

# DINE

NEWPORT  
BEACH

**NEWPORT BEACH RESTAURANT ASSOCIATION  
BUSINESS IMPROVEMENT DISTRICT  
ADMINISTRATION, MARKETING & FINANCIAL SERVICES  
CITY OF NEWPORT BEACH  
REQUEST FOR PROPOSAL (NO. 20-53)**

**NEWPORT BEACH & COMPANY  
RFP RESPONSE**

**MAY 8, 2020**





May 8, 2020

Mr. Anthony Nguyen  
Purchasing Agent  
City of Newport Beach  
100 Civic Center Drive  
Newport Beach, California 92660

Dear Mr. Nguyen:

For more than five years, through our Dine Newport Beach Business Unit, Newport Beach & Company has had the distinct pleasure to be the incumbent marketing, finance and administration agency for the Newport Beach Restaurant Association (NBRA) Business Improvement District (BID) for the City of Newport Beach. Along with our five other business units, we take great pride in the marketing, communications, sales, finance, BID administration and video-production services we provide the City of Newport Beach. It is truly an honor to tell the story of this amazing destination, our amazing culinary community and its more than 450 restaurants to the world.

Building on the nearly 30 years of success and partnership we've had with the City of Newport Beach, it is our great pleasure to present to you the following proposal and responses to your Request for Proposal (No. 20-53) for NBRA Administration, Marketing & Financial Services.

We know you have a choice in marketing, financial and administration solutions, so I wanted to highlight five fundamental reasons to choose Newport Beach & Company for the city's Newport Beach Restaurant Association Business Improvement District administration, marketing and financial services.

1. Talent & Longevity of Award-winning Marketing, Communications, Media Relations, Finance and Administration Services for the City of Newport Beach and the NBRA BID for a Combined six years of Service to the Newport Beach Restaurant Association.
2. Proven Experience, Qualifications, Project History and References and the Official, Accredited Destination-Marketing Organization for Newport Beach, California
3. Value-added Destination Video Programming & Culinary Content Outside of this Contract
4. Discounted Pricing due to the Unprecedented COVID-19 Crisis and its Impact on our Restaurant Community
5. New Dine Newport Beach Brand Identity System based on the New Visit Newport Beach Destination Brand Identity System launching July 1, 2020

Our Dine Newport Beach Team combined has more than 109 years of video, marketing, public relations, finance, advertising and BID administration experience ready to work for the NBRA and City of Newport Beach. We thank you for the opportunity to respond to this request for proposal, and we look forward to hearing about next steps in your search process for NBRA BID administration, marketing and financial services.

Warm Regards,

A handwritten signature in black ink, appearing to read "Gary C. Sherwin".

Gary C. Sherwin, CDME, APR  
President and CEO  
Newport Beach & Company



**CITY OF NEWPORT BEACH  
REQUEST FOR PROPOSAL (RFP) NO. 20-53  
NEWPORT BEACH RESTAURANT ASSOCIATION  
ADMINISTRATION, MARKETING & FINANCIAL SERVICES  
FROM  
NEWPORT BEACH & COMPANY  
MAY 8, 2020**

**OBJECTIVE**

Newport Beach & Company is the most qualified proposer to provide administration, marketing and financial services related to the Newport Beach Restaurant Association (NBRA) Business Improvement District (BID) for its next five-year contract period.

We know you have a choice in marketing, financial and administration solutions, so we wanted to highlight five fundamental reasons to choose Newport Beach & Company for the city's Newport Beach Restaurant Association Business Improvement District administration, marketing and financial services.

1. Talent & Longevity of Award-winning Marketing, Communications, Media Relations, Finance and Administration Services for the City of Newport Beach and the NBRA BID for a Combined six years of Service to the Newport Beach Restaurant Association.
2. Proven Experience, Qualifications, Project History and References and the Official, Accredited Destination-Marketing Organization for Newport Beach, California
3. Value-added Destination Video Programming & Culinary Content Outside of this Contract
4. Discounted Pricing due to the Unprecedented COVID-19 Crisis and its Impact on our Restaurant Community
5. New Dine Newport Beach Brand Identity System based on the New Visit Newport Beach Destination Brand Identity System launching July 1, 2020

**BACKGROUND**

Newport Beach & Company has served as the NBRA BID's marketing agency for the past six years, and its finance and BID administration service provider for the past four years. We have a wealth of knowledge/skills, thorough history of the destination/NBRA and record-setting results provided to our restaurant association and its members spanning six years.

The NBRA BID is the oldest and longest-serving RBID (restaurant business improvement district) in the State of California. Several of our executives have presented the outstanding work we've provided the NBRA BID at international conferences. NBRA BID is a shining example statewide and nationally, and we are honored to serve as the incumbent agency for the NBRA BID with the City of Newport Beach.

## NEWPORT BEACH & COMPANY CRITERION FOR SUCCESS

### EVALUATION CRITERIA #1: NEWPORT BEACH & COMPANY QUALIFICATIONS

Newport Beach & Company has more than six years of successful experience managing the marketing services for the Newport Beach Restaurant Association BID and four years of experience managing and leading the NBRA BID's administration and financial services.

Newport Beach & Company's tourism-marketing division, Visit Newport Beach, Inc., has more than 30 years of award-winning, dedicated service to the City of Newport Beach as the official destination-management organization for Newport Beach, California. Visit Newport Beach, Inc. is fully accredited with distinction from its international association, Destinations International, recently achieving its highest recognition as an eight-year accreditation with distinction.

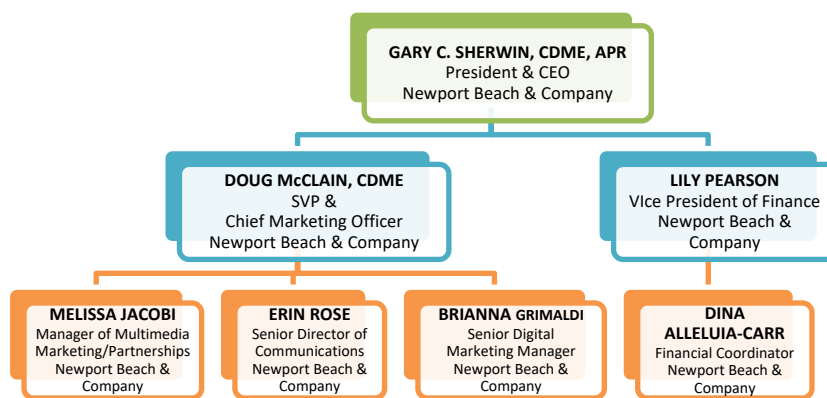
The Newport Beach & Company Dine Newport Beach Team boasts a robust, talented and highly skilled team of professionals that includes President & CEO, Gary Sherwin, Doug McClain, Lily Pearson, Melissa Jacobi, Erin Rose, Brianna Grimaldi and Dina Alleluia-Carr. This Dine Newport Beach team has a combined **109 years** of experience in the fields of marketing, public relations, culinary marketing, hospitality, video production, finance and BID administration.

Gary C. Sherwin serves as President and CEO of Newport Beach & Company. He provides overall direction, guidance, city connections, supervision, fiscal/fiduciary, and overarching responsibility for Newport Beach & Company's contract with City of Newport Beach for video production and government-access channel management as well as the company's other business units.

Doug McClain leads the Marketing/Communications team at Newport Beach & Company including the Dine Newport Beach Team. He provides strategic-planning, BID leadership, direct staff management/oversight, and fiscal responsibility for fulfilling all aspects of the contract.

