



DISCOVER SANTA CLARA™  
BOARD OF DIRECTORS  
REGULAR MEETING AGENDA  
(REVISED)

June 16, 2022

3:00 p.m.

Virtual Meeting

*Pursuant to the provisions of the California Governor’s Executive Order N-29-20, issued on March 17, 2020, to prevent the spread of COVID-19, Discover Santa Clara™ has implemented methods for the public to participate remotely.*

*The public can participate remotely via Zoom: <https://us06web.zoom.us/j/81070171260>  
Meeting ID: 810 7017 1260 or by phone: 1 (669) 900-6833.*

**CALL TO ORDER**

**ROLL CALL**

**PUBLIC COMMENT**

*For public comment on items not 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:
  - Discover Santa Clara™ Board of Directors – May 20, 2022

Recommendation: Approve Meeting Minutes and note and file.

**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**

2. Accounting Transition and Budget Update.
3. Update on the Santa Clara Tourism Improvement District Assessment.

4. Action on an Engagement Letter with Petrinovich Pugh & Co LLP to prepare the Federal and Requested State Corporate Income Tax Returns for Silicon Valley/Santa Clara DMO, Inc. for Tax Years 2019-2021.

Recommendation: Approve and authorize the Chair to negotiate and execute an Engagement Letter with Petrinovich Pugh & Co LLP to prepare the Federal and requested State corporate income tax returns for Silicon Valley/Santa Clara DMO, Inc. for tax years 2019-2021.

5. Action on Amendment No. 2 to extend Agreement with California People Search Through December 31, 2022 and to Authorize Chair to Negotiate and Execute Subsequent Amendments to Extend as Needed.

Recommendation: Approve and authorize the Chair to negotiate and execute Amendment No. 2 to extend Agreement with California People Search through December 31, 2022 and authorize the Chair to negotiate and execute subsequent amendments to extend as needed.

6. Discussion and Action on the FY 2022/23 Sales and Marketing Plan.

Recommendation: Approve the FY 2022/23 Sales and Marketing Plan.

7. Review of Monthly Progress Report for May 2022.

Recommendation: Note and file the Monthly Progress Report for May 2022.

8. Marketing Activity Updates.

9. Action on the Group Sales & Marketing Incentive and Performance Plan & Goal Setting Process.

Recommendation: Approve the Group Sales & Marketing Incentive and Performance Plan & Goal Setting Process.

## **GENERAL ANNOUNCEMENTS**

### **ADJOURNMENT**

The next regular scheduled meeting is on July 21, 2022 at 3:00 p.m.

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*\*Please see COVID-19 NOTICE\**

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 Kelly Carr, [KCarr@discoversantaclara.org](mailto:KCarr@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 Board of Directors. The agenda provides a general description and staff recommendation; however, the Board of Directors 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"), Silicon Valley/Santa Clara DMO, Inc. 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. Silicon Valley/Santa Clara DMO, Inc. 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 Silicon Valley/Santa Clara DMO, Inc. programs, services, and activities. Silicon Valley/Santa Clara DMO, Inc. 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 Silicon Valley/Santa Clara DMO, Inc. in an appropriate alternative format. Contact [DSCAdmin@discoversantaclara.org](mailto:DSCAdmin@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 Silicon Valley/Santa Clara DMO, Inc., should contact Kelly Carr, [KCarr@discoversantaclara.org](mailto:KCarr@discoversantaclara.org) as soon as possible before the scheduled event.

## ATTACHMENTS



DISCOVER SANTA CLARA™  
BOARD OF DIRECTORS  
SPECIAL MEETING MINUTES

DMO BOARD OF DIRECTORS  
JUNE 16, 2022  
AGENDA ITEM #1

May 20, 2022

2:00 p.m.

Virtual Meeting

*Pursuant to the provisions of the California Governor's Executive Order N-29-20, issued on March 17, 2020, to prevent the spread of COVID-19, Discover Santa Clara™ has implemented methods for the public to participate remotely.*

*The public can participate remotely via Zoom: <https://us06web.zoom.us/j/83461041372>  
Meeting ID: 834 6104 1372 or by phone: 1 (669) 900-6833.*

**CALL TO ORDER**

Chair Hodges called the meeting to order at 2:03 p.m.

**ROLL CALL**

Present: Pablo Barrera, I.B.T Local Union 853  
Kelly Carr, OVG360  
Christopher Hamilton, Levy Restaurants  
Eron Hodges, Hyatt Santa Clara  
Catherine Lentz, Forty-Niners Stadium Management Company  
Nadine Nader, City of Santa Clara  
Ruth Mizobe Shikada, City of Santa Clara (Ex-Officio)

Absent: Barb Granter, Great America (joined meeting at 2:05 p.m.)  
Leo Wandling, I.A.T.S.E Local Union 134 (joined meeting at 2:24 p.m.)

A quorum of 6 was met.

Attendance: Nancy Thome, City of Santa Clara  
Dan Fenton, Jones Lang LaSalle

**PUBLIC COMMENT**

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Member Granter joined the meeting at 2:05 p.m.

1. Action on the Minutes of:

- Discover Santa Clara™ Board of Directors – April 21, 2022
- Discover Santa Clara™ Board of Directors – April 28, 2022

Recommendation: Approve Meeting Minutes and note and file.

**A motion was made by Treasurer Carr, seconded by Member Nader, to approve the Consent Agenda.**

**Aye:**7 Member Barrera, Treasurer Carr, Member Granter, Secretary Hamilton, Chair Hodges, Vice-Chair Lentz, Member Nader

**Absent:**1 Member Wandling

**CONSENT ITEMS PULLED FOR DISCUSSION**

**PUBLIC PRESENTATIONS**

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**GENERAL BUSINESS – ITEMS FOR DISCUSSION**

2. Financial Services Updates and Revenue Report for Q3.

Treasurer Carr reported that they have moved away from the previous accountant although he is doing the taxes. The Form 990 has not been completed and it was due May 15<sup>th</sup>. Changes are needed to the 990 and the current accounting group is providing assistance to review. Dan Fenton added that some of the accounting treatments on the 990 were material and had to be discussed.

Nancy Thome reported out on the TID assessment revenues for the first three quarters. Approximately \$185k was collected in Q1, \$260k in Q2 and \$232k in Q3. The year-to-date total is just over \$676k which exceeds the initial estimate of \$610k. The year-end total is projected at about \$800k.

3. Update on the FIFA 2026 Hotel Allotment Requests.

Chair Hodges shared that the TID hotels were able to submit baseline room inventory for FIFA in conjunction with San Jose and San Francisco totalling an 11,000-room commitment. The dates are not confirmed but are tentative for May 15, 2026 to July 21, 2026. Some of the hotels do have signed contracts but it does not serve as a guarantee that they will get the room blocks. Chair Hodges added that he and Kelly have been discussing how the Santa Clara Convention Center can be involved. FIFA will publicly announce the host cities on June

16 which includes locations in the U.S., Canada, and Mexico.

**4. Update on the FY 2022/23 Sales and Marketing Plan.**

Dan Fenton reported they are finalizing the plan. They had adjusted the schedule based on the budget. He added that they met with the new marketing firm today and shared the schedule with them. Dan added that he felt that the firm now has a good sense of what they want to do for the year and launch the activations. There will be a finished product to show the Board next month.

Chair Hodges asked if there was any way of knowing what the website traffic is like with the launch of the new site. Dan Fenton indicated they can provide data to the Board. Additionally, the marketing group will provide feedback and ideas to drive traffic to the site.

**5. Update on Related Santa Clara Project.**

Ruth Shikada shared a slide of the Related Santa Clara project which she pulled from the current website and provided the following update:

- Attention is currently on Phase 1 and the permit applications for the garage and office buildings have been submitted to the City.
- There will be 789 parking spaces available on 49er game days.
- Applications have also been submitted to Streets and Utilities for review.
- There is a lot of effort going the Building Department and they hope to have permits issued at the end of the summer and have the ground-breaking late summer or early fall.
- People will see efforts on the site as they are stockpiling dirt which is needed for Phase 2 of the project.
- Other efforts are happening with the overall structure for train station connectivity.
- Regarding the east park, which will be part of Phase 2, community meetings are forthcoming to get feedback on the use which is about a 12-18-month process. This is not related to the Related Santa Clara project but there is 35 acres that belongs to the City that is not yet programmed. The surrounding roadway would need to be done prior to any programming.

Member Wandling joined the meeting at 2:24 p.m.

**6. Review of Monthly Progress Report for April 2022.**

Recommendation: Note and file the Monthly Progress Report for April 2022.

Dan Fenton reported that there are groups that have moved to tentative status. They saw some movement from leads to tentatives. The Knowland purchase is showing to be effective, and the new added activity is 52. This number shows that they are bringing on

more groups into the cue. The sales team works on moving the groups from research to prospect by contacting the client and ensuring they meet the required qualifiers. Dan added that there was one P2 added, they recently secured an event with Google and they are close to or have converted a piece of business with Intel. There were no P1 or P2 definites added. Regarding lost business, they are hoping the COVID19 piece will decrease. With the new marketing agency, they want to overcome the lost business situations where clients go to other cities. The overall focus remains on getting to the end goal.

**A motion was made by Member Nader, seconded by Vice-Chair Lentz, to note and file the Monthly Progress Report for April 2022.**

**Aye:8** Member Barrera, Treasurer Carr, Member Granter, Secretary Hamilton, Chair Hodges, Vice-Chair Lentz, Member Nader, Member Wandling

### **GENERAL ANNOUNCEMENTS**

### **ADJOURNMENT**

The meeting adjourned at 2:44 p.m. The next regular scheduled meeting is on June 16, 2022 at 3:00 p.m.





## Addendum No.2

### California People Search

303 Twin Dolphin Drive Suite 600  
Redwood Shores, CA 94065

Silicon Valley/Santa Clara DMO Inc.  
5001 Great America Parkway  
Santa Clara, CA 95054  
[DSCAdmin@discoversantaclara.org](mailto:DSCAdmin@discoversantaclara.org)

RE: Extending Terms

Date: June 10, 2022

The purpose of Addendum No. 2 is to amend the existing Agreement between California People Search and Silicon Valley/Santa Clara DMO, Inc., entitle Client Terms and Conditions 2021, which Agreement by its terms became effective on July 2, 2021, the date by which both CPS and the Company had executed the Agreement. All defined terms used in this Addendum not otherwise defined herein will have the same meaning ascribed to them in the Agreement.

The initial term of the Agreement is a period of six months from July 2, 2021, unless terminated earlier according to its terms.

Addendum No. 1 was executed November 29, 2021 extending the Agreement to June 30, 2022.

CPS and Company now desire to, and by signing this Addendum below, hereby extend the term of the Agreement through December 31, 2022 subject to all of the terms and conditions contained in the Agreement, including the early termination provisions contained in the Agreement.

X

\_\_\_\_\_  
Eron Hodges, Chair  
Silicon Valley/Santa Clara DMO Inc

\_\_\_\_\_  
Date

X

\_\_\_\_\_  
Becki Clague  
California People Search

\_\_\_\_\_  
Date

# FY 2022/23

# Sales & Marketing

# Plan



Updated: June 08, 2022

DISCOVER  
**SANTA  
CLARA**™

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## ABOUT DISCOVER SANTA CLARA™

Discover Santa Clara™ is a non-profit 501(c)(6) organization funded by the Santa Clara Tourism Improvement District and serves as the official destination marketing organization for Santa Clara, California. Discover Santa Clara™ is charged with the marketing, promotion, and selling of Santa Clara and the Santa Clara Convention Center as the destination of choice to national, regional, and local organizations and as a premium destination for conventions, meetings, trade shows, athletics, and group leisure events.

### MISSION

To promote and drive economic impact to Santa Clara as the Silicon Valley destination of choice for meetings, business and leisure travel.

### VISION

To be a world class destination for innovation, collaboration and exchange of ideas in Silicon Valley.

Discover Santa Clara's™ primary focus is to attract large, multi-day citywide events and work collaboratively with OVG360, Levy Restaurants (Levy), and the City of Santa Clara to drive all levels of business and event types to Santa Clara. The primary focus of Discover Santa Clara™ is generating a new mix of business and optimizing the utilization of the Santa Clara Convention Center, driving economic impact, and creating a sense of place while providing a seamless service approach for clients.

Discover Santa Clara™ strives to:

- Raise awareness about Santa Clara, California as a Silicon Valley, Bay Area, and Northern California destination for overnight visitation.
- Increase overnight visitation to Santa Clara hotels and destination, focusing on filling lower occupancy time periods.
- Generate new convention/meetings/citywide business through the development of a competitive citywide package, featuring Santa Clara hotels, key partners (including Great America and Levy Stadium) and the Santa Clara Convention Center.
- Raising Awareness of Santa Clara with meeting/event planners and other travel buyers and developing new prospects for the future.



# DISCOVER SANTA CLARA™

## **BRAND PROMISE**

A new brand platform has been developed for Discover Santa Clara™ that will be integrated across multiple platforms, including the sales and marketing activities of OVG and Levy.

Discover Santa Clara™ is reimagining event experiences. We're a unified network of ambitious problem-solvers who anticipate needs, craft custom solutions and elevate events to a whole new level. We employ versatility, creativity, and polish in every aspect of every event. With a history of thinking big and looking forward, Santa Clara is the perfect hub for trailblazers, risk-takers, and visionaries. The following are key pillars of the new DSC brand platform.

## **THINKING DIFFERENT**

As Santa Clara's official Destination Marketing Organization, our team is empowered to think differently, anticipate guests needs and bring new ideas to our clients. We thrive on new ideas and give our team the freedom to truly partner with our clients.

## **CUSTOM LOOK AND FEEL**

While innately tech forward and authentic Santa Clara, the size and flexibility of our facility allows us to truly customize to our clients' needs and make it theirs.

## **SENSE OF CRAFT**

Expect the unexpected when it comes to food and beverage (F&B). We bring the quality and variety of small cafés and restaurants to large scale events highlighted by locally sourced ingredients and small farm partners.

## **SEAMLESSNESS**

As a unified network of partners, we create a seamless approach from the first touch to post-con.

