



## Board of Directors Meeting

Tuesday, August 5, 2025

2:00 p.m.

Visit Carlsbad Office: 3088 State Street #103, Carlsbad 92008

### Agenda

#### **Welcome & Call to Order**

**Stripe**

#### **Self-Introductions**

**Stripe**

#### **Public Comment**

**Stripe**

*Members of the public are welcome to make comments on items on the agenda and not on the agenda.*

#### **Informational Items**

##### **CEO Report April – June 2025**

**Sidoriak**

##### **Report on CEO FY25 Goals Achieved and Related Bonus**

**Stripe**

##### **Financial Update**

**Sidoriak**

#### **Action Items**

##### **1. Approval of April 24, 2025 Meeting Minutes**

**Stripe**

*Board members will review and consider for approval the minutes of the prior meeting.*

##### **2. Board of Directors Appointment**

**Stripe**

*Board members will discuss and appoint a director to the vacant board seat.*

##### **3. Board Officer Elections**

**Stripe**

*Board members will discuss and elect the positions of Chair, Vice Chair and Secretary/Treasurer.*

##### **4. Grant Application – Bike MS**

**Sidoriak**

*Board members will discuss and consider the grant application from the National Multiple Sclerosis Society for Bike MS: Bay to Bay 2025*

##### **5. Grant Application – Walk MS**

**Sidoriak**

*Board members will discuss and consider the grant application from the National Multiple Sclerosis Society for Challenge Walk MS: Southern California*



6. **Grant Application – Carlsbad Marathon** **Sidoriak**  
*Board members will discuss and consider the grant application from In Motion for the Carlsbad Marathon*
7. **Grant Application – St. Michael's Jazz Fest** **Sidoriak**  
*Board members will discuss and consider the grant application from St. Michael's By-the-Sea Episcopal Church for Jazz Fest*
8. **Adjournment** **Stripe**

**Future meeting date:** October 16, 2025

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BROWN ACT: Government Code 54950 (The Brown Act) requires that a brief description of each item to be transacted or discussed be posted at least 72 hours prior to a regular meeting and 24 hours prior to a special meeting. Action may not be taken on items not posted on the agenda. Meeting facilities are accessible to persons with disabilities. If you require special assistance to participate in the meeting, notify Tina Burke at (760) 248-8478 at least 48 hours prior to the meeting.

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



## **Board of Directors Meeting Minutes**

### **Meeting Details**

Date: April 24, 2025

Time: 2:00 p.m.

Location: Visit Carlsbad Office - 3088 State Street #103, Carlsbad, CA 92008

### **Attendees**

Quorum confirmed with the following six members in attendance in person:

#### **Board Members**

Tim Stripe, Chair

Rob Stirling, Vice Chair

Randal Chapin, Member

Chad Eding, Member

Geoffrey Parkford, Member

Kurt Stocks, Member

#### **Other Attendees**

Kim Sidoriak, President & CEO, Visit Carlsbad

Tina Burke, Director of Finance & Administration, Visit Carlsbad

#### **Absence**

Craig Martin, Member

### **Call to Order**

Meeting called to order by Chair Stripe at 2:02 p.m.

### **Self-Introductions**

Self-introductions were made by all in attendance.

### **Public Comment**

Chair Stripe called for public comments; there was none.

### **Informational Items**

Sidoriak presented the quarterly (January – March 2025) CEO report which included destination performance (STR report) and an update on the 2022-2024 strategic plan's four areas of focus.

Sidoriak then presented financial information for nine months ended March 31, 2025, including the balance sheet, budget to actual revenues and expenses, Group Incentive Program summary, and golf-related assessment summary.



Sidoriak presented the fiscal year 2026 strategies and tactics. Discussion ensued regarding the 3-Year Strategic Plan and how it relates to the Business Plan.

### **Action Items**

#### **1. Approval of January 23, 2025 Meeting Minutes**

Chair Stripe presented the January 23, 2025 board meeting minutes for approval.

Burke stated that of the current board members, only Chair Stripe was in attendance at the January 23, 2025 meeting.

