



SEE MONTEREY BOARD ORIENTATION

Mission Statement:

To generate community prosperity for Monterey County through the responsible promotion and growth of the tourism economy.

Vision:

A thriving tourism economy that enriches Monterey County's economic vitality and quality of life.

SEE
MONTEREY

DMO (Destination Marketing Organization):

An organization responsible for promoting a specific destination to attract visitors, focusing on marketing and sales efforts. DMOs work to increase visitation, tourism revenue, and overall economic impact for the destination.

CVB (Convention & Visitors Bureau):

Traditionally refers to the same function as a DMO, promoting a destination for meetings, conventions, and leisure travel. Many CVBs have rebranded as DMOs to reflect a broader scope of marketing and promotion

LOCAL TRAVEL INDUSTRY PLAYERS



PROMOTE

- Develop and maintain marketing programs
- Attractant valuable meeting/conferences
- Keep Monterey County top-of-mind as a premier travel destination
- Promote sustainable/responsible behavior



ADVOCATE

- Champion the importance of the Monterey County travel and tourism industry
- Foster relationships among industry stakeholders
- Provide meaningful education opportunities

ADVISE/EDUCATE

- Enhance the interests and investments of the Monterey County travel and tourism industry



CHAMBER OF COMMERCE
& TOURIST CENTERS

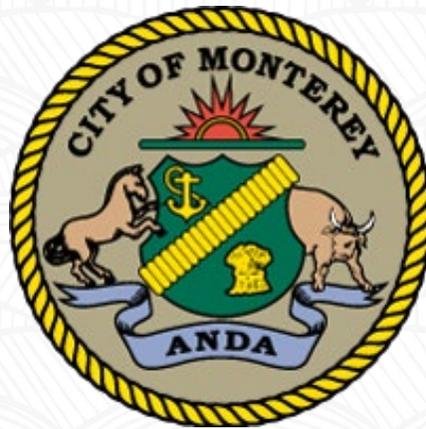
CARMEL
CHAMBER of
COMMERCE



MCHA

MONTEREY COUNTY
HOSPITALITY
ASSOCIATION





FUNDING REVIEW: TOT

Transient Occupancy Tax (TOT)

- The Transient Occupancy Tax (TOT) is the rent charged to transient guests in hotels/motels
- The TOT is commonly known as a “bed tax” or “hotel tax”.
- Taxes range from of 10.5% - 14% in the different jurisdictions around the county
- The TOT revenues benefit programs to stimulate tourism, promote the economy, create jobs, and/or a better quality of life in Monterey County. Entities and activities currently funded are economic and agricultural development, cultural heritage tourism, cultural arts programs, the film commission.



FUNDING REVIEW: TID is an Assessment

Monterey County Tourism Improvement District (TID)

- A TID or TBID, or Tourism Business Improvement District, is a way to fund tourism promotion and economic development in a local area.
- The funds are raised through assessments on businesses in the area, which can be passed on to customers.
- The goal of a TID is to increase revenue for the businesses that are assessed, and to bring more visitors to the destination.
- Used by over 60 DMOs in CA and growing throughout the US and internationally



DEVELOPMENT SET ASIDE (DSA)

What is it comprised of?

- In Monterey County, the "Development Set-Aside" (DSA) program funds four entities: See Monterey, the Arts Council for Monterey County, the Monterey County Film Commission, and the Monterey County Business Council, through a formula that sets aside a portion of development-related revenue.
- The Board of Supervisors Economic Development Committee reviews and provides oversight regarding the distribution, funding, and performance auditing of the Development Set-Aside Agencies.
- See Monterey's DSA Work Plan is strategically aligned with the four key goals outlined in the County's DSA Guidelines.
 1. Economic Development
 2. Work Force Development
 3. Marketing
 4. Collaborations & Partnerships
- The estimated Jurisdiction Investment Partnership with See Monterey through the Development Set Aside (DSA) for FY24-25 was approximately \$1,913,494.

