

**Board of Directors Meeting  
Kalispell Tourism Business Improvement District  
Wednesday – November 2, 2016  
3:00 pm – 5:00 pm**

**Location: Kalispell Chamber**

**AGENDA**

3:00 pm Meeting Called to Order: Dawn Hendrickson, Chairman of the Board

1. Hear from the Public

Members of the public are invited to present information related to the Tourism Business Improvement District. Presenters are limited to three (3) minutes each.

2. KCVB Event Grant applications – Montana NFAA State Indoor Archery Championships

3. Safety Awareness Updates

4. Board Action

- a) Approval of minutes from October 12, 2016
- b) TBID financial statements for September, 2016
- c) Glacier Half Marathon – potential event sponsorship

5. Board Discussion

- a) Event updates
- b) Role of TBID Associate Members on the board
- c) Group, M&C updates
- d) Marketing updates

5:00 pm Meeting Adjourns

Enclosures: October 12, 2016 minutes  
TBID financial statements for September 2016  
KCVB Updates

For Further Information, Please Contact:

Dawn Hendrickson, Board Chairman [dawn.hendrickson@hilton.com](mailto:dawn.hendrickson@hilton.com) or 406-890-7021  
Diane Medler, KCVB Director [diane@discoverkalispell.com](mailto:diane@discoverkalispell.com) or 406-758-2808

2016 TBID Board Meeting Schedule (subject to change)

<del>January 6</del>	<del>February 3</del>	<del>March 2</del>	<del>April 6</del>	<del>May 4</del>	<del>June 1</del>
July 6	August 3	September 7	October 5 & 12	November 2	December 7

Note: Other than the meeting starting time, times listed are approximate and agenda items may be rearranged. Action may be taken on any item listed on the agenda. Public comment is welcome on all items.

**Board of Directors Meeting**  
**Kalispell Tourism Business Improvement District**  
**Location: Kalispell Chamber of Commerce**  
**Wednesday, October 12, 2016**  
**(October 5 meeting was rescheduled due to lack of a quorum)**  
**3:00 pm – 4:00 pm**

## Minutes

**Board Members Present:** Janet Clark, Dawn Hendrickson, Zac Ford, Lisa Brown, Laurie Otto-Bradford

**Board Members Absent:** Nautam Patel, Dan Moderie

**Staff Present:** Diane Medler, Dawn Jackson, Vonnie Day

**Visitor:** Vanessa Moderie

---

Regularly scheduled TBID Board Meeting was held October 5<sup>th</sup>. The meeting did not achieve a quorum so no action was taken. Meeting was rescheduled for October 12<sup>th</sup>.

Meeting was called to order by Dawn Hendrickson, Board Chair, at 3:09 PM.

1. Hear from the Public – none
2. TBID Safety Awareness Updates – no safety issues reported
3. Discussion – Current TBID signature events and potential new event: Guest: Rob Brisendine  
Rob proposed exploring 3 potential events:
  - a. Vacation Races – Glacier Half Marathon is already scheduled for June 23 – 24, 2017 in East Glacier. Established race organization that conducts half marathons near national parks. Projected race participants 2,500 – 3,000. Vacation Races is looking for DMO to act as host community. Board considered hosting trade show/expo the night before the race. Discussed distance to East Glacier, but also lack of infrastructure to host ancillary event at that location.
  - b. Futsol Tournament – an opportunity to establish the first Futsol Championship in the state. There is rapidly growing participation in the sport in Montana’s largest towns. Event could be held in the trade center at the fairgrounds on a weekend December – February. A local management partner would be needed.
  - c. Tough Mudder – has expressed interest in a Montana location for their new product, the Half Mudder. The event would be held in September/October. Board expressed preference for a location near Kalispell and emphasized that the relationship with Spartan, Inc. should not be compromised. Investment would be substantial, estimate \$100,000 cash and in-kind.
4. Board Action
  - a. Approve minutes and financials from the September 7, 2016 meeting:  
Action: Motion was made by Janet Clark to approve the minutes. Motion seconded by Zac Ford.  
Discussion: none. Board approved unanimously.
  - b. Approve \$1,000 annual membership in the Kalispell Downtown Association.  
Action: Motion was made by Dawn Hendrickson to approve \$1,000 annual membership. Motion seconded by Zac Ford.  
Discussion: The KDA supports TBID events through cash sponsorships.  
Board approved unanimously.