Melissa Jacobi leads the day-to-day NBRA BID administration and finance for Dine Newport Beach at Newport Beach & Company. The team of marketing/PR professionals creates all of the content, media relations, advertising, collateral design, distribution, event planning, blogs, including three TV and digital video series: "Culinary Journeys," "Weekly Bites," and "Eat.Sea.Do."

#### NEWPORT BEACH & COMPANY/ DINE NEWPORT BEACH TEAM & QUALIFICATIONS:





## **NEWPORT BEACH & COMPANY/DINE NEWPORT BEACH TEAM & QUALIFICATIONS:**

### **Doug McClain, Senior Vice President & Chief Marketing Officer**

#### **Dine Newport Beach/Newport Beach & Company**

---

Doug McClain has more than 29 years of hospitality, travel and tourism-marketing experience. He currently serves as SVP & Chief Marketing Officer for Newport Beach & Company and five of its business units including Dine Newport Beach, Celebrate Newport Beach, Video Newport Beach (Newport Beach TV), Enterprise Newport Beach, and Visit Newport Beach (Leisure Marketing). He has held top marketing positions at Visit Tampa Bay, Visit KC, Rand McNally & Company and Hyatt Hotels & Resorts. He has a Bachelor of Journalism from the University of Missouri-Columbia and an M.B.A. degree from the University of Missouri-Kansas City. He has led the Dine Newport Beach Business Unit at Newport Beach & Company since NBRA BID marketing-services were first awarded to Newport Beach & Company in 2014. Certifications: McClain earned his Certified Destination Management Executive (CDME) certification in 2015 and his Certified Tourism Ambassador certification in 2008.

### **Lily Pearson, Vice President of Finance**

#### **Dine Newport Beach/Newport Beach & Company**

---

Lily Pearson is the Vice President of Finance for Newport Beach & Company. She brings to the team more than 30 years of accounting experience in financial management and accounting. She has held executive-level positions in both privately-held and non-profit companies with a focus in the banking, technology and service sectors. Lily graduated from the University of Utah with a B.S. in Accounting. Pearson currently leads the day-to-day NBRA BID financial services and BID administration in coordination with Doug McClain. Certifications: Pearson earned her certification as a Certified Public Accountant in 1984.

### **Melissa Jacobi, Senior Manager of Multimedia Marketing & Partnerships**

#### **Dine Newport Beach/Newport Beach & Company**

---

Melissa Jacobi is the Senior Manager of Multimedia Marketing & Partnerships for Newport Beach & Company. She has more than six years of partnership experience, and in her previous role, she served as the Assistant Athletic Director of Operations and Development for Concordia University Irvine. Jacobi managed the NCAA Division II corporate sponsorships, business operations, community outreach, and provided active leadership in the identification, solicitation, cultivation, and stewardship for major donors and donor prospects. In 2019, she was awarded 30 Under 30 by Destinations International and named one of 30 “Emerging Leaders” by the California Travel Association. Jacobi holds a B.A. in communications from Chapman University. She currently leads the day-to-day NBRA BID management, marketing, and video-production services for the Dine Newport Beach Business Unit and Video Newport Beach at Newport Beach & Company.

### **Erin Rose, Senior Director of Communications**

#### **Dine Newport Beach/Newport Beach & Company**

---

Erin Rose is Senior Director of Communications at Newport Beach & Company and is responsible for driving the owned- and earned-media and communications strategy for the organization and its five business units. Rose has served the hospitality industry for over 10 years and most recently held a communications position at Visit Anaheim, Orange County’s largest DMO. Rose earned a B.A. in Hospitality, Tourism and Events from Metropolitan State University of Denver. She currently leads the NBRA BID’s media relations, communications, event script-writing, independent blogger team, and social media for Dine Newport Beach at Newport Beach & Company.

**Brianna Grimaldi, Senior Digital Marketing Manager**  
**Dine Newport Beach/Newport Beach & Company**

---

Brianna Grimaldi is the Senior Digital Marketing Manager for Newport Beach & Company and is responsible for managing the organization's websites, email marketing, NBRA's customer-relation management (CRM) database, campaigns and brand in the digital space across a variety of platforms and online channels. She started her career in hospitality with Newport Beach & Company 10 years ago, which has allowed her to foster relations in every corner of the Newport Beach community. Grimaldi is a graduate of San Diego State University and received her bachelor's degree in Business Marketing: Specialization in Integrated Marketing Communications.

**Dina Alleluia-Carr, Financial Coordinator**  
**Dine Newport Beach/Newport Beach & Company**

---

Dina Alleluia-Carr has been with Newport Beach & Company since August 2015. She is responsible for all invoicing, accounts payable, including NBRA BID assessments, as well as managing the Accounts Payable process. Alleluia-Carr is a very detailed professional who has been an integral part of the administrative and financial services provided to the NBRA BID since 2016. She has 24 years of accounting and management experience. In coordination with the City of Newport Beach, Dina manages the minutes, Brown Act notifications, agendas and many other BID administration duties in addition to her excellent financial services to the NBRA BID.

## CRITERIA #2: NEWPORT BEACH & COMPANY BID EXPERIENCE, QUALIFICATIONS & REFERENCES

One of Newport Beach & Company's Business Units is Visit Newport Beach, Inc. A portion of Visit Newport Beach, Inc. (VNB) is governed under a business-improvement district, in this case a tourism business-improvement district (TBID). Similar to the NBRA BID, the VNB TBID is governed by the Brown Act. With more than 12 years of experience leading the Newport Beach Tourism Business Improvement District, the Group Sales Team has increased meetings room-night production from 11,000 hotel room nights booked to more than 111,000 room nights booked in its last fiscal year. This growth in small meetings bookings is unprecedented in Orange County and across the nation. Over the 12 years of the TBID's history, the Newport Beach TBID now has the most resources, talent and tenure dedicated to the small-meetings market than any other destination in the United States.

Through this TBID, Visit Newport Beach has operated, managed and provided administrative and financial services to the TBID, since 2008. Adding the BID experience from the NBRA BID (6 years) with the VNB TBID (12 years), Newport Beach & Company has 18 years of combined experience marketing, selling, administering and providing financial oversight for two business-improvement districts in Newport Beach.

Additionally, Newport Beach & Company has managed the government-access channel contract with the City of Newport Beach for Newport Beach TV for the past six years. The marketing agency also manages a contract with Newport Beach Chamber of Commerce/Commodores Club for the marketing, media relations and promotion of the Newport Beach Christmas Boat Parade for more than five years as well as event-marketing support for the Newport Beach Film Festival, Hyatt Regency Newport Beach Summer Concert Series, Newport Beach Wine & Food Festival, Hyatt Regency Newport Beach Jazz Festival, Wooden Boat Festival, Newport to Ensenada Yacht Race, and many other brand-defining events in Newport Beach.

Lastly, Newport Beach & Company has contracts with the Balboa Island Merchants Association and Balboa Village Merchants Association to manage all economic-development, marketing, media relations, social media, digital marketing and advertising for two famous Newport Beach neighborhoods.

Newport Beach & Company plans to continue its successful NBRA BID marketing, finance and administration services with many new initiatives planned for the new five-year contract.

