



SANTA CLARA TOURISM IMPROVEMENT DISTRICT
MEETING AGENDA

September 28, 2023, 3:00 PM
Santa Clara Marriott
2700 Mission College Blvd
Santa Clara, CA 95054
Meeting Room Salon 1

Attendees can participate remotely via Zoom: <https://us06web.zoom.us/j/88159841566>
Meeting ID: 881 5984 1566 or by phone: 1 (669) 900-6833.

CALL TO ORDER

ROLL CALL

PUBLIC COMMENT

For public comment on items on the Agenda that is within the subject matter jurisdiction of the Board.

CONSENT AGENDA

Matters listed in the Consent Agenda section will be considered routine by the Board and will be enacted by one motion. There will be no separate discussion of the items on the Consent Calendar unless discussion is requested by a member of the Board, staff or public. If discussion is requested, that item will be removed from the section entitled Consent Agenda and will be considered under Consent Items Pulled for Discussion.

1. Action on the Minutes of:

Santa Clara Tourism Improvement District – June 22, 2023
Santa Clara Tourism Improvement District – August 24, 2023

Recommendation: Note and file the Minutes of the Santa Clara Tourism Improvement District, June 22, 2023 and August 24, 2023.

2. Action on the FY 2022/23 Annual Report.

Recommendation: Note and File the FY 2022/23 Annual Report.

CONSENT ITEMS PULLED FOR DISCUSSION

PUBLIC PRESENTATIONS

This item is reserved for persons to address the Board on any matter not on the agenda that is within the subject matter jurisdiction of the Board. The law does not permit action on, or extended discussion of, any item not on the agenda except under special circumstances. The Board or staff may briefly respond to statements made or questions posed and may request staff to report back at a subsequent meeting.

GENERAL BUSINESS – ITEMS FOR DISCUSSION

3. Discussion on how the hotel partners would like to use the SCTID meeting time.
4. Discussion and Action on Selecting a New TID Meeting Date and Time.

Recommendation: Approve a Change in the TID Meeting Date and Time.

5. CEO Update

5A. Review of Discover Santa Clara® Sales Report for July 2023

5B. Staffing Update

5C. Monthly Accomplishments and Priorities

6. Marketing Update

GENERAL ANNOUNCEMENTS

ADJOURNMENT

Brown Act:

Government Code 54950 et seq (the Brown Act) requires that a brief description of each item to be transacted or discussed be posted at least 72 hours prior to a regular meeting. Action may not be taken on items not posted on the agenda. Meeting facilities are accessible to persons with disabilities. If you require special assistance to participate in the meeting, notify Beverly Corriere, BCorriere@discoversantaclara.org prior to the meeting.

Notice to Public:

The public is welcomed and encouraged to participate in this meeting. Public comment (3 minutes maximum per person) on items listed on the agenda will be heard at the meeting as noted on the agenda. Public comment on items not listed on the agenda will be heard at the meeting as noted on the agenda. Comments on controversial items may be limited and large groups are encouraged to select one or two speakers to represent the opinion of the group. The order of agenda items is listed for reference and may be taken in any order deemed appropriate by the SCTID. The agenda provides a general description and staff recommendation; however, the SCTID may take action other than what is recommended.

In accordance with the requirements of Title II of the Americans with Disabilities Act of 1990 ("ADA"), SCTID will not discriminate against qualified individuals with disabilities on the basis of disability in its services, programs, or activities, and will ensure that all existing facilities will be made accessible to the maximum extent feasible. SCTID will generally, upon request, provide appropriate aids and services leading to effective communication for qualified persons with disabilities including those with speech, hearing, or vision impairments so they can participate equally in SCTID programs, services, and activities.

SCTID will make all reasonable modifications to policies and programs to ensure that people with disabilities have an equal opportunity to enjoy all its programs, services, and activities.

Agendas and other written materials distributed during a public meeting that are public record will be made available by SCTID in an appropriate alternative format. Contact Beverly Corriere, BCorriere@discoversantaclara.org with your request for an alternative format copy of the agenda or other written materials.

Individuals who require an auxiliary aid or service for effective communication, or any other disability-related modification of policies or procedures, or other accommodation, in order to participate in a program, service, or activity of the SCTID, should contact Beverly Corriere, BCorriere@discoversantaclara.org as soon as possible before the scheduled event.

ATTACHMENTS



SANTA CLARA TOURISM IMPROVEMENT DISTRICT
MEETING Minutes

June 22, 2023, 3:00 PM
Marriott Santa Clara
2700 Mission College Blvd.
Santa Clara, CA 95054
Meeting in Grand Ballroom Salon A

CALL TO ORDER

Co-Chair Sullivan called the meeting to order at 3:05 p.m.

ROLL CALL

Present: 6 Justin Hart, AC Hotel Santa Clara
Kevin Dominguez, Element Santa Clara
Nicole Hausner, Embassy Suites Santa Clara-Silicon Valley
Farshad Mayelzadeh, Hilton Santa Clara
Kevin Hurley, Hyatt House Santa Clara
Chris Sullivan, Marriott Santa Clara

Absent: 5 Miriam Arreola, Avatar Hotel Santa Clara
Sean Steenson, Delta Hotel by Marriott Santa Clara Silicon Valley
Erin Henry, Hyatt Regency
Fernando Vasquez, Hyatt Centric Silicon Valley (Joined at 3:06 p.m.)
Bridgette Burns, TownePlace by Marriott

Quorum met. 6

In Attendance:

Beverly Corriere, Discover Santa Clara®
Christine Lawson, Discover Santa Clara®
Katelyn Studebaker, Discover Santa Clara®
Dan Fenton, Jones Lang Lasalle
Ruth Shikada, City of Santa Clara
Kelly Carr, Santa Clara Convention Center

PUBLIC COMMENT

For public comment on items on the Agenda that is within the subject matter jurisdiction of the Board.

Co-Chair Sullivan suggested that the TID have a vote on a new meeting time. This will be added to the next meeting agenda.

Beverly Corriere asked if the TID members wanted to continue to receive a report on the finances which requires a vote to note and file the report. Beverly asked if the TID members would prefer to receive the documents as information only. The TID members suggested they would receive the documents as information only. This would be an item on the next agenda.

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1. Action on the Minutes of:

- Santa Clara Tourism Improvement District – January 26, 2023
- Santa Clara Tourism Improvement District – February 23, 2023
- Santa Clara Tourism Improvement District – March 23, 2023
- Santa Clara Tourism Improvement District – April 27, 2023
- Santa Clara Tourism Improvement District – May 25, 2023

Recommendation: Note and file the Minutes of the Santa Clara Tourism Improvement District, January 26, 2023, February 26, 2023, March 23, 2023, April 27, 2023, and May 25, 2023.

2. Action on the Discover Santa Clara® Financial Report – May 2023.

Recommendation: Note and File the Discover Santa Clara® Financial Report for May 2023.

3. Review of the FY 2022/23 3rd Quarter Financial Report.

Recommendation: Note and File the FY 2022/23 3rd Quarter Financial Report

4. Action on Discover Santa Clara's® FY 2022/23 3rd Quarter Report.

Recommendation: Note and File Discover Santa Clara's® FY 2022/23 3rd Quarter Report.

A motion was made by Nicole Hausner and seconded by Co-Chair Vasquez to note and file the consent calendar.

Ayes: 7 Justin Hart, Kevin Dominguez, Nicole Hausner, Farshad Mayelzadeh, Fernando Vasquez, Kevin Hurley, Chris Sullivan

Absent: 4 Miriam Arreola, Sean Steenson, Erin Henry, Bridgette Burns

CONSENT ITEMS PULLED FOR DISCUSSION

PUBLIC PRESENTATIONS

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GENERAL BUSINESS – ITEMS FOR DISCUSSION

5. Effective Lead Management & Communication

CEO Lawson informed the SCTID that leads are coming in and the DMO is working on cross-team collaboration in protocols for effective lead management. Lead management will be the topic of the Director of Sales (DOS) Meeting with the DOS partners scheduled on June 29, 2023.

6. CEO Update

6A. Review of Discover Santa Clara® Sales Report for May 2023

CEO Lawson reported on the sales activity by priority. P1P2s are managed by the DMO. There are 264 Actively Researching, 5 New Prospects, 4 New Tentatives, 2 New Definites. The DMO had a sight inspection with a big group.

6B. Staffing Update

CEO Lawson reported that the Luz Cahtman, DMO Director of Sales, will start on June 26, 2023. The DMO Board of Directors approved a Marketing Coordinator and since bringing on the Director of Marketing there is a need to change the Coordinator to a Marketing Manager. The DMO Board approved the change. The DMO is working on filling the open roles.

6C. Current Priorities

CEO Lawson reported on the information in the slide and noted that the tradeshow booth is being developed as a step and repeat booth. The DMO leadership team is working on alignment and strategy for FY 2023/24. The DMO is developing marketing KPIs. CEO Lawson is working with the NFL host committee. Jordan Wong asked if there will be Superbowl events at Moscone Center. CEO Lawson will follow up on the events for the Superbowl.

7. Marketing Update

Katelyn Studebaker reported on social media activities and growing followers from 79 to 3,342 using a Like-Follow-Share Beyonce ticket giveaway campaign with the assistance of an influencer partner. Katelyn also gave an overview of the social media reels that are being created. Email marketing also went out announcing the location of Superbowl 60. The DMO reviewed existing collateral with partners, and marketing brochures were ordered. Katelyn visited nearly all the partner hotels. The Taylor Swift welcome plan will include July 28th and 29th as Taylor Swift Weekend and make Taylor Swift honorary mayor of Santa Clara during the Eras tour concert visit.

GENERAL ANNOUNCEMENTS

ADJOURNMENT

The meeting adjourned at 4:30 p.m. The next SCTID meeting is scheduled for July 27, 2023.



SANTA CLARA TOURISM IMPROVEMENT DISTRICT
MEETING MINUTES

August 24, 2023, 3:00 PM
Hyatt Centric Santa Clara Silicon Valley
3100 Lakeside Drive
Santa Clara, CA 95054
Meeting Room Santa Clara

CALL TO ORDER

Co-Chair Sullivan called the meeting to order at 3:15 p.m.

ROLL CALL

Present: 6 Sean Steenson, Delta Hotel by Marriott Santa Clara Silicon Valley
Nicole Hausner, Embassy Suites Santa Clara-Silicon Valley
Erin Henry, Hyatt Regency (left at 3:55 p.m.)
Chris Sullivan, Marriott Santa Clara
Fernando Vasquez, Hyatt Centric Silicon Valley

Absent: 5 Justin Hart, AC Hotel Santa Clara
Miriam Arreola, Avatar Hotel Santa Clara
Kevin Dominguez, Element Santa Clara
Farshad Mayelzadeh, Hilton Santa Clara
Kevin Hurley, Hyatt House Santa Clara
Bridgette Burns, TownePlace by Marriott

Quorum not met. 5

In Attendance:

Beverly Corriere, Discover Santa Clara®
Christine Lawson, Discover Santa Clara®
Katelyn Studebaker, Discover Santa Clara®
Dan Fenton, Jones Lang Lasalle
Nancy Thome, City of Santa Clara
Ruth Shikada, City of Santa Clara

PUBLIC COMMENT

For public comment on items on the Agenda that is within the subject matter jurisdiction of the Board.

There were no public comments.

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Co-Chair Sullivan made an adjustment to the agenda, Items 1, 2, and 3, were skipped since there was no quorum.

1. Action on the Minutes of:

Santa Clara Tourism Improvement District – June 22, 2023

Recommendation: Note and file the Minutes of the Santa Clara Tourism Improvement District, June 22, 2023.

2. Action on the FY 2022/23 Annual Report.

Recommendation: Note and File the FY 2022/23 Annual Report.

CONSENT ITEMS PULLED FOR DISCUSSION

PUBLIC PRESENTATIONS

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GENERAL BUSINESS – ITEMS FOR DISCUSSION

3. Discussion and Action on Selecting a New TID Meeting Date and Time.

Recommendation: Approve a Change in the TID Meeting Date and Time.

4. Nancy Thome to provide information on the TID funds Assessment Fee payment timeline to the City of Santa Clara.

Nancy Thome provided an update on the SCTID Assessment. Nancy Thome stated the City of Santa Clara website has current forms available that the hotels may use to process payments for assessments due.

5. CEO Update

- 5A. Review of the Discover Santa Clara® Financial Report – June/Year-end 2023

CEO Lawson reported on the June 2023 financials. The DMO was over budget for the month by an estimated \$24,000 in operating expenses due to three new employees starting and the need to purchase supplies and computer equipment for the new staff. The DMO was over budget in conferences by \$836 for IMEX conference expenses.

- 5B. Review of Discover Santa Clara® Sales Report for June 2023

CEO Lawson gave an update on the PIP2 DMO Sales Activity for June 2023. There are 53 Current Active Prospects, Actively Researching 269 New Prospects, 8 New Prospects, 3 New Tentatives, and 0 New Definites.