- c. Approve research on hosting the trade show/expo in Kalispell for Vacation Races.  
Action: Motion was made by Dawn Hendrickson to approve research conducted by Rob Brisendine.  
Motion seconded by Lisa Brown.  
Discussion: board requested that a specific written report be submitted at the November board meeting including research on comparable host communities located a similar distance from the race site.  
Board approved unanimously.
- d. Approve research on creating a Futsol Tournament.  
Action: Motion was made by Dawn Hendrickson to approve research conducted by Rob Brisendine.  
Motion seconded by Janet Clark.  
Discussion: board requested a specific written report including evaluation of existing teams and leagues in Montana including demographics on participants.  
Board approved unanimously.
- e. Meeting adjourned at 4:00 pm.

Respectfully Submitted: Diane Medler

For further information, please contact:  
Diane Medler, CVB Director, [diane@discoverkalispell.com](mailto:diane@discoverkalispell.com) or 406-758-2808

Kalispell Tourism Business Improvement District  
Summary of Financials  
November 2, 2016

TBID Funds – Expense Summary September 2016

Admin: bookkeeping; office supplies; postage & copies; telephone, misc. mileage & expenses; rent; email hosting; quarterly storage unit payment

Website: domain renewals; annual Dropbox subscription renewal

Consumer Marketing: social media admin; airport display stocking; creative for new Brewery, Winery, Distillery brochure

Event: event operation mgmt. monthly payment for September (Rob)

Meetings & Convention: Meeting planner FAM; quarterly payment for IDSS;

Publicity/PR: final payment to Matt Gibson social influencer; sponsorship to Glacier AERO

Prior FY Expenses: TBID share of Chamber audit

KCVB Event Funds - Summary January through September 2016

Dragon Boat 2016: (2016 - \$30,000 TBID)

Balance forward from 2015: (\$784.26)

Income: \$92,287.97

Expenses: \$86,049.06

Balance: \$5,454.65

Spartan 2016: (2016 - \$25,000 TBID)

Balance forward from 2015: \$3,706.40

Income: \$35,424.50

Expenses: \$33,832.79

Balance: \$5,298.11

Pond 2017: (2017 - \$30,000 TBID)

Balance forward from 2016: \$18,372.85

Income: \$2,700.00

Expenses: \$8,796.53

Deferred Revenue: \$34,200.00

Balance: \$46,476.32

## Tourism Business Improvement District

**Balance Sheet**

As of September 30, 2016

	Sep 30, 16
<b>ASSETS</b>	
Current Assets	
Checking/Savings	
1010 · Checking	179,725.57
<b>Total Checking/Savings</b>	179,725.57
<b>Total Current Assets</b>	179,725.57
Fixed Assets	
1710 · Office Equipment	3,954.84
1820 · Web Site Development	25,230.44
<b>Total Fixed Assets</b>	29,185.28
<b>TOTAL ASSETS</b>	<b>208,910.85</b>
<b>LIABILITIES &amp; EQUITY</b>	
Liabilities	
Current Liabilities	
Accounts Payable	
2000 · Accounts Payable	31,547.27
<b>Total Accounts Payable</b>	31,547.27
<b>Total Current Liabilities</b>	31,547.27
<b>Total Liabilities</b>	31,547.27
Equity	
32000 · Unrestricted Net Assets	161,699.28
Net Income	15,664.30
<b>Total Equity</b>	177,363.58
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>208,910.85</b>