# SANTA CLARA CONVENTION CENTER OVERVIEW

The Santa Clara Convention Center (SCCC) is uniquely positioned well to market and book conventions, trade shows, corporate meetings, and special events. Strategically located in the heart of Silicon Valley, adjacent to Levi's® Stadium – home of the San Francisco 49ers NFL football team - and California's Great America Theme Park, the SCCC is easily accessible from the San Jose International Airport and only 32 miles from the San Francisco International Airport. The SCCC is situated in the golden triangle of academic and research institutions such as Santa Clara University, San Jose State University and Stanford University and is ideally located within miles of the world's top 500 fortune companies, venture capital and research centers such as Applied Materials, Intel, Avaya, EMC, Apple, Google, Facebook, and LinkedIn. The city itself boasts over 3,800 modern hotel rooms which can support the Santa Clara Convention Center's activities. The SCCC is located in close proximity to the most successful regional shopping, dining and entertainment centers such as Westfield Valley Fair Shopping Center and Santana Row and will be neighbor to the upcoming urban development [Related Santa Clara](#).

The SCCC, currently undergoing a multi-million-dollar renovation to be completed in Fall 2022, features 100,000 square feet of exhibit space, a 22,400 square foot ballroom, 31 breakout rooms and a 607-seat theater and attracts over 350,000 visitors annually, and will feature the addition of an all-new Connect Café, the integration of café style restaurant concepts and an onsite bakery.

The Santa Clara Convention Center is owned by the City of Santa Clara, managed and operated by OVG360 with food and beverage services managed and operated by Levy. The seamless integration of the three partners will work collaboratively with the City of Santa Clara







**OVERVIEW**

Discover Santa Clara™, OVG360 and Levy are all directly involved in the sales and marketing efforts of the SCCC and the destination and are guided by the Santa Clara Convention Center Booking Strategy. The three teams work as one team to implement the Booking Strategy which establishes prioritized booking windows for events depending on the level of hotel room usage, economic benefit and SCCC revenue.

Discover Santa Clara™, OVG360 and Levy share responsibility in maximizing the SCCC’s level of usage, activity and sales, and work to ensure the composition of the events that take place at the SCCC generate the maximum benefit. The one team approach is a coordinated effort to generate the greatest hotel room usage and the greatest economic benefit through direct spending as well as revenue for the SCCC. The chart below illustrates each teams’ individual focus areas, as well as the areas where they collaborate in achieving the overall goals.



Key Decision Making Factors: Discover Santa Clara™ and OVG360 have discretion to consider the following factors when booking an event. These factors may support an event’s case for flexibility in the booking policy based on recommendations from OVG360, Discover Santa Clara™ and ultimately approval from the City:

- Economic impact on the city of Santa Clara,
- Hotel room utilization,
- Revenue to the SCCC,
- Time of year (peak vs. non-peak seasons and what year),
- Short term opportunity, filling “need” periods,
- Number of days of use,
- Potential for repeat booking,
- Applicant’s event history and experience,
- Legality and public safety,
- Compatibility with concurrent facility users, and
- Community impact.



# SANTA CLARA CONVENTION CENTER (SCCC) BOOKING STRATEGY

The following strategy is designed to give the highest priority to multi-day National/Regional Conventions, Conferences, Meetings and Events. The high priority meetings that will generate the greatest hotel room usage, economic benefit through direct spending, as well as revenue for the SCCC and serve as the consistent base for decision-making. This approach also lays the groundwork for developing sales and marketing strategies to focus on attracting the highest priority groups to Santa Clara.

## Weekday Groups

## Weekend Groups (Friday-Sunday & holidays)

Priority	Booking Window	Min. Room Nights on Peak	Priority	Booking Window	Min. Room Nights on Peak
P1	18-months+	1,100	P1	18-months+	400
P2	13-18 months	600-1,099	P2	13-18 months	200-399
P3	0-13 months	100-599	P3	0-13 months	50-199
P4	0-13 months	Less than 100	P4	0-6 months	Less than 50
P5	0-12 months	N/A	P5	0-3 months	N/A

## WEEKDAY GROUP OVERVIEW

**Priority 1 (P1) Weekday:** P1 events have a minimum peak (highest number of rooms per day) of 1,100 rooms at hotels located within the SCTID and generate one million dollars in SCCC revenue. These events typically include conventions and/or trade shows that are regional, national, or international in scope. P1 events may book space at the SCCC including all ballrooms at any time. The calendar will be held exclusively for P1 events 18 months and out.

**Priority 2 (P2) Weekday:** P2 events have a peak of 600-1,099 room nights at hotels located within the SCTID and generate \$750,000-\$1,000,000 in SCCC revenue. These events typically include regional multiple-day corporate meetings, trade shows, etc. P2 events may book space between 13-18 months. P2 events can only book space beyond 18 months on a “1<sup>st</sup> Option” basis and only with approval from Discover Santa Clara™ and OVG360.

**Priority 3 (P3) Weekday:** P3 events have a peak of 100-599 room nights at hotels located within Santa Clara and generate \$500,000-750,000 in SCCC revenue. These events typically include local or regional meetings or trade shows. P3 events may book space within 0-13 months. P3 events may book space beyond 13 months on a “1<sup>st</sup> Option” basis and only with approval from Discover Santa Clara™ and OVG360.

**Priority 4 (P4) Weekday:** P4 events have a peak of less than 100 room nights and generate \$200,000 - \$500,000 in SCCC revenue. These events typically include consumer shows, one day meetings and larger social events. P4 events can only book space within 9 months. P4 events may book space beyond 9 months on a “1<sup>st</sup> Option” basis and only with approval from Discover Santa Clara™ and OVG360.

**Priority 5 (P5) Weekday:** P5 events have no room night requirements but generate \$90,000-\$199,000 in SCCC revenue. These events typically include social events and day meetings. P5 events can only book space within 3 months. P5 events may book space beyond 3 months on a “1<sup>st</sup> Option” basis and only with approval from Discover Santa Clara™ and OVG360.

## WEEKEND GROUPS (Friday-Sunday & holidays)

For **Priority 1-5** events that meet on weekends or holidays there is more flexibility in the strategy.





## EVENT TYPE – DEFINITIONS

The following are event type definitions to provide a sampling of event types that currently meet at the SCCC and those we are trying to attract.

**Tradeshows:** An exhibition of products and/or services held for members of a common or related industry. Not open to the general public.

**Conventions:** An event where the primary activity of the attendees is to attend educational sessions, participate in meetings/discussions, socialize or attend other organized events of which the attendees are primarily from out of town. Sometimes there is a secondary exhibit component.

**Consumer Shows:** An exhibition that is open to the public, usually requiring an entrance fee. Common examples of consumer shows include auto shows, bridal shows, boat shows, flower and gardens shows, craft shows and festivals.

**Banquets/Social Events:** Formal, often ceremonial, dinner for a select group of people, often in honor of a particular person. The meal is the primary component of the event, consisting of a sit-down breakfast, lunch or dinner.

**Meetings & Seminars:** An event where the primary activity of the attendees is to attend educational sessions, participate in meetings/discussions, socialize, or attend other organized events. There is no exhibit component to this event.

**Sporting Events:** An event where athletes or individuals compete, and spectators view the event activities and/or ceremonies.

**Community-Based Event:** An event that has been designed to encourage community participation at the SCCC. These could be in conjunction with the City or designated non-profit organizations.



## SCCC COMPETITIVE OVERVIEW

The following destinations have been studied and identifies as frequent competitors with Santa Clara in securing business.

### **San Francisco, CA (Moscone West)**

Three-level convention center that is the smallest of a three-building complex of the Moscone Center. 367,500 square feet of space with a 25,000 square foot pre-function area. Each level has 100,000 square feet of space and 19 breakout rooms in the entire facility. 19,000 hotel rooms within walking distance of Moscone and over 100 restaurants.

### **San Jose, CA**

520,000 total square feet of space with 367,526 square feet of convention center space. 4,000 hotel rooms that are committable to citywide groups and over 40 restaurants within walking distance. San Jose attracts the same clientele as Santa Clara. Renovated in 2013 with attractive outdoor area for meeting room respite.

### **Austin, TX**

881,400 total square feet of space which is incredibly high-tech which attracts tech clients from around the country. 13,000 hotel rooms and over 50 restaurants within walking distance to the convention center. The Austin Convention Center is a gigabit-rated building and ranks among the most technologically advanced convention centers in the country. When the facility doubled its size, the Austin Convention Center upped the ante in the technical convention industry by installing a communication infrastructure capable of moving voice, video, and data at over 1 billion bits a second. The Austin Convention Center also offers complementary wireless internet service.

### **Providence, RI**

Similar in proximity to a large city like Santa Clara. 167,000 total square feet of space with 2,800 sleeping rooms within walking distance to the convention center. It is connected via skybridge to the 14,000-seat Dunkin' Donuts Center arena on one side and to the 564-room Omni Providence on the other. The Omni is, in turn, connected to the Providence Place Mall and within walking distance of over 20 restaurants.

### **Long Beach, CA**

The Long Beach Convention & Entertainment Center offers more than 400,000 square feet of meeting and exhibit space, with new wiring for the latest technology as well as wireless capability. Every major downtown and airport hotel is virtually brand new, thanks to \$105 million in recent renovations. Within walking distance of over 30 restaurants, Long Beach offers more than 5,000 rooms citywide, most within walking distance of conference facilities, entertainment and dining.

### **Sacramento, CA**

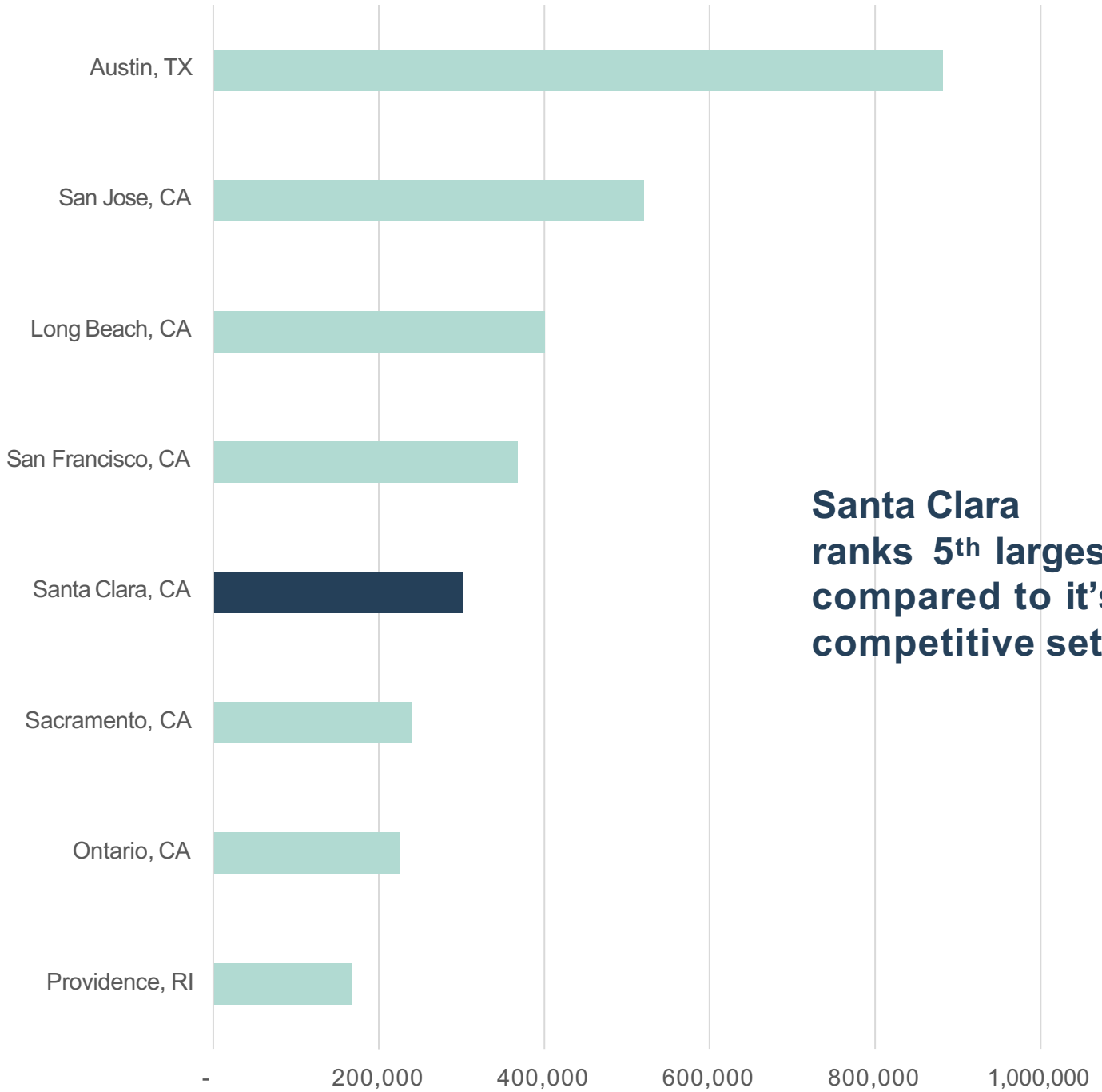
Close proximity to Santa Clara and sits among many California associations. Sacramento's downtown SAFE Credit Union Convention Center reopened in the spring of 2021 after a renovation and expansion. The new Convention Center offers 240,000 square feet of meetings and event space, along with a new outdoor activities plaza to take full advantage of Sacramento's climate. You'll find more than 2,000 hotel rooms within walking distance of the Convention Center, 2,000 more within just 3 miles, and over 50 different restaurants. In fact, Sacramento opened two new hotels in 2021.7.

### **Ontario, CA**

A contemporary venue with more than 225,000 square feet of flexible column-free exhibit, meeting and function space, the Ontario Convention Center is located just 2 miles from Ontario International Airport with access to a variety of hotel and over 10 dining options within walking distance, the center is frequently used by filmmakers as an onsite location for movies and commercials.