- 5C. Staffing Update

CEO Lawson gave an update on DMO staffing changes and introduced Luz Chatman as the Director of Sales. Luz has a background in hospitality and has already met several of the DMO's hotel DOS partners. Marwa Abubakr, was offered the position of Manager, Sales Systems and Strategy, and accepted the role beginning September 1, 2023. There is an offer out to a candidate for the position of Sales Manager.

- 5D. Monthly Accomplishments and Priorities

CEO Lawson gave an update on DMO accomplishments and priorities. A team offsite is scheduled for September 7th and 8th in which the marketing and sales team will align on strategy for the DMO. CVENT training is planned for the staff of the DMO, OVG, and Levy Restaurants. CEO Lawson attended the Destinations International Annual Meeting and Smart Woman Conference, where she received a Smart Woman award. Luz Chatman attended the Meeting Professionals International event. Accomplishments include the completion of the DMO FY22/2023 Annual Report, the orientation of a new accounting firm, working with the tax preparer on previous years' 990s to have the tax filing finalized, the DMO launched the 401K program, creating a draft of the financial policies/SOPs, incentives and goals are being developed, and a bank partner has been identified to obtain credit cards.

6. Marketing Update

Katelyn Studebaker provided a marketing update beginning with an introduction of Ben Landis. Ben's strength is content creation which will enhance the Marketing efforts.

The DMO co-wrote a press release with the City of Santa Clara in which the Taylor Swift campaign included the city being renamed as "Swiftly Clara" and Taylor Swift named Honorary Mayor for the dates of the Eras concert on July 28th and 29th. Shares of posts for the Taylor Swift Eras concert in Santa Clara are up and demonstrate the organic growth of DMO social media. Hotels report a positive experience during the Eras concert weekend. The DMO marketing team is working on collateral and branding and has updated the convention center floor plan brochure and added an additional page.

GENERAL ANNOUNCEMENTS

ADJOURNMENT

The meeting was adjourned at 4:11 p.m.



Santa Clara
Tourism Improvement
District

FY 2022/23 Annual Report

THINK BIG. LOOK FORWARD.

August 10, 2023

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SILICON VALLEY/SANTA CLARA DMO, INC. BOARD OF DIRECTORS

Catherine Lentz, Chair Forty Niners Stadium Management Co.	Nadine Nader City of Santa Clara
Leo Wandling, Vice-Chair I.A.T.S.E – Local 134	Christopher Hamilton Levy Restaurant
Kelly Carr, Treasurer OVG360	Barb Granter California’s Great America
Christine Lawson, Secretary/Ex-Officio Discover Santa Clara®	Chris Sullivan Santa Clara Marriott
Ruth Mizobe Shikada, Ex-Officio City of Santa Clara	Sean Steenson Delta Hotel
	Fernando Vazquez Hyatt Centric

LETTER FROM THE CEO

On behalf of the team, it is with pleasure that I present you with the Discover Santa Clara® (the “DMO”) Annual Report for FY 2022/23. While the past year has brought some challenges due to the unprecedented impact of the Covid-19 pandemic, subsequent slow rebound, and staff turnover/open positions, there are also many achievements to celebrate.

In October 2022, the DMO welcomed me as the new CEO where to date, my focus has been dedicated to cultivating a formidable team and establishing foundational processes to ensure success moving-forward. Key positions have been filled, including Director of Sales, Director of Marketing, and Sales Manager, to allocate critical resources and develop strategies that support the achievement of the DMO’s designated Key Performance Indicators (KPIs).

While we faced several obstacles, such as the delayed timeline in assembling our team and the challenges brought on by tech layoffs, the threat of a recession, and intense market competition, our progress in identifying potential larger conventions for Santa Clara is commendable. However, these circumstances restricted our ability to execute many of the tactics outlined in our FY 2022/23 Annual Report.

Nonetheless, we have experienced notable accomplishments in the past calendar year. Our team successfully secured one P2 event, scheduled to take place in November 2023. Additionally, we hosted a high-profile client for a site inspection in June 2023, as Santa Clara is being considered for a multi-year P1 event from 2025 to 2030. While we have yet to secure a P1 piece of citywide business, we have had interest and the opportunity to be part of the bidding process in partnership with the Santa Clara Convention Center (the “SCCC”). These preliminary wins demonstrate the teams’ capabilities, and they remain proactive in prospecting for new citywide business, establishing relationships, and generating interest in Santa Clara. These efforts will undoubtedly yield future business opportunities, despite the complexities of the current landscape.

In the upcoming fiscal year, we anticipate continued growth and are committed to re-introducing Santa Clara as a premier destination through direct sales and marketing efforts. To support our goals, we will be expanding our team by adding an additional Sales Manager, Marketing Manager, and Manager of Sales Systems & Strategy. Together, with a robust business plan focused on gaining exposure and cultivating strong partnerships with influential meeting and event planners, we will continue to propel the DMO forward.



Christine Lawson
CEO

FISCAL YEAR 2022/23 ACCOMPLISHMENTS

Convention Sales, Incentives and Services

The Convention Sales, Incentives, and Services category has been instrumental in building a successful foundation for growth. Dedicated efforts and strategic investments in this area have yielded significant accomplishments, with the intention of driving visitation to the assessed lodging businesses, our partners, and the City.

- Hired a Convention Sales Manager in September 2022 to focus on Citywide (P1 and P2) conventions/events.
- Welcomed new Director of Sales, Luz Chatman, on June 26, 2023 to develop a strategic deployment and sales plan to drive exposure, increase leads, and close larger pieces of citywide business.
- The Board approved the addition of a Manager, Sales Systems and Strategy position in the FY 2023/24 budget. This new role will oversee the management of the DMO's Simpleview Customer Relationship Management (CRM) system, and contribute data insights to our strategic sales efforts, enhancing efficiency and effectiveness.
- Reformed our operations by introducing a cadence of meetings to include:
 - Daily business review meetings, uniting the DMO, Convention Center, and Levy sales teams. Through detailed evaluation of every lead, we ensure optimal revenue generation for all stakeholders and assessed lodging businesses.
 - Continued and facilitated twice-monthly sales meetings to support collaboration across the DMO, Convention Center and Levy Sales Teams. Through these collaborative efforts, we have harnessed collective expertise to drive overnight visitation to assessed lodging businesses.
 - Implemented bi-weekly DMO team meetings and weekly one-on-one meetings with individual team members.
- Revamped and successfully implemented an advanced P1/P2 site inspection process, significantly elevating our ability to present the city of Santa Clara and our esteemed partners in a compelling manner. By providing a rich and immersive experience during site visits, we have strengthened our position as an attractive destination for group, meeting, and leisure customers.
- Collaborated with the Convention Center, Levy, and the SCTID Hotels to assess and revise the existing Booking Policy to meet current market dynamics, maintain a competitive edge, explore mutually beneficial strategies for better representation of the City, and to drive business. A new Booking Policy was approved by the Board and implemented in April of 2023.
- Implemented bi-monthly meetings with the SCTID Hotel Directors of Sales to discuss needs and strategies, and to communicate current DMO activities.
- Crafted a FY 2023/24 DMO Tradeshow/Sales Trip Calendar and Planning Checklist to gain both vital exposure and to reacquaint the marketplace with Santa Clara and all that the city and our partners have to offer for groups/meetings and leisure travel.

- Initiated a Request for Proposal (RFP) process to design and build a compelling tradeshow booth that will impress attendees and capture the spirit of Santa Clara to drive exposure, leads, and new business.
- Joined San Francisco Travel, providing the DMO with additional sales and marketing opportunities such as listing our Convention Center in their venue and supplier search tool, opportunities to participate in SF Travel-led tradeshows and meetings, and media familiarization excursions (FAMs), to name a few. The DMO will continue to explore opportunities to leverage this partnership.
- CEO attended high-profile industry events including the Visit California Forum, and California Travel's Spring Board Meeting which provided excellent insight on current efforts, campaigns, and participation opportunities for DMOs in addition to networking opportunities, and exposure for the DMO.
- Crafted necessary standard operating procedures for more effective communications and operations among the DMO, the Convention Center, Levy, and our SCTID Hotel partners.
- Partnered with San Francisco Travel and Team San Jose to develop a compelling bid to host Super Bowl 60 for 2026. The Bay Area was named the official host and the Super Bowl will be held at Levi's® Stadium.

Marketing & Communications

The Marketing and Communications program has played a pivotal role in regaining exposure for the DMO. Over the past Fiscal Year, strategic investments and creative campaigns have effectively highlighted the unique offerings and attractions that Santa Clara has to offer.

- Hired a Director of Marketing, Katelyn Studebaker, who started on May 3, 2023 to develop and execute a diverse and durable marketing plan.
- Received Board approval to add a Marketing Manager for FY 2023/24 to begin in mid-July 2023.
- Promotional materials were prepared in partnership with our Marketing Agency partner, *We The Creative*, to create a foundation of tools for sales and to establish a cadence of social media posts to drive exposure, and business. Specific items created were:
 - **Master Sales Pitch Deck:** A customizable deck of information about the DMO's brand and the benefits of booking with Santa Clara that can be used at tradeshows, direct client interaction and can be sent as a follow-up to customers in a PDF format.
 - **Social Media Posts:** Contracted and developed a social media campaign of eight (8) diverse monthly posts highlighting the space at the SCCC, our innovative food experience, our partners, and the City to drive demand for overnight visitation to assessed lodging businesses and our partners.

- These posts were brought to life through imagery and our branded taglines including #discoversantaclara #santaclara #conventioncenter #ThinkBigLookForward #MakeItYours #trailblazers #events #innovation @legendaryevents.
- **Email Templates:** Two email templates were created with the intent of emailing our database of approximately 5,000 customers to acquaint them with our new brand and how we are differentiating ourselves through unique events and experiences, collaboration, and culinary excellence. Responses to these emails will provide the sales team with the opportunity to reconnect and requalify clients. Campaigns will begin in Q1 of FY 2023/24.
- **RFP Template:** Developed a branded template outlining our unique approach to events. This will be used to send to clients who have requested a proposal and ensure consistency in brand messaging across team members.
- Implemented monthly marketing calls with *We The Creative* to include the DMO, Convention Center and Levy leadership to manage projects and discuss future strategy.
- Identified and implemented Email Marketing Platform, Act-On, to enable the DMO to effectively execute, automate and retarget clients with on-going targeted Email campaigns.
- Launched the first DMO email in May 2023 through Act-On to our database of 5,000 meeting/event planners, announcing Levi's® Stadium as the hosting location of Super Bowl 60.
- Initiated Google Ad campaign in March 2023 that is on-going, targeting meeting planners, weddings, and groups/events based upon our customer personas. Responses will allow us to identify commonalities across the groups which will enhance future ad strategy to drive overnight visitation to assessed lodging businesses.
- Created a Discover Santa Clara® website landing page to support our marketing efforts by directing clients responding to our campaigns and seeking additional information. This will allow us to track content reviewed, RFPs submitted and requests to speak to our sales department.
- In June 2023, the Director of Marketing developed a new Social Media Content strategy to be executed in concert with *We The Creative*. The goal is to target social media channels with relevant content for specific customer segments. Specifically:
 - LinkedIn will be used to reach meeting and event planners.
 - Facebook and Instagram will be focused on creating valuable Santa Clara content that motivates followers to save and share with the target audience of Leisure travel, Staycationer's and Day Trippers. Social media content categories will center around Santa Clara events, local restaurant spotlights, SCTID Hotel spotlights, Santa Clara news and User Generated Content.
- In June 2023, the DMO began utilizing social media Reels to feature on Facebook and Instagram providing an excellent opportunity to show our personality, spread brand awareness and connect with our audience through authentic content while growing our follower base.

- Conducted two Instagram growth initiative campaigns with local and diverse influencers to grow followers with a focus on the content being “liked, followed and shared.”
 - **Growth initiative #1:** Partnered with a high-profile local influencer “sanjosefoos” on a contest promoting two complimentary Beyonce concert tickets for her August 2023 show at Levi’s® Stadium. Grew followers by 3,170 (25%) in a 24-hour period for the minimal cost of only \$2,934.00.
 - **Growth initiative #2:** Partnered with influencer “Ninersnationbn” to promote a contest to win two complimentary 49’ers tickets for opening day. Grew followers by 1,000 at a cost of \$1,333.00.
- Initiated the creation of a Social Media Influencer Catalog to include pricing for local influencers available for hire to create inspirational content to promote Santa Clara and increase the DMO’s base of followers.
- Made calibrations to the existing Discover Santa Clara® website specific to:
 - Increased functionality by replacing ‘buzz words.’ Existing website is now easier to navigate.
 - Upgraded authenticity by replacing stock images with real Santa Clara images.
 - Updated homepage widgets to be more intuitive (Meet, Play, Plan, Stay).
- Director of Marketing conducted a collateral review with representatives from the DMO, OVG, Levy and the City to make refinements to current tools and identify additional needs.
- Refreshed photography for the DMO marketing brochure, better showcasing what the destination and our partners have to offer to each of our target audiences. Initiated updating floor plans for both the DMO and the SCCC to include:
 - Welcome to Santa Clara 3D Map providing a sense of place for SCCC’s proximity to hotels, Levi’s® Stadium, Great America, nearby parking lots and surrounding points of interest.
 - More detailed overview of the SCCC space, levels, and offerings.
 - Detailed capacity charts.
- Initiated search for photographers to shoot both updated catering photos for Levy and SCCC spaces to have professional photos for sales and marketing efforts. Photoshoots will take place in Q1 FY 2023/24.

