framework and LFA input session outcomes
- Core Marketing Team and Stewardship Program
  - Dashboard and PR recap
- Committee Reports & Recommendations
  - Marketing: Co-op research opportunities with SLO CAL
  - Strategic: Strategic Marketing session on 3/16
  - Governance:

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

- Strategic Marketing Framework
- LFA Board Applications
- Funding Applications
  - SSTA: RFP awarded to Solterra Strategies (\$125,000/year X 3 years = \$375,000)
  - SSTA: Tradeshow & Sales Mission (\$21,295)

**Future Agenda Items**

- Updating the Bylaws
- Strategic Marketing Presentation with Coraggio Group and LFA feedback session (April 25)

**Closing Comments**

**Adjournment**



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

Board Meeting Minutes

February 28, 2018

12:00 p.m.

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

**DRAFT UNTIL APPROVED**

SLO CBID Members Present:

Board: Shirley Lyon, Mike Hanchett, Bram Winter, Matt Masia, John King

County Liaison: Nikki Schmidt; CAO Cheryl Cuming

Absent: Laila Kollmann (excused), Lori Keller, (excused)

Guests: Toni LeGras, John Sorgenfrei, Kaci Knighton, Rick Turton

**Call to Order**

Board Secretary Matt Masia called the meeting to order at 12:09 p.m.

**Public Comment**

None

**Administrative Items**

- Roll Call

Shirley Lyon, Mike Hanchett, Bram Winter, John King (arrived 12:20pm) and Matt Masia are present. Laila Kollmann and Lori Keller are absent (both excused).

- Consent Agenda

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

- Financials

CAO Cuming reviewed the financials, balance sheet and reconciliation statement.

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

CAO Cuming providing the administrator highlights for 2017.

- Upcoming Events

Next board meetings will be March 28 and April 25. CAO Cuming also reminded the board of the Avila Beach constituent mixer on 3/21 and the Form 700 deadline of April 2, 2018. The Annual Renewal sequence of events was provided by Nikki and Cheryl confirm the 5/1 deadline for the Year End Report.

## **Presentations**

- **None**

## **Discussion Items**

- **Strategic/Topic Discussion**
- **Core Marketing Team & Stewardship**

Kaci shared the updated dashboard, noting that the Coastal Discovery & Stewardship (CDSC) video reached over 90,000 in the 6-week promotion. Kaci also highlighted the details of the RoadTripper influencer visit with a strong presence on Instagram with over 15 **separate postings**. John addressed the decline in web traffic, noting the CBID's request to eliminate SEO as the board continues the Strategic Marketing planning process. Rick noted that H1DR.com has lost almost 50,000 sessions in the last 60 days.

Kaci noted that the Rural Road Trip Bucket List promotion continues to drive good results to our destination pages, which currently represents 50% of our overall site traffic. She also shared digital performance stats for CDSC and Cheryl noted that over 3,000 attended the Hearst Castle Theater movie. Shirley commented on the number of locals attending the film and was excited about the positive impact locally for our Stewardship program.

Kaci reviewed the NBC prom results, including the parallax page execution, with over 1.69 million impressions delivered with 575,000 video views. Facebook posts reached 98,000 with over 3,600 clicks.

## **Committee Reports & Recommendations:**

Marketing Committee: No meeting was held.

Cuming shared progress with the 3 newly approved contractors: VinVibe, Vingage and Jaime Lewis. The focus in the next 30 days will be to complete the website backend improvements so our site speed improves. Vingage will focus on the database engagement project and will create a survey to send to our current subscribers to determine areas of interest.

Strategic Plan: CAO Cuming reviewed the strategic marketing outcomes from the 2/13 and 2/14 sessions. Matt asked how we can do a better job of setting goals going forward, so we are achieving what we really want rather than just getting quantity over quality.

Cuming walked the board members through the value proposition, the marketing funnel, the target personas, the 3 marketing imperatives and their corresponding marketing initiatives. Nikki wanted to ensure that all 10 communities will be represented and promoted. The board spoke at length about outcomes and how to engage the Local Fund Areas in the process. Cuming will work with Coraggio Group and the Strategic Planning Committee to evolve the personas (as compared to VisitCA and SLO CAL), the funnel (our position and role in the funnel comparative to SLO CAL), our asset grid (focusing on our proximity to Highway 1), and the marketing initiatives. Matt noted that as we evolve, we need to understand how our partnership with SLO CAL fits in, and how we engage and support the LFAs.