# SCCC COMPETITIVE OVERVIEW

Competitive Markets by Covention Center Size



**Santa Clara  
 ranks 5<sup>th</sup> largest  
 compared to it's  
 competitive set**

# SCCC TARGET MARKET SEGMENTS (BY INDUSTRY)



<p><b>CORPORATE</b></p>	<ul style="list-style-type: none"> <li>• Tech</li> <li>• Media &amp; News</li> <li>• Finance</li> <li>• Healthcare (Pharma, Bio Tech, Medical Services)</li> </ul>	<ul style="list-style-type: none"> <li>• Automotive</li> <li>• Manufacturing</li> <li>• Real Estate</li> </ul>
<p><b>ASSOCIATIONS &amp; NONPROFITS</b></p>	<ul style="list-style-type: none"> <li>• City, County Nonprofits (Special Rates)</li> <li>• Professional Associations (Silicon Valley Leadership Group, MPI, NACE Etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• State, National, International Nonprofits</li> <li>• Social Services</li> <li>• Healthcare</li> </ul>
<p><b>SPECIAL INTEREST GROUPS</b></p>	<ul style="list-style-type: none"> <li>• Special Hobbies (Comic Con, Toys &amp; Collectibles, National Model Railroad Association Etc.)</li> <li>• Entertainment (Theater &amp; Performing Arts Groups)</li> <li>• LGBTQ+</li> </ul>	<ul style="list-style-type: none"> <li>• Ethnicity, Racial, Cultural</li> <li>• Travel &amp; Leisure</li> <li>• Lifestyle</li> <li>• Home &amp; Garden</li> <li>• Fashion &amp; Beauty</li> <li>• Environmental</li> <li>• Holistic Health, Wellness</li> <li>• Religious Groups</li> </ul>
<p><b>SPORTS &amp; ATHLETICS</b></p>	<ul style="list-style-type: none"> <li>• Dance</li> <li>• Cheerleading</li> <li>• Futsal</li> <li>• Volleyball</li> </ul>	<ul style="list-style-type: none"> <li>• Theater &amp; Performing Arts Groups</li> <li>• College Sporting Events at Levi's® Stadium</li> <li>• Basketball</li> <li>• Fencing</li> </ul>
<p><b>EDUCATION</b></p>	<ul style="list-style-type: none"> <li>• Graduations</li> <li>• Standardized Testing</li> </ul>	<ul style="list-style-type: none"> <li>• Career Fairs</li> </ul>
<p><b>GOVERNMENT</b></p>	<ul style="list-style-type: none"> <li>• Local, County, Regional, State, National Governing Bodies</li> </ul>	<ul style="list-style-type: none"> <li>• Political Groups</li> <li>• Police</li> </ul>
<p><b>HEALTHCARE</b></p>	<ul style="list-style-type: none"> <li>• Pharma</li> <li>• Bio Tech</li> </ul>	<ul style="list-style-type: none"> <li>• Medical Services</li> </ul>
<p><b>SOCIAL EVENTS</b></p>	<ul style="list-style-type: none"> <li>• Cultural Weddings</li> <li>• Holiday Parties</li> <li>• Banquets</li> </ul>	<ul style="list-style-type: none"> <li>• Galas</li> <li>• Fundraisers</li> <li>• Celebrations Of Life</li> </ul>

# KEY PERFORMANCE INDICATORS

Key performance indicators (KPIs) provide a way to measure how well Discover Santa Clara™, OVG360 and Levy are performing in relation to their strategic goals and objectives. KPI's are designed to depict a more comprehensive picture of success to include sustainability and benefit to the community.

Working with the City, the SCCC team collectively establishes and reports on annual goals. As demonstrated below, a majority of the KPIs are shared or overlap and provide a holistic view of success, drive accountability, and support seamless service to clients.

**X** = Overlapping KPIs

KPI	OVG360	Levy	Discover Santa Clara™
Convention Center Gross Revenue	X		X
Net Income	X	X	
Room Nights Consumed	X		X
Economic Impact	X		X
Customer Service (Customer Satisfaction)	X	X	X
Event Mix	X		X
Community Benefit/Impact	X	X	
Room Nights Generated/Booked		X	X
Sustainability		X	
Workforce Development/Training		X	
Local Purchasing		X	
Sales Activity/Prospects		X	X
Retail Space Activations		X	
Definite Events Booked			X
Weeks Impacted			X

## KEY PERFORMANCE INDICATORS



### DEFINITIONS

#### **Convention Center Gross Revenue**

Actual event spend at the SCCC including rental, food and beverage services, audio-visual services, information technology services and other event related services.

#### **Net Income**

The gross revenue minus the cost of goods sold, expenses and taxes for an accounting period.

#### **Number of Room Nights Consumed**

The total number of rooms occupied at SCTID hotels for P1 and P2 events at the SCCC, multiplied by the number of nights each room is occupied. Measures the level of hotel business generate by P1 and P2 events.

#### **Economic Impact**

The total value of an event, including direct spending, on Santa Clara's local economy. Measures the level of the direct spending impact of the groups attending events at the SCCC.

#### **Customer Service Survey Results**

Satisfaction surveys are administered by a third-party to SCCC meeting planners, clients and attendees to measure the overall customer satisfaction partners' performance in providing services.

#### **Event Mix**

The desirable mix of events at the SCCC that optimizes use of the SCCC. An optimized center demonstrates the most effective use of the SCCC's physical space that results in the best financial and economic results.

#### **Community Benefit/Impact**

Community benefits are programs or activities that serve the community and citizenry of Santa Clara, City/community use of the SCCC, and enhanced community partnerships and local contracting/hiring. Community impact is the impact that many different partners, working in collaboration, have on a specific population (i.e., community, town, state, etc.).

#### **Number of Room Nights Booked (for future years)**

The total number of rooms blocked at Santa Clara lodging businesses for P1 or P2 events, multiplied by the number of nights each room is reserved. Guidelines for securing a definite include a SCCC contract and SCTID hotel contract, with verifiable history.



## DEFINITIONS (CONT.)

### **Sustainability**

Sustainability is operating in a way that protects, preserves, or restores the natural environment, promotes social equity, enhances the lives of people and communities and contributes to economic prosperity.

### **Workforce Development/Training**

The activities, policies and programs established to create, sustain and retain a viable workforce that can support current and future business and industry.

### **Local Purchasing**

Northern California grown and produced food, beverages, and supplies.

### **Number of Prospects**

Potential clients interested in booking an event at the SCCC and deemed a good match; active contact maintained with potential client.

### **Retail Space Activations**

Public space activation provides for social/public gathering places and retail opportunities outside of the formal meeting spaces.

### **Number of Definite Events Booked (in the year for future years)**

A “definite” event is a future event confirmed with a signed and executed SCCC contract with the event organizer and at least one SCTID hotel for event room blocks. The room night estimate must be substantiated by documented history.

### **Number of Weeks Impacted**

Weeks throughout the year where a P1 event or a combination of events positively impacts the SCTID hotels and Santa Clara’s local economy.

## GROUPS SALES TRADESHOWS & CLIENT EVENTS

One of the goals of Discover Santa Clara™ is to raise awareness with meeting planners and industry professionals about the opportunities for events in Santa Clara. The roadmap below shows a month-to-month plan for potential marketing & client activations and attendance at key conferences & tradeshow, in support of that goal.

July	
<b>Support Services</b>	<p>Quarterly Client Activation</p> <p><b>Subject</b> – Brand Teaser  <b>Data Base:</b> Internal/Full  <b>Content:</b> Brand Teaser Hype Video  <b>CTA:</b> Sign Up For Launch Event Info</p>
<b>Marketing Activities</b>	<p><b>Additional Touch Points:</b></p> <ul style="list-style-type: none"> <li>• LinkedIn</li> <li>• Discoversantaclara.org</li> <li>• Sales team email signatures</li> </ul> <p><b>Content Creation Needed:</b> Brand Hype Video</p>
August	
<b>Conference &amp; Tradeshow</b>	<p>Connect Marketplace                      8-10 (Detroit, MI)</p>
<b>Marketing Activities</b>	<p><b>Subject</b> – DiscoverSantaClara.org Launch  <b>Data Base:</b> Internal/Full  <b>Content:</b> Brand Intro Copy, Graphic Elements pulled through from Web  <b>CTA:</b> Click referral to website</p> <p><b>Additional Touch Points:</b></p> <ul style="list-style-type: none"> <li>• LinkedIn</li> <li>• Discoversantaclara.org</li> </ul> <p><b>Content Creation Needed:</b> graphic elements/copy writing</p>
September	
<b>Marketing Activities</b>	<p><b>Subject</b> – Food and Beverage Story  <b>Data Base:</b> separate content for corporate and social sub lists  <b>Content:</b> two versions of integrated video, targeted messaging to each sub list  <b>CTA:</b> click thru to F&amp;B section on website/schedule a tasting</p> <p><b>Additional Touch Points:</b></p> <ul style="list-style-type: none"> <li>• LinkedIn</li> <li>• Discoversantaclara.org</li> </ul> <p><b>Content Creation Needed:</b> Video chef interview, F&amp;B Images</p>



## GROUPS SALES TRADESHOWS & CLIENT EVENTS

One of the goals of Discover Santa Clara™ is to raise awareness with meeting planners and industry professionals about the opportunities for events in Santa Clara. The roadmap below shows a month-to-month plan for potential marketing & client activations and attendance at key conferences & tradeshows, in support of that goal.

October	
Support Services	Quarterly Client Activation
Conference & Tradeshows	IMEX North America (Las Vegas, NV)  <b>Subject</b> – Technology <b>Target Date:</b> 6/22 <b>Data Base:</b> Internal/Full <b>Content:</b> Center technology improvements <b>CTA:</b> referral to website/schedule a site inspection
Marketing Activities	<b>Additional Touch Points:</b> <ul style="list-style-type: none"> <li>• LinkedIn</li> <li>• Discoversantaclara.org</li> <li>• Sales team email signatures</li> </ul> <b>Content Creation Needed:</b> graphic elements/copy writing
November	
Conference & Tradeshows	Connected Medical/Tech (TBD)
Marketing Activities	Monthly Email Blast
December	
Marketing Activities	Monthly Email Blast
January	
Support Services	Quarterly Client Activation
Marketing Activities	Monthly Email Blast
February	
Marketing Activities	Monthly Email Blast
March	
Marketing Activities	Monthly Email Blast
April	
Support Services	Quarterly Client Activation
Marketing Activities	Monthly Email Blast
May	
Marketing Activities	Monthly Email Blast
June	
Marketing Activities	Monthly Email Blast



## PRIORITY 1 & 2

# GOALS AND STRATEGIES

Discover Santa Clara™ focuses on generating P1 and P2 leads by targeting cities in select geographic areas and businesses in key vertical markets with an emphasis on the tech market. Additionally, the sales Discover Santa Clara™ continues to target meetings, conventions and trade show business that book at least 1,100 contracted rooms on peak nights. This section outlines the sales efforts the Discover Santa Clara™ team undertakes on a year-round basis to promote Santa Clara as the ultimate choice for meetings and conventions.

### GOAL

*Steadily increase prospecting to generate incremental new P1 & P2 business for the destination.*

### STRATEGY

Generate new leads and secure definitive room nights and drive commensurate SCCC revenue.

### TACTICS

- Generate communications via social media marketing and e-mail with new and existing clients.
- Sales managers continue to meet monthly and work closely together to identify potential business.
- Sales managers will continue to data mine the industry to generate new prospects for P1 and P2 businesses in the vertical markets by making solicitation calls and reviewing other center calendars, etc.

### GOAL

*Generate excitement about destination developments at industry trade shows and meetings.*

### STRATEGY

Attend and participate in purposeful tradeshow and meetings to keep Santa Clara at top of mind within the industry.

### TACTICS

- Use every opportunity to network with industry professionals, providing the latest destination developments and reasons to bring their meetings to Santa Clara.
- Organize and host SCCC site visits for key decision-makers, prospective new clients, boards of directors, site committees, tradeshow management committees and executive boards.
- Continue to promote the SCCC and Santa Clara at all shows attended.



## PRIORITY 1 & 2

# GOALS AND STRATEGIES

### GOAL

*Develop and organize Discover Santa Clara™ showcase events and venue reviews to sell Santa Clara as a meetings destination.*

### STRATEGY

Design events that showcase the latest Santa Clara has to offer for meeting planners and conference organizers, including hybrid events where appropriate.

### TACTICS

- Connect with decision makers to bring their meetings and conventions to Santa Clara by conducting familiarization trips, strategic client events, presentations and coordinated site visits.
- Host strategic client events and venue reviews to provide an opportunity to showcase convention center updates, new hotels and renovated properties within the destination.

### GOAL

*Maintain year-round communication and partnership with local stakeholders, hotels, and other key business partners.*

### STRATEGY

Form partnerships with the citywide stakeholders to further identify priorities and service client needs.

### TACTICS

- Leverage client relationships with tradeshow companies, associations, third parties and corporations as the prime source of new prospects in the medical, healthcare, financial, insurance and pharmaceutical fields, which continue to be of interest to the SCTID hotels.
- Begin regularly scheduled SCTID hotel partner meetings, including representatives from OVG360, Discover Santa Clara™, Levy, SCTID hotels, California's Great America, Levi's® Stadium, and the City of Santa Clara.
- Begin quarterly general manager and directors of sales business partner meetings and invite Convention Center partners.
- Conduct quarterly directors of sales task force meetings by bringing together all geographical area hotels to communicate with Discover Santa Clara™ on industry issues and focus areas.
- Continue participating in the monthly SCCC sales meetings to ensure communications about citywide groups that we are soliciting and other potential opportunities.
- Support citywide conventions, meetings, and trade shows in the Convention Center, thus reaching a broader base of potential repeat business.
- Support and keep clients informed of COVID-19 protocols that may affect their shows at the SCCC.



## P3, 4, & 5 ROOM NIGHT GENERATING GROUPS GOALS AND STRATEGIES

The COVID-19 pandemic has hit the hospitality industry hard, and Discover Santa Clara™ recognizes the future of events will be significantly different moving forward. During this temporary slowdown, we have taken the opportunity to revisit our strategy and made modifications based on what we anticipate the new future will look like. In order to successfully compete in the industry, it will be essential for the team to reimagine events and forge new and creative ideas for revenue streams. For shorter-term business, the team knows it must develop a plan that emphasizes strategies for identifying and placing Priority 3, 4 and 5 events in the SCCC, with the focus of these bookings on filling gaps in the calendar and to generate revenue.

### GOAL

*Provide community focused support by fostering additional opportunities for groups to host events, forge a new path for revenue and offer a helping hand in the financial recovery of the destination.*

### STRATEGY

The SCCC will provide booking incentives to targeted organizations and businesses within Santa Clara.