Administration and Operations

The following initiatives taken in FY 2022/23 not only reinforced the commitment to effective administration and operations for the DMO, but will ultimately benefit our partners, positioning them for increased visibility, collaboration, and success in the market.

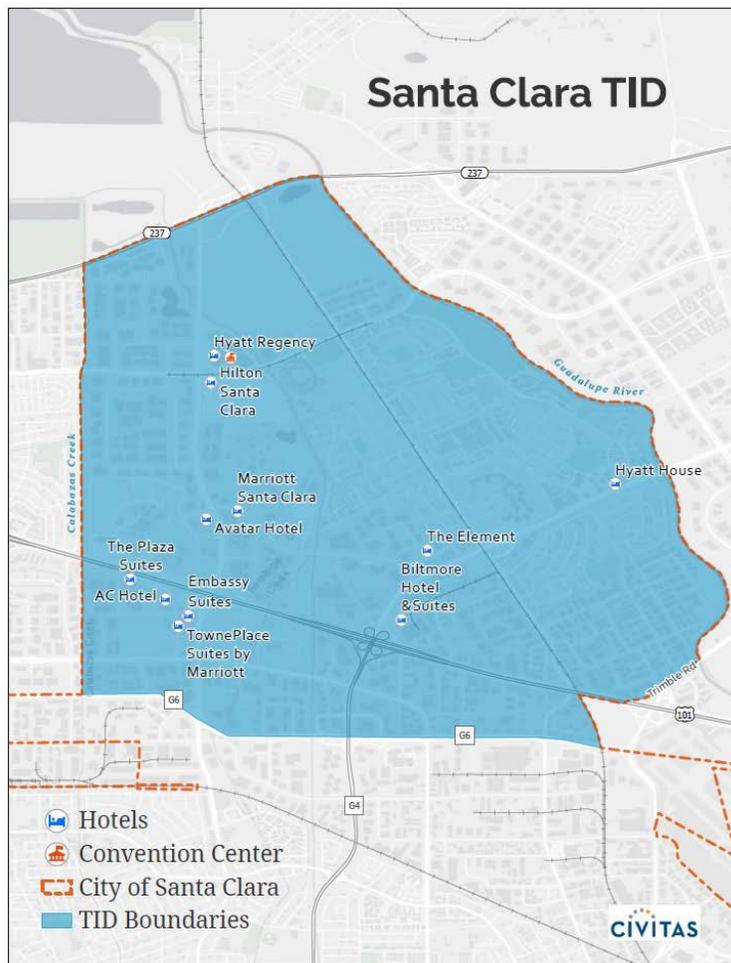
- CEO and Administrative Services Manager went through a strong orientation immersion process including:
 - Meetings with the City, Jones Lang LaSalle (JLL), and the SCCC teams providing support for the DMO CEO and team’s onboarding including weekly meetings with Kelly Carr, GM of the SCCC, and Dan Fenton of JLL.
 - Conducted CEO introductory meetings with the DMO Board Members and the SCTID Hotel General Managers and Directors of Sales to understand business needs and develop rapport.
 - Fostered strategic collaborations by organizing CEO meetings with key vendor partners, further strengthening the support system for assessed lodging businesses.
 - Continued the onboarding process through regular meetings with City representatives Ruth Shikada and Nancy Thome to facilitate seamless integration and maximize operational efficiency.
- CEO engaged with DMO accounting firm, ArightCo, to sharpen current reporting stack and processes.
- Formalized a partnership with Krisch & Company to facilitate the creation of Financial Standard Operating Processes (SOPs) for the DMO slated to be presented for the Board's approval in Q1 of FY 2023/24 with the ultimate objective of the DMO securing custody of the budget and SCTID Assessment Funds.
- In June, the CEO met with Mayor Gillmor to discuss the vision for Santa Clara, share DMO accomplishments to date, and strategies in-flight.
- Alerted the current accounting firm, ArightCo, that we will be transitioning to a new accounting firm, Krisch & Company in the upcoming FY 2023/24 to better serve the evolving needs of the DMO.
- Commenced working with CPS HR Consulting to design the DMO’s annual review format and process for implementation in Q1 of FY 2023/24.
- Partnered with ADP to initiate discussions and take the necessary steps to launch a DMO 401k program in July 2023.
- Worked with JLL to create a DMO Workplan for completion prior to the conclusion of the JLL contract with the City on December 31, 2023. The current focus is on crafting incentive plans for eligible positions on the team, Sales Managers, Director of Sales, Director of Marketing and CEO. The goal is to have plan drafts completed for presentation to the Board prior to the end of Q1 of FY 2023/24.
- Completed the FY 2023/24 budget process which was presented to the Board of Directors and approved on April 7, 2023. This comprehensive financial plan ensures the allocation of resources is aligned with our strategic objectives, benefiting our assessed lodging businesses, and driving their success in the coming year.
- CEO recognized by *Smart Meetings* as one of their **“2023 Smart Women in Meetings”** Award Winners. This prestigious honor provides excellent exposure for the DMO, highlighting our leadership and expertise in the industry.

BOUNDARY

The Santa Clara Tourism Improvement District (the “SCTID”) will include all lodging businesses with ten (10) rooms or more, existing and in the future, available for public occupancy within the boundaries of a portion of the city of Santa Clara. The boundary, as shown in the map below, currently includes eleven (11) lodging businesses, listed in the Appendix. There are no proposed changes to the boundaries of the SCTID. One (1) lodging business is currently undergoing renovation and will be under new management.

One SCTID Hotel partner changed ownership:

- The Avatar Hotel is anticipated to re-open as a Tapestry Collection by Hilton property in September 2023: 4200 Great America Pkwy, Santa Clara, CA 95054



IMPROVEMENTS AND ACTIVITIES

The improvements and activities to be provided for FY 2023/24 are consistent with the Management District Plan (the “Plan”) with no proposed changes. The focus will be on the execution of high-impact sales and marketing efforts to gain exposure, lead generation, and bookings for the City and our partners now that we have the majority of our team members in place. Aligned with the activities and improvements outlined in the Plan, noted below are highlights and areas of focus anticipated for FY 2023/24.

Convention Sales, Incentives and Services

- **Development of Sales Organization Model.**
 With the arrival of the Director of Sales in late June, a priority will be to develop a Sales organizational structure that sets the DMO up for success. This structure will include deploying the sales team towards targeted market segments (e.g., technology, banking, sports, etc.) so that the team is both interacting and qualifying key business influencers to drive awareness and business for the City and our partners.
- **Enhancement of Sales Enablement and Operations Process.**
 With the addition of the Manager, Sales Systems & Strategy budgeted to start on September 1, 2023, we have the opportunity to both evolve and create new processes specific to day-to-day sales operations, forecasting, business intelligence, and tracking sales performance metrics. These critical processes will enable the team to be more effective in time management, focusing on the right customers for the City and our partners while properly tracking all business activity in the CRM to support future tactics and strategic approach.
- **Attendance to Key/High-Profile Tradeshows and Targeted Sales Trips.**
 Due to the turnover of staff and the delayed onboarding of the current DMO team, a considerable number of planned activities related to direct sales, in the form of tradeshows, business trips and customer activities, did not occur during FY 2022/23 as intended. However, with our newly added staff and continued focus on recruiting an additional Sales Manager, the DMO is entering the new fiscal year with a more robust team. By strengthening our team and resuming our planned sales activities, we are taking the initiative towards fulfilling our mission of driving visitation to assessed lodging businesses, the City, and our partners. Moreover, these efforts will allow us to forge valuable connections, and promote our destination in a compelling way.
- **Client Familiarization Trip and Events.**
 Efforts will be focused on inviting key meeting/event planners to Santa Clara as a means of providing vital information and first-hand experience on what the City and our partners have to offer. This and other targeted events will allow us to highlight our offerings and build/deepen important relationships for future business.

- Creation of Target Account List.**
 The DMO team will be developing multiple target client lists based upon business segments and influence. These lists are crucial to afford us the ability for focused and efficient resource allocation, enabling the sales and marketing teams to prioritize efforts and allocate time and energy towards prospects with the highest potential for conversion. This targeted approach will serve to maximize productivity and increases the likelihood of achieving our KPIs.
- Active Involvement in Industry/Community Events.**
 The DMO team is committed to expanding their reach and fostering meaningful connections within the industry. With a proactive approach, the team will actively engage in high-profile industry and professional networking events, seizing every opportunity to highlight the destination's offerings. By participating in these events, the team aims to gain exposure, and establish a strong presence in the market (e.g., MPI, SVBTA, etc.).

Marketing & Communications

- Website Redesign.**
 The objective is to redesign the current DMO website to provide a richer and more diverse experience for our group, meeting, and leisure customers. This revamp aims to generate increased demand for overnight visitation to assessed lodging businesses, and overall economic impact for the City. Providing varied audience content will support investments on the sales and marketing side to drive traffic to the site, and keep people engaged while on the site with the goal of meeting planners being more inclined to complete an RFP.

Additionally, it is critical that we enhance the site to support the DMO's goal of marketing the destination with updated events and reasons to come/stay at assessed lodging businesses in Santa Clara.
- Branding Meeting.**
 While the DMO has created a brand, the goal of the branding session is to answer the question "Why Santa Clara?" There is a need to have greater and more compelling content to be used to create stories that resonate with our target customer segments to create an emotional connection, increase exposure, leads and overall economic impact to the City. The goal is to have completed this meeting before the end of Q1 of FY 2023/24.
- Photoshoots.**
 The DMO has allocated a portion of the budget to invest in photography to build and expand its content library. Currently, the DMO primarily uses stock photography that does not accurately portray the destination or our valued partners.

Websites, social media, Google Ads, and other sales materials can all benefit from the use of rich imagery. The use of captivating visuals will help create an authentic and compelling representation of our destination, effectively captivating the attention and interest of potential visitors.

Additionally, the DMO's Director of Marketing has scheduled and will manage photoshoots for both the Convention Center and Levy with monies from these respective budgets to bolster our portfolio of sales and marketing assets.

- **Videography.**

For numerous marketing purposes, including the website, it is imperative that the DMO invest in video production. With the popularity of video for marketing, the DMO will be investing in video production to drive exposure, leads and bookings. The goal of the DMO is to have a comprehensive highlight reel that highlights the destination and offerings. These videos will be further segmented into smaller clips intended for usage with specific target audiences/ customer segments.

By incorporating captivating and informative videos, the goal is to effectively engage our audience, evoke interest, and inspire visitors to choose our destination for their next travel experience, driving demand for the City and our partners.

- **Focus on Influencer Marketing.**

The DMO has budgeted funds to collaborate with "influencers" who are widely regarded as experts in their field or as having significant social influence. This will help us connect with the influencers audience and raise the DMO's exposure and followers through diverse audiences, thus increasing followers and demand.

- **Customer Database Growth Strategies.**

In today's digital landscape, where social media platforms and email marketing have become vital pillars of business success, implementing effective customer database growth strategies is crucial specifically for popular platforms like Instagram, LinkedIn, Facebook, Email subscribers, and web views, with the aid of Google Analytics. The DMO's marketing team will focus on harnessing the potential of these platforms and utilizing data-driven insights so that we can unlock new avenues for growth, enhance customer engagement, and boost exposure, leads, and business.

- **Development of Content Strategy.**

There will be a strong focus on developing a potent content strategy for key channels such as our website, social media platforms, and email marketing. A well-crafted strategy will ensure consistent and engaging content, leading to a strong brand identity and increased audience engagement. Moreover, delivering personalized and relevant messages to specific customer segments will help to drive better conversion rates and customer retention.

Some areas of concentration will be on developing blogs and whitepapers for the DMO website, and advanced creation of custom content calendars for both social media platforms and Email marketing.

- **Strategic Advertising.**

In addition to the Google Ads that began running in March 2023, the DMO will expand digital advertising in the new fiscal year. This will include PPC advertising on multiple platforms that allow targeting by job title, such as LinkedIn and Meta. There are many creative ways to hyper target Meta (Facebook/Instagram) ads, including geotargeting conferences that the DMO attends. LinkedIn advertising will include setting up automated direct messages to individuals with Event Planner and Executive Admin titles. The DMO will begin retargeting people who began an RFP but did not complete it. Retargeting is a high priority initiative. To date, 6.6k RFPs were started, and only twenty-one were submitted. Purchasing website display ads on reputable websites such as CNN, ESPN, Better Homes and Gardens, Huffington Post, The Weather Channel and Yahoo will also be researched.

- **Participation in Visit California Marketing Campaigns.**

Visit California is a non-profit organization that is focused on developing, executing, and maintaining marketing programs to further develop tourism in California. Visit California has a wide reach and provides DMOs the opportunity to participate in marketing programs allowing for diversification of sales and marketing exposure and exploiting their follower base in both domestic and international markets.