OUR STRATEGIC IMPERATIVES



1

Contribute to the long-term viability of the tourism economy

2

Generate the ideal visitation for Monterey County

3

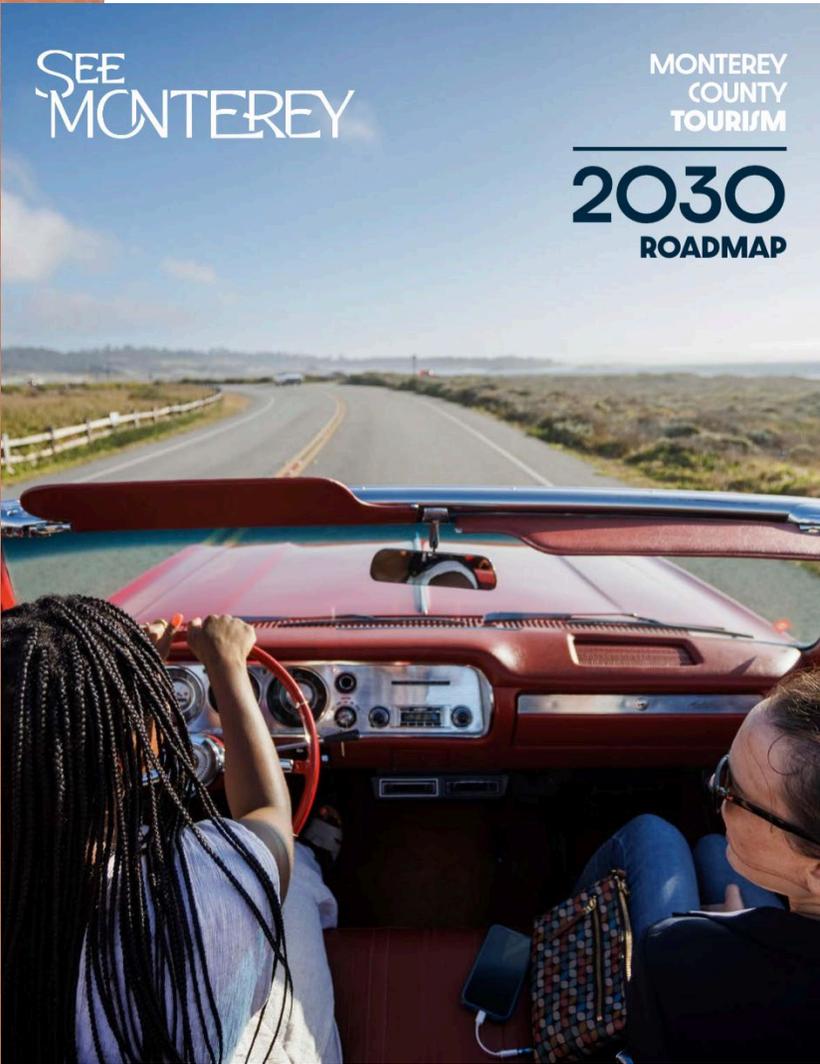
Enhance community and member engagement

4

Ensure long term organizational financial stability

5

Cultivate See Monterey's strong organizational culture



SEE
MONTEREY

MONTEREY
COUNTY
TOURISM

2030
ROADMAP



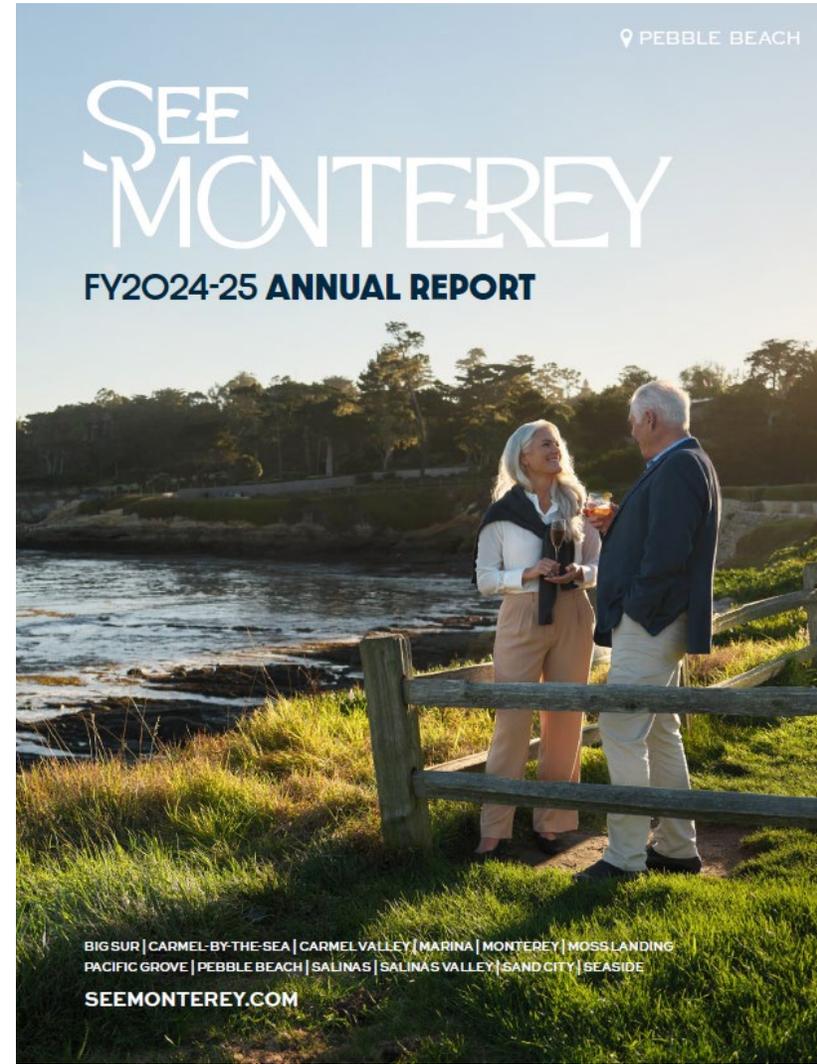
MONTEREY

SEE
MONTEREY

FY2025-26 BUSINESS PLAN

BIG SUR | CARMEL-BY-THE-SEA | CARMEL VALLEY | MARINA | MONTEREY | MOSS LANDING
PACIFIC GROVE | PEBBLE BEACH | SALINAS | SAND CITY | SEASIDE

SEEMONTEREY.COM



PEBBLE BEACH

SEE
MONTEREY

FY2024-25 ANNUAL REPORT

BIG SUR | CARMEL-BY-THE-SEA | CARMEL VALLEY | MARINA | MONTEREY | MOSS LANDING
PACIFIC GROVE | PEBBLE BEACH | SALINAS | SALINAS VALLEY | SAND CITY | SEASIDE

SEEMONTEREY.COM



Any questions?

SEE MONTEREY GOVERNANCE OVERVIEW

Established in May 2000, See Monterey is a private, 501(c)6 Non-profit corporation

Formed through collaborative partnership among business, government and community leaders across Monterey County

Comprised of Marketing, Public Relations, Group Business Development, Community Relations and Operations



SEE MONTEREY GOVERNANCE OVERVIEW

Board of Directors

- 15-19 Directors (voting members), up to 15 Advisors (non-voting members)

Directors:

- 1 seat for each jurisdiction at a minimum investment level set by the Board – 3% investment for smaller jurisdictions, 6% for City of Monterey and Monterey County
 - Board seats are not appointed by the jurisdiction but by the Board
- Elected officials may serve as directors but not officers (Chair, Chair Elect, Treasurer or Secretary)