## REFERENCES

---

Newport Beach & Company is pleased to provide the following references for work it has provided the City of Newport Beach, the Newport Beach Hospitality Community, and county-wide organizations:

### **FOR NEWPORT BEACH TV VIDEO PRODUCTION & GOVERNMENT-ACCESS CHANNEL SERVICES:**

Ms. Tara Finnigan, APR  
Deputy City Manager  
City of Newport Beach  
100 Civic Center Drive, Bay 2E  
Newport Beach, CA 92660  
949-644-3035  
[tfinnigan@newportbeachca.gov](mailto:tfinnigan@newportbeachca.gov)

### **FOR NEWPORT BEACH RESTAURANT ASSOCIATION BID MARKETING, FINANCIAL & ADMINISTRATIVE SERVICES:**

Mr. Carlos Godinez  
Tavern House  
333 Bayside Drive  
Newport Beach, CA 92660  
949-673-8464  
[carlos.godinez08@gmail.com](mailto:carlos.godinez08@gmail.com)

### **FOR NEWPORT BEACH TOURISM IMPROVEMENT DISTRICT (TBID) MARKETING, SALES, FINANCIAL & ADMINISTRATIVE SERVICES:**

Ms. Debbie Snavelly  
General Manager  
Marriott Newport Beach Hotel & Spa  
900 Newport Center Drive  
Newport Beach, CA 92660  
949-640-4000  
[Debbie.Snavelly@marriott.com](mailto:Debbie.Snavelly@marriott.com)

### **FOR ORANGE COUNTY VISITORS ASSOCIATION STRATEGIC PLANNING & MARKETING SERVICES:**

Mr. Ed Fuller  
President/CEO  
Orange County Visitors Association  
19200 Von Karman Ave., Suite 880  
Irvine, CA 92612  
949-333-1387  
[ed.fuller@visittheoc.com](mailto:ed.fuller@visittheoc.com)

Micky Rucireta  
SVP Operations & Administration  
Orange County Visitors Association  
19200 Von Karman Ave., Suite 880  
Irvine, CA 92612  
949-333-1387  
[micky.rucireta@visittheoc.com](mailto:micky.rucireta@visittheoc.com)



**DINE NEWPORT BEACH:**

Dine Newport Beach is the strategic-marketing initiative cooperatively created and managed by the Newport Beach Restaurant Association and Newport Beach & Company. It was designed to enhance the economic vitality of the Newport Beach culinary community by showcasing and promoting Newport Beach, California, as a dining destination, offering innovative cuisine, fresh fare, diverse experiences, and a variety of exceptional restaurants.



The City of Newport Beach and the NBRA BID have achieved outstanding results and bottom-line impact from Newport Beach & Company's six years of marketing service and four years of finance/administration services to the Newport Beach Restaurant Association.

Additionally, BID Finance assessment collections have increased from 70 percent (pre-Newport Beach & Company involvement) to now currently 94 percent (current FY2020 YTD).

BID Administration has progressed extremely well with numerous stakeholder eNewsletters, surveys and eBlasts created and sent to the 450 restaurant stakeholders. BID Administration has managed more than six semi-monthly board meetings annually including an annual meeting of all stakeholders held each year. Last year's NBRA Annual Meeting was held at Muldoon's Restaurant.

Newport Beach & Company has managed the NBRA BID's involvement in numerous community events such as the Mayor's Dinner, Newport Beach & Company Annual Dinner, Police Appreciation Breakfast, Fire & Lifeguard Dinner, Newport Beach Wine & Food Festival and many more community events.

Newport Beach & Company will showcase its ability to provide services as outlined in the Scope of Services below by showcasing the results we have achieved for the NBRA BID during the current and prior fiscal years. These metrics and record results showcase all of the abilities outlined in the Scope of Work following the Evaluation Criteria Section.

Following are some topline results from the last fiscal year (FY2019) and the year-to-date metrics for FY2020:

**FY2019 NBRA BID: NEWPORT BEACH & COMPANY YEAR-END RESULTS**

In the last fiscal year, Newport Beach & Company's Dine Newport Beach Team delivered a record:

- 162,880 DineNB.com Website Visits
- 38 Targeted Media Relations Placements
- 13,551 Social Media Followers

For the **13<sup>th</sup> Annual Newport Beach Restaurant Week** last fiscal year, Newport Beach & Company generated incredible results for the culinary community:

- 6 Million Advertising Impressions
- 9.7 Million Public Relations Impressions
- 15.7 Million Restaurant Week Campaign Impressions
- 6,600+ Restaurant Week Reservations on DineNB.com
- \$3.7 Million in Incremental Diner Spending

Also in FY2019, Newport Beach & Company created a “52 Weeks of Dining” Promotion that served up:

- 1,285 New Social Media Subscribers
- 3.3 Million Total Impressions

---

#### **FY2020 NBRA BID: NEWPORT BEACH & COMPANY RESULTS YEAR-TO-DATE:**

In FY2020, Newport Beach & Company’s Dine Newport Beach Team secured even greater exposure, impressions and results for the fiscal year from July 1, 2019 through March 31, 2020. The Dine Newport Beach Team is currently developing a COVID-19 Restaurant Recovery Plan for the last quarter of FY2020, which will include nearly \$10,000 in recovery promotion, marketing, advertising and public relations for restaurants severely affected by the pandemic. This will include a Restaurant Month in June or July 2020.

Prior to the COVID-19 Pandemic, the Dine Newport Beach Team secured the following year-to-date media coverage, impressions, diner spending and results for the NBRA BID:

#### **FY2020 Earned Media (Public Relations) + Paid Media (Advertising)**

- PR impressions reached over **144.4 million**, an increase of **1,404 percent** from the prior year.
- Secured over **228 PR placements**, an increase of **500 percent** year over year.
  - Key Media Placement in Regional publications: Riviera Magazine, LA Times, Daily Pilot, Orange Coast Magazine, OC Register, Orange County Business Journal, Newport Beach Independent, Sauté Magazine, Locale Magazine, Greer’s OC, Pelican Hill Magazine.
  - National and International publications - New York Times, Telegraph UK, Cara Magazine, Millie.
- Broadcast TV Media Coverage: Two TV features on Fox 11 Los Angeles’ ‘**Good Day LA**’ featuring 10 Newport Beach restaurants during Wellness Week and Christmas Boat Parade. Also, secured cable TV coverage on Spectrum News 1.
- Paid media Impressions reached over **7.3 million** within the LA and OC regions.
- Targeted paid advertising on digital platforms such as Pandora, relevant digital sites and social channels were used to broaden audience reach and engagement.

#### **FY2020 Website/Digital Marketing**

- DineNB.com Website Pageviews - 689,361 + unique sessions 270,525, an increase of **14 percent** year over year.

#### **FY2020 Direct Marketing**

- Published the weekly Dine NB eNewsletter, which includes stakeholder spotlights, upcoming events, special offers through the email subscription database, as well as content prepared by food bloggers.
- Social media channels – **42-percent** increase.
- Ran a successful email campaign, “52 Weeks of Dining,” in August of 2019, which was focused on increasing the email subscription database.
  - Pre-campaign: 6,173 subscribers
  - Post campaign: 10,113 subscribers
  - Increased distribution database by **63 percent**.
  - Yielded **162,000+ impressions**.

- Distributed quarterly stakeholder emails, which provides partner updates and stakeholder applicable content.
- Continued our two culinary TV /video series with 52 episodes of “Weekly Bites” and 10 episodes of “Culinary Journeys” now in their third year of production. These shows run on Newport Beach TV, DineNB.com and all Visit/Dine Newport Beach digital channels, highlighting stakeholder establishments. Continued into the second year of a new TV/video program called “Eat.Sea.Do.” Both “Culinary Journeys” and “Eat.Sea.Do” are shot, edited, hosted and produced at **no cost** to the NBRA BID. These two video series are value-added, bonus restaurant TV/video shows that are free to NBRA BID. Combined, these videos generated over 113,447 views this current fiscal year plus bonus exposure on Newport Beach TV.