Administration and Operations

- **Creation of DMO Financial SOPs.**

The DMO is actively developing Financial Standard Operating Procedures (SOPs) in collaboration with Krisch and Company and City representation. These SOPs aim to establish fiscally responsible processes within the organization and ultimately secure custody of the SCTID Assessment Funds. The DMO seeks to create essential policies that will promote sound financial management and ensure the efficient allocation of resources.

- **Development of Annual Review Process.**

The DMO partnership with CPS HR Consulting to collaborate on developing an innovative Annual Review format and process. Our primary objective is to ensure that leadership within our organization is equipped to deliver valuable feedback on performance, identify areas of success, and pinpoint opportunities for growth.

Through this strategic collaboration, we aim to create an effective framework that fosters professional development and enhances the overall productivity and success of our team. The goal is to have an approved process by the end of Q1 of FY 2023/24.

- **Construction of Goal Setting Process and Incentive Plans.**

The DMO is partnering with JLL to develop competitive incentive plans. The goal is to foster a supportive and motivating culture that rewards individuals based on the achievement of their personal KPIs. Additionally, the intent is to encourage team collaboration to achieve collective DMO goals.

Contingency

The budget shall continue to include a contingency line item to account for uncollected assessments, if any. If there are contingency funds collected, they may continue to be held in a reserve fund or utilized for other program, administration, or renewal costs at the discretion of the DMO Board. Policies relating to contributions to the reserve fund, the target amount of the reserve fund, and expenditure of monies from the reserve fund shall be set by the DMO Board. Contingency/reserve funds may be spent on District programs or administrative and renewal costs in such proportions as determined by the DMO Board. The reserve fund may be used for the costs of renewing the SCTID.

City Administration Fee

The City of Santa Clara shall continue to be paid a fee equal to 2% of the amount of assessment collected to cover its costs of collection and administration which may include but are not limited to staffing costs, legal services, and operational costs for rent, telephone, supplies, postage, and other general office expenses.

FY 2022/23 FINANCIALS

Compared to the forecasted amount of \$1.17 million, the SCTID assessment for FY 2022/23 is estimated to actualize at approximately \$2.5 million. With the continued impact of Covid-19 and the prospect of a recession on individual travel, meetings, and events at the beginning of the fiscal year, it was difficult to predict this unanticipated revenue growth of \$1.3 million (72.5%) in assessment revenue.

As of June 30, 2023, the DMO expended 67% of the Operating Budget leaving a balance of \$550,507. As previously referenced, the delay in assembling the team greatly inhibited our ability to execute many of the budgeted activities for the DMO. As we enter FY 2023/24 with new key discipline leaders in sales and marketing the team looks forward to reacquainting the market and key customers with the City, our partners, and offerings.

Income	Budget	Actuals
SCTID Assessment	\$1,174,623	\$2,500,000
Other Revenue	\$66,000	\$69,571

FY 2022/23 Expenditures	Budget	Actuals	Balance
CONVENTION SALES, INCENTIVES & SERVICES	\$607,274	\$199,245	\$408,029
MARKETING & COMMUNICATIONS	\$203,048	\$121,529	\$81,520
ADMINISTRATION	\$822,592	\$770,014	\$52,579
CONTINGENCY	\$35,239	\$0	\$35,239
CITY ADMINISTRATION FEE	\$23,429	\$50,288	(\$26,859)
TOTALS	\$1,691,583	\$1,141,076	\$550,507

An additional Reserve Fund was created in FY 2021/22 to be used for any large-scale unexpected expenses or emergencies only upon Board of Directors approval. There were no expenses to the Reserve Fund.

FY 2022/23 Expenditures	Budget	Actuals	Balance
RESERVE FUND	\$678,001	\$0	\$678,001

The detailed FY 2022/23 Financial Report is included as Appendix A.

KEY PERFORMANCE INDICATORS (KPIs)

The established KPIs are the core metrics that drive success and serve as the compass for the DMO. Our KPIs are strategically established to ensure the realization of targeted objectives, with the primary focus on securing a specified number of P1 and P2 events that translate into substantial revenue, hotel room occupancy, and overall economic impact for the Convention Center, the SCTID Hotels and the City.

With the current economic and competitive landscape, and lack of a full team, the DMO did not achieve the established KPIs for FY 2022/23, however did secure one P2 event that will actualize in FY 2023/24. With the continued building of the DMO team, there is confidence that FY 2023/24 KPIs will be achieved.

Silicon Valley/Santa Clara DMO Inc.			
Performance Measures			
	2022/23 Target	2022/23 Actuals	2023/24 Target
1. Event Mix (Consumed)			
Percent of P1 Events	1%	0%	0.5%
Number of P1 Events	3	0	1
Percent of P2 Events	2%	0%	1.0%
Number of P2 Events	6	0	2
2. Number of Definite Events Booked (Booked in the year for future years)			
Number of P1 Events	5	0	2
Number of P2 Events	11	1	4
3. Convention Center Gross Revenue (P1 & P2)	\$2,580,000	\$0	\$800,000
4. Number of Room Nights Booked (For future years)	16,438	750	4,506
5. Number of Room Nights Consumed	9,375	0	2,253
6. Number of Weeks Impacted (Consumed)	9	4	2
7. Customer Service Survey Results (Overall satisfaction)	85%	0%	85%
8. Number of Prospects (active) (Non-cumulative P1 & P2)	300	53	140
9. Economic Impact (Consumed P1 and P2 events)	\$6,031,943	\$0	\$2,745,582

KPI Summary

1. **Event Mix.** This KPI focuses on the target mix of convention/meeting types (P1's– P5's) that will deliver the best financial and economic results for the City. Additionally, the goal is to focus on the type and quality of events as opposed to strictly focusing on the quantity of events. While the quality of event mix overall at the Convention Center improved, there were no consumed P1s and P2 during this fiscal year.

2. **Definite Events Booked.** A “definite” event is a future event confirmed with a signed executed Convention Center contract and at least one SCTID lodging business. While the DMO team did not meet the target of nine citywide events to be consumed in FY 2022/23 or the booking goal of 16 events to be booked in the fiscal year for future years, one P2 event was contracted in FY 2022/23 for November 2023.
3. **Convention Center Gross Revenue.** The Convention Center’s Gross Revenue came in higher than expected at \$16,791,629. However, there were no consumed P1 or P2 events for the DMO. There were staffing challenges with the DMO only having one dedicated sales manager.
4. **Room Nights Booked.** Achieving the goals for occupied hotel rooms in the past fiscal year was a collaborative effort with OVG, Levy and the DMO. While the goal of booking P1 and P2 events resulting in 16,438 in booked guestrooms was not achieved, the DMO did contract one P2 event with 750 guestrooms.
5. **Room Nights Consumed.** Achieving the goals for rooms that have been occupied in the past fiscal year is a collaborative effort with OVG, Levy and the DMO. The team has made great strides in securing business for the Convention Center that drives overnight stays into SCTID hotels while generating significant revenue. The groups that are characterized as larger (P1 and P2) are a focus of the DMO. There were not any consumed room nights for P1s and P2s this year.
6. **Number of Weeks Impacted.** This KPI reports the number of weeks throughout the year where a P1/P2 event or a combination of events positively impacted Santa Clara’s economy and was above the 700 peak room nights threshold per day for two or more days. In FY 2022/23, there were 4-weeks impacted to a goal of 9-weeks based upon overlapping P3-P5 events.
7. **Customer Service Survey Results.** The newly developed and completed customer service platform has provided valuable insight in assessing successes and opportunities in the service areas. Because there were not any P1 or P2 events, there was no score for the DMO. The team will continue to leverage this tool to further understand the customer experience and increase satisfaction.
8. **Prospects.** While measures were being taken to assist with prospecting efforts, due to the staffing challenges in the year there was not a significant increase in the number for P1 and P2 prospects. However, there has been significant sales activity from the DMO side, with 264 leads being researched and 53 active prospects in the pipeline.
9. **Economic Impact.** The total economic impact of Convention Center events in the fiscal year was \$57,879,937. However, there was not any economic impact for consumed P1 or P2 events for the DMO.

COST

In preparing the FY 2023/24 Adopted Operating Budget, it is important to address the challenges the DMO has encountered since its inception. The unprecedented impact of the Covid-19 pandemic and subsequent slow rebound have continued to test our resilience. Additionally, we have faced the unavoidable reality of staffing turnover, further amplifying the hurdles we have had to overcome. In navigating these obstacles, our steadfast commitment has been to monitor expenses diligently and to ensure a maximum return on investment for all budgeted expenditures. As we delve into the upcoming fiscal year, our approach remains unwavering. However, we must also acknowledge the need to revitalize the DMO with an aggressive sales and marketing plan, one that propels the organization forward and secures critical customer and market exposure for the City and our partners.

The allocation of budgeted funds within the Adopted FY 2023/24 Operating Budget has been crafted to seize every opportunity to effectively raise awareness of Santa Clara in the Meetings and Convention industry. We have designed an aggressive direct sales and marketing plan strategically tailored to enhance Santa Clara's stature and recognition among key decision makers.

In addition to increased resources and personnel, there will be a continued emphasis to improve the DMO's administrative functionality, including consistency in operations, ongoing effectiveness in financial reporting, policy/financial SOP development and Human Resources administration.

The full FY 2023/24 Adopted Operating Budget is included as Appendix B

BUDGETED COST BY PROGRAM	FY 2023/24 Adopted	% of Budget
CONVENTION SALES, INCENTIVES & SERVICES	\$1,188,331	38.9%
MARKETING & COMMUNICATIONS	\$818,578	26.8%
ADMINISTRATION	\$935,821	30.7%
CONTINGENCY	\$66,000	2.2%
CITY ADMINISTRATION FEE	\$44,000	1.4%
TOTAL OPERATING BUDGET	\$3,052,730	100%

FY 2023/24 Projections

The cost of providing improvements and activities for FY 2023/24 is consistent with the Plan. The total budget has increased as a result of adding team members to execute specific tactics and improved business conditions. The total Operating Budget for FY 2023/24 is \$3,052,730 which includes the estimated SCTID collections for the fiscal year of \$2,200,000, \$786,730 in carry-over funds, and \$66,000 in other revenue. The categorical breakdown is below. All budget category allocations of estimated SCTID revenue for FY 2023/24 are within the authorized

twenty percent (20%) adjustment of the SCTID revenue allocations from the prior year.

Category	% of Budget	FY 2023/24 Assessment Estimate	% Change from previous year	Other Revenue	FY 2022/23 Carryover	FY 2023/24 Operating Budget
CONVENTION SALES, INCENTIVES & SERVICES	40%	\$880,000	0%	\$0	\$328,331	\$1,208,331
MARKETING & COMMUNICATIONS	20%	\$440,000	3%	\$66,000	\$202,578	\$708,578
ADMINISTRATION	35%	\$770,000	-3%	\$0	\$255,821	\$1,025,821
CONTINGENCY	3%	\$66,000	0%	\$0	\$0	\$66,000
CITY ADMINISTRATION FEE	2%	\$44,000	0%	\$0	\$0	\$44,000
TOTALS	100%	\$2,200,000		\$66,000	\$786,730	\$3,052,730

ASSESSMENT

The assessment rate for the initial year FY 2021/22, was one and one-half percent (1.5%) on gross short-term (30 days or less) room rentals (10 rooms or more). In compliance with the Plan, the DMO’s Board of Directors approved an increase of one-half percent (0.50%) for FY 2022/23 increasing the annual assessment rate to the maximum of two percent (2.0%) on gross short-term room rentals. Based on the benefit received, assessments will not be collected on stays by any officer or employee of a foreign government who is exempt by reason of express provision of Federal law or international treaty. Additionally, assessments will not be collected on stays by any Federal or State of California officer or employee on official business who shall provide one of the following; a warrant or check drawn on the Treasury of the United States; a copy of the official travel orders indicating the issuing governmental agency and the employee’s full name; or, a copy of a letter on the official letterhead of an exempt governmental agency requesting exemption and listing the employee’s name and stating that the stay is for official government business. The dates of occupancy must also be included.

The term “gross room rental revenue” as used herein means: the consideration received, whether or not actually charged by the lodging business, for the occupancy of space in a lodging business valued in money, whether said gross room rental revenue is received in money, goods, labor, or otherwise, including all receipts, cash, credits, and property and services of any kind or nature. A lodging business may provide complimentary non-assessable rooms for employee use, guest satisfaction or charitable purposes (by a qualified 501(c)(3) charity) and a lodging business shall detail all complimentary non-assessable rooms in its regular reporting. Failure to accurately report complimentary rooms shall result in assessment of the rooms in question. Gross room rental revenue shall not include any federal, state, or local taxes collected, including but not limited to transient occupancy taxes.