## Tourism Business Improvement District

10/20/16

## Profit &amp; Loss

Accrual Basis

September 2016

	Sep 16	Jul - Sep 16
<b>Income</b>		
4000 · TBID Revenue	0.00	150,650.45
4100 · Interest Income	8.10	22.10
<b>Total Income</b>	8.10	150,672.55
<b>Expense</b>		
5000 · Staffing	16,231.25	72,705.76
5100 · Administrative		
5110 · Bank Fees	28.25	36.72
5125 · Bookkeeping	410.00	930.00
5140 · Office Supplies	40.79	106.04
5150 · Postage & Copies	167.28	313.71
5160 · Rent	700.00	2,100.00
5165 · Storage Unit	180.00	360.00
5180 · Telephone	269.16	788.23
5185 · Travel & Entertainment	97.59	466.49
5190 · Technology Support	40.00	110.00
<b>Total 5100 · Administrative</b>	1,933.07	5,211.19
5200 · Research & Education		
5210 · Smith Travel Reports	5,750.00	5,750.00
<b>Total 5200 · Research &amp; Education</b>	5,750.00	5,750.00
5250 · Web Site		
5270 · Maintenance & Enhancements	167.68	198.02
<b>Total 5250 · Web Site</b>	167.68	198.02
5400 · Consumer Marketing		
5430 · Social Media Admin & Adv	845.00	1,690.00
5460 · Travel Show Attendance	0.00	707.50
5480 · Airport Displays	150.00	250.00
5420 · E-Marketing	0.00	116.11
5496 · Visitor Guide & Niche Brochures	547.30	547.30
<b>Total 5400 · Consumer Marketing</b>	1,542.30	3,310.91
5500 · Event Marketing		
5548 · Events Operations Management	1,750.00	5,250.00
5501 · Dragon Boat	0.00	30,000.00
5549 · Other Event Marketing	0.00	1,750.00
<b>Total 5500 · Event Marketing</b>	1,750.00	37,000.00
5550 · Meetings & Conventions		
5565 · Meeting Planner Shows	70.81	3,006.67
5567 · Meeting Planner FAM	4,266.95	4,266.95
5570 · Meeting Planner Incentive Progm	-572.50	-562.25
5583 · Customer Relationship Mgmt Syst	1,500.00	1,500.00
<b>Total 5550 · Meetings &amp; Conventions</b>	5,265.26	8,211.37
5650 · Publicity		
5660 · Travel Media Press Trips/FAM	666.00	666.00
5690 · Airline Subsidies	1,000.00	1,000.00
<b>Total 5650 · Publicity</b>	1,666.00	1,666.00
6000 · Prior Fiscal Year Expense	955.00	955.00
<b>Total Expense</b>	35,260.56	135,008.25
<b>Net Income</b>	<b>-35,252.46</b>	<b>15,664.30</b>

## Tourism Business Improvement District

## Profit &amp; Loss Budget vs. Actual

July through September 2016

10/20/16

Accrual Basis

	Jul - Sep 16	Budget	\$ Over Bud...	% of Budget
<b>Income</b>				
4000 · TBID Revenue	150,650.45	574,000.00	-423,349.55	26.2%
4100 · Interest Income	22.10			
<b>Total Income</b>	150,672.55	574,000.00	-423,327.45	26.2%
<b>Expense</b>				
5000 · Staffing	72,705.76	227,000.00	-154,294.24	32.0%
5100 · Administrative	5,211.19	27,250.00	-22,038.81	19.1%
5200 · Research & Education	5,750.00	8,500.00	-2,750.00	67.6%
5250 · Web Site	198.02	18,000.00	-17,801.98	1.1%
5400 · Consumer Marketing	3,310.91	86,750.00	-83,439.09	3.8%
5500 · Event Marketing	37,000.00	118,500.00	-81,500.00	31.2%
5550 · Meetings & Conventions	8,211.37	58,000.00	-49,788.63	14.2%
5650 · Publicity	1,666.00	30,000.00	-28,334.00	5.6%
6000 · Prior Fiscal Year Expense	955.00			
<b>Total Expense</b>	135,008.25	574,000.00	-438,991.75	23.5%
<b>Net Income</b>	<u>15,664.30</u>	<u>0.00</u>	<u>15,664.30</u>	<u>100.0%</u>