### **FY2020 Newport Beach Restaurant Week Event – Dine to Make a Difference**



- **72 participating restaurants – record-breaking**
- 8 new restaurants participated
- Added a new Charity Component: Partnered with Second Harvest Food Bank. **Charity donation - \$4,060.**
- Culinary Journey’s Media Kick-off and Diner Taste Event **sold 160 tickets to the public**, an increase of **60 percent** from prior year’s event.
  - **55 media representatives** attended the media launch event, an increase of **150 percent** from prior year.
  - Secured **57 key media placements** from media event.
  - **\$6,900 in ticket sales, increase of 75.5 percent from prior year.**
- Revenue for event participation of \$39,599, a **19-percent increase** from last year.
- Expanded partnerships with **OpenTable** and **Yelp OC**.
- Three NBRW preview tastings with Yelp OC, over **68k+ impressions**.
- Paid media partnership with **Locale Magazine**, which featured the event and included a spread in its foodie edition, as well as two blogs and a three-part video content series.
- Website performance – **189,797-page views**, increase of **70-percent from prior year**.
- Estimated consumer spending of **\$3.9 million**, an increase of **5.4-percent from last year**.
- Top Restaurant Results:
  - **20-percent sales increase** during Restaurant Week
  - **100-percent** stakeholder participating restaurants’ satisfaction
  - **88-percent will return** in 2021.
  - **75 Total Media Placements**, an increase of **192 percent from last year**.
  - Total Restaurant Week campaign impressions estimated at **226 million** total impressions.

#### **FINANCE & ACCOUNTS RECEIVABLE**

- Newport Beach & Company collected over 94-percent of the stakeholder assessments for a total of \$172,812 in revenue—up from a static 70% prior to Newport Beach & Company's tenure with NBRA BID as its finance and administration agency.

#### **METHODOLOGY:**

Newport Beach & Company strongly believes in a research-driven, customer-focused strategic and extremely integrated marketing approach to everything we do as a community-marketing agency for Newport Beach. It all starts with customer research, insights and business intelligence. This includes forecasting, economic impact studies, advertising effectiveness studies and goals-driven marketing initiatives that drive results.

If awarded a new contract, Newport Beach & Company strives to expand and grow its NBRA BID marketing, administration and financial services with a special goal next year of leading the culinary community's COVID19 Restaurant Recovery efforts.

#### EVALUATION CRITERIA #4: NEWPORT BEACH & COMPANY SUBJECT MATTER EXPERTISE

In addition to the qualifications listed in Evaluation Criteria #1, the BID experience outlined in Evaluation Criteria #2, and our abilities to meet or exceed the Scope of Services in Evaluation Criteria #4, Newport Beach & Company will provide additional examples of its subject matter expertise in culinary marketing, finance and BID administration.

In July 2020, Newport Beach & Company plans to launch a completely new destination brand identity system, which will include a new destination logo, pattern, font, textures and colors. This new brand identity system has been created for the entire destination, but also included variations for each of Newport Beach & Company's six business units—including a completely new brand identity system for Dine Newport Beach and Newport Beach Restaurant Week.

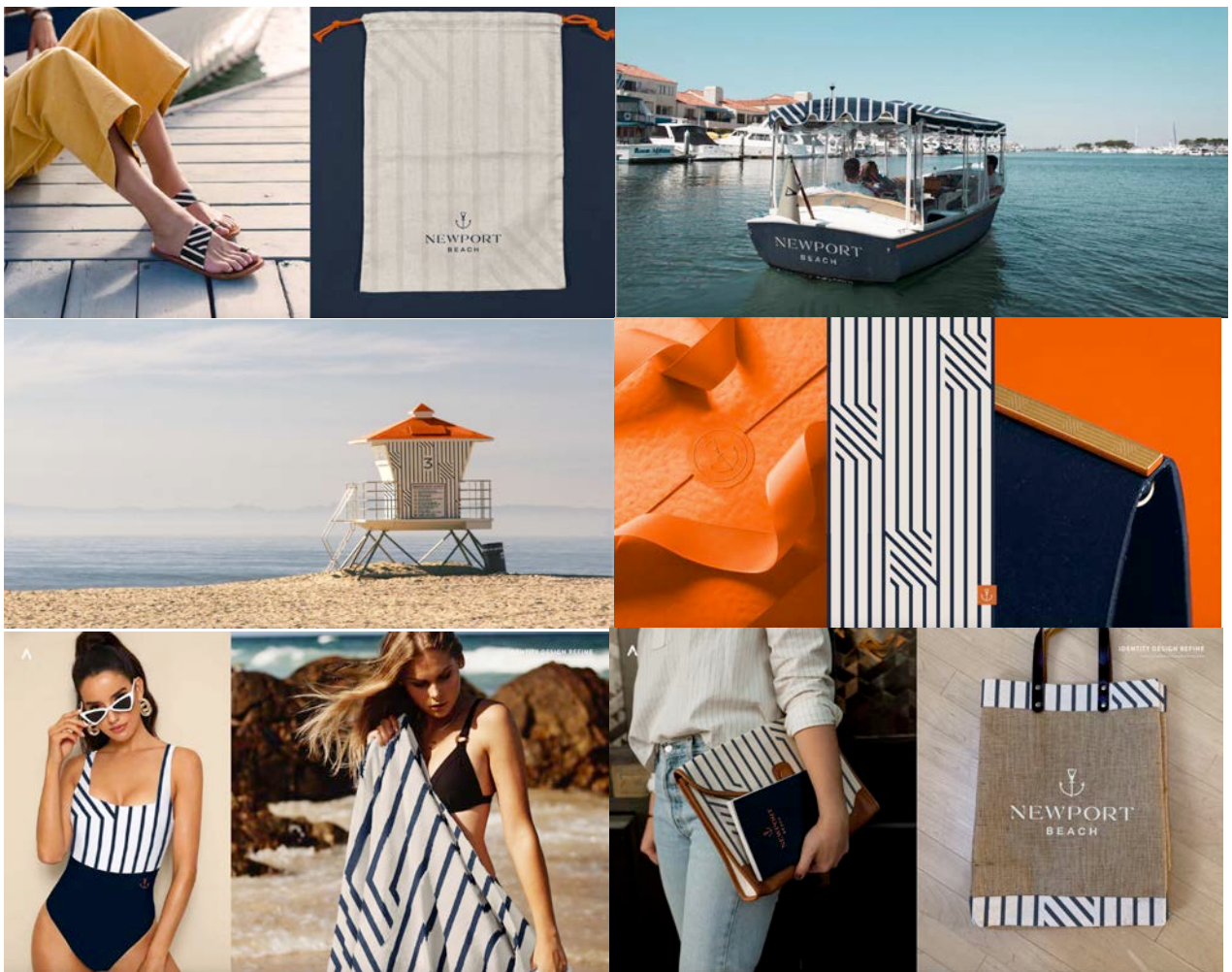
All of this creative work, designs and logo identity system was created at no cost to the NBRA BID or the City of Newport Beach. NBRA BID will be able to use this new brand identity system as a part of a larger community-wide branding initiative that includes Newport Beach Police Department, Dine Newport Beach, Celebrate Newport Beach, Video Newport Beach, Enterprise Newport Beach and Visit Newport Beach.