The assessment is levied upon and a direct obligation of the assessed lodging business. However, the assessed lodging business may, at its discretion, pass the assessment on to transients. The amount of assessment, if passed on to each transient, shall be disclosed in advance and separately stated from the amount of rent charged and any other applicable taxes, and each transient shall receive a receipt for payment from the business. If the SCTID assessment is identified separately it shall be disclosed as the "SCTID Assessment." As an alternative, the disclosure may include the amount of the SCTID assessment and the amount of the assessment imposed pursuant to the California Tourism Marketing Act, Government Code §13995 et seq. and shall be disclosed as the "Tourism Assessment." The assessment is imposed solely upon and is the sole obligation of the assessed lodging business even if it is passed on to transients. The assessment shall not be considered revenue for any purpose, including calculation of transient occupancy taxes.

Bonds or any debt obligation shall not be issued.

Time and Manner for Collecting Assessments

The City will continue to be responsible for collecting the assessment on a quarterly basis or at the close of any shorter reporting period as established by the Director of Finance (including any delinquencies, penalties, and interest) from each assessed lodging business. The City shall make all reasonable efforts to collect the assessments from each assessed lodging business. The City shall forward the assessments collected to the Owners' Association.

Penalties and Interest

The SCTID shall reimburse the City of Santa Clara for any costs associated with collecting unpaid assessments. If sums in excess of the delinquent SCTID assessment are sought to be recovered in the same collection action by the City, the SCTID shall bear its pro rata share of such collection costs. Assessed businesses which are delinquent in paying the assessment shall be responsible for paying:

1. **Delinquency Interest**
Any lodging business that fails to remit any assessment imposed within the time required shall pay interest as described in subparagraph three below.
2. **Penalty for Willful Noncompliance or Repeated Delinquencies**
If the City determines that the nonpayment of any remittance due is due to willful noncompliance or repeated delinquencies, a penalty of twenty-five percent (25%) of the amount of the assessment shall be added thereto in addition to the interest as required by subparagraph three below.
3. **Calculation of Interest**
In addition to the penalties imposed, any lodging business that fails to remit any assessment imposed shall pay interest at the rate of the United States government T-Bills sold at the latest sale prior to the date of the delinquency plus three percent (3%) prorated per month or fraction thereof on the amount of the assessment, exclusive of penalties, from the date on which the remittance first became delinquent until paid.

4. Penalties and Interest Merged with Assessment

Except for the purpose of calculation of interest and penalties, every penalty imposed and such interest as accrues under the provisions of this section shall become a part of the assessment herein.

SURPLUS AND OTHER FUNDING

Surplus / Deficit

The surplus includes SCTID collections that have been carried over from previous years. The total amount of funds to be carried over is estimated at \$3,541,406. Of these funds, \$328,331 is allocated to Convention Sales, Incentives & Services, \$202,578 is allocated to Marketing & Communications, and \$255,821 is allocated to Administration for FY 2023/24. Of the remaining funds, \$1,221,092 will be placed into a Reserve Fund leaving a balance of \$1,533,584 in unallocated funds.

Category	Carryover
CONVENTION SALES, INCENTIVES & SERVICES	\$328,331
MARKETING & COMMUNICATIONS	\$202,578
ADMINISTRATION	\$255,821
Reserve Fund	\$1,221,092
Unallocated	\$1,533,584
TOTAL	\$3,541,406

Other Funding

The DMO receives \$66,000 in marketing support from two sources: OVG and Levy Restaurants. OVG, the company appointed by the City of Santa Clara to oversee the Convention Center, will contribute \$36,000, while Levy Restaurants, the contracted food and beverage provider for groups and events at the Convention Center, will contribute \$30,000.

Appendix A – FY 2022/23 Financial Report

Silicon Valley/Santa Clara DMO, Inc.							
FY 2022/23 YEAR-TO-DATE (YTD) SUMMARY BY PROGRAM JUNE 2023							
Budget Item	FY 22/23 Budget	YTD Budget	Actual YTD Exp	Variance	Expended		
					YTD	Annual	
CONVENTION SALES, INCENTIVES & SERVICES							
Personnel	\$ 457,669.00	\$ 457,669.00	\$ 120,776.37	\$ 336,892.63	26%	26%	
Salary	\$ 300,000.00	\$ 300,000.00	\$ 105,797.42	\$ 194,202.58	35%	35%	
1.0 FTE Director of Sales	\$ 112,500.00	\$ 112,500.00	\$ -	\$ 112,500.00	0%	0%	
1.0 FTE Sales Manager	\$ 97,500.00	\$ 97,500.00	\$ 73,442.40	\$ 24,057.60	75%	75%	
1.0 FTE Sales Manager	\$ 90,000.00	\$ 90,000.00	\$ 32,355.02	\$ 57,644.98	36%	36%	
Incentives	\$ 75,000.00	\$ 75,000.00	\$ -	\$ 75,000.00	0%	0%	
Benefits	\$ 33,934.00	\$ 33,934.00	\$ 5,311.88	\$ 28,622.12	16%	16%	
Health	\$ 18,934.00	\$ 18,934.00	\$ 5,311.88	\$ 13,622.12	28%	28%	
401K Fee	\$ 15,000.00	\$ 15,000.00	\$ -	\$ 15,000.00	0%	0%	
Payroll Taxes	\$ 44,415.00	\$ 44,415.00	\$ 9,147.07	\$ 35,267.93	21%	21%	
Other-Cell Phone Stipend	\$ 1,320.00	\$ 1,320.00	\$ 520.00	\$ 800.00	39%	39%	
Other-relocation	\$ 3,000.00	\$ 3,000.00	\$ -	\$ 3,000.00	0%	0%	
Convention Sales, Incentives & Services Expenses	\$ 149,605.00	\$ 149,605.00	\$ 78,469.06	\$ 71,135.94	52%	52%	
Operating Supplies		\$ -	\$ 223.11	\$ (223.11)	0%	0%	
Memberships	\$ 3,015.00	\$ 3,015.00	\$ 2,018.75	\$ 996.25	67%	67%	
Industry Related Expense	\$ -	\$ -	\$ 270.00	\$ (270.00)	0%	0%	
Professional Convention Management Association (PCMA)	\$ 1,000.00	\$ 1,000.00	\$ 444.62	\$ 555.38	44%	44%	
Meeting Professional International (MPI)	\$ 1,665.00	\$ 1,665.00	\$ 134.08	\$ 1,530.92	8%	8%	
California Society of Association Executives (Cal SAE)	\$ 350.00	\$ 350.00	\$ 420.05	\$ (70.05)	120%	120%	
California Travel Association	\$ -	\$ -	\$ 750.00	\$ (750.00)	0%	0%	
Mileage Reimbursement	\$ 500.00	\$ -	\$ -	\$ -	0%	0%	
Subscription Services	\$ 32,390.00	\$ 32,390.00	\$ 43,282.96	\$ (10,892.96)	134%	134%	
CVENT	\$ 19,202.00	\$ 19,202.00	\$ 26,633.46	\$ (7,431.46)	139%	139%	
Knowland	\$ 13,188.00	\$ 13,188.00	\$ 16,649.50	\$ (3,461.50)	126%	126%	
Business Development	\$ 50,000.00	\$ 50,000.00	\$ 2,427.08	\$ 47,572.92	5%	5%	
Conferences and Tradeshows	\$ 20,700.00	\$ 20,700.00	\$ 21,536.92	\$ 3,554.77	104%	104%	
CONNECT Marketplace	\$ 4,450.00	\$ 4,450.00	\$ -	\$ 4,450.00	0%	0%	
CONNECT Medical Tech	\$ 4,450.00	\$ 4,450.00	\$ -	\$ 4,450.00	0%	0%	
IMEX North America	\$ 11,800.00	\$ 11,800.00	\$ 17,145.23	\$ (5,345.23)	145%	145%	
Other Conf & Tradeshows	\$ -	\$ -	\$ 4,391.69	\$ (4,391.69)	0%	0%	
Support Services	\$ 36,000.00	\$ 36,000.00	\$ 6,271.40	\$ 36,000.00	17%	17%	
Virutal Happy Hour	\$ 2,000.00	\$ 2,000.00	\$ -	\$ 2,000.00	0%	0%	
Client Activations	\$ 4,000.00	\$ 4,000.00	\$ -	\$ 4,000.00	0%	0%	
Personalized Greetings	\$ 2,000.00	\$ 2,000.00	\$ -	\$ 2,000.00	0%	0%	
Client Events	\$ 28,000.00	\$ 28,000.00	\$ -	\$ 28,000.00	0%	0%	
Site Visits	\$ -	\$ -	\$ 6,271.40	\$ (6,271.40)	0%	0%	

Budget Item	FY 22/23 Budget	YTD Budget	Actual YTD Exp	Variance	Expended	
Travel & Entertainment	\$ 7,000.00	\$ 7,500.00	\$ 2,708.84	\$ 4,791.16	36%	39%
Destination International Annual Convention	\$ -	\$ -	\$ 49.85			
CONNECT Marketplace	\$ 2,300.00	\$ 2,300.00	\$ -	\$ 2,300.00	0%	0%
IMEX North America	\$ 1,900.00	\$ 1,900.00	\$ 866.24	\$ 1,033.76	46%	46%
CONNECT Medical Tech	\$ 2,800.00	\$ 2,800.00	\$ -	\$ 2,800.00	0%	0%
Other Expense	\$ -	\$ -	\$ 1,737.87	\$ (1,737.87)	0%	0%
Mileage Reimbursement	\$ -	\$ 500.00	\$ 54.88			
TOTAL CONVENTION SALES, INCENTIVES & SERVICES	\$ 607,274.00	\$ 607,274.00	\$ 199,245.43	\$ 408,028.57	33%	33%
MARKETING & COMMUNICATIONS						
Personnel	\$ -	\$ -	\$ 30,429.82	\$ (30,429.82)	0%	0%
Salary						
1.0 FTE Director of Marketing	\$ -	\$ -	\$ 22,158.99	\$ (22,158.99)	0%	0%
Incentives	\$ -	\$ -	\$ -	\$ -	0%	0%
Benefits	\$ -	\$ -	\$ -	\$ -	0%	0%
Health	\$ -	\$ -	\$ 2,318.14	\$ (2,318.14)	0%	0%
401K Fee	\$ -	\$ -	\$ -	\$ -	0%	0%
Payroll Taxes	\$ -	\$ -	\$ 5,912.69	\$ (5,912.69)	0%	0%
Other-Cell Phone Stipend	\$ -	\$ -	\$ 40.00	\$ (40.00)	0%	0%
Other-relocation	\$ -	\$ -	\$ -	\$ -	0%	0%
Marketing Expenses	\$ 203,048.00	\$ 203,048.00	\$ 91,098.69	\$ 111,949.31	45%	45%
Contract Services	\$ 124,460.00	\$ 124,460.00	\$ 84,549.74	\$ 39,910.26	68%	68%
Marketing Services	\$ 110,000.00	\$ 110,000.00	\$ 71,838.89	\$ 38,161.11	65%	65%
Website	\$ 14,460.00	\$ 14,460.00	\$ 12,710.85	\$ 1,749.15	88%	88%
Advertising & Promotions	\$ 75,000.00	\$ 75,000.00	\$ 6,093.82	\$ 68,906.18	8%	8%
Software Licenses	\$ 3,588.00	\$ 3,588.00	\$ 455.13	\$ 81,519.49	60%	13%
TOTAL MARKETING & COMMUNICATIONS	\$ 203,048.00	\$ 203,048.00	\$ 121,528.51	\$ 81,519.49	60%	60%
ADMINISTRATION						
Personnel	\$ 476,375.00	\$ 476,375.00	\$ 305,747.95	\$ 170,627.05	64%	64%
Salary	\$ 335,000.00	\$ 335,000.00	\$ 264,481.43	\$ 70,518.57	79%	79%
1.0 FTE CEO	\$ 210,000.00	\$ 210,000.00	\$ 167,096.72	\$ 42,903.28	80%	80%
1.0 FTE Administrative Assistant	\$ 125,000.00	\$ 125,000.00	\$ 97,384.71	\$ 27,615.29	78%	78%
Incentives	\$ 52,500.00	\$ 52,500.00	\$ -	\$ 52,500.00	0%	0%
Benefits	\$ 36,796.00	\$ 36,796.00	\$ 14,850.78	\$ 21,945.22	40%	40%
Health	\$ 13,770.00	\$ 13,770.00	\$ 14,850.78	\$ (1,080.78)	108%	108%
401K Fee	\$ 23,026.00	\$ 23,026.00	\$ -	\$ 23,026.00	0%	0%
Payroll Taxes	\$ 46,119.00	\$ 46,119.00	\$ 21,695.74	\$ 24,423.26	47%	47%
Other-Cell Phone Stipend	\$ 960.00	\$ 960.00	\$ 720.00	\$ 240.00	75%	75%
Other-Car Allowance	\$ -	\$ -	\$ 4,000.00	\$ (4,000.00)	0%	0%
Other - Relocation	\$ 5,000.00	\$ 5,000.00	\$ -	\$ 5,000.00	0%	0%