**Tourism Business Improvement District**  
**Profit & Loss Budget vs. Actual**  
 July through September 2016

	Jul - Sep 16	Budget	\$ Over Bud...	% of Budget
<b>Income</b>				
4000 · TBID Revenue	150,650.45	574,000.00	-423,349.55	26.2%
4100 · Interest Income	22.10			
<b>Total Income</b>	150,672.55	574,000.00	-423,327.45	26.2%
<b>Expense</b>				
5000 · Staffing	72,705.76	227,000.00	-154,294.24	32.0%
5100 · Administrative				
5350 · City of Kalispell Admin Fee	0.00	5,000.00	-5,000.00	0.0%
5110 · Bank Fees	36.72			
5120 · Audit	0.00	2,000.00	-2,000.00	0.0%
5125 · Bookkeeping	930.00	2,000.00	-1,070.00	46.5%
5140 · Office Supplies	106.04	2,000.00	-1,893.96	5.3%
5150 · Postage & Copies	313.71	750.00	-436.29	41.8%
5160 · Rent	2,100.00	7,500.00	-5,400.00	28.0%
5165 · Storage Unit	360.00	750.00	-390.00	48.0%
5180 · Telephone	788.23	2,800.00	-2,011.77	28.2%
5185 · Travel & Entertainment	466.49	2,515.00	-2,048.51	18.5%
5190 · Technology Support	110.00	500.00	-390.00	22.0%
5195 · Equipment (Software)	0.00	1,435.00	-1,435.00	0.0%
<b>Total 5100 · Administrative</b>	5,211.19	27,250.00	-22,038.81	19.1%
5200 · Research & Education				
5210 · Smith Travel Reports	5,750.00	5,500.00	250.00	104.5%
5230 · Organizational Memberships	0.00	3,000.00	-3,000.00	0.0%
<b>Total 5200 · Research &amp; Education</b>	5,750.00	8,500.00	-2,750.00	67.6%
5250 · Web Site				
5270 · Maintenance & Enhancements	198.02			
5250 · Web Site - Other	0.00	18,000.00	-18,000.00	0.0%
<b>Total 5250 · Web Site</b>	198.02	18,000.00	-17,801.98	1.1%
5400 · Consumer Marketing				
5405 · Photo and Video Library	0.00	5,000.00	-5,000.00	0.0%
5430 · Social Media Admin & Adv	1,690.00	12,000.00	-10,310.00	14.1%
5440 · Creative Services	0.00	20,000.00	-20,000.00	0.0%
5450 · Media Buy Online	0.00	30,000.00	-30,000.00	0.0%
5460 · Travel Show Attendance	707.50	2,500.00	-1,792.50	28.3%
5470 · Trade Show Booth	0.00	1,500.00	-1,500.00	0.0%
5480 · Airport Displays	250.00	750.00	-500.00	33.3%
5420 · E-Marketing	116.11	5,000.00	-4,883.89	2.3%
5496 · Visitor Guide & Niche Brochures	547.30	10,000.00	-9,452.70	5.5%
<b>Total 5400 · Consumer Marketing</b>	3,310.91	86,750.00	-83,439.09	3.8%
5500 · Event Marketing				
5548 · Events Operations Management	5,250.00	21,000.00	-15,750.00	25.0%
5501 · Dragon Boat	30,000.00	30,000.00	0.00	100.0%
5502 · Spartan Event	0.00	23,000.00	-23,000.00	0.0%
5509 · Pond Hockey	0.00	30,000.00	-30,000.00	0.0%
5549 · Other Event Marketing	1,750.00	14,500.00	-12,750.00	12.1%
<b>Total 5500 · Event Marketing</b>	37,000.00	118,500.00	-81,500.00	31.2%
5550 · Meetings & Conventions				
5565 · Meeting Planner Shows	3,006.67	10,000.00	-6,993.33	30.1%
5567 · Meeting Planner FAM	4,266.95	12,000.00	-7,733.05	35.6%
5570 · Meeting Planner Incentive Progm	-562.25	15,000.00	-15,562.25	-3.7%
5573 · Group Photo & Video Library	0.00	6,000.00	-6,000.00	0.0%
5574 · M&C Guide	0.00	7,000.00	-7,000.00	0.0%
5583 · Customer Relationship Mgmt Syst	1,500.00	6,000.00	-4,500.00	25.0%
5585 · Sales Calls	0.00	1,000.00	-1,000.00	0.0%
5587 · Lead Generating Service	0.00	0.00	0.00	0.0%
5589 · M&C Memberships	0.00	1,000.00	-1,000.00	0.0%
<b>Total 5550 · Meetings &amp; Conventions</b>	8,211.37	58,000.00	-49,788.63	14.2%



KALISPELL CONVENTION & VISITOR'S BUREAU

EVENT BALANCES

Accrual Basis

	DRAGON BOAT	POND HOCKEY	SPARTAN RACE	MTGS & CONV	WAYFINDING	WBD BROCHURE	TOTAL
2015 Balance Forward	(784.26)	18,372.85	3,706.40	0.00	63,100.00	0.00	84,394.99
January 2016	6,902.04	8,094.75	0.00	0.00	0.00	0.00	14,996.79
February 2016	(642.16)	(13,695.93)	0.00	0.00	0.00	0.00	(14,338.09)
March 2016	(858.86)	603.30	(3,166.58)	0.00	0.00	0.00	(3,422.14)
April 2016	(791.00)	(629.25)	23,695.34	0.00	(19,884.69)	0.00	2,390.40
May 2016	5,875.00	300.00	(16,992.43)	0.00	(21,822.00)	0.00	(32,639.43)
June 2016	1,221.34	0.00	(1,295.22)	0.00	(7,974.75)	0.00	(8,048.63)
July 2016	12,201.01	(120.00)	0.00	0.00	(5,996.22)	0.00	6,084.79
August 2016	25,956.68	0.00	0.00	185.76	0.00	0.00	26,142.44
September 2016	(43,625.14)	(649.40)	(649.40)	0.00	(4,095.40)	2,075.00	(46,944.34)
October 2016							0.00
November 2016							0.00
December 2016							0.00
Deferred Revenue*		34,200.00					34,200.00
EVENT BALANCES	5,454.65	46,476.32	5,298.11	185.76	3,326.94	2,075.00	62,816.78