Here is an initial first-glance look at the destination's new brand identity:

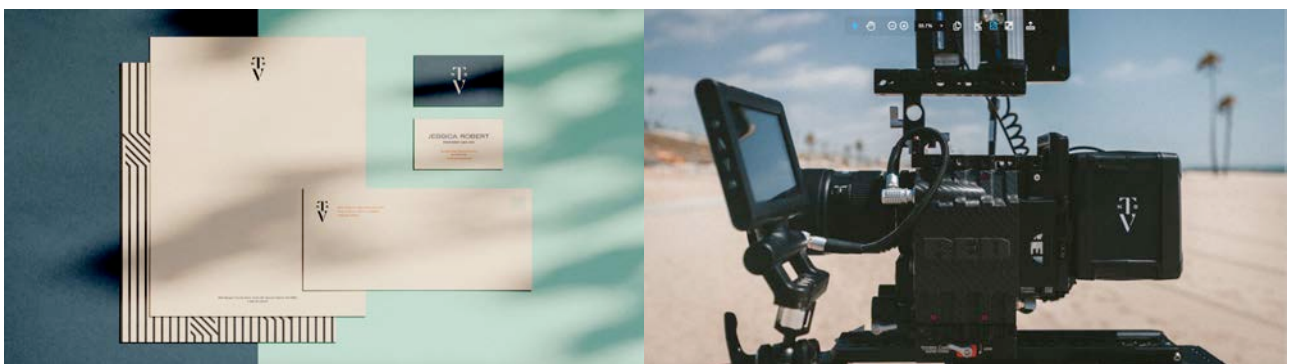
### NEW PROPOSED NEWPORT BEACH TOURISM BRAND IDENTITY SYSTEM:





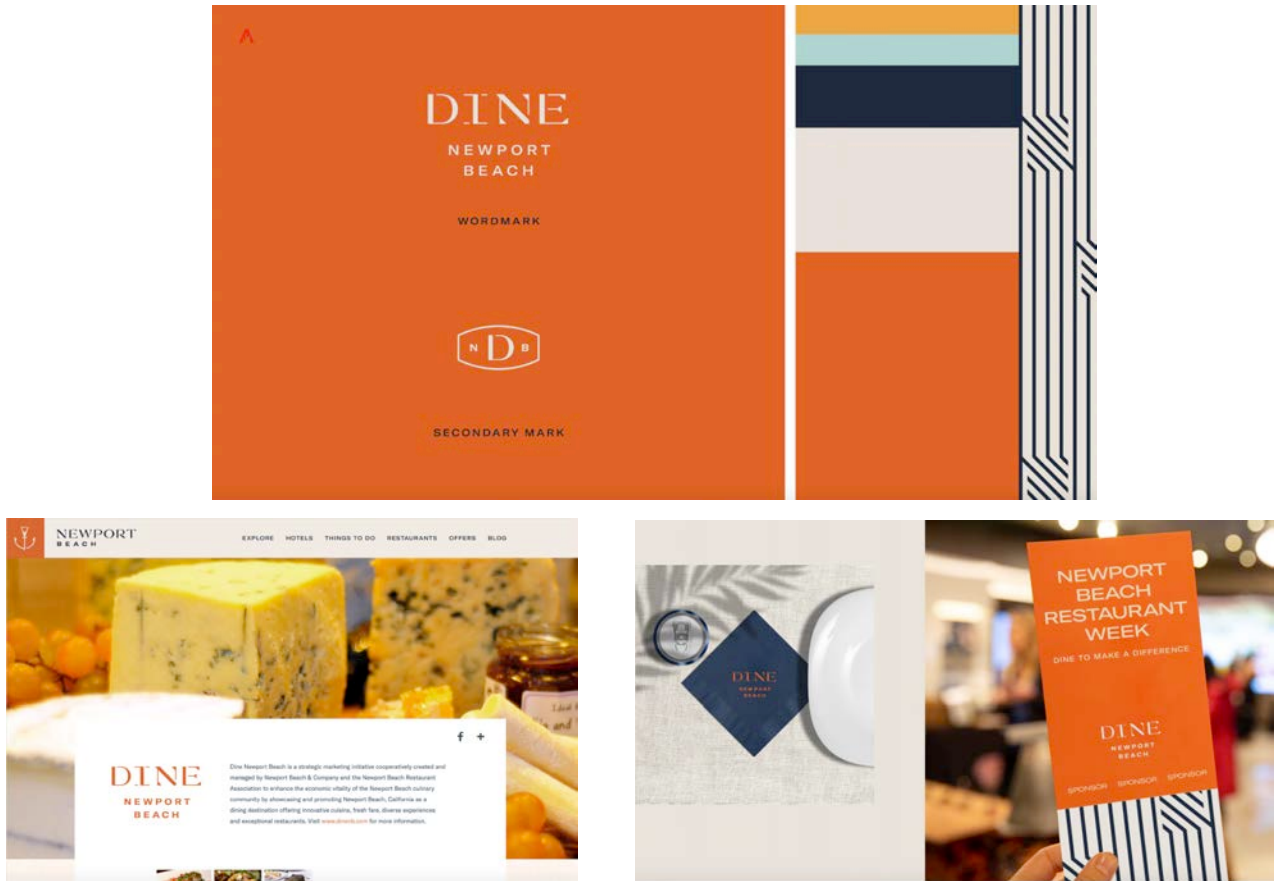


## NEW PROPOSED NEWPORT BEACH TV/NBTV BRAND IDENTITY SYSTEM:





## NEW PROPOSED DINE NEWPORT BEACH/NBRW BRAND SYSTEM:



Beyond this new Brand Identity System for our entire destination, Newport Beach & Company is planning an extensive COVID-19 Restaurant Recovery Plan to aide and assist our local restaurants with getting back on their feet financially after the worst economic crisis in a century.

Initial plans call for an immediate Restaurant Month as soon as the State of California declares restaurants and dining establishments can re-open. NBRA BID will play a bigger role in Newport Beach & Company's Wellness Week in August—now its third successful year, which is designed to spur travel to Newport Beach in an August need-period for restaurants and hotels.

Newport Beach & Company is planning an even more successful 15<sup>th</sup> Annual Newport Beach Restaurant Week in January 2021. Our BID Administration Team has its work cut out for it in the new year with new health/wellness/safety stakeholder communications in the post-COVID-19 era in addition to the day-to-day management of semi-monthly board meetings, annual meeting and BID correspondence.

And lastly, the Newport Beach & Company NBRA BID Finance Team is preparing financials for a new fiscal year, audit information, billing and invoicing assessment and accounts payable on the numerous NBRA BID initiatives.

Newport Beach & Company has the years of experience, destination knowledge, culinary marketing skills and administration/finance know-how to guide the City of Newport Beach and NBRA BID into a post-COVID-19 recovery and beyond.

## EVALUATION CRITERIA #5: NEWPORT BEACH & COMPANY PROPOSED PROJECT COSTS

Given the gravity, severity and unprecedented COVID-19 health and economic crisis and the uncertainty as to whether or not NBRA BID stakeholders will be able to pay their assessments in the first year of the contract, Newport Beach & Company is willing to severely discount the fees charged in year one (FY2021) of the new contract.

### FY2021 PROPOSED FEE STRUCTURE:

If we foresee a worst-case scenario, whereas the NBRA BID FY2021 Budget is severely impacted, Newport Beach & Company will be willing to **discount our three BID Service Group Fees** (Marketing Services, Financial Services and Administration/Agency Fee) by **50 percent** vs. our previous year's fee structure. All three combined fees for FY21, would be only \$54,000 (total annual fees) vs. the previous \$108,000 (total annual fees).