Budget Item	FY 22/23 Budget	YTD Budget	Actual YTD Exp	Variance	Expended	
Administrative Expenses	\$ 346,218.00	\$ 346,218.00	\$ 464,265.88	\$ (118,047.88)	134%	134%
Contract Services	\$ 299,964.00	\$ 299,964.00	\$ 307,176.14	\$ (7,212.14)	102%	102%
Human Resources	\$ 30,000.00	\$ 30,000.00	\$ 5,133.75	\$ 24,866.25	17%	17%
Fiscal	\$ 30,904.00	\$ 30,904.00	\$ 59,106.60	\$ (28,202.60)	191%	191%
Legal	\$ 24,000.00	\$ 24,000.00	\$ 32,726.50	\$ (8,726.50)	136%	136%
Payroll	\$ 6,000.00	\$ 6,000.00	\$ 1,983.00	\$ 4,017.00	33%	33%
Professional Services	\$ 135,000.00	\$ 135,000.00	\$ 139,866.87	\$ (4,866.87)	104%	104%
IT	\$ 4,000.00	\$ 4,000.00	\$ 3,120.43	\$ 879.57	78%	78%
Audit	\$ 10,000.00	\$ 10,000.00	\$ -	\$ 10,000.00	0%	0%
Staffing Services	\$ 60,060.00	\$ 60,060.00	\$ 65,238.99	\$ (5,178.99)	109%	109%
Operating Supplies	\$ 14,777.00	\$ 14,777.00	\$ 42,474.52	\$ (27,697.52)	287%	287%
Bank Fees	\$ 500.00	\$ 500.00	\$ 60.00	\$ 440.00	12%	12%
Office supplies	\$ 5,000.00	\$ 5,000.00	\$ 18,637.67	\$ (13,637.67)	373%	373%
Licenses	\$ 100.00	\$ 100.00	\$ 71.50	\$ 28.50	72%	72%
Software Licenses	\$ 3,877.00	\$ 3,877.00	\$ 4,589.66	\$ (712.66)	118%	118%
Postage	\$ 300.00	\$ 300.00	\$ 9.55	\$ 290.45	3%	3%
IT (Computers and Hardware)	\$ 5,000.00	\$ 5,000.00	\$ 19,106.14	\$ (14,106.14)	382%	382%
Insurance	\$ 11,737.00	\$ 11,737.00	\$ 11,209.67	\$ 527.33	96%	96%
Workers Comp	\$ 1,852.00	\$ 1,852.00	\$ 1,247.56	\$ 604.44	67%	67%
Business Owners Liability & Property	\$ 1,800.00	\$ 1,800.00	\$ 1,824.00	\$ (24.00)	101%	101%
Professional Liability	\$ 3,085.00	\$ 3,085.00	\$ 3,089.43	\$ (4.43)	100%	100%
Management Liability	\$ 5,000.00	\$ 5,000.00	\$ 5,048.68	\$ (48.68)	101%	101%
Memberships	\$ 1,600.00	\$ 1,600.00	\$ 4,221.25	\$ (2,621.25)	264%	264%
Destinations International	\$ 1,600.00	\$ 1,600.00	\$ 4,221.25	\$ (2,621.25)	264%	264%
Mileage Reimbursement	\$ 500.00	\$ 500.00	\$ -	\$ 500.00	0%	0%
Recruitment	\$ 500.00	\$ 500.00	\$ 56,601.06	\$ (56,101.06)	11320%	11320%
Subscription Services	\$ 17,140.00	\$ 17,140.00	\$ 42,583.24	\$ (25,443.24)	248%	248%
Act On	\$ -	\$ -	\$ 20,876.00	\$ (20,876.00)	0%	0%
CRM System (Simpleview)	\$ 9,800.00	\$ 9,800.00	\$ 9,641.65	\$ 158.35	98%	98%
CoStar Realty Information	\$ -	\$ -	\$ 2,640.00	\$ (2,640.00)	0%	0%
Destinations International EIC Subscription	\$ 7,340.00	\$ 7,340.00	\$ 9,425.59	\$ (2,085.59)	128%	128%
TOTAL ADMINISTRATION	\$ 822,593.00	\$ 822,593.00	\$ 770,013.83	\$ 52,579.17	94%	94%
Contingency	\$ 35,239.00	\$ 35,239.00	\$ -	\$ 35,239.00	0%	0%
City Administration Fee	\$ 23,429.00	\$ 23,429.00	\$ 50,288.49	\$ (26,859.49)	215%	215%
TOTAL OPERATING BUDGET	\$ 1,691,583.00	\$ 1,691,583.00	\$ 1,141,076.26	\$ 550,506.74	67%	67%

Appendix B – FY 2023/24 Operating Budget

Silicon Valley/Santa Clara DMO, Inc. FY 2023/24 Adopted Budget			
Budget Item	FY 2022/23 Adopted	FY 2023/24 Adopted	FY 2023/24 Variance
CONVENTION SALES, INCENTIVES & SERVICES			
Personnel	\$ 457,669	\$ 735,056	\$ 277,387
Salary	\$ 300,000	\$ 480,500	\$ 180,500
1.0 FTE Director of Sales	\$ 112,500	\$ 180,000	\$ 67,500
1.0 FTE Sales Manager	\$ 97,500	\$ 105,000	\$ 7,500
1.0 FTE Sales Manager	\$ 90,000	\$ 120,500	\$ 30,500
1.0 FTE Manager, Sales Systems & Strategy	\$ -	\$ 75,000	\$ 75,000
Incentives	\$ 75,000	\$ 101,375	\$ 26,375
Benefits	\$ 33,934	\$ 68,540	\$ 34,606
Health & Dental	\$ 18,934	\$ 41,124	\$ 22,190
Retirement Plan	\$ 15,000	\$ 27,416	\$ 12,416
Payroll Taxes	\$ 44,415	\$ 79,721	\$ 35,306
Other-Cell Phone Stipend	\$ 1,320	\$ 1,920	\$ 600
Other-Relocation	\$ 3,000	\$ 3,000	\$ -
Convention Sales, Incentives & Services Expenses	\$ 149,605	\$ 453,275	\$ 303,670
Business Development	\$ 50,000	\$ 150,000	\$ 100,000
Conferences and Tradeshows	\$ 20,700	\$ 47,700	\$ 27,000
Destination International Annual Convention	\$ -	\$ 1,100	\$ 1,100
CalTravel Summit	\$ -	\$ 1,100	\$ 1,100
IMEX North America	\$ 11,800	\$ 15,000	\$ 3,200
TEAMS Conferences & Expo	\$ -	\$ 5,000	\$ 5,000
Connect West	\$ 4,450	\$ 4,500	\$ 50
Connect DC	\$ 4,450	\$ -	\$ (4,450)
CalSAE Seasonal Spectacular	\$ -	\$ 600	\$ 600
PCMA Convening Leaders	\$ -	\$ 2,000	\$ 2,000
Visit Outlook Forum	\$ -	\$ 1,300	\$ 1,300
Simpleview Annual Summit	\$ -	\$ 3,200	\$ 3,200
Destinations International - CEO Summit	\$ -	\$ 1,400	\$ 1,400
Visit California Go West Sales Mission	\$ -	\$ 3,000	\$ 3,000
Helms Briscoe Conference	\$ -	\$ 5,500	\$ 5,500
MPI ACE/WEC	\$ -	\$ 2,000	\$ 2,000
Marketing Conference - Social Media Marketing World	\$ -	\$ 2,000	\$ 2,000
Memberships	\$ 3,015	\$ 12,508	\$ 9,493
Cal SAE	\$ 350	\$ 751	\$ 401
CalTRAVEL	\$ -	\$ 1,900	\$ 1,900
San Francisco Travel	\$ -	\$ 5,250	\$ 5,250
Meeting Professional International (MPI)	\$ 1,665	\$ 2,025	\$ 360
Professional Convention Management Association (PCMA)	\$ 1,000	\$ 2,037	\$ 1,037
Sales & Marketing Executives International	\$ -	\$ 345	\$ 345
NATPE Membership	\$ -	\$ 200	\$ 200
Subscription Services	\$ 32,390	\$ 33,684	\$ 1,294
CVENT	\$ 19,202	\$ 16,836	\$ (2,366)
CVENT- License	\$ -	\$ 3,000	\$ 3,000
Knowland	\$ 13,188	\$ 13,848	\$ 660
Support Services	\$ 36,000	\$ 120,300	\$ 84,300
Site Tours	\$ -	\$ 15,000	\$ 15,000
Familiarization Trips	\$ -	\$ 30,000	\$ 30,000
Client Events	\$ 28,000	\$ 20,000	\$ (8,000)

Silicon Valley/Santa Clara DMO, Inc. FY 2023/24 Adopted Budget			
Budget Item	FY 2022/23 Adopted	FY 2023/24 Adopted	FY 2023/24 Variance
Virtual Happy Hour	\$ 2,000	\$ -	\$ (2,000)
Client Activations	\$ 4,000	\$ 6,000	\$ 2,000
Personalized Greetings	\$ 2,000	\$ 2,400	\$ 400
Promotional Items	\$ -	\$ 20,000	\$ 20,000
Tradeshow Booth Storage	\$ -	\$ 2,400	\$ 2,400
Tradeshow Shipping, Set-Up + Breakdown	\$ -	\$ 24,500	\$ 24,500
Travel & Entertainment	\$ 7,500	\$ 89,083	\$ 81,583
Destination International Annual Convention	\$ -	\$ 2,254	\$ 2,254
CalTravel Summit	\$ -	\$ 1,410	\$ 1,410
IMEX North America	\$ 1,900	\$ 4,749	\$ 2,849
TEAMS Conference + Expo	\$ -	\$ 5,620	\$ 5,620
Connect West	\$ 2,300	\$ 444	\$ (1,856)
Connect DC	\$ 2,800	\$ -	\$ (2,800)
CalSEA Seasonal Spectacular	\$ -	\$ 1,055	\$ 1,055
PCMA Convening Leaders	\$ -	\$ 2,142	\$ 2,142
Visit California Outlook Forum	\$ -	\$ 3,520	\$ 3,520
Simpleview Annual Summit	\$ -	\$ 4,660	\$ 4,660
Destination International - CEO Summit	\$ -	\$ 2,331	\$ 2,331
Visit California Go West Sales Mission	\$ -	\$ 2,380	\$ 2,380
Helms Briscoe	\$ -	\$ 3,960	\$ 3,960
MPI WEC 2024	\$ -	\$ 2,435	\$ 2,435
Social Media Marketing World Conference	\$ -	\$ 2,365	\$ 2,365
Quarterly Sales Trips	\$ -	\$ 22,418	\$ 22,418
Client Entertainment	\$ -	\$ 24,000	\$ 24,000
Mileage Reimbursement	\$ 500	\$ 3,340	\$ 2,840
TOTAL CONVENTION SALES, INCENTIVES & SERVICES	\$ 607,274	\$ 1,188,331	\$ 581,057
MARKETING & COMMUNICATIONS			
Personnel	\$ -	\$ 408,895	\$ 408,895
Salary	\$ -	\$ 256,294	\$ 256,294
1.0 FTE Director of Marketing	\$ -	\$ 156,294	\$ 156,294
1.0 FTE Marketing Manager	\$ -	\$ 100,000	\$ 100,000
As-Needed/Hourly	\$ -	\$ 13,500	\$ 13,500
Incentives	\$ -	\$ 39,074	\$ 39,074
Benefits	\$ -	\$ 56,545	\$ 56,545
Health & Dental	\$ 18,934	\$ 33,927	\$ 14,993
Retirement Plan	\$ -	\$ 22,618	\$ 22,618
Payroll Taxes	\$ -	\$ 42,522	\$ 42,522
Other-Cell Phone Stipend	\$ -	\$ 960	\$ 960
Marketing Expenses	\$ 203,048	\$ 409,683	\$ 206,635
Advertising & Promotions	\$ 75,000	\$ 70,000	\$ (5,000)
Contract Services	\$ 124,460	\$ 339,683	\$ 215,223
Marketing Consultant	\$ 110,000	\$ 66,000	\$ (44,000)
Digital Marketing	\$ -	\$ 110,000	\$ 110,000
Influencer Marketing	\$ -	\$ 10,000	\$ 10,000
Email Marketing	\$ -	\$ 10,000	\$ 10,000
Photography	\$ -	\$ 20,000	\$ 20,000
Videography	\$ -	\$ 30,000	\$ 30,000
Branding	\$ -	\$ 15,000	\$ 15,000