### TACTICS

- Virtual offerings provided by in-house audio-visual and information technology partners, PSAV and Smart City Networks.
- Extend incentives on rental rates for post COVID-19 events may be further negotiated to maintain business. Final decision on the rental changes will be approved by the SCCC general manager or assistant general manager.
- Consideration of COVID-19 surcharge for additional labor/cleaning /public health and safety protocols and changes in the City, County, State or National event guidelines.
- Offer new concepts for food and beverage service, floor plan layouts and partnership opportunities with Santa Clara venue partners.
- On a case-by-case basis, the SCCC can further negotiate on space rentals to groups that will provide significant value and revenue to the destination. These may include, but are not limited to, groups with dates within off-peak event season, booking multiple events at a time, revenue for in-house vendor partners and/or destination with significant room nights, or groups that marry well with other groups.
- We will provide opportunities for nonprofit organizations looking to host fundraisers, banquets, theater events and other special events.



# P3, 4, & 5 ROOM NIGHT GENERATING GROUPS GOALS AND STRATEGIES (CONT.)

## GOAL

Engage both tech and community-based organizations to “keep it local.”

## STRATEGY

The SCCC will provide special incentives or offers to locally based organizations.

## TACTICS

- Provide opportunities to use a large space to spread out smaller groups to keep health and safety in mind.
- Offer occasions for nonprofit organizations looking to host fundraisers, banquets, theater events and other special events.
- Flexibility with weekend events, utilizing the updated booking policy.

Below are examples of special pricing and incentives:

Description	Category 1 Fees Within Santa Clara city limits	Category 2 Fees Within Santa Clara County
Room Rental	Reduced 35%	Reduced 15%
City owned equipment (tables, chairs, etc.)	Established rental rates	
Room set-up and tear down / housekeeping and/or other incurred staff costs	Standard set-up included with room rental	
Food and Beverage Services (F&B)	Reduced 20% on retail costs (does not include service fees and taxes)	Reduced 10% on retail costs (does not include services fees or taxes)
Audio Visual (AV) equipment rental	Reduced 15% for equipment rental only	Reduced 10% for equipment rental only
Information Technology (IT)	Reduced 10% on equipment only	Reduced 10% on equipment only
Electrical	Client may hire their own electrical contractor	
Other	All eligible groups are responsible for any applicable third-party costs related to the event including but not limited to insurance, EMT, security, police officers, fire marshal, related event permits, special linens and dressings, lighting, additional furniture or set-up needs, structures, equipment, etc.	

### OTHER THIRD-PARTY COSTS

Third-Party Costs	All eligible groups are responsible for any additional and applicable third-party costs including, but not limited to, insurance, EMT's, security services, police officers, fire marshal, related event permits, special linens and dressings, lighting, additional furniture or set-up structures, equipment, etc.
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# SOCIAL CATERING GOALS AND STRATEGIES

The Santa Clara Convention Center and Discover Santa Clara™ sales team promotes the method of creating meaningful interface with prospective clients not only to identify their needs and find solutions that solve their challenges but to also offer innovative concepts and ideas that will create a memorable experience for the attendees.

## GOAL

*Research the local social market, learn new trends and identify new opportunities to consistently stay competitive and innovative in our market*

## STRATEGY

Assertively focus on weddings, community (non-profit) local fundraising events, and small to medium private parties.

## TACTICS

- Community Events – The SCCC is currently focusing on helping the community by offering non-profit organizations reduced rental rates, catering, AV and IT if they are located within the city or county of Santa Clara.
- Partnership with Local Chefs – The Levy culinary team developed a partnership with a local chef to provide “authentic” ethnic food which is a high demand in the Bay Area.
- Open House – Key planners and partners will be invited to an open house at the SCCC where the newly renovated building and new culinary experiences will be highlighted.
- Social Media Advertising – Instagram, Facebook, LinkedIn, etc. will be utilized to promote unique and creative food and beverage offering at the SCCC.
- Planner Incentive – A “Planner Rewards Program” was implemented to incentivize qualified groups/planners to bring in more than one event to the SCCC within the same year.
- Virtual Happy Hour – Deliver a bottle of wine to a client’s home for virtual happy hour (local clients only) to ensure focus of relationship development with clients.
- Personalized/Local Box Delivery – Using personalized packaging with Santa Clara flair along with a handwritten card, send clients the chef’s homemade dessert or jarred creations (i.e. jam, salsa, etc.)
- Personalized video from SCCC team – Sending clients a personalized video letting them know how much we miss them and looking forward to working together again.
- Personalized Greetings/Thank you cards for clients



# SOCIAL CATERING GOALS AND STRATEGIES

The Santa Clara Convention Center and Discover Santa Clara™ sales team promotes the method of creating meaningful conversation with prospective clients not only to identify their needs and find solutions that solve their challenges but to also offer innovative concepts and ideas that will create a memorable experience for the attendees.

## GOAL

*Continue to find ways to differentiate the SCCC from other venues.*

## STRATEGY

Uncover innovative concepts and ideas that distinguish the SCCC from competitive cities and venues.

## TACTICS

- Artisan style “individual food station” Ferla Bikes. These multipurpose props may be used for a reception, Restaurants and Cafés (R&C) and sponsorship opportunity. The size and functionality of a Ferla bike will allow the flexibility of a stationary and/or movable station.
- Mashgin point-of-sale systems provides guests with a new way to self-check-out that can expedite R&C transactions, limiting contacts and maximizing sales transactions.
- Vintage Valley Market caters to large P1 and P2 groups. When nothing is planned during the evening of an event, the SCCC will provide a late-night gathering place within the building with a variety of artisan food, cocktails and music. This can serve as the perfect opportunity for a group to have a built-in networking opportunity.
- Support local farmers by acquiring locally grown products. Through the practice of using sustainable farm fresh resources, the chefs at the SCCC start with the freshest ingredients. From there, vibrant and creative menus are crafted.
- Develop a partnership with Food Fleet (food trucks).
- In partnership with an Indian Chef, the ability to provide authentic Indian food which is in high demand in the Bay Area
- Create a custom menu experience for clients to ensure events are tailored to their needs and best suits their attendees’ need. (i.e. boxed “hot” lunch, pouch cocktails, etc.)
- Ability to host complimentary tasting for qualified events even if it is out of state to win the business and working with Levy partners across the U.S.

# MARKETING ACTIVITIES

## BRAND DEVELOPMENT

The purpose of developing the brand was to put emphasis on the brand’s differentiators. Through the seamless collaboration between the team, Discover Santa Clara™ can provide a one-of-a-kind, elevated experience to future clients.

### GOAL

Create a unique and easily identifiable brand for Discover Santa Clara™

### STRATEGY

Creation of positional messaging and supporting visuals to capture voice and core attributes of Discover Santa Clara™.

### TACTICS

- Position Santa Clara as a premier destination for events by showcasing the unique offerings and next-level service standards.
- Develop consistent messaging that resonates with the target audience(s) that can be adapted and used across all media.

#### TARGET AUDIENCES

- Primary: Event planners (internal and intermediary)
  - Secondary: Corporate hosts and C-suite executives (decision makers)
  - Tertiary: Attendees (corporate employees, enthusiasts, attendee families)
  - General: Tech-forward companies, Bay Area professionals, city-wide (P1) event opportunities (nationwide and international)
- Build a toolkit of brand assets that encompass the most marketable strengths of Santa Clara and the network of hospitality and entertainment giants behind it.
  - Market Levi’s® Stadium, California’s Great America, and the Related Santa Clara project as exceptional experiential aspects.
  - Highlight elevated, chef-driven food and beverage at the SCCC.
  - Enable prospective clients to see Santa Clara in a new light, opening up the possibilities for the types of events that could be hosted here.

## BRAND LOGO AND TAG





# MARKETING ACTIVITIES



## WEBSITE AND CRM

### GOAL

Create and manage website and customer relationship management (CRM)

### STRATEGY

Create new destination website focused on dynamic storytelling to attract and educate potential P1 and P2 business.

### TACTICS

- Create a “wow” moment to immediately get planners to think differently and want to learn more.
- Establish a narrative and continual thread to entice prospective clients to navigate intuitively through out the site.
- Provide meeting planners a foundation for communication, education and planning tools to address their needs at all stages of the planning process in a modern, attractive and intuitive manner.
- Educate prospective clients on the SCCC’s unique approach and brand philosophy.
- Change planner perceptions and encourage new engagement.
- Create optimized online enhancements to increase qualified leads.
- Offer more robust and experiential information typically desired by meeting.
- Use tracking and analytics to optimize and enhance the experience increasing RFPs and bookings.

### GOAL

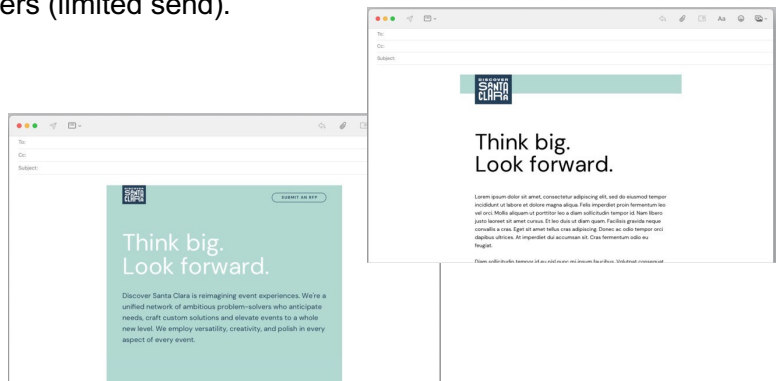
On a monthly basis, using integrated dynamic content and video, email the client base to communicate stories and narratives.

### STRATEGY

Leverage the CRM database to conduct a steady series of communication reintroducing the destination, changing client perception and highlighting center renovations, new F&B concepts and meeting innovations.

### TACTICS

- Curate monthly email content centered around authentic story telling highlighting innovation and proof of concepts. Incorporating the use of mixed media with combinations of video, text and imagery to increase interaction and click through rate.
- Break up distribution with defined audiences, segmenting out between our internal full database email list and niche targeted verticals broken out through the data in the CRM. Amplifying this with purchased email lists from vendors and partners (limited send).



# MARKETING ACTIVITIES

## ADVERTISING & DIGITAL MARKETING

### GOAL

Increase awareness and targeted P1 and P2 lead generation and bookings for the Santa Clara Convention Center, increasing citywide room nights at SCTID hotels.

### KEY PROGRAM PERFORMANCE INDICATORS INCLUDE:

- advertising reach,
- click-through rates,
- cost-per-action,
- total site traffic,
- site engagement,
- email opt-ins, and
- meetings and convention center leads.

### STRATEGY

With the focus on creating a solid brand foundation to build off, we will continue to evaluate advertising and digital marketing opportunities on a case-by-case basis, focusing on creating immediate impact to lead generation. This includes comprehensive research of all segments of the business-to-business market with the opportunity to host and event.

### TACTICS

- Focus on establishing a solid SEO strategy to create a solid organic presence.
- Implement direct trade show and center event support.
- Continue to optimize current CVENT lead-generation program.
- Leverage non-cost partner and industry opportunities, platforms and resources.

### FUTURE TACTICS

- Further develop a media plan that integrates digital and non-traditional media that's hyper targeted efforts aligns with KPIs.
- Launch digital component of our messaging to increase raise awareness and drive traffic and RFP's to the website. Large focus on trackability and ROI to help continually optimize are efforts.
- Incorporate Discover Santa Clara™'s new brand messaging in all advertising opportunities, educating planners around Discover Santa Clara™'s unique approach.
- Supplement the efforts of the sales team by leveraging opportunities at participating shows and events.
- Continue to evaluate the partnership with CVENT, deploying targeted advertising to key planners raising awareness and increasing visibility.
- Customize social media activities to key audiences.

### MEDIA RELATIONS & PROMOTIONS (PUBLIC RELATIONS)

Discover Santa Clara™ media relations and promotions strategy will center around leveraging partner communication channels for distribution and media pitching. The launch of the brand and our unique approach to the way we think about events. The focal point will center around the roll out of innovation and to drive awareness, buzz and brand recognition among targeted the P1 and P2 meeting planner community, ultimately inspiring interest in leads and bookings.

# MARKETING ACTIVITIES

## SOCIAL MEDIA

### GOAL

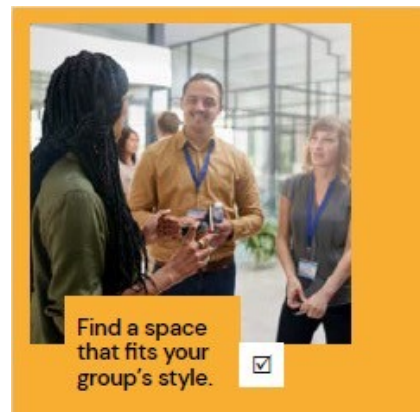
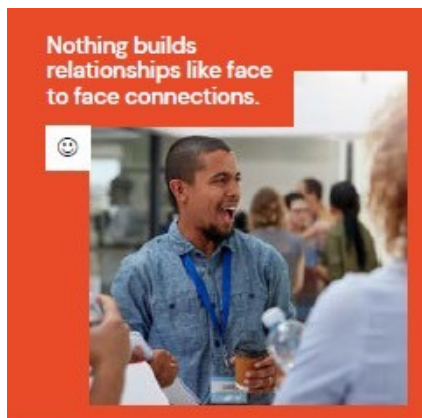
To create brand awareness, while building credibility, trust and educating audiences.

### STRATEGY

Create a social media brand strategy and defined messaging platform to give a unique voice that will help position Discover Santa Clara™ as a differentiator in the event space. Building off the new brand positioning and tying back into web narratives we will develop social platform (LinkedIn, Facebook, Instagram) specific messaging, visual guidelines and assets that will resonate with prospective planners and attendees on an emotional level. This will serve as a roadmap as we look to establish the brand's social presence as well as to refine and segment its target audience. After the launch of the brand platform and new website platform, the goal would be to create 2-3 posts per week of relevant and varied content. This would ensure regular brand recognition, increased results inorganic post impressions while to over communicating to our audience.