Vote:

In favor: Stripe

Abstain: Stirling, Chapin, Eding, Parkford, Stocks

**Motion passed.**

#### **2. Approval of February 27, 2025 Meeting Minutes**

Chair Stripe presented the February 27, 2025 special board meeting minutes for approval.

Burke stated that of the current board members, only Stripe, Stirling and Stocks were in attendance at the February 27, 2025 meeting.

Motion to approve the February 27, 2025 special board meeting minutes was made by Stocks; seconded by Stirling.

Vote:

In favor: Stripe, Stirling, Stocks

Abstain: Chapin, Eding, Parkford

**Motion passed.**

#### **3. Approval of April 14, 2025 Meeting Minutes**

Chair Stripe presented the April 14, 2025 special board meeting minutes for approval.

Motion to approve the April 14, 2025 special board meeting minutes was made by Parkford; seconded by Stocks.

In favor: Stripe, Stirling, Chapin, Parkford, Stocks

Abstain: Eding

**Motion passed.**



**4. Approval of 3-Year Strategic Plan**

Sidoriak presented a new 3-Year Strategic Plan for fiscal years 2025/2026 – 2027/2028 developed in conjunction with SMG Consulting. Discussion ensued including the intention that the plan is to inform each fiscal year Business Plan and is a “living document”.

Motion to approve the 3-Year Strategic Plan was made by Stocks; seconded by Parkford.

Vote: All in favor.

**Motion passed.**

**5. Approval of Fiscal Year 2026 Budget**

Sidoriak presented the fiscal year 2026 budget. She also explained there are additional funds available outside the proposed budget due to carryovers from the prior fiscal year. Those funds could potentially be used for other unique programs and opportunities and would be brought to the board for approval.

Motion to approve the 2026 budget was made by Parkford; seconded by Stirling.

Vote: All in favor.

**Motion passed.**

**6. Approval of 2025-2026 Annual Report**

Sidoriak presented the Carlsbad Tourism Business Improvement District 2025/2026 Annual Report to be submitted to the City of Carlsbad. The report was prepared by Civitas Advisors.

Motion to approve the 2025/2026 Annual Report was made by Eding; seconded by Parkford.

Vote: All in favor.

**Motion passed.**

**7. Approval of Ad Agency Contract**

Sidoriak presented an ad agency contract with 62Above for a total of \$2.1M for fiscal year 2026. This will be the fourth contract with 62Above and Visit Carlsbad has been pleased with their performance. Sidoriak stated an RFP process was completed in fiscal year 2022 which led to 62Above’s appointment. Typically, destination



marketing organizations put their advertising agency contracts out to RFP every 3-5 years. There will likely be an RFP process next fiscal year.

Motion to approve the ad agency contract with 62Above was made by Stocks; seconded by Eding.

Vote: All in favor.

**Motion passed.**

**8. Approval of Group Incentive Program Offer**

Sidoriak presented the Group Incentive Program offer for fiscal year 2026. Discussion ensued and it was decided to keep the offer the same as the most recent offer for both financial and consistency considerations. Highlights of this offer are: 5% incentive with a maximum incentive of \$20,000 and must contract to actualize in the months of November through March. This offer extends the "consume by" date to March 31, 2028.

Motion to approve a Group Incentive Program offer for fiscal year 2026 was made by Stirling; seconded by Parkford.

Vote: All in favor.

**Motion passed.**

**9. Adjournment**

Chair Stripe called to adjourn the meeting at 4:06 p.m.

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Tim Stripe, Chair



### **VISIT CARLSBAD BOARD OF DIRECTORS APPLICATION**

To apply for a position on the Visit Carlsbad Board of Directors, please email your completed application and your bio or resume to [info@visitcarlsbad.com](mailto:info@visitcarlsbad.com) by Friday, February 14, 2025 at 5:00pm with the subject line "Visit Carlsbad Board Application".

**Date:** 2/10/25

**Name:** Keith Noe

**Current occupation (organization and job title):**

Excel Hotel Group - Regional Director of Operations

**CTBID assessed lodging business represented:**

Carlsbad by the Sea and Fairfield Inn Carlsbad

**Email:** knoe@excelhotelgroup.com

**Phone number:** 619-577-2897

**Please list your current and past board experiences including the organization and your position/role, if any.**

Carlsbad Tourism Improvement District

**Please explain your interest in joining this Board.**

I live in North County and have spent 10 years of my career working in Carlsbad helping promote and support tourism. I know the city well and have watched Carlsbad continue to grow and develop into a top destination in Southern California. I feel like I have been a part of that process and I would like to continue that.