Silicon Valley/Santa Clara DMO, Inc. FY 2023/24 Adopted Budget			
Budget Item	FY 2022/23 Adopted	FY 2023/24 Adopted	FY 2023/24 Variance
Website Development	\$ -	\$ 60,500	\$ 60,500
Website Hosting	\$ 14,460	\$ 18,183	\$ 3,723
Software Licenses	\$ 3,588	\$ -	\$ (3,588)
TOTAL MARKETING & COMMUNICATIONS	\$ 203,048	\$ 818,578	\$ 615,530
ADMINISTRATION			
Personnel	\$ 476,375	\$ 548,336	\$ 71,961
Salary	\$ 335,000	\$ 367,328	\$ 32,328
1.0 FTE CEO	\$ 210,000	\$ 242,828	\$ 32,828
1.0 FTE Administrative Services Manager	\$ 125,000	\$ 124,500	\$ (500)
Incentives	\$ 52,500	\$ 60,707	\$ 8,207
Benefits	\$ 36,796	\$ 52,397	\$ 15,601
Health & Dental	\$ 13,770	\$ 31,438	\$ 17,668
401k	\$ 23,026	\$ 20,959	\$ (2,067)
Payroll Taxes	\$ 46,119	\$ 60,944	\$ 14,825
Other-Cell Phone Stipend	\$ 960	\$ 960	\$ -
Other-Car Allowance	\$ -	\$ 6,000	\$ 6,000
Other-Relocation	\$ 5,000	\$ -	\$ (5,000)
Administrative Expenses	\$ 346,218	\$ 387,485	\$ 41,267
Contract Services	\$ 299,964	\$ 289,776	\$ (10,188)
Audit	\$ 10,000	\$ 15,000	\$ 5,000
Fiscal	\$ 30,904	\$ 65,108	\$ 34,204
Accounting	\$ 20,000	\$ 51,060	\$ 31,060
Tax Preparation	\$ 2,000	\$ 5,000	\$ 3,000
Fiscal Sponsor	\$ 8,904	\$ 9,048	\$ 144
Human Resources	\$ 30,000	\$ 20,000	\$ (10,000)
IT Services	\$ 4,000	\$ 5,574	\$ 1,574
Legal	\$ 24,000	\$ 35,000	\$ 11,000
Payroll	\$ 6,000	\$ 5,600	\$ (400)
Professional Services	\$ 135,000	\$ 100,000	\$ (35,000)
Temp. Staffing Services	\$ 60,060	\$ 31,494	\$ (28,566)
Internal Team Strategy Meetings	\$ -	\$ 12,000	\$ 12,000
Insurance	\$ 11,737	\$ 12,978	\$ 1,241
Business Owners Liability & Property	\$ 1,800	\$ 1,897	\$ 97
Management Liability	\$ 5,000	\$ 2,946	\$ (2,054)
Professional Cyber Liability	\$ 3,085	\$ 3,283	\$ 198
Workers Comp	\$ 1,852	\$ 4,852	\$ 3,000
Memberships	\$ 1,600	\$ 3,350	\$ 1,750
Destinations International	\$ 1,600	\$ 3,350	\$ 1,750
Mileage Reimbursement	\$ 500	\$ -	\$ (500)
Operating Supplies	\$ 10,900	\$ 10,850	\$ (50)
Bank Fees	\$ 500	\$ 250	\$ (250)
Computers-Hardware	\$ 5,000	\$ -	\$ (5,000)
Licenses	\$ 100	\$ 100	\$ -
Office supplies	\$ 5,000	\$ 8,000	\$ 3,000
Postage/Mailing/Shipping	\$ 300	\$ 2,500	\$ 2,200
Software Licenses	\$ 3,877	\$ 8,124	\$ 4,247
Quickbooks	\$ -	\$ 1,302	\$ 1,302
Adobe Acrobat	\$ -	\$ 2,268	\$ 2,268

Silicon Valley/Santa Clara DMO, Inc. FY 2023/24 Adopted Budget			
Budget Item	FY 2022/23 Adopted	FY 2023/24 Adopted	FY 2023/24 Variance
Microsoft Office + Email	\$ -	\$ 3,624	\$ 3,624
Zoom	\$ -	\$ 930	\$ 930
Office Rent	\$ -	\$ 8,100	\$ 8,100
Recruitment	\$ 500	\$ 500	\$ -
Subscription Services	\$ 17,140	\$ 53,807	\$ 36,667
Simpleview CRM System	\$ 9,800	\$ 28,600	\$ 18,800
Annual Subscription	\$ 9,800	\$ 13,800	\$ 4,000
ACT-ON	\$ -	\$ 4,800	\$ 4,800
Additional Support Hours	\$ -	\$ 10,000	\$ 10,000
Destinations International	\$ 7,340	\$ 7,707	\$ 367
CoStar Group (STR Reports)	\$ -	\$ 15,000	\$ 15,000
Trade Journals/Newspapers	\$ -	\$ 2,500	\$ 2,500
TOTAL ADMINISTRATION	\$ 822,593	\$ 935,821	\$ 113,228
CONTINGENCY	\$ 35,239	\$ 66,000	\$ 30,761
CITY ADMINISTRATION FEE	\$ 23,429	\$ 44,000	\$ 20,571
TOTAL OPERATING BUDGET	\$ 1,691,583	\$ 3,052,730	\$ 1,361,147

Appendix C – Assessed Businesses

SCTID Hotel Partner Name	Address	City, State ZIP
AC Hotel	2970 Lakeside Dr	Santa Clara, CA 95054
Avatar Hotel (Reopening as a Tapestry Collection by Hilton property in September 2023)	4200 Great America Pkwy	Santa Clara, CA 95054
Delta Hotel by Marriott	2151 Laurelwood Rd	Santa Clara, CA 95054
Embassy Suites	2885 Lakeside Dr	Santa Clara, CA 95054
Hilton Santa Clara	4949 Great America Pkwy	Santa Clara, CA 95054
Hyatt House	3915 Rivermark Plaza	Santa Clara, CA 95054
Hyatt Regency	5101 Great America Pkwy	Santa Clara, CA 95054
Marriott Santa Clara	2700 Mission College Blvd	Santa Clara, CA 95054
The Element	1950 Wyatt Dr	Santa Clara, CA 95054
Hyatt Centric Santa Clara	3100 Lakeside Dr	Santa Clara, CA 95054
TownePlace Suites by Marriott	2877 Lakeside Dr	Santa Clara, CA 95054

DMO Board Meeting

September 28, 2023

- July Sales Activity Report.
- Staffing Update.
- Monthly Accomplishments & Priorities.



Sales Activity Report

July 2023

DISCOVER
SANTA
CLARA®

JULY 2023
SALES ACTIVITY
RECAP



MONTHLY TOTALS BY EVENT PRIORITY TYPE

	P 1 - P 2	P 3	P 4	P 5
Current Active Prospects	53	152	169	399
July	P 1 - P 2	P 3	P 4	P 5
Actively Researching	269	0	0	0
New Prospects	5	2	3	35
New Tentatives	0	0	0	15
New Definites	0	1	5	16

Silicon Valley/Santa Clara DMO Inc.			
Performance Measures			
	2023/24 Target	YTD	July
1. Event Mix (Consumed)			
Percent of P1 Events	0.5%	0%	0%
Number of P1 Events	1	0	0
Percent of P2 Events	1.0%	0%	0%
Number of P2 Events	2	0	0
2. Number of Definite Events Booked (booked in the year for future years)			
Number of P1 Events	2	0	0
Number of P2 Events	4	0	0
3. Convention Center Gross Revenue (P1& P2)	\$800,000	\$0	\$0
4. Number of Room Nights Booked (for future years)	4,506	0	0
5. Number of Room Nights Consumed	2,253	0	0
6. Number of Weeks Impacted (Consumed)	2	-	-
7. Customer Service Survey Results (overall satisfaction)	85%	-	-
8. Number of Prospects (active) (non-culmulative P1 & P2)	140	53	53
9. Economic Impact (Consumed P1 and P2 events)	\$2,745,582	\$0	\$0



JULY DASHBOARD

SCCC	Beg	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total YTD	Month Avg	Annual Avg	3 Year Pace
Researching	269	0												269	0	0	269
Prospects	53	5												58	5	60	233

Meeting & Convention Sales

Incremental Booked Business*	Current Month	Year to Date	Goal	% to Goal
Priority 1 (P1)				
Number of Groups	-	-	1	0%
Priority 2 (P2)				
Number of Groups	-	-	2	0%

Convention Center Revenue from Bookings	Current Month	Year to Date	Goal	% to Goal
Overall	-	\$0	\$800,000	0%

Notable P1/P2 Bookings for July	Rent	F&B	Total Room Nights
Notable P1/P2 Lost Leads for July	Rent	F&B	Total Room Nights
Fox Rothschild - Partner Retreat - 2024	\$ 100,000.00	\$318,750	1,885

Glossary of Terms & Definitions:

Prospect: A group who will fit in the SCCC, fit the overall parameters of the SCCC.

Tentative: A group who has agreed to the overall parameters required and space is being held at SCCC.

Booking: A group who has agreed to the overall parameters required and has a signed contract with the SCCC.

P1 Mid-Week (700+ on Peak / \$650k+)

P1 Weekend (250+ on peak / \$250k+)

P2 Mid-Week (350-699 on peak / \$400k - \$649,999k)

P2 Weekend (150-249 on peak / \$100k)

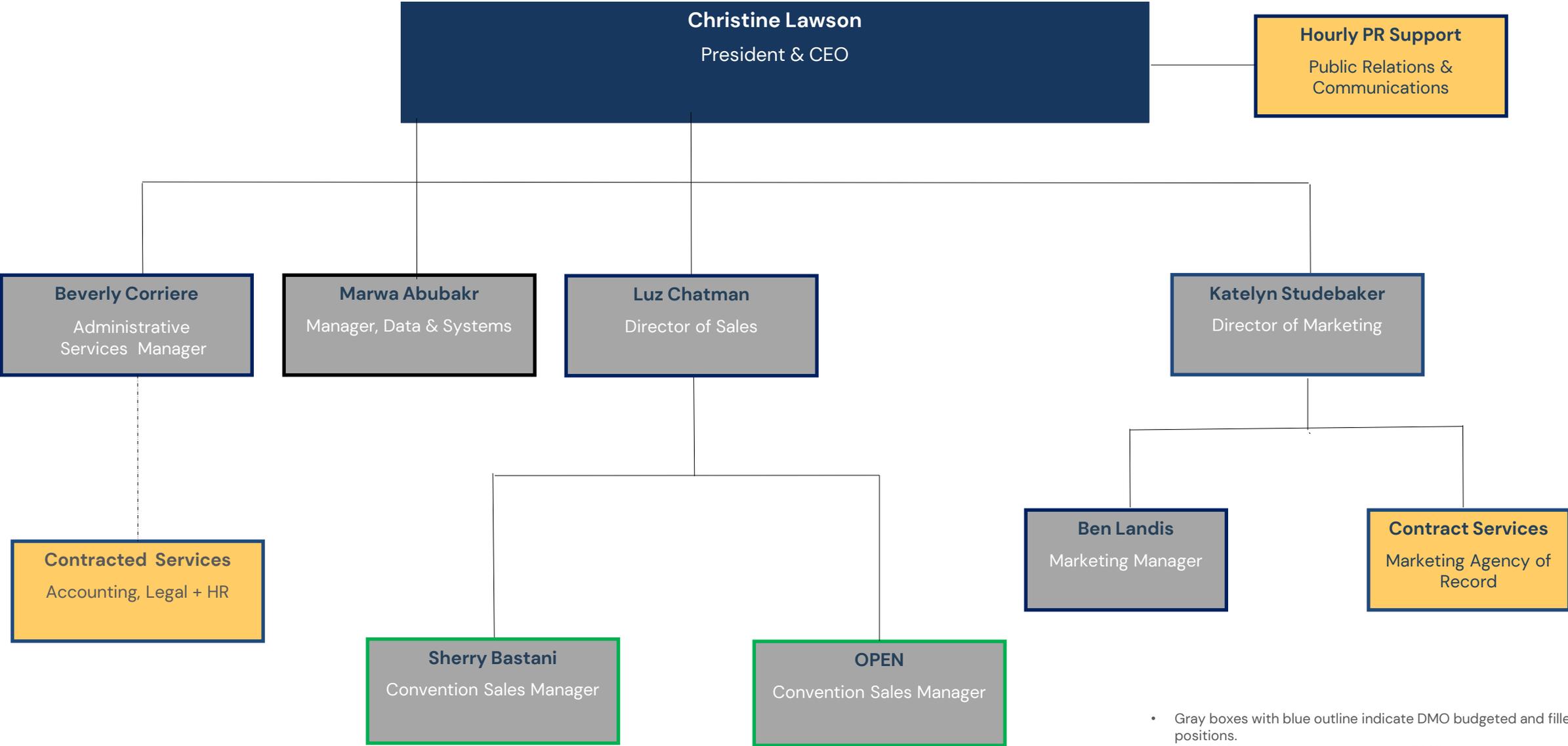


Staffing Update



**Welcome
Sherry Bastani
Convention Sales Manager**

FY 2023/24 ADOPTED ORGANIZATIONAL STRUCTURE



- Gray boxes with blue outline indicate DMO budgeted and filled positions.
- Gray boxes with green lines indicate DMO budgeted, but not yet filled positions.
- Gold boxes represent DSC's Agencies of Record and/or outside contractors.



Monthly Accomplishments and Priorities

- Prepared onboarding documents for new Convention Sales Manager.
- Intensive planning and appointment setting for both TEAMS and IMEX Tradeshows in October.
 - Continued focus on confirming meetings with key clients.
- Reviewing and refining the initial sales deployment model draft.
- Partnered with business development company, Baronfeld Consulting Group.
 - Provide assistance with prospecting activities until the last Convention Sales Manager position is filled.