\*Deferred revenue is listed on the balance sheet as a payable, because there is a portion that is refundable.

Income will be recorded the same calendar year as the event is held.

**Kalispell Chamber of Commerce**  
**KCVB P&L by Class**  
January through September 2016

	Dragon Boat	Pond Hockey	Spartan	Meetings/ Conventions	Wayfinding Grant	WBD Brochure	TOTAL
<b>Income</b>							
4025.00 · Program Revenue	0.00	0.00	0.00	300.00	0.00	2,075.00	2,375.00
4700.00 · Special Events	62,110.76	2,700.00	10,424.50	0.00	0.00	0.00	75,235.26
4400.00 · Grants & Contributions	177.21	0.00	0.00	0.00	0.00	0.00	177.21
4410.00 · TBID Revenue	30,000.00	0.00	25,000.00	0.00	0.00	0.00	55,000.00
<b>Total Income</b>	<u>92,287.97</u>	<u>2,700.00</u>	<u>35,424.50</u>	<u>300.00</u>	<u>0.00</u>	<u>2,075.00</u>	<u>132,787.47</u>
<b>Gross Profit</b>	<u>92,287.97</u>	<u>2,700.00</u>	<u>35,424.50</u>	<u>300.00</u>	<u>0.00</u>	<u>2,075.00</u>	<u>132,787.47</u>
<b>Expense</b>							
5000.00 · Direct Program	38,655.62	1,558.05	20,898.95	114.24	59,773.06	0.00	120,999.92
5060.00 · Bank Fees & Service Charges	116.04	18.00	54.46	0.00	0.00	0.00	188.50
5260.00 · Insurance	3,667.00	442.00	1,806.00	0.00	0.00	0.00	5,905.00
5160.00 · Contributions & Scholarships	5,533.00	0.00	4,600.00	0.00	0.00	0.00	10,133.00
5520.00 · Professional Fees	33,370.12	6,185.83	2,096.70	0.00	0.00	0.00	41,652.65
5500.00 · Printing & Publications	140.39	141.25	147.89	0.00	0.00	0.00	429.53
5400.00 · Miscellaneous	1,022.70	96.00	600.00	0.00	0.00	0.00	1,718.70
5420.00 · Office	963.92	147.47	568.42	0.00	0.00	0.00	1,679.81
5740.00 · Travel	2,590.27	207.93	3,060.37	0.00	0.00	0.00	5,858.57
<b>Total Expense</b>	<u>86,049.06</u>	<u>8,796.53</u>	<u>33,832.79</u>	<u>114.24</u>	<u>59,773.06</u>	<u>0.00</u>	<u>188,565.68</u>
<b>Net Income</b>	<u><u>6,238.91</u></u>	<u><u>-6,096.53</u></u>	<u><u>1,591.71</u></u>	<u><u>185.76</u></u>	<u><u>-59,773.06</u></u>	<u><u>2,075.00</u></u>	<u><u>-55,778.21</u></u>