Governance: Cuming reviewed the meeting recap, and also touched on the recap from the meeting with Nikki.

## **Action Items**

**Strategic Marketing Direction:** A motion was made by Mike Hanchett, and seconded by John King, to support the strategic marketing framework in concept. Cuming confirmed that an evolved framework will be discussed again at the 3/16 session with Coraggio Group, and a final version will be presented at the March CBID Advisory Board meeting. With no further discussion, the minutes were approved by a voice vote of the Advisory Board.

Note: John King had another commitment and left the meeting at 1:53pm.

**Letter of Support for VR MUP in Cambria:** Toni LeGras was introduced and provided information to support the approval of a MUP for the Cambria vacation rental located at 2701 Windsor Blvd. Toni noted that the Board of Supervisors approved and then it was appealed the Coastal Commission. The topic will be reviewed at the 3/8 Coastal Commission meeting. Toni provided some compelling stats – 374 licensed vacation rentals in Cambria with 212 in use. 43% (up from 28% in 2016) are not reporting TOT which may

indicate that it is inactive and not using the vacation rental license connected to the property. Properties that are interested in allowing their home to be a vacation rental must go through the MUP process since the current VR licenses are at capacity.

A motion was made by Mike Hanchett, and seconded by Bram Winter, to approve the CBID letter in support of tourism infrastructure and expanded lodging choices. Matt noted the importance of raising awareness and support overall. The board noted that the letter was an overall support of growing tourism, and that future requests of this kind will be **considered in the same way. Bram asked about the CBID's ability to have a position on this matter, and Nikki shared County Counsel's opinion:**

**"The letter from the CBID written in support of the issuance of a MUP for a vacation rental, and in general support of all validly licensed vacation rentals, appears to fall within the general purpose of the CBID as set forth in the CBID ordinance and its by-laws, which is the promotion of tourism in the County. NN".** With no further discussion, the scope was approved by a voice vote of the advisory board.

### **Local Fund Area (LFA) Board Applications**

As agreed in the February CBID Advisory Board meeting, all new LFA applications will come before the CBID for review prior to submission to the BOS for approval. Cuming confirmed there are two new LFA board applications:

ABTA: Summer Rogovoy – Cuming read a note from Lori Keller sharing insights about her work experiences with Summer.

A motion was made by Mike Hanchett, seconded by Bram Winter, to support **Summer's** board application. With no further discussion, the board application was approved by a voice vote of the Advisory Board.

SSTA: Miguel Sandoval

A motion was made by **Bram Winter, seconded by Shirley Lyon, to support Miguel's** board application. With no further discussion, the board application was approved by a voice vote of the Advisory Board.

**Local Fund and Matching Fund Applications** – there were no applications this month

### **Closing Comments**

#### **Future Agenda Items**

- Updating the by-laws
- BlendFest follow-up report
- Strategic Marketing presentation with Coraggio Group and LFA feedback session

### **Adjournment**

The meeting was adjourned at 2:08p.m.