- Conducting site inspections and engaging with potential P1 and P2 leads.
- Collaborating with Catherine Lentz, Director, Levi's[®] Stadium Event Services to coordinate a joint strategic team meeting involving her team and the DMO.
- Director of Sales attended CalTravel Annual Summit for networking and educational sessions.
- Evaluating and enhancing the sales pitch deck for the DMO created by the Marketing team.
- CEO active member on SF Bay Area Regional Advisory Committee being led by JLL.



- Arranged and executed a Strategic Team Offsite for critical planning.
- Collaborated with Linh Lam from City Finance to enhance the Financial SOP draft; project is still in progress.
- In the process of refining the performance review format and process.
- Partnering with JLL on DMO Workplan initiatives.
 - Advancing the development and design of incentive plans, goal setting, and performance management drafts
 - Preparing for the Simpleview CRM Audit Process.



- Successfully crafted the DMO T&E Policy draft.
- Delivered the FY 2022/23 Annual Report to City Council on September 19th.
- In the process of wrapping up the 2019 – 2021 990 tax forms for endorsement and submission.
- Onboarding our new accounting partner, Kirsch & Company to ensure seamless communication and alignment within our reporting infrastructure.



- Beyonce
- Social Media
- Content
- Tradeshows
- Collateral



Beyonce Recap

- Worked with the city to name Beyonce honorary Mayor and gave her the Key to the City on August 20th
- Launched a joint press release with the City of Santa Clara, announcing the activations.
- Interviewed with multiple press outlets, which resulted in ample positive media coverage.



Santa Clara to make Beyoncé honorary mayor, give her key to city ahead of Levi's Stadium show

By Zach Fuentes
Tuesday, August 29, 2023



SANTA CLARA, Calif. (KGO) -- [Beyoncé](#) is scheduled to bring one of the biggest concerts of the year right here to the Bay Area.



Beyoncé becomes honorary mayor of Santa Clara ahead of "Renaissance World Tour" performance

Jon Powell
August 30, 2023 · 2 min read



The outlet also spoke with Discover Santa Clara CEO Christine Lawson, who explained Bey's direct impact to the area as a result of her pending concert. "Our hotels are close to [or] at maximum capacity, and we've seen average rate lifts thus far around \$50 higher than we would this time of year if there were no big name like Beyoncé in the city," she confirmed.

The Mercury News

The hits keep coming: Beyonce, Taylor Swift and Ed Sheeran shows raise big bucks in Bay Area

Beyonce's Renaissance World Tour arrives at Levi's Stadium on Aug. 30.

Santa Clara officials have been abuzz about this season's lineup and its economic impact. Christine Lawson, the CEO of tourism group Discover Santa Clara, said it's seen an "unprecedented response" when it comes to hotel bookings for Swift and Beyonce in particular. Beyonce's Beyhive has helped sell out almost every room in town. That's not the norm for concerts at Levi's, according to Lawson.

"It's tremendously beneficial for our hotel community and it says a lot about Beyonce's pull — especially since it's on Wednesday night," she said.

Artists like Beyonce and Swift have also seen an influx in fans willing to travel to see the same concert tour a second, third or even a fourth time.

"It's not just if they live in New York they only went to that show," Lawson said. "A lot of people want to see the show more than once."

DAILY NEWS

Beyoncé made honorary mayor of Santa Clara, Calif. as Renaissance Tour arrives

"We're on the edge of our seats as Santa Clara gets ready to welcome the music icon, and philanthropist that is Beyoncé," Discover Santa Clara CEO Christine Lawson said in a [statement](#) Tuesday. "Beyond the thrilling performances, Beyoncé has a history of energizing local economies of the cities she visits and we're looking forward to experiencing the same here, further highlighting our city as a vibrant and welcoming destination."

THE SILICON VALLEY VOICE

Power To Your Voice

Beyoncé Knowles-Carter Receives Key To The City, Honorary Mayor

Press Release & Erika Towne

"We're on the edge of our seats as Santa Clara gets ready to welcome the music icon, and philanthropist that is Beyoncé. Beyond the thrilling performances, Beyoncé has a history of energizing local economies of the cities she visits and we're looking forward to experiencing the same here, further highlighting our city as a vibrant and welcoming destination," says Christine Lawson, CEO of Discover Santa Clara.



Social Media Data



Instagram Growth Initiative

- Partnered with local influencer @SiliconValley.Foodies to do a Like/Follow/Share giveaway consisting of Gift Cards to her favorite Santa Clara Restaurants, plus a 1-night stay at Hilton Santa Clara.
- Stats:
 - Video Views: **84K Views**
 - Followers Before: **4,804**
 - Followers After: **6,044**
 - Percentage Increase: **+25%**


71 Posts 4,804 Followers 198 Following

Discover Santa Clara
 The official tourism page for Santa Clara, CA. 🍷 🌾
 Tag us at @discoversantaclara for a chance to be featured. 🎁
discoversantaclara.org 062




80 Posts 6,044 Followers 207 Following

Discover Santa Clara
 The official tourism page for Santa Clara, CA. 🍷 🌾
 Tag us at @discoversantaclara for a chance to be featured. 🎁
discoversantaclara.org

Top 3 Performing Posts

WIN OVER \$1000 WORTH OF GIFT CARDS TO MY...

siliconvalley.foodies · Original audio
September 12 · Duration 0:12



If you've been wondering where to get Cube Crois...

andrewvleh · Pete Drake - "Forever"
September 13 · Duration 0:06



Have you had Korean Chinese food before?! 🔥 If...

Kenya Grace · Strangers
August 17 · Duration 0:13



Reach ⓘ

61,386
Accounts reached



Reach ⓘ

68,433
Accounts reached



Reach ⓘ

167,193
Accounts reached





Content

- Launched a Blog | Content drives email blasts, LinkedIn posts and pre/post tradeshow communications with meeting planners.

What's New in Santa Clara?

Stay up-to-date with the latest news, events, and stories in this vibrant city.

Discover the best of Santa Clara right here.



Savoring Santa Clara:
Lee's Sandwiches- A Journey
From Past To Present

If you've lived in the San Jose or the greater south Bay Area, chances are that you will instantly recognize the Lee's Sandwiches name. Serving Vietnamese Banh Mi, "European style" baguette sandwiches, Vietnamese iced coffee, and a delightful array of Vietnamese quick eats, Lee's Sandwiches has become a beloved fixture in the South Bay Area.

[READ MORE](#)



5 Athletic Facilities in Santa Clara
You Might Not Know About!

Santa Clara, nestled in the heart of Silicon Valley, is known for its tech giants and innovation. But beyond the hustle and bustle of the tech world, this vibrant city boasts a surprising number of recreational facilities and parks. Today, we're going to introduce you to five hidden gems in Santa Clara that you may or may not have heard of yet.

[READ MORE](#)



Venue Hunting Demystified
The Event Planner's Playbook

Hi, all you brilliant and beautiful event planners and meeting junkies attending IMEX 2023! Ah, the art of choosing the perfect event venue—finding a place where dreams come true, the parking is plentiful, and the WiFi is strong. (We're in Silicon Valley, not to lie too much but we got the tech thing down.) Buckle in and join us as we help you find the perfect venue for your event.

[READ MORE](#)



IMEX 2023 Unleashed:
Top 10 Conference Tips

Ah, surviving IMEX, the ultimate adventure in the world of conferences! Strap on your seatbelts, folks, because our team at Discover Santa Clara is going to help you navigate through your journey as you embark on a rollercoaster ride of networking, sessions, and endless walking.

[READ MORE](#)



10 Ways to Make Networking Easier

Hey there, conference-goer! The TEAMS Conference and Expo is right around the corner, and the Discover Santa Clara team is all set to network in Palm Beach!

We understand you're here to learn, connect, and perhaps score some free swag, but let's be honest—networking at conferences can sometimes feel a bit like trying to make friends in a crowded elevator if your execution is off.

[READ MORE](#)



Beyond Music: Swift and Beyoncé' in Santa Clara

Who run the world? Girls. The recent economic surge witnessed in Santa Clara thanks to Taylor Swift's "Eras Tour" at Levi's Stadium was nothing short of impressive. Following suit, anticipation is building around the positive impact Beyoncé's upcoming "Renaissance Tour" on August 30th, 2023, will likely bring to Santa Clara's financial landscape.

[READ MORE](#)

- Sent (4) Email Blasts through ActOn Platform.
- Emails were a combination of segmented emails to meeting planners in preparation for the IMEX and TEAMS Tradeshows in October, in addition to the email article sent to all subscribers regarding the Economic Impact of Beyonce + Taylor Swift on Santa Clara.

← This Year

	Sent	Opens	Clicks	Out
IMEX PRE - Portal Is Open <small>HTML sent by Katelyn Studebaker on Tue Sep 19 2023 1:29 PM PDT</small>	2.12K	297	13	9
IMEX Email - Pre Portal Opening <small>HTML sent by Katelyn Studebaker on Tue Sep 12 2023 12:06 PM PDT</small>	2.15K	309	45	5
TEAMS Distro List First Outreach <small>HTML sent by Katelyn Studebaker on Wed Sep 06 2023 11:14 AM PDT</small>	102	20	0	1
Beyoncé and Swift <small>HTML sent by Katelyn Studebaker on Wed Aug 16 2023 12:05 PM PDT</small>	7.90K	1.19K	44	98

Tradeshow Preparations

- Designed and sourced (2) Banner Stands and George Kittle Cutout for Teams Booth
- Developed a 4x9 Rack Card sized handout for TEAMS Conference
- TEAMS Giveaway: Branded clear stadium backpacks
- IMEX Giveaway: Branded 4-port USB Hubs



Luz Chatman
Director of Sales
Discover Santa Clara

(408) 748-7093
lchatman@discoversantaclara.org

Ariel Alvero
Director of Sales
Santa Clara Convention Center

(408) 748-7078
Ariel.Alvero@oakviewgroup.com

With SB50 under our belt, and SB60 + FIFA on the way, it's safe to say that Santa Clara knows sports.

Santa Clara boasts an impressive 28 regional parks spanning over 52,000 acres with fantastic sports facilities. Whether you're in the market for an Olympic Lap Pool, world class baseball or soccer fields, volleyball, tennis or basketball courts... we truly have it all.

In addition to our world class amenities, Santa Clara also enjoys 300 sunny days per year. Our location in the heart of Silicon Valley means that public transportation and rideshare abounds, plus we are only 6 miles from an International Airport.

Want to learn more about the Santa Clara Convention Center, Hotel Guest Rooms and Levi's Stadium? Scan the QR Code.



Collateral and Branding

Hotel 1 Sheets highlighting SCTID Hotels.

- Printed Version will be distributed at Trade Shows and included in our Sales Folder/Brochure, which is currently under construction.
- Digital Version will be emailed to clients as an amendment to proposals.



Hotel Accommodations




Hotel	Address	Total Guest Rooms	Dates	Peak Room Nights	Room Rate	Total Event Space
AC Hotel Santa Clara	2970 Lakeside Dr., Santa Clara, CA, 95054	185	-----	-----	-----	1,389 SQ FT
Avatar Hotel	4200 Great America Parkway, Santa Clara, CA, 95054	168	-----	-----	-----	
Delta Hotel by Marriott - Santa Clara Silicon Valley	2151 Laurelwood Road, Santa Clara, CA, 95054	263	-----	-----	-----	6,750 SQ FT
Element Santa Clara	1950 Wyatt Drive, Santa Clara, CA, 95054	175	-----	-----	-----	1,415 SQ FT
Embassy Suites Santa Clara - Silicon Valley	2885 Lakeside Drive, Santa Clara, CA, 95054	258	-----	-----	-----	4,044 SQ FT
Hilton Santa Clara	4949 Great America Parkway, Santa Clara, CA, 95054	280	-----	-----	-----	5,142 SQ FT
Hyatt House Santa Clara	3915 Rivermark Plaza, Santa Clara, CA, 95054	150	-----	-----	-----	500 SQ FT
Hyatt Regency	5101 Great America Parkway, Santa Clara, CA, 95054	505	-----	-----	-----	60,000 SQ FT
Marriott Santa Clara	2700 Mission College Blvd, Santa Clara, CA, 95054	759	-----	-----	-----	26,849 SQ FT
Hyatt Centric Silicon Valley	3100 Lakeside Drive, Santa Clara, CA, 95054	219	-----	-----	-----	6,982 SQ FT
Towneplace by Marriott	2877 Lakeside Drive, Santa Clara, CA, 95054	107	-----	-----	-----	
		3,069				

Concessions

Click to add text







Hotel Accommodations




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		3,069	

The Santa Clara Convention Center is Conveniently Located:

- 3,069 hotel guest rooms within 5 miles
- 785 hotel guest rooms within walking distance
- 6.2 Miles from San Jose Mineta International Airport
- Steps from VTA Light Rail
- Half of a mile from Amtrak and ACE Train Station







- Managed the design of Levy Restaurant's new robotic coffee vending machine wrap.





Thank you

Appendix