DiscoverKalispell.com	Q1 (Jul-Sep 2016)	% change vs. Q1 2015
Sessions	61,993	27.62%
Unique Visits	51,765	28.22%
Page Views	127,624	24.89%
Pg/Visit	2.06	-2.14%
New Visits	50,387	81.3% of total
Returning Visitor	11,606	18.7% of total
Growth in Mobile	desktop	35.1% of total traffic
	mobile	50.3% of total traffic
	tablet	14.6% of total traffic
Top pages (all searches)	home page; Glacier Trip; Family Fun; Shopping; Flathead Lake; Trails and Routes; Hiking; GNP; lodging	
Top exit pages	Glacier trip; home page; family fun; shopping; hiking; trails and routes; lodging listing; GNP; Flathead Lake	
Search traffic metrics - (% of total traffic)	Organic search	79.70%
	direct	9.00%
	referral	4.40%
Referring Sites	City of Kalispell; Kalispell Chamber; Visitmt; Downtown Kalispell; Facebook; Instagram; Glacier MT; ads; MT Dragon Boat; xpatmatt	
Visits by Location	Top cities: Calgary, SLC, Dallas, WF, Seattle, Denver, Edmonton, Chicago, Missoula	Top regions: MT, AB, UT, WA, TX, CA, CO, IL, MN, OR
Organic Search	Top keywords: glacier national park; waterton national park, things to do in kalipsell mt; glacier national park map; things to do in kalispell; kalispell events	Top pages: home; family fun; shopping; trails and routes; Flathead Lake; hiking; GNP; Jewel Basin; events; state parks
Paid Search	Top performing terms by click: kalispell; lake trout fishing; things to do in kalispell; kalispell events; kalispell montana weather; fishing montna	Ad word campaign: CTR 2.07%; Clicks 809; Avg CPC \$1.81; Impressions 39,171

**STR REPORT – SEPTEMBER**

Year over Year OCC: +7.9% to 74.8%; DEMAND: +14.6; SUPPLY: +6.2; ADR: +0.5% to \$105.26; RevPAR: +8.4% to \$78.71.

Kalispell YTD OCC +1.3%; ADR -0.3%

Kalispell Economy class YOY OCC: +18.3%, ADR: -0.9%; Mid/Upper class OCC: +2.8%, ADR: +1.5%

Comp Set: avg ADR change YOY +4.8%; YTD ADR +2.6%

United States YOY: OCC: +1.6%; ADR: +3.9%; RevPAR: +5.6%. Montana YOY: OCC: +3.9%; ADR: +4.2%; RevPAR: +8.2%

**Kalispell VIC - September**

1,326 total interactions, 36% increase over 2015

**Calgary Women's Show                      October 22-23, 2017**

- Attendance: approx. 10,000
- Distributed over 500 sets of materials
- Obtained 203 entries to drawing to win Kalispell Shopping Vacation Packages
  - Entries added to quarterly CVB enews. TBID properties who want copy of list, contact Diane.
- What we heard: Lots of people who have heard about Kalispell from friends and family and anxious to visit. Minimal comments about inability to travel since dollar is weak



# October 2016 Goal Sheet

Dawn Jackson-KCVB Group Sales Manager

## RFP's Sent:

1. Pacific West Fastener Association

## Sales Calls & Site Visits:

1. Aubrie Roth-Met for opportunity with Farm to Table conference for 2018  
See attached IMEX Appointments

## October Highlights:

1. Provided items for MT League of Cities conference for Aimee
2. IMEX Show October 18-20 in Las Vegas
3. Leadership Flathead-City Government
4. Oktoberfest Bavarian Chamber Night
5. Voices of Tourism lunch
6. Continued work on M&C Guide and first E-News