- 4 Representatives from the MCTID (Monterey County Tourism Investment District) Oversight Committee

Advisors:

- Non-voting
- MCHA (Monterey County Hospitality Association), Arts Council for Monterey County, MCFC (Monterey County Film Commission), MCFB (Monterey County Farm Bureau), MCC (Monterey Conference Center), MRY (Monterey Regional Airport), MST (Monterey Salinas Transit) and At-Large

SEE MONTEREY GOVERNANCE

7 STANDING COMMITTEES

- Executive Committee – Officers
- MCTID Oversight Committee
- Finance Committee
- Compensation Committee
- Sales Committee
- Marketing Committee
- Board Development Committee



THE ROLE OF A BOARD MEMBER

Fiduciary (n. Latin – “trust”)

- A person or organization action on behalf of another
- Trusted to manage affairs due to greater knowledge or expertise
- Held to higher legal and ethical standard of conduct
- Prioritizes the beneficiary’s best interests above all else
- Avoids conflicts of interest and acts with integrity



THE ROLE OF A BOARD MEMBER

Authority

- Hold ultimate authority and responsibility for See Monterey
- Act as a trustee for stakeholders and community

Functions

- Establish objectives and policies
- Approval & oversight of budget
- Elect Board Members and Officers
- Oversee organizational overall performance
- Hire, direct and oversee President and CEO
- Actively participate in committees



THE ROLE OF A BOARD MEMBER

Legal and Ethical Standards

- Comply with laws and organizational policies.
- Adhere to Code of Conduct
- Disclose conflicts of interest
- Demonstrate unwavering loyalty to See Monterey, its mission and the communities it serves.