### TACTICS

- Build social media content library by:
  - Working closely with partners and internal departments to conceptualize and gather social media-driven photo opportunities;
  - Working with community partners to source local area content; and
  - Creating effective types of content include formats like infographics, videos, surveys, and other multimedia content that brings unique value.
- Remember the importance of employer branding by showcasing team members and personalities that bring our vision and culture to life.
- Work with trade publications and industry bloggers to draft meeting articles and post across relevant social channels including LinkedIn and Twitter.
- Share content and narrative from discoversantaclara.org via social to drive site traffic and engagement.
- Partner with influential and socially active industry publications.
- Drive engagement and leads by advertising to specific demographics of meeting and convention planners with relevant messaging via paid content on LinkedIn.
- Facebook Live tours of the site and interviews with key personalities and employees.
- Actively engage with the online community, promote the facilities, showcase events and highlights of the SCCC's transformation.



## MARKETING TOOLBOX

### CREATIVE DEVELOPMENT

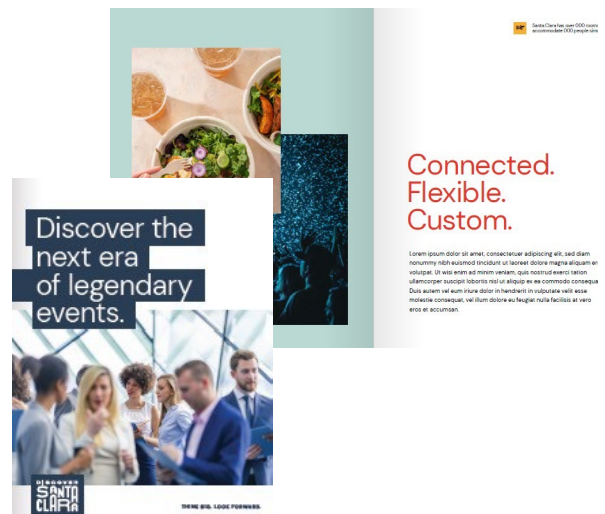
Goal is to provide professional, bespoke graphic solutions representative of Discover Santa Clara™'s brand and mission including creating ads, sales tools, brochures, postcards, signs and other collateral products that showcase

### DYNAMIC VISUAL ASSETS

From new photography, to an immersive video, capture the essence of the new event experience through visual assets that captivate the audience.

### CREATIVE & BRAND TOOLS

- Proposal/Pitch deck PowerPoint proposal floor plans
- New menu templates
- Standard email template for targeting internal database
- Invites and collateral for open house event
- Brand letterhead, business card, email signature
- Reporting digital
- Signage templates for new digital signage
- Entertainment district map
- Quick One sheets highlighting key narratives
- Editable sales flyers for promos etc.
- Library of targeted messaging for different segments



### LEVERAGING AND INTERGRATING PARTNERS

To further entice clients to book their meetings and conventions in Santa Clara, the SCCC has partnered with Levi's® Stadium and California's Great America to further elevate its unparalleled level of imagination. Through the incorporation of both venues early in the sales process, the team is able to develop specific exclusive experiences, versatile venue options, and an overall more creatively customized attendee experience.

**PROPOSED SALES ACTIVITIES BUDGET****FISCAL YEAR 2022-2023**

The budget listed below is the actual budget that was presented and considered for approval by the Board of Directors. The proposed events are pending budget and time considerations.

**Conferences and Tradeshows**

Dates	Activity	Location	Cost
August 8-10, 2022	Connect Marketplace	Detroit, MI	\$ 7,192.00
October 2022	IMEX North America	Las Vegas, NV	\$ 13,677.00
Nov/Dec 2022	Connect Medical/Tech	TBD	\$ 6,725.00
April 2023	MPI Northern California - Race to ACE 2023!	San Francisco, CA	\$ 2,356.00
<b>Total Sales Activities \$</b>			<b>\$29,950.00</b>

**Support Services**

Dates	Activity	Cost
	Virtual Happy Hour	\$ 2,000.00
	In-Person Meeting Planner Event	\$ 10,000.00
July 2022	Quarterly Activations - July	\$ 2,000.00
October 2022	Quarterly Activations - October	\$ 2,000.00
January 2023	Quarterly Activations - January	\$ 2,000.00
April 2023	Quarterly Activations - April	\$ 2,000.00
	Personalized Greeting/Thank you Card for Clients	\$ 2,000.00
<b>Total Sales Activities \$</b>		<b>\$ 22,000.00</b>

**Marketing Activities**

Dates	Activity	Location	Cost
Jul 2022 - Jun 2023	Creative for Sales Collateral/eblasts		\$ 9,000.00
	July e-blast \$500 per e-blast		
	August e-blast \$500 per e-blast		
	September e-blast \$500 per e-blast		
	October e-blast \$500 per e-blast		
	November e-blast \$500 per e-blast		
	December e-blast \$500 per e-blast		
	January e-blast \$500 per e-blast		
	February e-blast \$500 per e-blast		
	March e-blast \$500 per e-blast		
	April e-blast \$500 per e-blast		
	May e-blast \$500 per e-blast		
	June e-blast \$500 per e-blast		
<b>Total Marketing Activities \$</b>			<b>9,000.00</b>
<b>Grand Total Activities Per Fiscal Year \$</b>			<b>60,950.00</b>

**DISCOVER  
SANTA  
CLARA™**

5001 GREAT AMERICA PARKWAY  
SANTA CLARA, CALIFORNIA 95054

408-748-7095

[DiscoverSantaClara.org](http://DiscoverSantaClara.org)





*Santa Clara  
Convention Center*

Monthly Sales  
Progress Report

May 2022

Updated: 06-09-22

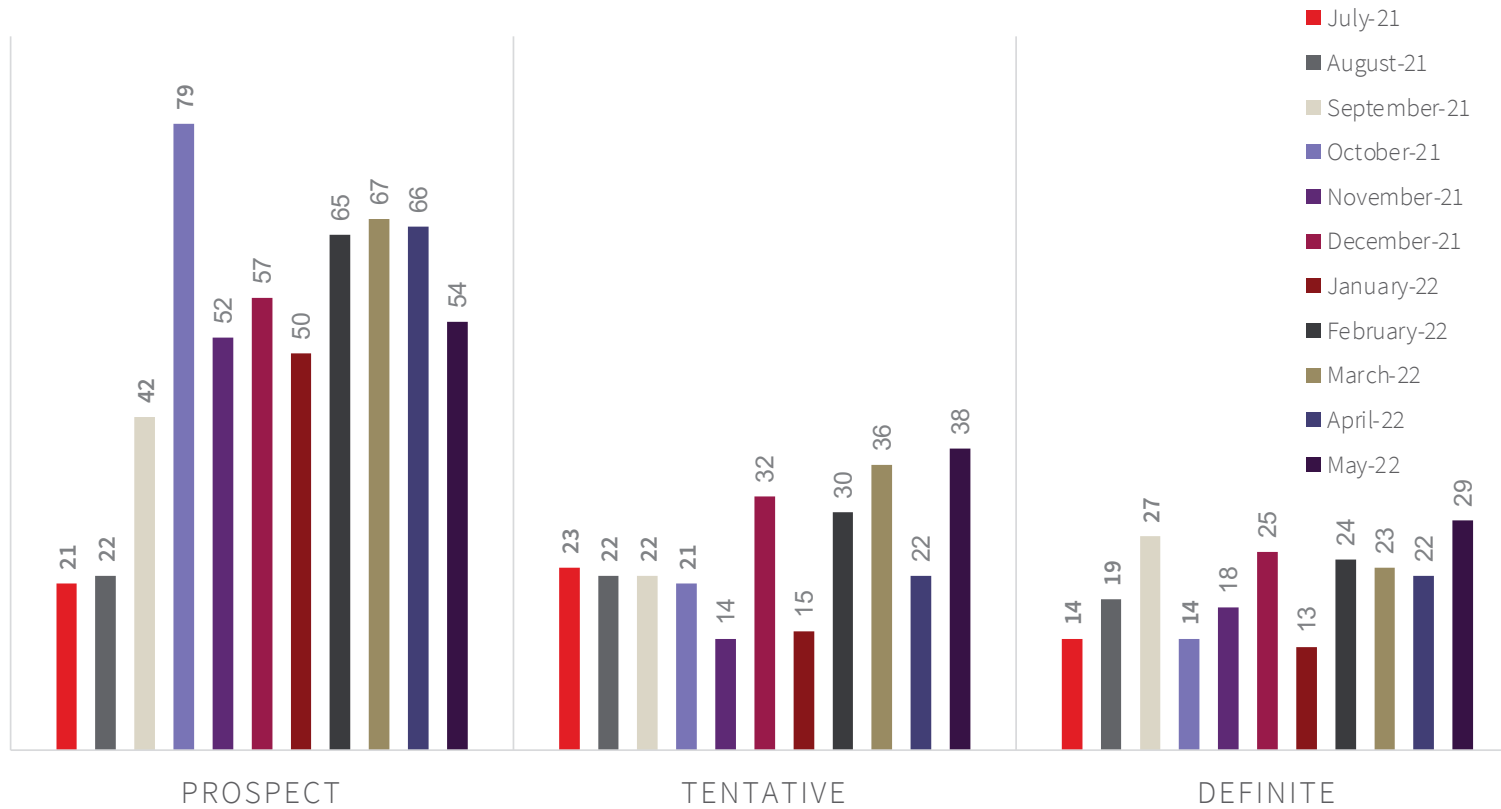


## Executive Summary

- The SCCC team has reached the recommended level of prospects to maintain consistent sales activity to build the pipeline for P3-P5 events
- P1 Definite Short Listed → No Dig Show 2026
- Exceeded Definite goals for definite leads for P3-P5
- Decrease in lost leads
- Recruitment on going for DMO Sales Manager
- Economic Impact current



# Monthly Lead Trends | FY 21-22



## Monthly Totals by Event Type

	P 1 - P 2	P 3 - P 5
Current Active Prospects	40	520
<b>May</b>	<b>P 1 - P 2</b>	<b>P 3 - P 5</b>
New Prospects	2	52
New Tentatives	1	37
New Definites	0	29



Silicon Valley/Santa Clara DMO Inc.			
Performance Measures			
	2021/22 Target	May	NOTES
1. Event Mix (Consumed)			
Percent of P1 Events	1%	0%	
Number of P1 Events	1	0	
Percent of P2 Events	2%	0%	
Number of P2 Events	2	0	
2. Number of Definite Events Booked (booked in the year for future years)			
Number of P1 Events	3	0	
Number of P2 Events	6	0	
3. Convention Center Gross Revenue (P1 & P2)	\$876,000	\$0	
4. Number of Room Nights Booked (for future years)	9,375	0	
5. Number of Room Nights Consumed	3,125	0	
6. Number of Weeks Impacted (Consumed)	3	-	Reported at year-end
7. Customer Service Survey Results (overall satisfaction)	85%	-	Reported at year-end
8. Number of Prospects (active) (non-cumulative P1 & P2)	770	40	FY 2021/22 was based on full year staffing of two sales manager and DOS
9. Economic Impact (Consumed P1 and P2 events)	\$2,010,649	\$0	

Anthony Mancuso	2021/22 Target	May	NOTES
Prospecting Goal - Number of new prospects	210	20	
Actual	14	0	Anthony Resigned in the month of May

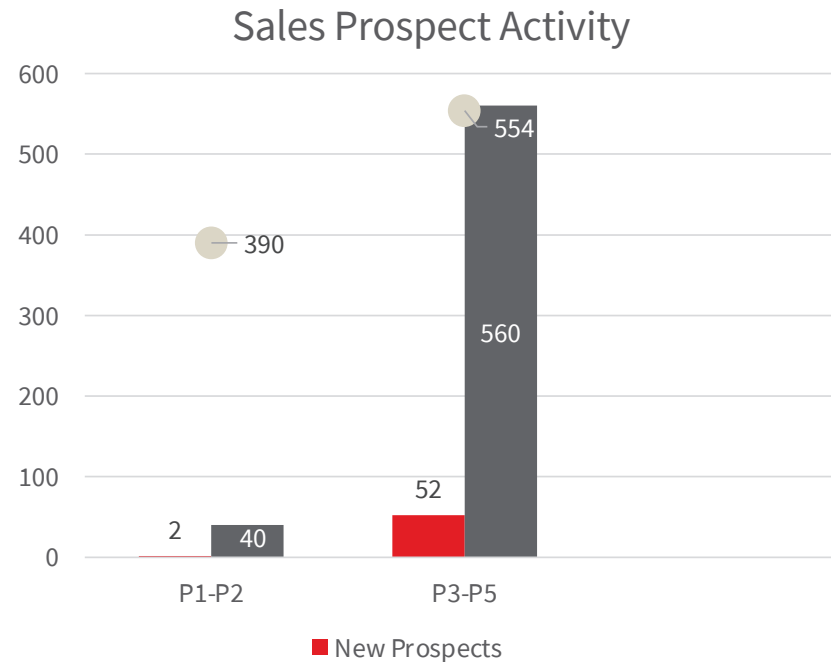
Michael Baker	2021/22 Target	May	NOTES
Prospecting Goal - Number of new prospects	180	20	
Actual	12	1	

Prospect Conversion Rate	1.17%	0%	
--------------------------	-------	----	--

## SCCC Sales Prospects

The sales teams across all partners added **54** new prospects for the SCCC in the month of May, with an additional 43 being researched.

- Research Activity
  - Total: 225
  - New Added for the month: 43
- There is a goal to maintain a certain level of sales activity.
  - P1-P2 = **390 (current staffing levels)**  
*770 (proposed staffing levels)*
  - P3-P5 = **554**
- New prospects added represent:
  - 12,009 room nights and 58,206 attendees
  - \$2,155,206.00 in Overall Projected Building Spend
- Economic Impact
  - \$21,157,386.65

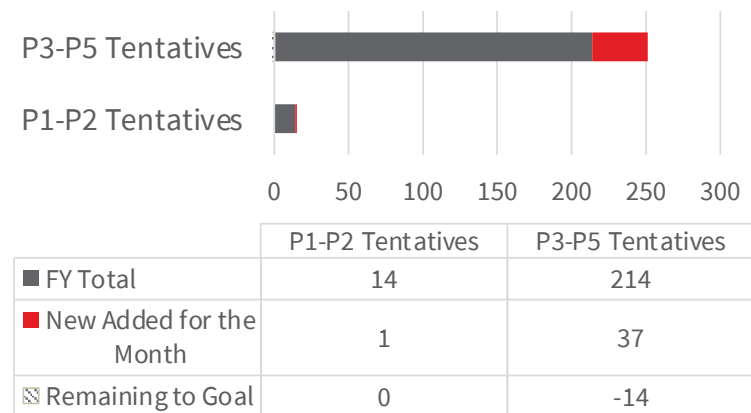


## SCCC Sales Tentative Events

The sales teams across all partners added **38** new tentative events for the SCCC in the month of May.