## Total Contracted Rooms:

# Kalispell Convention & Visitors Bureau Task Report

Created Between 10/1/2016 - 10/28/2016

Assigned Sales Rep: Dawn Jackson

Create	Account Name	Contact Name	Task Type	Due Date	Assigned To	Status	Closed
10/27/2016	HELMSBRISCOE	Lauren Pontier	Email	11/4/2016	Dawn Jackson	Open	
10/28/2016	Pacific Coast Oto Ophthalmological	Thelma DeSouza	Phone Call	11/7/2016	Dawn Jackson	Open	
10/28/2016	Reliable Facility Placement	Mark Feldman	Email	11/7/2016	Dawn Jackson	Open	
10/28/2016	The Travel Gallery	Marianne Svensson	Email	11/7/2016	Dawn Jackson	Open	
<i>Winter Carnival Idea</i>							
10/11/2016	MT Organic Association	Susan Waters	Event Note	10/11/2016	Dawn Jackson	Closed	10/11/2016
<i>Susan emailed me and let me know the conference website was up with the agenda rate</i>							
10/27/2016	Impact Organization	Mike Tuzee	General Note	10/27/2016	Dawn Jackson	Closed	10/27/2016
<i>He came with 2018 business. He has a 300-400 person event and does an extension of this trip for about 150 ppl (100 rooms) for April or May and considering Montana. He prefers 4-5 diamond properties. His originating location in 2016 was Washington DC with an extension to Sedona. He has done Jasper, Yosemite in the past. For 2017 he is going to Anchorage. Group demographics include: Ages range from 45-65 Debbie will follow up.</i>							
10/27/2016	Summit Event Management	Jeffrey Weiman	General Note	10/27/2016	Dawn Jackson	Closed	10/27/2016
<i>He prefers to be call Jeff. He has worked in the business for 16 years. He is just now considering mountain areas for new destinations. Regarding attendee size there are 2 programs that would work in this area, 2 separate incentive programs, one in February for 40-50 couples and one in the summer that requires 120 rooms. Holding one in June 2017 in Vancouver BCPrefers 4 diamond and higher, really liked Whitefish but open to group and spouse activities.</i>							
10/27/2016	BCD Meetings	Kristin Flowers	General Note	10/27/2016	Dawn Jackson	Closed	10/27/2016
<i>Met Kristin at a lunch. She books for Meljie and Honeywell.</i>							
10/27/2016	HELMSBRISCOE	Lauren Pontier	General Note	10/27/2016	Dawn Jackson	Closed	10/27/2016
<i>Potential for July of 2019 with CSU West-the elected state host with the legislature puts this on. They are currently looking at Big Sky and would need 270 rooms peak (willing to work between different hotels) Their space requires a room to hold 400 ppl in rounds 3 main breakfasts each with a Hollow Square seating 70 and would consider off site venues if they are close, very important that isn't smaller. Planning a January site tour. Send her information.</i>							
10/27/2016	Prestige	Doug Peterson	General Note	10/27/2016	Dawn Jackson	Closed	10/27/2016
<i>The company has been in business for 30 years and they have 32 sales partners. They have 85 US businesses and 15 international. They have 72 planners for the larger markets and 30-40 for the smaller groups. They book business in all 50 states and have been to Big Sky in the past. It was so-so. They like a wide variety of different programs to source. He likes to work with DMC's we suggested Flathead Travel. He was curious as to what we have in Montana and has a son that loves to fly fish. Didn't have any specific business now but may find a fit in the future.</i>							
10/27/2016	Lizard IncentEvents	Andie Poppe	General Note	10/27/2016	Dawn Jackson	Closed	10/27/2016

Assigned Sales Rep: Dawn Jackson

Create	Account Name	Contact Name	Task Type	Due Date	Assigned To	Status	Closed
10/28/2016	Reliable Facility Placement	Mark Feldman	General Note	10/28/2016	Dawn Jackson	Closed	10/28/2016
<p><i>Mark works the West Coast Region. The group he is considering Montana for is NCURA with 200 ppl. He utilizes Hilton properties and would consider overflow. Looking at 2018 and like the outdoors. Will send Debbie an RFP. Follow up with him and send information.</i></p>							
10/28/2016	Pacific Coast Oto Ophthalmological	Thelma DeSouza	General Note	10/28/2016	Dawn Jackson	Closed	10/28/2016
<p><i>Looking for the 2nd or 3rd week in June 2018. 55-85 participants. They have meetings their 1st day and the following 3 days are half day meetings with afternoon activities. Prefer resorts, participants bring families and stay in suites, large rooms or connecting rooms. They have 6 guest speakers that come. Coming from Portland, LA, San Diego. The organization is 116 years old. She works a year or less out! Follow up with activities options.</i></p>							
10/28/2016	New San Cai	Lillian Zheng	General Note	10/28/2016	Dawn Jackson	Closed	10/28/2016
<p><i>Works for an chinese government owned agency. Wanted to promote her publication that introduces and highlights American cities and their uniqueness to Chinese. Their tour guides are members and they help sell directly to Chinese.</i></p>							
10/28/2016	Wyndam Jade	James Stuckeman	General Note	10/28/2016	Dawn Jackson	Closed	10/28/2016
<p><i>Wyndam Jade is comprised of a Meeting, Travel, Housing Registratio Division. They work with all types of meetings. The group he was inquiring about is Baylor with 25-30 ppl and is an incentive trip. It is for a Friday, Saturday, Sunday. Debbie will follow up.</i></p>							
10/28/2016	rs-travelling-events	Reinhard Schmohl	General Note	10/28/2016	Dawn Jackson	Closed	10/28/2016
<p><i>Meeting that he is considering MT for is with the textile industry, 30-40 ppl, Incentive for fall of 2018. Has a good working relationship with United Airlines. Prefers resorts and 4-5 diamentd properties. He also hold 3 large conferences 1 in February for 400ppl and May for 400 ppl. He prefers to keep them under 1 roof. Debbie will fu.</i></p>							
10/28/2016	Conference Direct	Anastasia Defrancesco	General Note	10/28/2016	Dawn Jackson	Closed	10/28/2016
<p><i>She works specifically with a cosmetic company that has 280 store. Milleniums. They dislike animal testing of any kind, prefer properties and areas that have a recycle and waste management program, they dedicate one day of their conference to eat vegetarian. They like second tier cities, book 1 year out, prefer downtown properties and look un the US and Canada. She was getting information on Montana. Debbie will fu.</i></p>							
10/28/2016	Maritz Travel	Fioranna Duran	General Note	10/28/2016	Dawn Jackson	Closed	10/28/2016
<p><i>Fio works in Maritz sourcing department for the Pacific NW, Washington, Idaho, Oregon and Montana. She was getting more information about Montana. She previously worked as account manager for Star Bucks, Microsoft, REI and Nike. She is staying at Paws Up Nov 20 and driving back home November 23. Trying to get her to extend her stay and drive up to this area. Linda Schweitz is the DMC Director, Meg Pizanni is the location direction that puts together presentation for the buyers. Strongly urged us to put together a lunch presentation for the buyers. Debbie will send her an invite to the Connect conference in December and she is also on LinkedIn. Strongly advise us/region to do a presentation!</i></p>							
10/28/2016	LUSH Fresh Handmade Cosmetics	Dale Sattel	General Note	10/28/2016	Dawn Jackson	Closed	10/28/2016
<p><i>Date plans 3 meetings a year. This is a younger group and very active. Meetings is geared to manufacturers (60-90ppl), retail and sales. He was getting information.</i></p>							
10/28/2016	EMC Venues	Jean Wilsterman	General Note	10/28/2016	Dawn Jackson	Closed	10/28/2016
<p><i>They have companies in US, Canada and Latin America. She was looking for a sales incentive destination for about 16 rooms. They bring</i></p>							