Affirm By Signing:

Board of Directors Code of Conduct,
Board Member Agreement & Conflict
of Interest Disclosure Statement



EXPECTATIONS OF A BOARD MEMBER

Expectations

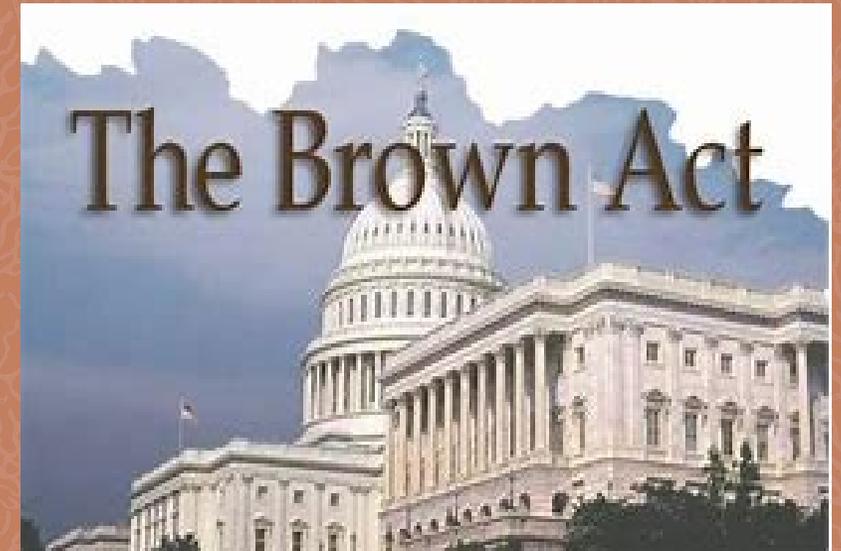
- Actively participate and attend Board meetings, strategic planning sessions, workshop, and organizational events
- Maintain a strong understanding of See Monterey's mission, vision, programs and strategic priorities
- Come prepared and contribute thoughtfully to Board discussions and decision-making processes
- Respect and consider diverse perspectives; offer constructive input to advance the Board's collective goals
- Serve as an ambassador for See Monterey in public forums, with individuals, and across partner organizations
- Advocate for See Monterey's interests at stakeholder and jurisdictional meetings
- Communicate community feedback and concerns to the President and CEO

WHAT IS THE BROWN ACT?

CA law enacted in 1953 to ensure transparency in local government by requiring meetings be open and accessible to the public

Why See Monterey?

MCTID and Jurisdiction investments are public monies



BROWN ACT BASICS

What does it really mean?

- All regular meetings must be noticed 72 hours in advance
 - Distributed to meeting members, interested parties
 - Posted on SeeMonterey.com
 - Posted at venue available to public 24/7
- Special meetings require 24 hour's notice
- ONLY items on the agenda may be discussed
- Meeting must be held within jurisdiction to ensure public access/participation
- No serial meetings: Board members talk to each other one by one or through another individual to make decisions outside of a public meeting
- All communications are discoverable – emails, text messages, meeting minutes, reports.

FAQs



Q: Can I send a substitute to a meeting if I can't make it?

A: Absolutely for information purposes; however, voting proxies are not allowed and a sub can't help make a quorum.



Q: Can I call in to a meeting from my home if I'm working remotely?

A: Yes, as long as the meeting has been noticed as being virtual and the agenda includes the addresses and virtual means for members of the public to join and participate in the meeting.



Q: What happens if we violate the Brown Act?

A: The meeting will have to be repeated. Any decisions made at the initial meeting will be deemed invalid, as will the entire meeting proceeding.

BOARD MANAGEMENT SOFTWARE

BoardEffect

- One stop shop for board organization, calendar of upcoming meetings, files and document library
- Stores packet and agenda information to follow along during meetings
- Accessible with easy to utilize app and web browser
- Directory of fellow board members



BoardEffect
a Diligent brand

Click the logo to watch a brief introduction video

YOUR RESOURCES

Marissa Reader- Director of Operations

- Administration@SeeMonterey.com

Rob O'Keefe- President & CEO

- Rob@SeeMonterey.com

Websites

- [See Monterey Board Page](#)
- [See Monterey Reports](#)
- [Monterey County Tourism 2030](#)
- [FY 2025-26 Business Plan](#)
- [MCTID Management District Plan](#)

Additional Resources:

- [Travel & Tourism Terms](#)
- [Brown Act Training](#)



Thank you!