Newport Beach & Company has only one caveat to this extremely discounted fee structure. If FY2021 NBRA BID revenues unexpectedly are at or near previous income levels (roughly \$200,000 annual budget), and there are over-and-above Scope of Work expectations given to Newport Beach & Company during this recovery period, we would ask for the opportunity to explore returning the FY2021 fee to historic levels (\$108,000 total annual fees) or at a cost comparable to work provided. Given the severity of the current economic crisis, it's unlikely that NBRA BID revenues will be anywhere near comparable to previous years, but we would kindly request the opportunity to requote our fee structure for year one of the contract—should conditions miraculously improve.

### FY2022-2025 PROPOSED FEE STRUCTURE:

If the economy and Newport Beach restaurant industry recover in the next 15 months, then Newport Beach & Company proposes that years two through five of the contract would go back to the previous contract levels (\$108,000 total annual fees) with no annual increase for inflation.

If the economy and local restaurant industry are not fully recovered by year two of the contract (FY2022) and NBRA BID revenues are nowhere near the historic \$200,000+ levels, Newport Beach & Company would very much like to work with the City of Newport Beach and NBRA BID to continue the heavily reduced fee structure, provided we are financially capable of giving a discount. We would be open to renegotiating our fee for services in future years, should the economic condition not improve and NBRA BID Revenues are not at historic levels.

### NEWPORT BEACH & COMPANY PROPOSED SCHEDULE OF BILLING RATES:

Newport Beach & Company is pleased to present the following Schedule of Billing Rates for NBRA BID Marketing, Financial and Administrative Services at a heavily discounted rate for FY2021 and back to historic levels for future years of the five-year contract.

NEWPORT BEACH & COMPANY PROPOSED FEES (FY2021-FY2025)									
	FY2020 (PRIOR YEAR CONTRACT)		FIRST YEAR OF NEW CONTRACT			2 <sup>nd</sup> YEAR	3 <sup>rd</sup> YEAR	4 <sup>th</sup> YEAR	5 <sup>th</sup> YEAR
NBRA BID SERVICE GROUP DESCRIPTIONS	PREVIOUS ANNUAL FEES	PREVIOUS MONTHLY FEES	FY21 COVID-19 RECOVERY % FEE DISCOUNT	FY21 PROPOSED ANNUAL DISCOUNTED FEES	FY21 PROPOSED MONTHLY FEES	FY22 PROPOSED ANNUAL FEES	FY23 PROPOSED ANNUAL FEES	FY24 PROPOSED ANNUAL FEES	FY25 PROPOSED ANNUAL FEES
BID Marketing Services	\$60,000	\$5,000	50%	\$30,000	\$2,500	\$60,000	\$60,000	\$60,000	\$60,000
BID Financial Services	\$18,000	\$1,500	50%	\$9,000	\$750	\$18,000	\$18,000	\$18,000	\$18,000
BID Administration/Agency Fee	\$30,000	\$2,500	50%	\$15,000	\$1,250	\$30,000	\$30,000	\$30,000	\$30,000
<b>TOTAL CONSULTANT FEES</b>	<b>\$108,000</b>	<b>\$9,000</b>	<b>50%</b>	<b>\$54,000</b>	<b>\$4,500</b>	<b>\$108,000</b>	<b>\$108,000</b>	<b>\$108,000</b>	<b>\$108,000</b>

NOTE: Assumes lowest possible NBRA BID Total Revenue of \$100,000 or less vs. \$212,000 Prior Year Revenue

**NEWPORT BEACH & COMPANY PROPOSED ITEMIZED REIMBURSABLE ITEMS:**

---

Newport Beach & Company presents the following items to be included as reimbursable items under this contract. This list is not a full representation of all types of prior expenses, but merely an estimation of the types of items that would typically be reimbursed under this contract much as we've invoiced in all of our previous years on the contract.

**PROPOSED ITEMIZED REIMBURSABLE ITEMS:**

Aside from the Service Group Fees (Marketing, Financial and Administrative/Agency Fees), here are some examples of reimbursable items:

- Print, digital, out-of-home, radio, TV advertising and any other paid media to promote Dine Newport Beach and NBRA BID including media placement fees, ad serving fees, and agency commissions for ad placements
- Postage, stamps, envelopes and the perforated paper for the annual assessment mailings
- Event planning fees including décor, lighting, signage, power generators, food, beverages, staging, set-up fees, tear-down fees, service/wait staff, security staff, venue rental fees, fuel/captain for boat charters (Annual Meeting) and any charges to produce, hold and execute an event on behalf of the NBRA BID.
- Marketing Research: Ad Effectiveness Study for NBRW, Economic Impact Study for NBRA, Survey tools such as SurveyMonkey or any other outside research fees.
- Collateral/Signage: printing fees for posters, NBRW utility bill mailings, NBRA Annual Meeting postcard invitations, NBRA tri-fold brochures, direct mail, brochures, NBRA Restaurant Banners and any other printing or production fees to produce printed signage or direct mail collateral for NBRA BID.
- Strategic Business Plan consultants
- Photoshoot/Photography/Video Editing/Video Shooting: any external fees incurred to photograph, video tape or video edit still photography or video footage for use by NBRA BID and Newport Beach & Company to market and promote the NBRA BID.
- Gift cards for sweepstakes drawings and promotions

## SCOPE OF SERVICES

### SERVICE GROUP 1: BID ADMINISTRATION

Newport Beach & Company has been the incumbent agency for NBRA BID Administration for the previous four years. We have a dedicated team of administrative, managerial and finance professionals who are familiar with the Brown Act and all items listed below in the BID Administration Scope of Work section. We have and will continue to assist with serving as the primary contact between the NBRA BID and stakeholders, conducting BID meetings with the approval of City of Newport Beach staff and City Council, creating and sending all stakeholder communications, board presentations, handouts and reports, meeting minutes, agendas and BID records in addition to everything outlined in the scope below. Newport Beach & Company may suggest several mini-Restaurant Weeks, Restaurant Months or other recover campaigns as an additional promotion to encourage dining in Newport Beach restaurants as a part of a COVID-19 Restaurant Recovery Plan. This would be in addition to the Annual Restaurant Week held in January each year.

#### 1.0 BID ADMINISTRATION

- 1.1 Consultant shall serve as the liaison to the City as it related to the activities of the BID and act as the primary contact between the NBRA BID Board and stakeholders.
- 1.2 Consultant will ensure that the NBRA BID Board and stakeholder meetings are noticed and executed according to the Ralph M. Brown Act and any other applicable laws or City policies. This includes preparing agendas and meeting minutes, as well as maintaining BID records.
- 1.3 Consultant shall assist the NBRA BID Board in the preparation of the annual report and proposed budget for review and approval by the BID Board and City Council as required by state law, including providing information for staff reports and public notices.
- 1.4 Consultant shall facilitate and provide follow-up for all Board, stakeholder and subcommittee meetings.
- 1.5 Consultant shall maintain a current database of NBRA BID stakeholders with contact information.
- 1.6 Consultant will assist in the preparation of all NBRA BID communication materials including, but not limited to the annual report, stakeholder mailings, emails and surveys.
- 1.7 Consultant shall effectively communicate with the City and the NBRA BID Board and its stakeholders and provide updates as requested;
- 1.8 Consultant shall provide a dedicated professional to attend all NBRA BID Board meetings, prepare reports and prepare other documents as required or requested;
- 1.9 Consultant shall involve the NBRA BID Board in the selection and hiring processes as they relate to any dedicated professionals specifically retained and assigned to the NBRA BID Board and the City for the purposes of this Project;
- 1.10 City shall, upon request, provide the Consultant with any documentation necessary to execute the services required in this Project.
- 1.11 Consultant shall provide regular reports to the City and the NBRA BID Board noting the progress and a forecast of what will be accomplished in the month(s) ahead. This update shall, at a minimum be delivered in a presentation; however, the City and the NBRA BID Board reserves the right to request a full-written report.