11:37 AM

SLOCTBID

03/19/18

Balance Sheet

Accrual Basis

As of February 28, 2018

	Jul 31, 17	Aug 31, 17	Sep 30, 17	Oct 31, 17	Nov 30, 17	Dec 31, 17	Jan 31, 18	Feb 28, 18
<b>ASSETS</b>								
<b>Current Assets</b>								
Checking/Savings								
CBID Checking Account	615,755.87	579,779.72	614,811.12	637,439.84	633,755.16	618,867.76	596,661.79	593,481.55
Local Fund Checking Accounts								
Avila Beach	103,171.74	121,525.23	129,040.67	132,319.32	136,495.78	140,597.70	143,987.22	145,769.76
Cambria	90,594.16	73,350.45	96,974.49	104,814.43	104,687.28	102,950.06	93,381.01	98,896.77
Cayucos	124,240.94	139,794.07	148,542.26	161,770.34	170,816.31	155,068.53	161,421.58	167,068.64
San Simeon	606,274.90	628,677.39	647,097.82	654,191.25	633,958.43	627,377.35	606,460.47	591,505.08
Los Osos/Morro Bay	17,256.07	19,374.29	21,384.25	23,395.68	22,798.33	22,543.67	18,335.71	16,926.88
Nipomo/Oceano	33,215.12	33,454.57	33,499.34	33,884.63	31,463.15	31,368.52	29,579.00	29,821.71
AG/SLO	17,961.81	16,155.51	17,876.59	18,775.44	19,670.97	19,918.73	18,687.73	17,522.38
<b>Total Local Fund Checking Accounts</b>	<b>992,714.74</b>	<b>1,032,331.51</b>	<b>1,094,415.42</b>	<b>1,129,151.09</b>	<b>1,119,890.25</b>	<b>1,099,844.56</b>	<b>1,071,852.72</b>	<b>1,067,511.22</b>
Checking	-28,984.07	-28,299.42	-7,326.10	-6,879.66	-9,666.51	-7,487.92	-10,528.21	-5,714.85
<b>Total Checking/Savings</b>	<b>1,579,486.54</b>	<b>1,583,811.81</b>	<b>1,701,900.44</b>	<b>1,759,711.27</b>	<b>1,743,978.90</b>	<b>1,711,224.40</b>	<b>1,657,986.30</b>	<b>1,655,277.92</b>
Accounts Receivable								
Accounts Receivable	27,370.61	26,685.96	5,712.64	5,266.20	8,053.05	5,874.46	8,914.75	4,101.39
<b>Total Accounts Receivable</b>	<b>27,370.61</b>	<b>26,685.96</b>	<b>5,712.64</b>	<b>5,266.20</b>	<b>8,053.05</b>	<b>5,874.46</b>	<b>8,914.75</b>	<b>4,101.39</b>
<b>Total Current Assets</b>	<b>1,606,857.15</b>	<b>1,610,497.77</b>	<b>1,707,613.08</b>	<b>1,764,977.47</b>	<b>1,752,031.95</b>	<b>1,717,098.86</b>	<b>1,666,901.05</b>	<b>1,659,379.31</b>
<b>TOTAL ASSETS</b>	<b>1,606,857.15</b>	<b>1,610,497.77</b>	<b>1,707,613.08</b>	<b>1,764,977.47</b>	<b>1,752,031.95</b>	<b>1,717,098.86</b>	<b>1,666,901.05</b>	<b>1,659,379.31</b>
<b>LIABILITIES &amp; EQUITY</b>								
<b>Liabilities</b>								
<b>Current Liabilities</b>								
Accounts Payable								
Accounts Payable	199,519.41	69,742.52	100,429.84	22,830.02	20,371.28	109,830.49	84,655.17	96,923.33
<b>Total Accounts Payable</b>	<b>199,519.41</b>	<b>69,742.52</b>	<b>100,429.84</b>	<b>22,830.02</b>	<b>20,371.28</b>	<b>109,830.49</b>	<b>84,655.17</b>	<b>96,923.33</b>
<b>Total Current Liabilities</b>	<b>199,519.41</b>	<b>69,742.52</b>	<b>100,429.84</b>	<b>22,830.02</b>	<b>20,371.28</b>	<b>109,830.49</b>	<b>84,655.17</b>	<b>96,923.33</b>
<b>Total Liabilities</b>	<b>199,519.41</b>	<b>69,742.52</b>	<b>100,429.84</b>	<b>22,830.02</b>	<b>20,371.28</b>	<b>109,830.49</b>	<b>84,655.17</b>	<b>96,923.33</b>
<b>Equity</b>								
CBID Unrestricted Net Assets	291,466.87	291,466.87	291,466.87	291,466.87	291,466.87	291,466.87	291,466.87	291,466.87
Unrestricted Net Assets - All	889,267.61	889,267.61	889,267.61	889,267.61	889,267.61	889,267.61	889,267.61	889,267.61
Net Income	226,603.26	360,020.77	426,448.76	561,412.97	550,926.19	426,533.89	401,511.40	381,721.50
<b>Total Equity</b>	<b>1,407,337.74</b>	<b>1,540,755.25</b>	<b>1,607,183.24</b>	<b>1,742,147.45</b>	<b>1,731,660.67</b>	<b>1,607,268.37</b>	<b>1,582,245.88</b>	<b>1,562,455.98</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>1,606,857.15</b>	<b>1,610,497.77</b>	<b>1,707,613.08</b>	<b>1,764,977.47</b>	<b>1,752,031.95</b>	<b>1,717,098.86</b>	<b>1,666,901.05</b>	<b>1,659,379.31</b>