Assigned Sales Rep: Dawn Jackson

Create	Account Name	Contact Name	Task Type	Due Date	Assigned To	Status	Closed
--------	--------------	--------------	-----------	----------	-------------	--------	--------

on a lake, spas and surfing very active. 125 ppl with need for about 70 rooms. This is a top sales club with 1/2 that are winners and 1/2 are nominees. Age range is 30-40. They are looking at the first full weekend in October of 2017. Debbie will fu.

10/28/2016	NAI Capital	Tessa Harper	General Note	10/28/2016	Dawn Jackson	Closed	10/28/2016
------------	-------------	--------------	--------------	------------	--------------	--------	------------

She works with a sales group that produce a 2 million annual achievement. This incentive groups is about 60-150 attendees. It is for 5 days, she chooses 3 destinations and the winners get to vote on the destination and choose. She is gathering information and was interested in Rock Creek. Age range is 50 and up. Debbie will follow up.

10/28/2016	The Travel Gallery	Marianne Svensson	General Note	10/28/2016	Dawn Jackson	Closed	10/28/2016
------------	--------------------	-------------------	--------------	------------	--------------	--------	------------

She works with special interest groups and some MICE. Examples: Nature, Jazz, Breweries. No Summer months. Groups can consist of 10-200 ppl. Has alot os repeat and loyalty. I will follow up with some ideas... Winter Carnival may be one...

10/28/2016	Wintrust Mortgage	Amy Howell	General Note	10/28/2016	Dawn Jackson	Closed	10/28/2016
------------	-------------------	------------	--------------	------------	--------------	--------	------------

She does 2 Incentive Programs yearly to 2nd tier cities. She would consider Montana for the Presidents Circle with 120 ppl (60 rooms per night) for 4 nights/3 days in Feb or March. It is for couples and they like activities. She like Flathead Lake Lodge. Debbie will follow up.

10/28/2016	Teamamerica	Luisa Konzatti	General Note	10/28/2016	Dawn Jackson	Closed	10/28/2016
------------	-------------	----------------	--------------	------------	--------------	--------	------------

Luisa was recently through the state over the Beartooth Mountains. Marlee and Kim helped with an itinerary. She only works with groups of 10-1000 and does escorted tours through Canada. Her main market is Italy. Needs 2 nights for the Solar Eclips and can't find. MT Office of Tourism/Debbie will continue to work with her.

**Total Tasks: 27**