## **2.0 COMMUNITY RELATIONS**

- 2.1 Consultant shall maintain existing NBRA BID memberships in a variety of professional restaurant, tourism and community associations and, based on the NBRA BID Board's input, develop new partnership opportunities that will enhance the reach and promotion of dining in Newport Beach.
- 2.2 Consultant shall present information on and oversee the NBRA BID's participation in local events and activities that support the goals and mission of the NBRA BID.
- 2.3 Consultant shall serve as the NBRA BID representative while attending local community events to distribute Dine Newport Beach marketing materials and promote the Newport Beach dining experience.

## **3.0 EVENTS**

- 3.1 Consultant shall plan and produce the NBRA BID's annual meeting including selecting and securing a meeting location, overseeing, preparing and distributing invitations to NBRA BID stakeholders and guests and developing the program;
- 3.2 Consultant shall plan and produce the NBRA Annual Restaurant Week event, including selecting and securing a meeting location for its kick-off event, overseeing and preparing the overall Restaurant Week program, working with interested participating stakeholders, developing and executing the program;
- 3.3 Consultant shall make every effort to minimize the cost of events in the interest of the NBRA BID stakeholders.

**Newport Beach & Company has been the incumbent agency for NBRA BID Marketing Services for the previous six years. We have a dedicated team of marketing, advertising, media relations, social media, video editing, video hosting, video shooting, digital marketing, website maintenance, email marketing, strategic planning, marketing planning, marketing research, presentation skills, graphic design and production experts.**

**Each of the staff members who lead the respective marketing disciplines above are highly experienced, award-winning and Newport Beach destination/culinary marketing experts.**

**We have and will continue to assist with serving as the brand management, advertising, promotions, website/social media and public/media relations team in addition to all Marketing Services outlined in the scope below for the City of Newport Beach and the NBRA BID.**

#### **4.0 SERVICES: GOALS, PROVISIONS & RESPONSIBILITIES**

- 4.1 Consultant shall provide the NBRA BID Board of Directors (Board) with planning, development, implementation and delivery of the annual marketing plan. This comprehensive plan shall address the following components:
  - Brand Management
  - Advertising
  - Promotions
  - Website and Social Media
  - Public and Media Relations
- 4.2 Consultant shall oversee and coordinate all marketing efforts including working closely with and monitoring the work product of vendors and other subcontracts and subconsultants, while maintaining the cost services in accordance with the NBRA BID's approved budget and working diligently to keep the cost of services as low as possible;
- 4.3 Services provided by subcontractors and/or vendors shall comply with all City of Newport Beach (City) policies as defined in City Council Policy F-14: Authority to Contract and the City's administrative purchasing policies;
- 4.4 Consultant shall effectively communicate with the City and the NBRA BID Board and its stakeholders and provide updates as requested;
- 4.5 Consultant shall provide a dedicated professional to attend all NBRA BID Board meetings and prepare marketing reports and other marketing documents as required or requested;
- 4.6 Consultant shall involve the NBRA BID Board in the selection and hiring processes as they relate to any dedicated professionals specifically retained and assigned to the NBRA BID Board and the City for the purposes of this Project;
- 4.7 City shall, upon request, provide the Consultant with any documentation necessary to execute the services required in this Project;
- 4.8 Upon Agreement execution, Consultant shall provide the City and the NBRA BID Board with an annual calendar of the marketing plan containing specific dates and deadlines including advertising campaigns and advertising buys.



- 4.9 Upon Agreement execution, Consultant shall confirm the NBRA BID’s strategic goals and develop a tailored marketing plan with key performance metrics and goals for website, social metrics and public relations

## **5.0 MARKETING**

- 5.1 Consultant shall, with the involvement of the NBRA BID Board, develop and implement a strategic marketing plan and program that fulfills the goals of the NBRA BID as detailed in its adopted Strategic Plan and Annual Report.
- 5.2 Consultant shall develop a plan that contains an implementation schedule, budget and measurable qualitative and quantitative goals, objectives and metrics.
- 5.3 Consultant shall prepare periodic reports to present to the NBRA BID Board and the City that details the progress made in and achieving, or the failure to achieve, the established marketing goals and objectives.
- 5.4 Consultant shall fulfill tasks based on the direction of the City and input from the NBRA BID Board that include, but are not limited to:

### **5.4.1 ADVERTISING**

- 5.4.1.1 Consultant shall be responsible for the creation and development of the NBRA BID advertising campaign materials including graphic design, layout, content and photography.
- 5.4.1.2 Consultant shall select and manage all print and online placement in key media outlets to market Newport Beach restaurants and the dining destination in accordance with the NBRA BID budget.

### **5.4.2 PROMOTIONAL MATERIALS**

- 5.4.2.1 Consultant shall design and print all requested collateral such as informational brochures, promotional materials and stakeholder informational pieces in a manner providing a consistency in branding.

### **5.4.3 WEBSITE**

- 5.4.3.1 Consultant shall oversee, update and maintain the NBRA BID website.
- 5.4.3.2 Consultant shall ensure that the website is regularly updated with relevant content including information of interest to the NBRA BID stakeholders and items of interest to the Orange County diners, area visitors and the local Newport Beach community.
- 5.4.3.3 Consultants shall ensure that all stakeholders in good standing are listed, and their information remains current on the NBRA BID website.
- 5.4.3.4 Consultant shall provide regular metric reports to the NBRA BID Board noting the progress made and a forecast of what will be accomplished in the coming months. This reporting will be inclusive of website visitors, webpage page views, and email subscribers, as well as Google analytics when applicable.

#### **5.4.4 SOCIAL MEDIA**

- 5.4.4.1 Consultant shall maintain and routinely update NBRA BID's Facebook, Twitter, Instagram and all other social media channels deemed relevant by the NBRA BID Board and desired to be engaged by the Board.
- 5.4.4.2 Consultant shall develop social media campaigns and promotions that increase visibility for Newport Beach restaurants, the local culinary community and dining experiences, as needed.

#### **5.4.5 COMMUNICATIONS**

- 5.4.5.1 Consultant shall write and distribute monthly e-newsletters to the consumer database of email subscribers.
- 5.4.5.2 Consultant shall write and distribute quarterly e-newsletters to NBRA BID stakeholders providing information on promotional opportunities, industry insight and BID-related news.
- 5.4.5.3 Consultant shall write, edit and publish regular blog posts on the NBRA BID website on a weekly basis.

#### **5.4.6 EVENTS**

- 5.4.6.1 Consultant shall produce, direct, provide support and coordinate activities, marketing, advertising, promotion and media relation as needed for Newport Beach Restaurant Week as well as any other Board-directed events.
- 5.4.6.2 Consultant shall make every effort to minimize the cost of events in the interest of the NBRA BID stakeholders.

### **6.0 MEDIA RELATIONS**

- 6.1 Consultant shall develop a public relations (PR) plan that complements the NBRA BID's marketing program.
- 6.2 Consultant shall include in the plan specific objectives, strategies, and tactics for an effective public and media relations campaign.
- 6.3 Consultant shall identify qualitative and quantitative methods for measuring the success or failure of the public and media relations campaign.
- 6.4 Consultant shall provide regular reports on PR metrics to the NBRA BID Board noting the progress made and a forecast of what will be accomplished in the coming months. This reporting will be inclusive of impressions, ad value and media visits.
- 6.5 Consultant shall consult with the City and the NBRA BID Board Chair on any media related requests, speaking engagements, and/or appearances prior to responding to such requests aside from providing information related to the BID's general marketing and the production and promotion of the NBRA BID's events.