SLOCTBID  
**Profit & Loss Budget vs. Actual - General Fund**  
 July 2017 through February 2018

	<u>Jul '17 - Feb 18</u>	<u>Budget</u>	<u>\$ Over Budget</u>	<u>% of Budget</u>
<b>Income</b>				
<b>BID Assessment Collection</b>				
General Fund	686,661.47	912,335.00	-225,673.53	75.26%
<b>Total BID Assessment Collc</b>	<b>686,661.47</b>	<b>912,335.00</b>	<b>-225,673.53</b>	<b>75.26%</b>
Carryforward	275,335.56	275,335.56	0.00	100.0%
<b>Total Income</b>	<b>961,997.03</b>	<b>1,187,670.56</b>	<b>-225,673.53</b>	<b>81.0%</b>
<b>Gross Profit</b>	<b>961,997.03</b>	<b>1,187,670.56</b>	<b>-225,673.53</b>	<b>81.0%</b>
<b>Expense</b>				
<b>Administration</b>				
Administration - Fin. Sup	4,621.00	7,200.00	-2,579.00	64.18%
Administrator - General F	38,859.74	78,300.00	-39,440.26	49.63%
District Administration Fe	11,745.03	18,000.00	-6,254.97	65.25%
Meals	262.10			
Mileage	2,222.99			
Office Rent	2,476.16			
Supplies	1,750.56			
Telecommunications	1,167.75			
<b>Total Administration</b>	<b>63,105.33</b>	<b>103,500.00</b>	<b>-40,394.67</b>	<b>60.97%</b>
<b>Marketing/Advertising</b>				
Collateral / Brochure	62,467.11	63,300.00	-832.89	98.68%
Creative Development	21,380.00	74,000.00	-52,620.00	28.89%
<b>Media</b>				
RRT Campaign	59,171.98	70,000.00	-10,828.02	84.53%
CDSM Campaign	13,300.00	15,000.00	-1,700.00	88.67%
Co-op	0.00	40,000.00	-40,000.00	0.0%
Ordinance Renewal	0.00	1,200.00	-1,200.00	0.0%
Shoulder Season	80,063.18	155,000.00	-74,936.82	51.65%
<b>Total Media</b>	<b>152,535.16</b>	<b>281,200.00</b>	<b>-128,664.84</b>	<b>54.24%</b>
<b>Total Marketing/Advertising</b>	<b>236,382.27</b>	<b>418,500.00</b>	<b>-182,117.73</b>	<b>56.48%</b>
<b>Memberships/Sponsorships</b>				
<b>Memberships</b>				
Chamber	270.00			
<b>Total Memberships</b>	<b>270.00</b>			
<b>Sponsorships / Events</b>				
Event Focus/Matching	5,000.00			
VSLOC/VisitCA co-op	10,000.00	72,000.00	-62,000.00	13.89%
<b>Total Sponsorships / Eve</b>	<b>15,000.00</b>	<b>72,000.00</b>	<b>-57,000.00</b>	<b>20.83%</b>
<b>Total Memberships/Sponso</b>	<b>15,270.00</b>	<b>72,000.00</b>	<b>-56,730.00</b>	<b>21.21%</b>
<b>Project Management</b>				
Project Management	57,406.25	101,125.00	-43,718.75	56.77%
<b>Total Project Management</b>	<b>57,406.25</b>	<b>101,125.00</b>	<b>-43,718.75</b>	<b>56.77%</b>
<b>Promotions</b>	<b>11,000.00</b>	<b>24,000.00</b>	<b>-13,000.00</b>	<b>45.83%</b>
<b>Public Relations</b>				
<b>Group FAM Trip</b>				
Expenses	3,000.00			
<b>Total Group FAM Trip</b>	<b>3,000.00</b>			
Individual FAM Trips	11,000.00	16,000.00	-5,000.00	68.75%
Public Relations - Other	45,345.10	70,000.00	-24,654.90	64.78%
<b>Total Public Relations</b>	<b>59,345.10</b>	<b>86,000.00</b>	<b>-26,654.90</b>	<b>69.01%</b>
<b>Research</b>				
Strategic Plan	16,234.88	26,000.00	-9,765.12	62.44%
<b>Total Research</b>	<b>16,234.88</b>	<b>26,000.00</b>	<b>-9,765.12</b>	<b>62.44%</b>
<b>Social Media</b>				
Facebook, Blogging, etc.	40,250.00	72,000.00	-31,750.00	55.9%
Monthly E-Newsletter	8,015.00	17,750.00	-9,735.00	45.16%
<b>Total Social Media</b>	<b>48,265.00</b>	<b>89,750.00</b>	<b>-41,485.00</b>	<b>53.78%</b>
<b>Stewardship/Sustainability</b>				
Kind Travel	9,000.00	9,000.00	0.00	100.0%
CMT	6,917.56	12,000.00	-5,082.44	57.65%
Management	16,403.77	25,000.00	-8,596.23	65.62%
Miscellaneous	6,506.00	5,000.00	1,506.00	130.12%
<b>Total Stewardship/Sustaina</b>	<b>38,827.33</b>	<b>51,000.00</b>	<b>-12,172.67</b>	<b>76.13%</b>
<b>Web Development</b>				
Content Management	9,161.20	18,000.00	-8,838.80	50.9%
Hosting & Maintenance	16,000.00	30,000.00	-14,000.00	53.33%