**Please briefly outline the specific skills, education, experience, or contributions you would bring to this Board.**

Working with Carlsbad hotels for the majority of my career (La Quinta Inn Carlsbad, Fairfield Inn Carlsbad, and the Carlsbad by the Sea Hotel), as a Sales Manager, General Manager, and as a Regional Director I bring a well-rounded skill set and knowledge of the tourism and hospitality industry. I have helped drive tourism working with Travel Agents, Legoland, Getaway Today, Welk, Athlete Travel, and others for many years.

# Keith L. Noe

3901 Brown Street  
Oceanside, CA 92056  
(760) 917-4336  
knoebb@gmail.com

**OBJECTIVE:** to continue leading and assisting hotels to help them reach their full financial potential while exceeding guest expectations, employee satisfaction, surpassing brand standards, and maintaining the asset.

## **EDUCATION:**

### **University of California, San Diego**

San Diego, CA  
Bachelors in Communication  
Graduated in June 2009

### **Palomar Junior College**

San Marcos, CA  
A.A. in Liberal Arts and Sciences  
Graduated in May of 2006

## **EXPERIENCE:**

January 2022-Present

### **Regional Director of Operations**

Excel Hotel Group

November 2019-January 2021

### **Area Operations Manager**

Excel Hotel Group

Oversee as many as 7 hotels, representing \$35 million in total revenue. Brands have included Marriott, Hyatt, IHG, Wyndham, Choice, and Best Western as well as Independent Hotels with property sizes ranging from 79 room to 150 rooms. Helped oversee all areas of the hotel operations including staffing efficiencies, brand standards, financial performance, forecasting, budgeting, contracts and renewals, and capex items. Also, responsible for Excel Quality Assurance audits, completing 15-20 on property operational audits each half of the year as well as the 360 accounting audits as needed (5-10 a year).

January 2018-October 2019

### **General Manager**

Hampton Inn San Diego - Downtown

Lead a team of 55+ associates at a 177 room property with 1000 sf of meeting space with an Airport Shuttle. Helped the property improve Overall Experience scores, improve AOS scores, Pass Quality Assurance as well as Internal Audits, and reach expected flex/flow goals. Maintained a well-balanced scorecard keeping us in the top 20% of the Dimension Development Portfolio.

2-11-25



# Keith L. Noe

February 2016-December 2017

**General Manager**

Courtyard by Marriott Solana Beach

Lead a team of 43+ associates at a 120 room property with 750 sf of meeting space and the Courtyard Bistro. Helped lead the property out of the Red Zone by running at Overall Satisfaction scores above the brand threshold in two consecutive 6-month periods and passing BSA. Our team accomplished this while increasing revenue by \$500K YOY with 100%+ flow YoY, exceeding budgeted GOP of 54%+. Maintained a well-balanced scorecard by exceeding the expectations of our guests, limiting staff turnover, ensuring the longevity of the asset, delivering top-line revenue, and GOP.

February 2013-February 2016

**General Manager**

La Quinta Inn & Suites Carlsbad

Supervised hotel personnel to ensure completion of hotel operational duties. Coordinated the activities of all departments including housekeeping, engineering, sales, front desk, and breakfast. Ensured the delivery of quality and service to hotel guests at all times. Maintained consistent pursuit and achievement of guest satisfaction while driving revenues, managing business expenses and maximizing profit. Weekly, Monthly, and quarterly forecasting and adjusted inventory and rates as needed. Scheduled and supervised quarterly preventative maintenance plan and deep cleanings. Supervised and managed renovation in 2013 and 2014. Renovations included all guest rooms, breakfast/lounge area, lobby, and patio.

June 2012-February 2013

**Sales Manager**

La Quinta Inn & Suites Carlsbad

Group sales segment. Handled all incoming group inquiries and contracts. Prospected local events and potential group business in our area making 15-20 prospective calls per week. Assisted other properties with quarterly sales blitz.