## **7.0 RESEARCH & MEASUREMENT**

- 7.1 Consultant shall conduct or utilize existing research, as appropriate and with NBRA BID Board consideration, to ensure that the marketing plan and strategy are effective and producing quantifiable results.
- 7.2 Examples include, but are not limited to, stakeholder surveys, customer satisfaction surveys, website and social media analytics, and hospitality industry research.
- 7.3 Consultant shall prepare reports and present findings to the NBRA BID Board and adjust the marketing program if necessary, based on research results or direction from the NBRA BID Board.

Newport Beach & Company has been the incumbent agency for NBRA BID Financial Services for the previous four years. We have a dedicated team of finance professionals who are familiar with the Brown Act, GAAP and all professional finance, accounting and financial services. We have and will continue to assist with serving as the lead agency for maintaining an accurate, detailed general ledger for the BID, financial statements, assessment invoices, accounts payable/receivable, performance metrics, budgeting, auditing and all phases of financial services to expertly administer and monitor public funds through the NBRA BID. With four years of experience, Newport Beach & Company's Dine Newport Beach Finance Team can pick up immediately in the new fiscal year and assist with any audit for the prior year. We are fully staffed and extremely capable to manage all aspects of the Financial Services Service Group of the NBRA BID.

By continuing your financial services through Newport Beach & Company, NBRA BID will achieve financial stability, accuracy and integrity every step of the way as we assist with COVID-19 recovery plans and tough budget decisions that will need to be made in addition to all of the Financial Services Scope of Work defined below.

## 8.0 SERVICES: FINANCIAL SERVICES

- 8.1 Consultant shall maintain an accurate and detailed general ledger for the BID; prepare timely financial statements; prepare assessment invoices; process accounts payable bills for approval; prepare key financial performance metrics for review by the City and the NBRA BID Board and provide other financial services and reporting as requested by the City or the NBRA BID Board.
- 8.2. Budgeting – Consultant shall maintain an accurate and detailed general ledger and provide relevant, detailed financial reporting and preparation assistance to the City and the NBRA BID Board to facilitate effective annual budgeting.
- 8.3 Accounts Receivable Processing – Consultant shall prepare annual assessment invoices to all current stakeholders in July of each year. This process will occur following the renewal of the NBRA BID by the City Council and approval of the annual budget. Annual assessments and other fee monitoring and maintenance will be stored in an integrated and secure database system. Consultant will monitor all activity pertaining to NBRA BID stakeholder accounts.
  - 8.3.1. Consultant shall maintain a current database of NBRA BID stakeholders with contact and billing information
- 8.4 Financial Statements – Consultant shall prepare all financial and accounting processes to be followed according to US GAAP and the internal control policies approved by the City. All accounts shall be reconciled and statements prepared by the 10th day of each month for the previous month end. The City and the NBRA BID Board shall receive a Year-to-Date Statement of Activities, a Statement of Position, a Statement of Cash Flow, Check Register, a current A/R Detail of Outstanding Assessments, and any other requested reports each month at the regularly scheduled meeting. The City and the NBRA BID Board shall also receive a detailed transaction report for the month for all income and expense accounts. Any requested additional reporting shall be accommodated in a timely manner.

- 8.4.1 Consultant shall effectively communicate with the City and the NBRA BID Board and its stakeholders and provide updates as requested;
  - 8.4.2 Consultant shall provide a dedicated professional to attend all NBRA BID Board meetings and prepare financial reports and other documents as required or requested;
- 8.5 Accounts Payable Processing – Consultant shall provide an accounts payable workflow structured upon the digital review and approval of all invoices. Consultant shall receive and review each invoice prior to uploading to the electronic bill payment system with all necessary supporting documentation. The approval process shall be: 1) City Manager’s Office BID Liaison; 2) NBRA BID Treasurer; and 3) City’s Deputy City Manager. All Approvals will be electronically documented within the financial database system and digital copies retained within the vendor file per the City’s records retention schedule.
- 8.6 Auditing – The City may request an audit of the BID’s financial accounts. Such audits may include, but are not limited to the following: the review of files maintained by the consultant, a review of processes used by the consultant to fulfill its duties, the accounting controls in place at the consultant’s offices and a review of accounting transactions during the accounting period.
- 9.0 REPORTING & DELIVERABLES**
- 9.1 Consultant shall provide regular reports to the City and the NBRA BID Board noting the progress and a forecast of what will be accomplished in the month(s) ahead. This update shall, at a minimum be delivered in a presentation; however, the City and the NBRA BID Board reserves the right to request a full-written report.
- 9.2 Consultant shall assist the NBRA BID Board in the preparation of the proposed annual budget for review and approval by the BID Board and City Council as required by state law, including providing information for staff reports and public notices.

## TOP 5 REASONS

NEWPORT BEACH & COMPANY IS THE PREFERRED AGENCY  
FOR NBRA BID MARKETING, FINANCE & ADMINISTRATION SERVICES

---

1. TALENT & LONGEVITY OF AWARD-WINNING MARKETING, COMMUNICATIONS, MEDIA RELATIONS, FINANCE AND ADMINISTRATION SERVICES FOR THE CITY OF NEWPORT BEACH AND THE NBRA BID FOR A COMBINED SIX YEARS OF SERVICE TO THE NEWPORT BEACH RESTAURANT ASSOCIATION
6. PROVEN EXPERIENCE, QUALIFICATIONS, PROJECT HISTORY AND REFERENCES AS THE OFFICIAL, ACCREDITED DESTINATION-MARKETING ORGANIZATION FOR NEWPORT BEACH, CALIFORNIA
7. VALUE-ADDED DESTINATION VIDEO PROGRAMMING & CULINARY CONTENT OUTSIDE OF THIS CONTRACT
8. DISCOUNTED PRICING DUE TO THE UNPRECEDENTED COVID-19 CRISIS AND ITS IMPACT ON OUR RESTAURANT COMMUNITY
9. NEW DINE NEWPORT BEACH BRAND IDENTITY SYSTEM BASED ON THE NEW VISIT NEWPORT BEACH DESTINATION BRAND IDENTITY SYSTEM LAUNCHING JULY 1, 2020

## THANK YOU

It is an absolute privilege to market, promote, sell and provide financial/administrative services to a destination as amazing as Newport Beach. We could be marketing and promoting Kraft Macaroni & Cheese, Tide Detergent, Gillette Razor Blades or Peoria, Illinois, but instead we are honored to represent the crown jewel of this Southern California coastal oasis. And, not only are we blessed as the caretakers of the Newport Beach destination story, but we're also its marketers and promoters for its incredible culinary community of nearly 450 restaurants, its 10 distinct neighborhoods, its brand-defining events and its government-access TV channel.

We couldn't ask for anything more except to be your renewed agency for NBRA BID Marketing, Financial and Administration Services for the next five-year period. Just think where we can go as we work together to climb out of these terrible times with the Newport Beach Restaurant Association and the City of Newport Beach into this new decade!

Thank you for allowing us the opportunity to serve the Newport Beach Restaurant Association BID and the City of Newport Beach. We appreciate the opportunity to bid on these services.

Journey Well,



Gary S. Sherwin, CDME, APR  
President & CEO

Newport Beach & Company/Dine Newport Beach