SLOCTBID  
**Profit & Loss Budget vs. Actual - General Fund**  
 July 2017 through February 2018

	<u>Jul '17 - Feb 18</u>	<u>Budget</u>	<u>\$ Over Budget</u>	<u>% of Budget</u>
SEO/Content/Links	14,285.32	28,000.00	-13,714.68	51.02%
<b>Total Web Development</b>	<b>39,446.52</b>	<b>76,000.00</b>	<b>-36,553.48</b>	<b>51.9%</b>
<b>Encumbrances</b>				
Getaway Giveaways	312.50	312.50	0.00	100.0%
<b>Total Encumbrances</b>	<b>312.50</b>	<b>312.50</b>	<b>0.00</b>	<b>100.0%</b>
<b>Contingency</b>				
Event Matching Funds	2,250.00	14,750.00	-12,500.00	15.25%
Jamie Lewis NTE	0.00	7,500.00	-7,500.00	0.0%
KindTraveler Getaway	0.00	3,000.00	-3,000.00	0.0%
Strategic Marketing Plan	15,000.00	39,000.00	-24,000.00	38.46%
Trademark	0.00	1,250.00	-1,250.00	0.0%
Vingage Audit	10,000.00	10,000.00	0.00	100.0%
Vingage NTE	0.00	39,500.00	-39,500.00	0.0%
VinVibe NTE	0.00	11,000.00	-11,000.00	0.0%
Wildlife Tips Reprint	2,660.50	2,660.50	0.00	100.0%
Contingency - Other	0.00	10,822.56	-10,822.56	0.0%
<b>Total Contingency</b>	<b>29,910.50</b>	<b>139,483.06</b>	<b>-109,572.56</b>	<b>21.44%</b>
<b>Total Expense</b>	<b>615,505.68</b>	<b>1,187,670.56</b>	<b>-572,164.88</b>	<b>51.83%</b>
<b>Net Income</b>	<b>346,491.35</b>	<b>0.00</b>	<b>346,491.35</b>	<b>100.0%</b>