- There is a goal to achieve **252** tentatives annually
- The SCCC team achieved **100%** of its overall annual goal
- The DMO team has achieved **103%** of its annual goal
- The conversion rate from prospect to tentative YTD is **46%**
- Economic Impact
  - \$9,684,595.04

### Total Tentatives Funnel

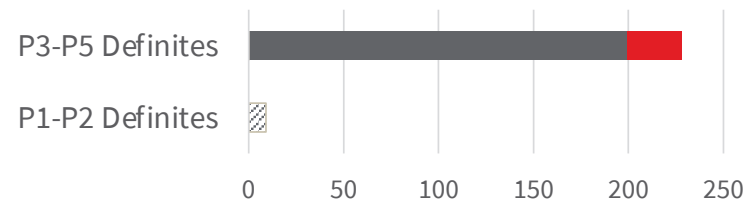


## SCCC Sales Definite Events

The sales teams across all partners added **29** new definite events for the SCCC in the month of May for future dates.

- The SCCC teams FY definite booking goal is **224**
  - Spectra's goal is 30
  - Levy's goal is 194
- The DMO FY definite booking goal is **9**
- The conversion rate from tentative to definite YTD is **11%**
  - Spectra booked 24
  - Levy booked 5
- Economic Impact
  - \$7,448,398.03

### Total Definites Funnel



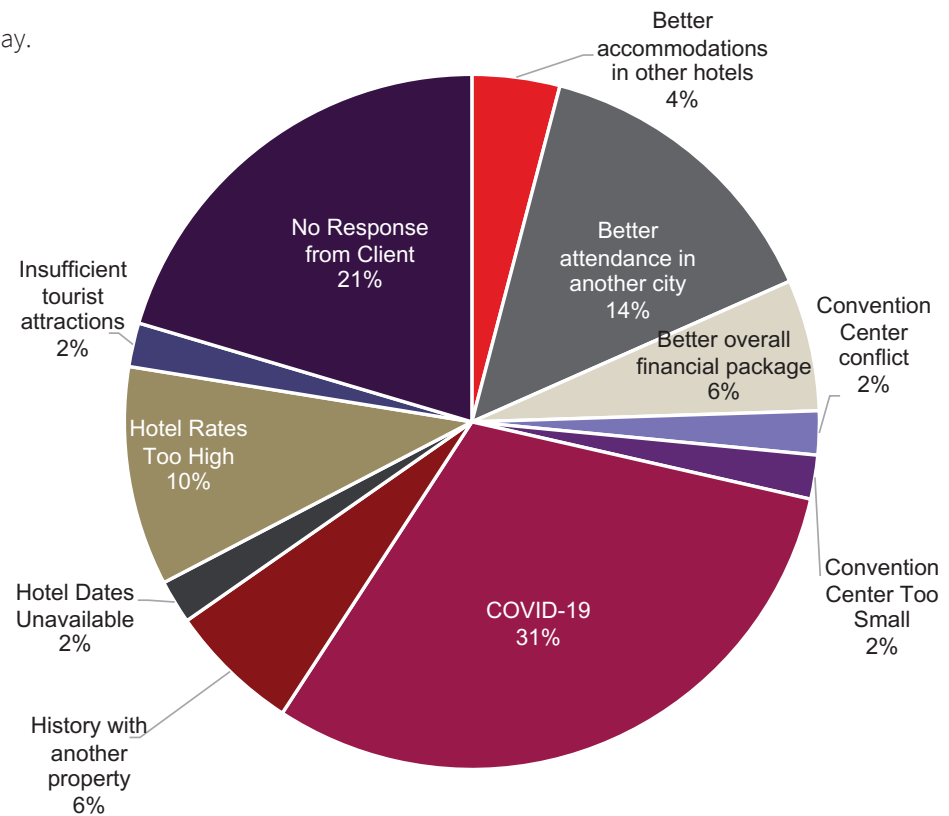
	P1-P2 Definites	P3-P5 Definites
■ FY Total	0	199
■ New Added for the Month	0	29
▨ Remaining to Goal	9	-4

## SCCC Sales Lost Events

There were 2 pieces of lost business in the month of May.

- The events represented:
  - 2,000 attendees
  - \$575,000 in SCCC revenue (rental + F&B)
- Economic Impact
  - \$2,314,048.89

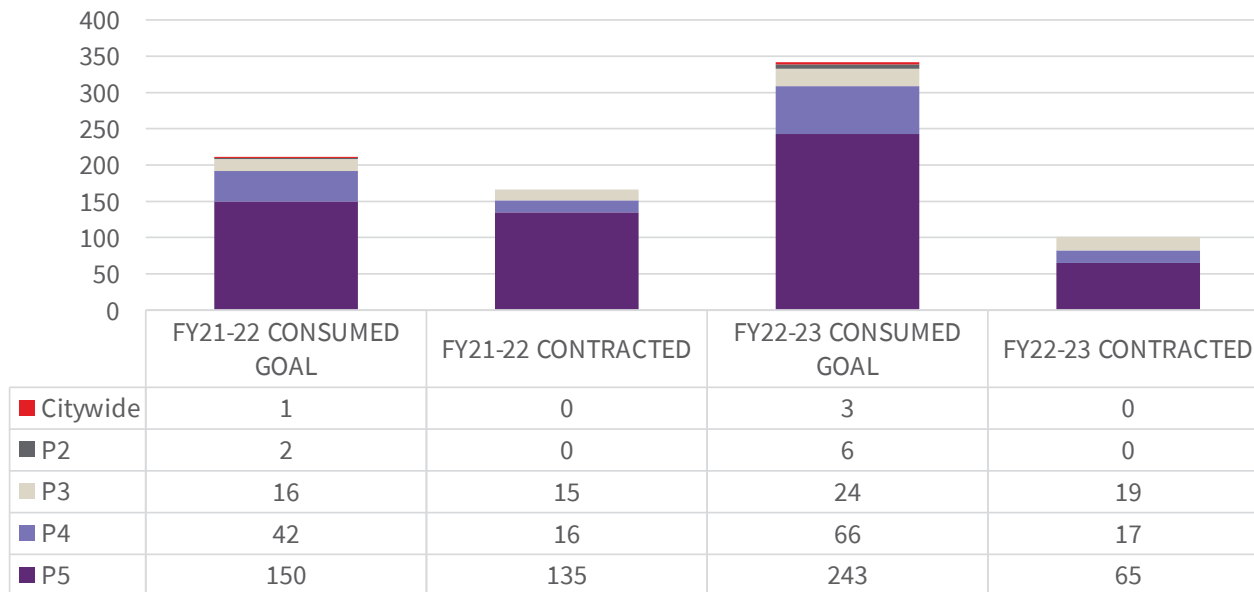
## Lost Business by Reason YTD



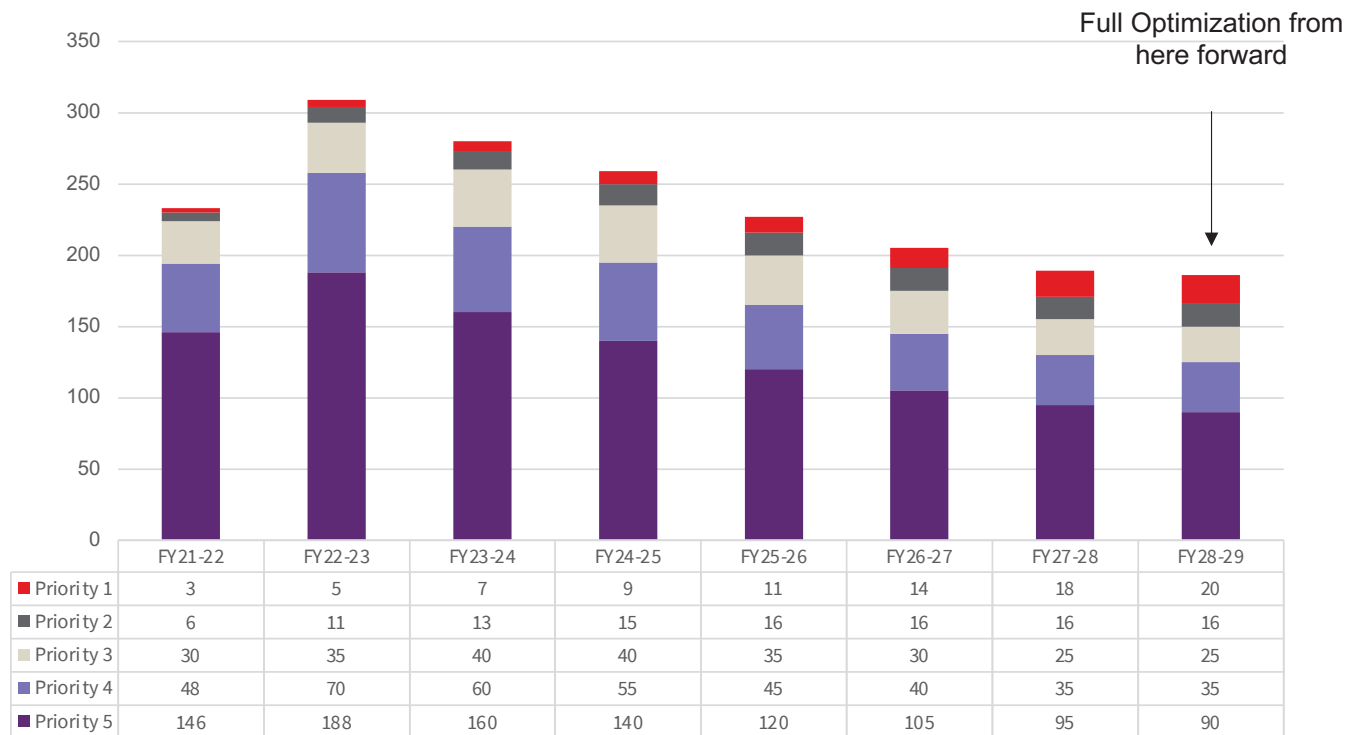


## FY Budget Events (consumed in this FY)

### FY Consumed Goals



# Event Mix Goal to Full Optimization



# Website Performance

Discover Santa Clara > All

YTD 2022									
	Traffic		E-Commerce Goals				Online Advertising		
	Visits	% of Visits	CDRS	Click-to-Calls	RFPs Started	RFP's Completed	Media Spend	PPC Cost per Visit	PPC Cost per Lead
<b>Website</b>	955		4	4	65	1	\$0	\$0.00	\$0.00
Previous Year	0		0	0	0	0	\$0	\$0.00	\$0.00
Difference to PY	955		4	4	65	1	\$0	\$0.00	\$0.00
Change %	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%		
<a href="#">Google My Business</a>	0			0					
Previous Year	0			0					
Difference to PY	0			0					
Change %	0.0%			0.0%					
<b>Channels</b>									
Direct	603	63.14%	1	0	43	1			
<a href="#">Natural Search</a>	203	21.26%	3	2	20	0			
<a href="#">Paid Search</a>	0	0.00%	0	0	0	0			
<a href="#">Email</a>	0	0.00%	0	0	0	0			
<a href="#">Display</a>	0	0.00%	0	0	0	0			
<a href="#">Paid Social</a>	0	0.00%	0	0	0	0			
<a href="#">Other Campaign</a>	0	0.00%	0	0	0	0			
<a href="#">Meta Search</a>	0	0.00%	0	0	0	0			
<a href="#">Referring Domains</a>	50	5.24%	0	0	1	0			
<a href="#">Social Networks</a>	97	10.16%	0	1	1	0			
Internal	9	0.94%	0	1	0	0			