July 2011-February 2013

**Sales Manager**

Days Inn Encinitas

Corporate and Group segments. Made 35-50 prospective/cold calls to potential corporate accounts per week. Maintained account files and record all customer contacts in SalesPro. Analyzed and understood the competition's strengths and weaknesses. Actively sold room nights through outside sales calls. Maintained a presence with in-house guests by welcoming groups and corporate accounts. 15-20 prospective calls to potential group events and businesses. Prospected local events and potential group business in our area. Handled all incoming group inquiries. Developed a rapport with community with weekly sales calls. Worked with community organizations including DEMA, the Downtown Encinitas Mainstreet Association. Forecast occupancy and alter selling activities accordingly.

# Keith L. Noe

May 2012-July 2012

March 2012-May 2012

## **Interim General Manager**

La Quinta Inn & Suites Carlsbad

Days Inn Encinitas

Acting and Interim General Manager. Inputted daily reports in to M3 accounting software. Handled all deposits to make sure they were made at a timely manner. Managed all staff and helped with payroll duties. Helped front desk by covering shifts and breaks. Maintained budget and forecasting. Processed payables and invoices. Attended GM conference calls, forecasting and revenue meetings. Handled guest service issues and assisted HR department during the open enrollment period. Continued Sales Manager duties including prospective calls and handling all inquiries.

May 2010-July 2012

## **Assistant General Manager**

Quality Inn & Suites Oceanside

As Assistant General Manager I supervised 5 person front desk staff as well as maintenance and housekeeping staff. I scheduled all staff including front desk, maintenance, housekeeping and breakfast attendant. Provided front desk and night audit training. Took care of the hiring and interviewing process. Placed orders for hotel and processed invoices. Acted in sales capacity to take care of all group reservations, RFPs, Hotel Beds and Hotel Planner. Set up Direct Bill accounts with corporate accounts. Double checked shift reconciliations and cash drops for each shift.

## **Managed Projects:**

- Property Renovation at the Carlsbad by the Sea Hotel – completion date June 2025
- Property Renovation at the Holiday inn Express Sorrento Valley - completed February 2024
- Property Renovation at the Holiday inn Express National City - completed July 2024
- Property Purchase/Transition at the Carlsbad by the Sea Hotel – completed May 2023
- Property Opening – Hyatt Place Bakersfield – opened February 2020
- Hampton Inn San Diego Downtown Suite Shop addition – Completed 2018
- Property Renovation at the La Quinta Inn Carlsbad - completed 2014

# Keith L. Noe

## **SKILLS:**

Word Document-

- Tables
- Mail Merge

Excel-

- Tables and Charts
- Formulas

Power-point-

- Presentations
- Designs

## **ACCOMPLISHMENTS:**

### **Excel Hotel Group**

- Corporate MVP, 2021

### **Dimension Development**

- Highest Revenue Improvement, 2019

### **Pinnacle Hotels, USA**

- Sales Manager of the Quarter – 1<sup>st</sup> Quarter 2012
- Sales Manager of the Quarter – 4<sup>th</sup> Quarter 2012

### **At the University of California, San Diego**

- 2008 - UCSD Athlete of the Year
- 2008 Division II All-American
- 2008 All-West Region
- 2008 All-Conference

# Keith L. Noe

## REFERENCES

Mary Bautista, Director Revenue Management at  
Dimension Development  
8369 Vickers Street  
San Diego, CA 92111  
858.531.5343

John Henry, Executive VP at ZMC Hotels  
1855 Olympic Blvd Suite 300  
Walnut Creek, CA 94596  
925.858.3124



### **VISIT CARLSBAD BOARD OF DIRECTORS APPLICATION**

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6/25/2025

**Date:**

Thomas Lee

**Name:**

Area General Manager

**Current occupation (organization and job title):**

Cape Rey Carlsbad Beach,

**CTBID assessed lodging business represented:**

[thomas.lee@caperey.com](mailto:thomas.lee@caperey.com)

**Email:**

323-573-8141

**Phone number:**

**Please list your current and past board experiences including the organization and your position/role, if any.**

Visit Laguna - Board Member, Visit Conejo Valley - Board Member

**Please explain your interest in joining this Board.**

In being a resident as well as a business leader in the city of Carlsbad, I would love to contribute my experience and knowledge for the betterment of promoting tourism to the city of Carlsbad, and to see the city thrive and grow.