JAMES P ERB, CPA

SAN LUIS OBISPO COUNTY AUDITOR- CONTROLLER- TREASURER - TAX COLLECTOR - PUBLIC ADMINISTRATOR

**MONTHLY SLOCTBID RECONCILIATION**

**FISCAL YEAR 2017-18**

**Month Ending: February 28, 2018**

PREPARED BY :  
Sylvia Ramirez

APPROVED BY : \_\_\_\_\_

DATE March 6, 2018

DATE : \_\_\_\_\_

<b>SLOCTBID-Undistributed</b>											
<b>Account 3100500003-2601852 Balance :</b>		<b>1,690,765.94</b>									
<b>Adj for December 2017 Activity Deposited in January 2018</b>		<b>4,101.39</b>									
<b>Subtotal:</b>		<b>1,694,867.33</b>									
<b>Prior FY Undistributed</b>		<b>(1,584,479.93)</b>									
<b>Prior Periods Undistributed</b>		<b>(104,890.54)</b>									
<b>Current Period Distributed</b>		<b>111,896.15</b>									
<b>Adjusted SAP Balance</b>		<b>117,393.01</b>									
<b>HdL TOT/BID System</b>											
<b>Summary Deposit Report</b>	Month Ending 2/28/18	<b>117,393.01</b>									
<table border="1" style="width: 100%;"> <tr> <td style="width: 60%;">+4,088.89 for February revenue deposited in March.</td> <td style="width: 20%;"></td> <td style="width: 20%;"></td> </tr> <tr> <td>+ \$12.50 Reversal/Correction for TOT 0000413 on February 2, 2018 not deposited in SAP.</td> <td>Difference</td> <td style="text-align: right;">\$ (0.00)</td> </tr> <tr> <td colspan="2"><b>Total:</b></td> <td style="text-align: right;"><b>0.00</b></td> </tr> </table>			+4,088.89 for February revenue deposited in March.			+ \$12.50 Reversal/Correction for TOT 0000413 on February 2, 2018 not deposited in SAP.	Difference	\$ (0.00)	<b>Total:</b>		<b>0.00</b>
+4,088.89 for February revenue deposited in March.											
+ \$12.50 Reversal/Correction for TOT 0000413 on February 2, 2018 not deposited in SAP.	Difference	\$ (0.00)									
<b>Total:</b>		<b>0.00</b>									
<b>HdL TOT/BID System</b>											
<b>Area Report</b>	<b>Total BID</b>	<b>2% Admin Fee</b>	<b>Dist to Vendor</b>	<b>Dist to TC</b>	<b>Interest Pd</b>	<b>Undistributed</b>					
Jul 2017	188,732.23	3,774.64	166,309.74			22,422.49					
Aug 2017	246,605.24	4,932.10	239,148.46	3,774.64		3,682.14					
Sep 2017	198,599.43	3,971.99	97,363.20	4,932.10		96,304.13					
Oct 2017	206,628.07	4,132.56	145,291.69	3,971.99		57,364.39					
Nov 2017	173,944.61	3,478.89	174,014.83	4,132.56		(4,202.78)					
Dec 2017	137,218.89	2,744.38	161,597.16	3,478.89		(27,857.16)					
Jan 2018	140,165.86	2,803.32	180,244.15	2,744.38		(42,822.67)					
Feb 2018	117,393.01	2,347.86	109,092.83	2,803.32		5,496.86					
Mar 2018		0.00				0.00					
Apr 2018		0.00				0.00					
May 2018		0.00				0.00					
Jun 2018		0.00				0.00					
<b>Totals</b>	<b>1,409,287.34</b>	<b>28,185.74</b>	<b>1,273,062.06</b>	<b>25,837.88</b>		<b>110,387.40</b>					
<b>Diff SAP Bal less Undist</b>						<b>\$ (0.00)</b>					



## **Administrator's Highlights March 2017**

### **BID Infrastructure**

Strategic Marketing Framework: 3 meetings with Coraggio Group (Feb and March)

### **Collaborations**

Tourism Stakeholders: successfully concluded Coastal Discovery & Stewardship Celebration promo

SLO CAL: H1 Strategic Marketing discussions; SLO CAL Marketing Retreat

Wine Industry: BlendFest follow-up report

### **Local Areas/Constituent Outreach**

Rural Road Trip month-long LFA promo – launched Avila Beach and prepped Oceano Nipomo

Local applications: 456 processed to date totaling over \$6.00 million

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; Los

Osos|Baywood marketing committee meetings

### **Web Development/Advertising/PR**

Worked with VinVibe on website fixes, including improved site load times and site migration to new server

Launched SLO CAL retargeting 'coat tails' co-op; content curation with Jaime for H1 and H1DR profiles

Created new bucket list landing page for SLO CAL traffic

Launched digital campaign to compliment Spring campaign effort with SLO CAL retargeting

Launched database survey with Vingage to support email segmentation strategy

Kind Traveler sponsorship details for Feb/March promo

### **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, Governance and Strategic Planning 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