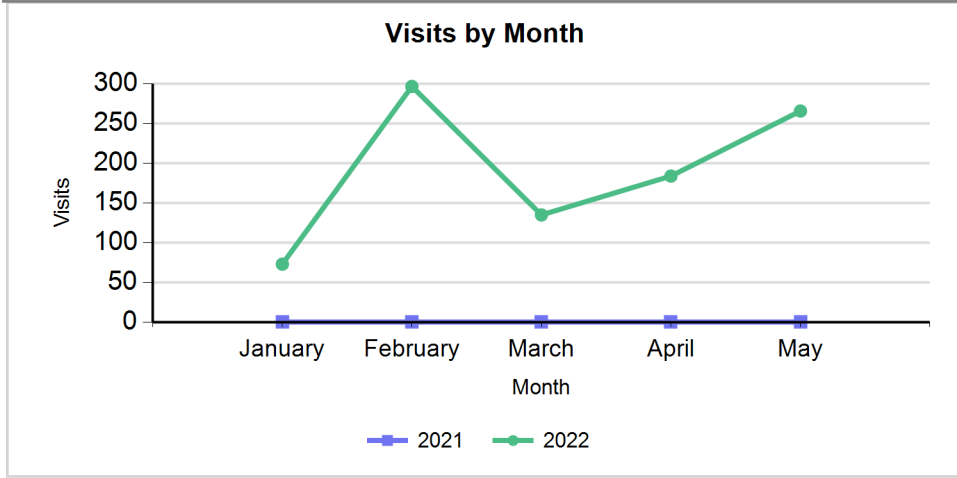
# Website Performance

Discover Santa Clara > All

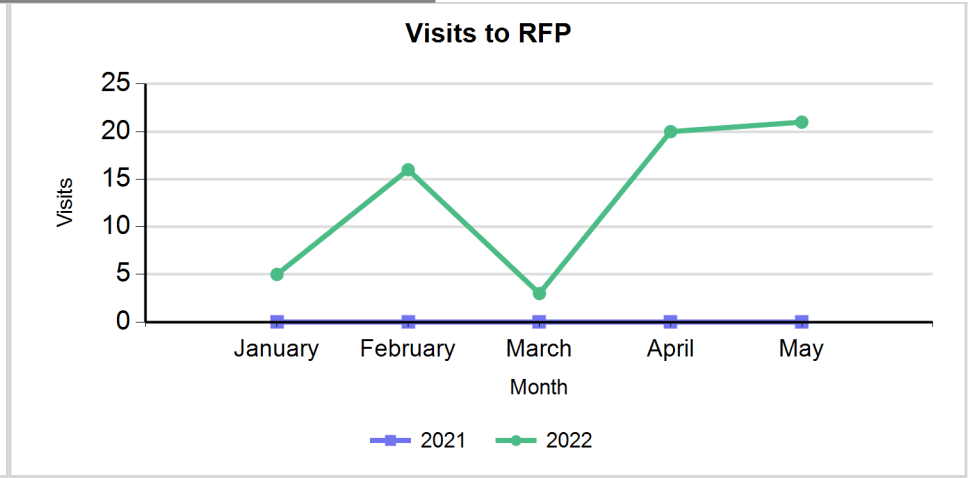
May 2022									
	Traffic		E-Commerce Goals				Online Advertising		
	Visits	% of Visits	CDRS	Click-to-Calls	RFPs Started	RFP's Completed	Media Spend	PPC Cost per Visit	PPC Cost per Lead
<b>Website</b>	266		3	3	21	0	\$0	\$0.00	\$0.00
Previous Year	0		0	0	0	0	\$0	\$0.00	\$0.00
Difference to PY	266		3	3	21	0	\$0	\$0.00	\$0.00
Change %	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%		
<a href="#">Google My Business</a>	0			0					
Previous Year	0			0					
Difference to PY	0			0					
Change %	0.0%			0.0%					
<b>Channels</b>									
Direct	103	38.72%	0	0	14	0			
<a href="#">Natural Search</a>	116	43.61%	3	2	6	0			
<a href="#">Paid Search</a>	0	0.00%	0	0	0	0			
<a href="#">Email</a>	0	0.00%	0	0	0	0			
<a href="#">Display</a>	0	0.00%	0	0	0	0			
<a href="#">Paid Social</a>	0	0.00%	0	0	0	0			
<a href="#">Other Campaign</a>	0	0.00%	0	0	0	0			
<a href="#">Meta Search</a>	0	0.00%	0	0	0	0			
<a href="#">Referring Domains</a>	16	6.02%	0	0	1	0			
<a href="#">Social Networks</a>	24	9.02%	0	0	0	0			
Internal	7	2.63%	0	1	0	0			

# Website Performance

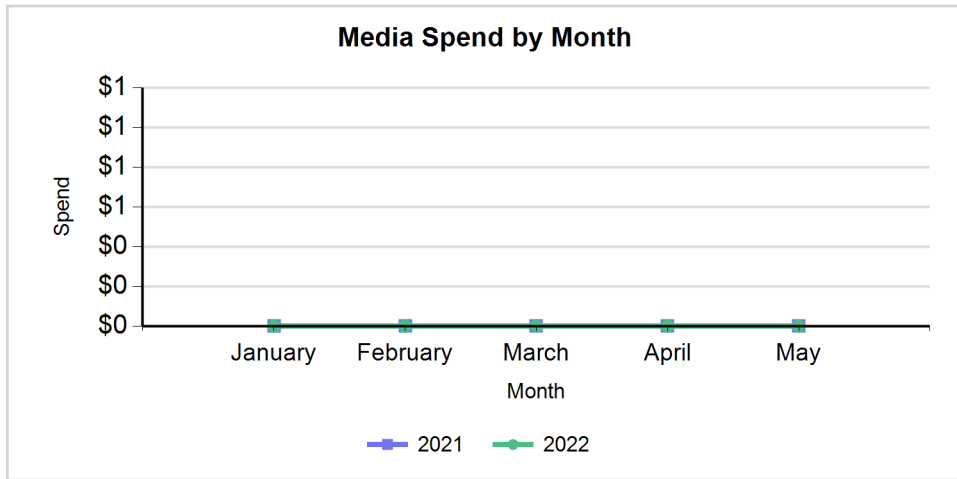
Discover Santa Clara > All



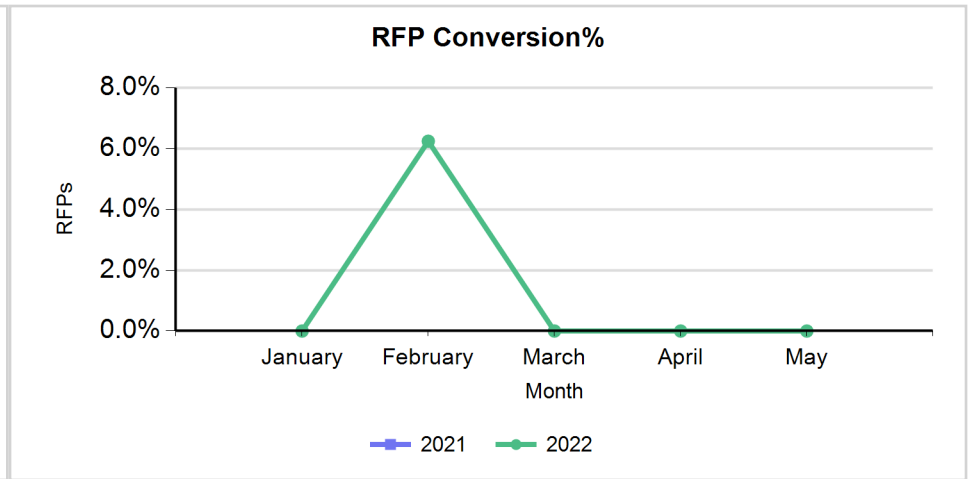
Graph breaks down the visits to your website by the months selected and compares the current YTD value to the previous year.



Graph breaks down the visits to your RFPs by the months selected and compares the current YTD value to the previous year.



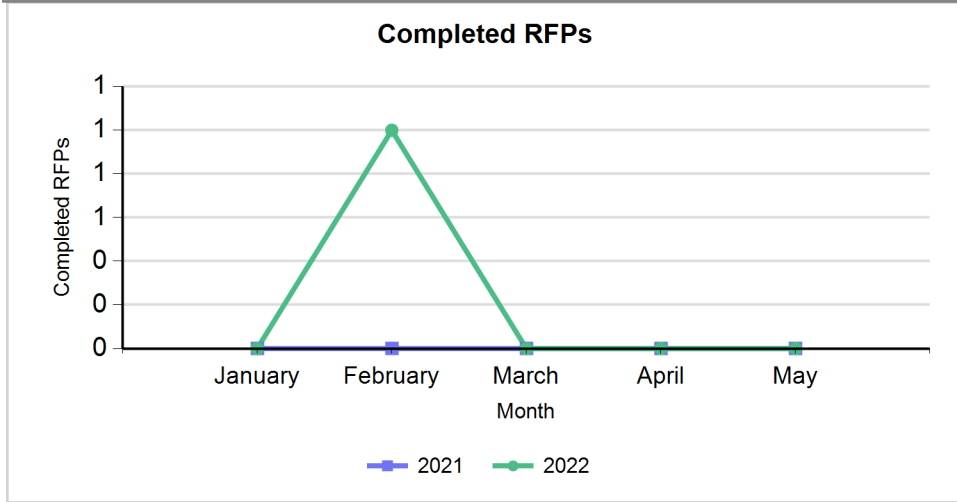
Graph breaks down the media spend for your website by the months selected and compares the current YTD value to the previous year.



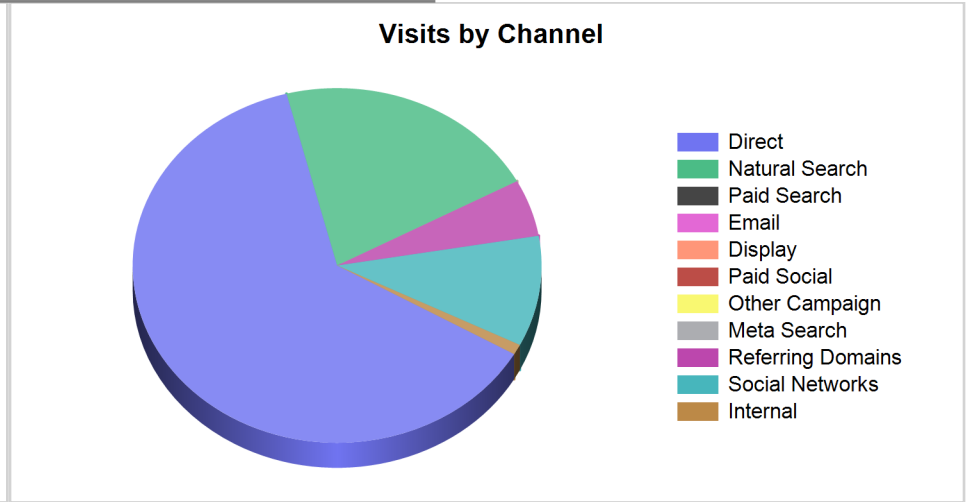
Graph breaks down the conversion percentage for your RFPs by the months selected and compares the current YTD value to the previous year.

# Website Performance

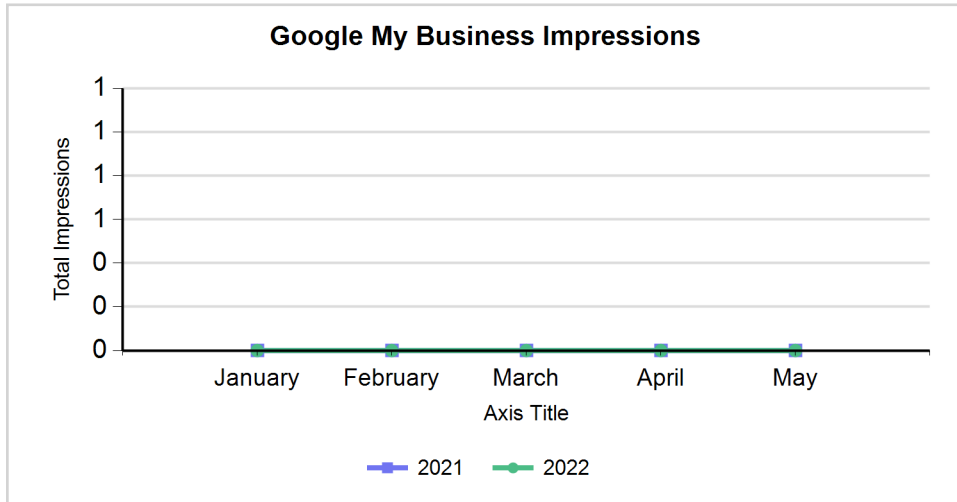
Discover Santa Clara > All



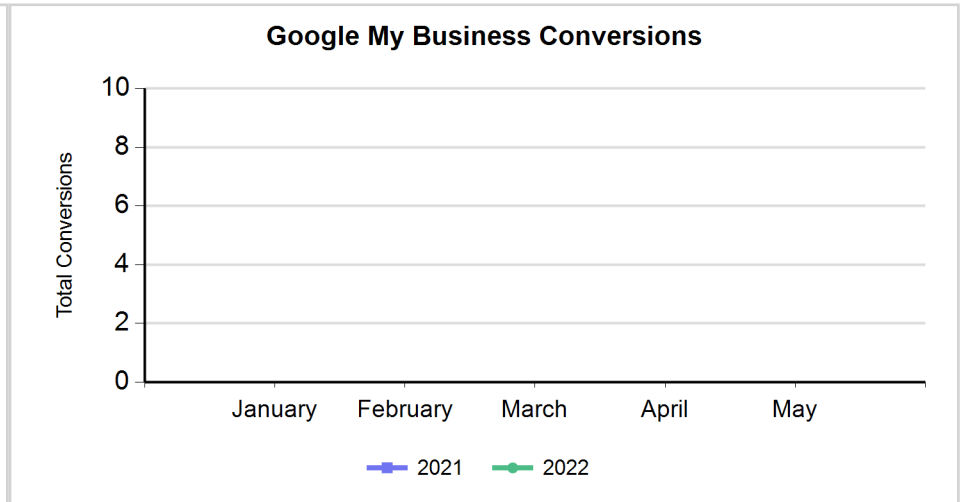
Graph breaks down the total completed RFPs for your website by the months selected and compares the current YTD value to the previous year.



Graph breaks down the visits to your website by channel.



Graph breaks down the GMB total impressions or views from the Google search result listings or map listings (Direct brand search or Discovery search result).



Graph breaks down the total conversions or actions from your GMB listings. Direct traffic to your site, a phone call (directly from GMB listing) or a click to get directions.



Group Sales & Marketing  
Incentive and Performance Plan &  
Goal Setting Process

June 16, 2022

THINK BIG. LOOK FORWARD.



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## OBJECTIVE AND BACKGROUND

The object of the proposed sales incentive and performance plan is to create an overall sales environment that rewards exemplary individual performance and includes an objective approach to managing performance, specific to sales team members.

According to the Destinations International Compensation and Benefits Study, and JLL's review of existing industry incentive and sales performance plans, performance incentives for Destination Marketing Organizations can range in level of potential compensation from 5% of base salary to an "uncapped" approach that does not have a maximum amount that can be earned. The Discover Santa Clara™ (DSC) Board of Directors approved a 25% of base salary maximum payout for employees eligible to participate in the incentive plan. The following is an approach to creating an incentive plan that rewards exceptional performance and a complementary sales performance plan, which provides an objective platform for monitoring performance. In addition, a proposed goal setting process is included to ensure internal and external participation in the process.

This plan is designed to create a dynamic sales environment that rewards outstanding performance, objectively monitors achievement of accepted performance standards, and contains an inclusive goal setting process.

In summary, the focus of this plan is on **high performance** and **rewarding production**. Combined with a competitive base salary, this will reward and **attract high performing** sales leaders. As stated, the maximum percentage of salary that can be achieved in the proposed Incentive Plan is set at **25% of base salary**. The higher level of "**upside**" is designed to reward performance that goes above and beyond. To achieve **25% incentive payout**, a Sales Manager must **achieve 130%** of the approved goals.

### Accountability – Sales Performance

The goal of the proposed plan is to create an objective approach to managing sales performance. There is a recommended approach to monitoring sales results on a quarterly basis and instituting performance improvements measures when needed. The plan creates an agreed upon timeframe for a sales manager to achieve the agreed upon minimum quantitative results. The overall timeline to perform at a satisfactory level is nine months and there are thresholds that a sales manager must meet to be successful with Discover Santa Clara. This is further outlined below.

### Goal Setting Process

The inclusive nature of the proposed goal setting process is designed to receive input from the internal sales managers, engage the key partners and include a review by the SCTID Hotels prior to gaining feedback and approval from the Discover Santa Clara™ Board of Directors.

## PERFORMANCE EXPECTATION AND REWARD

All DSC sales team members are required to meet or exceed sales performance goals on an annual basis to receive incentive compensation. The incentive awards begin when a sales manager has achieved 100% of their individual goals. A future consideration may include a requirement of the sales team achieving a minimum overall performance as a prerequisite for the full achievement of the individual incentive compensation in the future.

In conjunction with this plan, sales managers who meet or exceed sales performance goals can receive an incentive payout up to 25% of base salary. The maximum incentive is achieved when goals are exceeded by 30% or more, e.g., (130% of goal = 25% base salary incentive).

### Initial Key Metrics | Individual Sales Managers

Based on the current strategy of the sales effort, the proposed quantitative metrics for individual sales managers that should be taken into consideration are:



Performance Indicator	Weight
1. Number of P1s and P2s Booked	33%
2. Total Room Nights Booked	33%
3. Convention Center Gross Revenue Booked	33%

The virtual equal weighting of the proposed metrics is designed to support the importance of the number of P1's and P2's booked in conjunction with the room nights and center revenue secured for the future. The metrics are anticipated to evolve to include consumption results as groups are secured and begin to meet at the Santa Clara Convention Center. In other words, the actualized room nights and Convention Center revenues will tracked and factored into the overall incentive calculation.

## COMPENSATION ELEMENTS & ELIGIBILITY

Compensation to the participants in this plan consists of the following elements:

### Base salary + Sales Incentive

An incentive payout will be based on the achievement of a sales manager's annual goal during a Fiscal Year. The reward of the incentive will begin when a sales manager has achieved 100% of their annual goals. The sales incentive plan will be paid after the end of the Fiscal Year and upon completion of an audit of the annual sales results.

Eligible employees must be employed as of July 1<sup>st</sup> through June 30<sup>th</sup> for full participation or by January 1<sup>st</sup> through June 30<sup>th</sup> for a pro-rated level of eligibility. An employee must be employed with DSC at the time the incentive is paid to be eligible for the incentive payout.

In the event of a booking in a fiscal year that is cancelled in the same fiscal year, the booking will be taken out of incentive calculation. If a compliant booking is completed and a cancellation occurs due to unavoidable circumstances (i.e., Force Majeure), there is no reduction to the incentive earned.

A sales manager may be ineligible for the incentive payout if he or she is subject to any disciplinary action during the calendar year. Examples of this could include attendance or behavior issues.

## GROUP SALES & MARKETING INCENTIVE PLAN PAYOUT SCHEDULE

The new incentive plan for Discover Santa Clara™ is designed to create an opportunity to be rewarded for exemplary performance. This plan provides a strong motivation for sales-driven team members to produce results above their base goals. Combined with a competitive base salary, this plan is designed to create an environment that focuses on high level performance and rewards exemplary sales production which in return will attract and retaining industry sales talent.

Below is breakdown of year-end performance results and subsequent incentive payout. The maximum bonus that can be earned in the incentive plan is 25% of base salary. To achieve a 25% incentive payout, a sales manager must achieve over 130% of the agreed upon goal(s).

The table below illustrates the progression of incentive compensation in correlation to the percent achievement of individual sales goals.

Incentive Payout Schedule*	
Percentage Goal Achievement	Percentage Incentive Compensation
100 %	10%
115%	17.5%
130+%	25%

## GROUP SALES & MARKETING INCENTIVE PLAN PAYOUT SCHEDULE (CONT.)

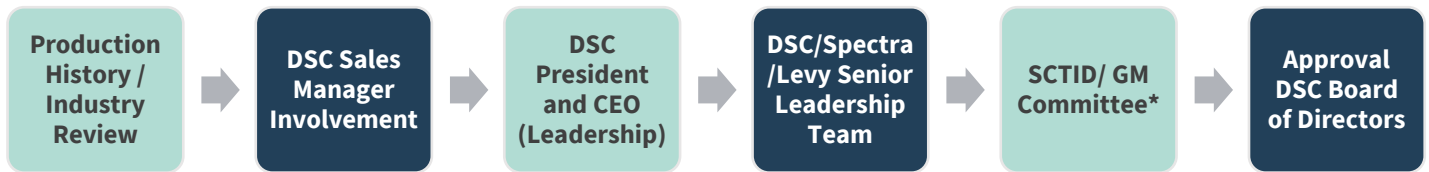
The calculation of the sales managers incentive will be prorated based on the actual percentage that has been achieved. For example, a sales manager who achieves 118% of the individual goal would receive a 19% incentive payout.

(18%/30% = .6 or 60% of available percentage X 15% (25%-10%) = 9 percentage points added to 10% baseline = 19%)

Incentive Payout Schedule*			
Percentage Goal Achievement	Percentage Incentive Compensation	Percentage Goal Achievement	Percentage Incentive Compensation
100 %	10%	116%	18%
101 %	10.5%	117%	18.5%
102%	11%	118%	19%
103%	11.5%	119%	19.5%
104%	12%	120%	20%
105%	12.5%	121%	20.5%
106%	13%	122%	21%
107%	13.5%	123%	21.5%
108%	14%	124%	22%
109%	14.5%	125%	22.5%
110%	15%	126%	23%
111%	15.5%	127%	23.5%
112%	16%	128%	24%
113%	16.5%	129%	24.5%
114%	17%	130% max	25%
115%	17.5%		

## GOAL SETTING PROCESS

An inclusive approach to goal setting is an important process for overall success. The following are the newly proposed suggested steps, based on the current organizational structure, for the goal setting process. The process is designed to gain approval and buy-in from internal and external stakeholders and creates goals that are aspirational, but mutually developed. The goal setting process is also designed to include the internal sales team and engage the SCTID hotels



**\*SCTID/GM Committee will review the overall goals and provide input.**

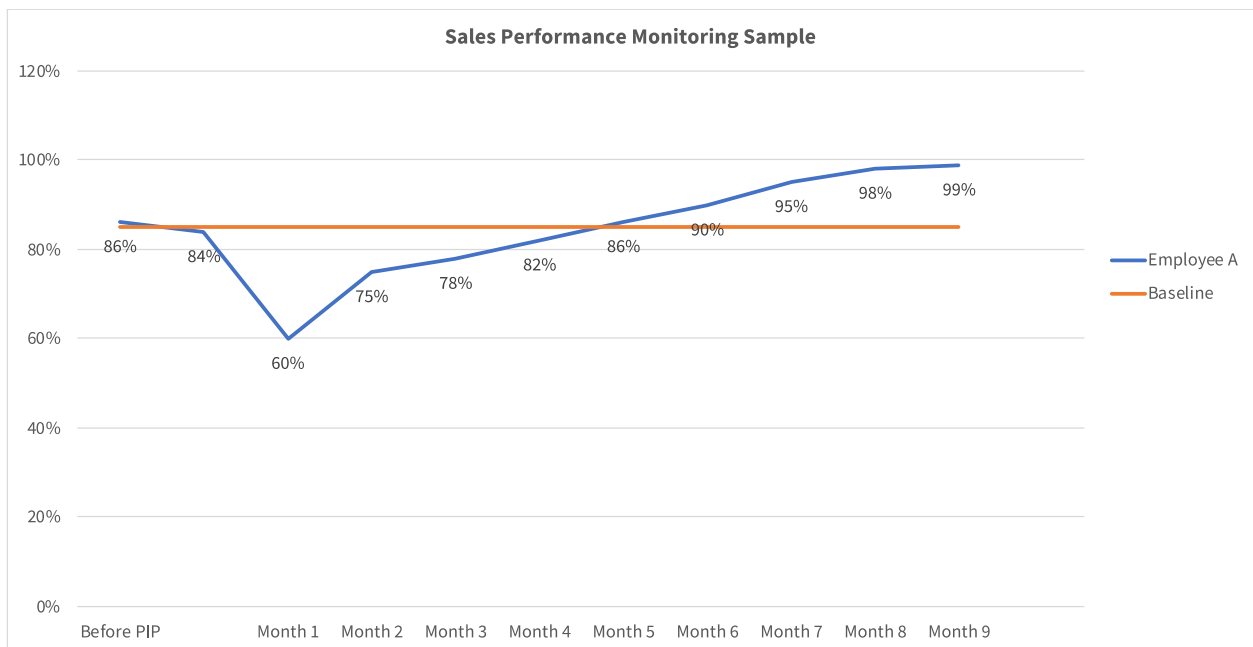




## SALES PERFORMANCE MINIMUMS AND PERFORMANCE MONITORING

The sales performance plan utilizes a **nine-month performance monitoring period**. The nine-month period is ongoing or a rolling period, using three (3) month periods or quarters for monitoring purposes. Sales performance program goals for monitoring are determined on a calendar year based on the individual sales manager goals. The performance data will be monitored and reported to the CEO and a third-party Human Resources team or assigned subcommittee to help support objective oversight and consistent coaching. **The minimum performance accepted goal for a sales manager to achieve is a verified minimum of 85% of the targeted number of events, room nights, and Convention Center revenue goals in a rolling nine-month period.** In addition, if the sales manager falls below 60% achievement in any consecutive two-month periods, they will be subject to performance improvement planning.

The chart below illustrates the performance per month, keeping in mind the baseline minimum and the cumulative minimum performance over a nine-month period of 85%:



## SALES PERFORMANCE MINIMUMS AND PERFORMANCE MONITORING (CONT.)

The chart below illustrates the minimum performance per quarter and the cumulative minimum performance over a nine-month period:

### Minimum Performance Illustration

Review Periods		Minimum Achievement
<b>Quarter 1</b>	3 months	85%*
<b>Quarter 2</b>	3 months	85%*
<b>Quarter 3</b>	3 months	85%*
<b>Cumulative Performance</b>	9 months	85%

\*In addition, below 60% achievement of goal in any consecutive two-month periods will result in not achieving minimum performance and subject to disciplinary action up to and including termination.

Sales performance goals will be consistently reviewed through direct reporting from the Customer Relationship Management (CRM) platform. The Discover Santa Clara™ leadership will monitor performance on a monthly basis and the designated reviewer/committee will also receive the reporting to confirm consistent implementation of the agreed upon plan. An individual performance report for each sales manager will be generated monthly.

If a sales manager falls below the minimum performance guideline of 85% over a nine-month period, they may be subject to termination. In addition, if performance numbers fall below 70% for two consecutive months, it will result in the sales manager being placed on a Performance Improvement Plan (PIP).

## PERFORMANCE IMPROVEMENT PLAN – MONITORING SALES PERFORMANCE

Performance Improvement Plans (PIP) will be implemented as needed and are designed to identify performance issues and to determine potential support that can be provided to improve results. The PIP is designed to assure consistent implementation of sales performance practice for all group sales managers. The DSC CEO will be accountable for the administration of Performance Improvement Plan. The quantitative nature of the plan and the accessibility for consistent reporting provides an opportunity for human resources support and/or designated subcommittee, to provide oversight and/or support for the administration of the performance improvement. Human Resources will keep all records of these activities, as part of a sales team member's employee file.

The PIP process is implemented when a sales manager is not satisfactorily meeting his/her defined minimum goals as described above and has not satisfactorily met the minimum 85% threshold of their goal during a 90-day period (or for a rolling three quarters). In addition, a sales manager who has not met 70% of his/her goals within a 60-day period will also be subject to a PIP. The overall goal of the PIP is to identify potential performance issues early and develop a plan to improve the booking trends. The performance levels are monitored on a quarterly basis and PIP's will be administered after one quarter of a sales manager achieving results below 85%. In both cases, the sales manager will automatically be put on a PIP. Should the sales team member continue to not meet their defined minimum goals after being placed on a PIP, the sales team member would be subject to further disciplinary action up to and including termination.

### Check in Points – Performance Improvement Plan

- PIP is implemented when the individual has not satisfactorily met 70% of their goals within a two-month period. If trends do not improve, subject to further discipline
- PIP is implemented when a sales manager is below 85% for a quarter and/or a cumulative nine-month period.
- Sales manager is subject to disciplinary action, up to and including termination, if minimum goals are not met in a 9-month period.

Discover Santa Clara™ reserves the right to modify sales goal expectations due to circumstances which are extenuating or beyond the organization's control; examples include: a natural disaster, economic downturn, etc. Each sales manager will sign the sales performance plan as an acknowledgment and to kick off the new direction.

### New Hires – Performance Plan Eligibility

Newly hired Sales manager's annual performance goals are determined on the standard percentage calculation using a prorated formula. Sales Performance Plan monitoring will begin after 60 days of employment to give a new sales manager time for orientation.

## SAMPLE CALCULATION

The following is a sample calculation of an incentive payout:

### Sales Manager A – Goals

<p><b>5</b> [total bookings] [2 P1s + 3 P2s]</p>	<p><b>10,000</b> [total room nights booked] [5,500 P1s + 4,500 P2s]</p>	<p><b>\$4,250,000</b> [total convention center revenue] [\$2,000,000 P1s + \$2,250,000 P2s]</p>
--	---	---

### Sales Manager Actual

<p><b>5</b> [total bookings] [2 P1s + 3 P2s]</p>	<p><b>11,000</b> [total room nights booked] [6,000 P1s + 5,000 P2s]</p>	<p><b>\$4,500,000</b> [total convention center revenue] [\$2,250,000 P1s + \$2,250,000 P2s]</p>
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Sample Salary = \$95,000

Percentage Achieved (prorated) 105% = 12.5% award or \$11,875

Performance Indicator	Weight	Actual
1. Number of P1s and P2s Booked 5/5	34%	34%
2. Total Room Nights Booked 11K/10K	33%	36%
3. Convention Center Gross Revenue Booked 4.5/4.25	33%	35%
		<b>105%</b>