**Please briefly outline the specific skills, education, experience, or contributions you would bring to this Board.**

I have worked in the hospitality industry as a manager/leader for over 30 years, I have a Masters Degree in Hotel, Travel, and Restaurant Administration from the University of Massachusetts and a Political Science Degree from the University of CA, Irvine. I have also worked with both Visit Laguna and Visit Conejo Valley as a board member in building successful marketing and strategic plans for both areas to promote tourism.

## **Thomas Lee Bio**

For the past nine years, Thomas Lee has been Area General Manager for Cape Rey Carlsbad, a Hilton Resort and Hilton Garden Inn Carlsbad Beach which are situated along San Diego's spectacular North County coastline.

A seasoned hospitality professional and avid outdoor enthusiast- who even spent a few years playing on the AVP Pro Beach Volleyball circuit- Lee is perfectly suited at the helm at the upscale coastal retreat steeped in local adventure and beach life. Lee previously served as General Manager of the Pacific Edge Hotel, a Joie de Vivre property in Laguna Beach, Calif. A native of Newport Beach and longtime veteran of the hospitality industry, Lee has held several senior-level positions within Davidson Hotels and Resorts working with properties within the Hyatt, Hilton, Starwood and Intercontinental portfolios. Prior to joining Davidson, Lee played a key role in high profile hospitality and entertainment projects in Los Angeles including the re-launch of the historic Hollywood Roosevelt Hotel and the Governor's Ball for the Academy Awards.

Lee's hospitality career spans an extensive list working for such notable properties at the Sofitel in Beverly Hills, the Bel Age Hotel on the famed Sunset Strip, and running the Dorothy Chandler Pavillion in Downtown Los Angeles. A graduate of the University of Massachusetts Amherst, Lee holds a master's degree in Hotel, Restaurant and Travel Administration. He previously served on the board of Visit Laguna Beach. In his free time, you can find him running on the beach, hiking a nearby trail or spending time with his wife and two daughters.



# EVENT GRANT APPLICATION

July 1, 2024 - June 30, 2025

## Applicant Information

Name of Proposed Program/Event: Bike MS: Bay to Bay 2025

Name of Applicant/Organization: National Multiple Sclerosis Society, Pacific South Coast Chapter

Address: 9915 Mira Mesa Blvd Ste 325, San Diego, CA 92131

Contact Name: Renata Sahagian

Title: Chapter President

Email: renata.sahagian@nmss.org

Phone: 619.895.7263

Federal Tax ID #: 13-5661935

## Amount of Grant Request:

\$ \$25,000

## Total Event Budgeted Expenses:

\$ 575,000

This application is for:



Placemaking Event



Brand Positioning Event



Room Night Driving Event

## Program/Event Description *(Use additional pages if necessary):*

Proposed date or timeframe of event: October 18-19, 2025

Is the date firm? Yes

**Describe your program or event:** *Include potential alignment with key experience pillars, whether the event is a new event and if there is potential to establish as a marquee recurring event for Carlsbad.*

Bike MS: Bay to Bay is a two-day cycling event that starts in Irvine and Carlsbad, has an overnight celebration at the Westin/Sheraton property in Carlsbad, and ends in San Diego. It raises funds for research to find a cure for Multiple Sclerosis, as well as programs and services for those impacted by MS. Each year our ridership and revenue grow. We do a full property sellout at the Sheraton/Westin and have rooms at the Courtyard in Carlsbad which equates to approximately 400 rooms total each year.

**Describe how the program/event will benefit tourism in Carlsbad:**

At least 80% of our event participants come from outside of Carlsbad, bringing significant tourism to the city. Of those participants most are either seniors or parents, many of whom bring their spouses and children with them to stay overnight.. Not only does our event overnight in Carlsbad, we also ride through it. Regardless of which of our 4 available routes they choose, all 1,300 of our riders ride by views of iconic Carlsbad landmarks such as the Carlsbad Sign, the Sea Wall, and downtown.

Projected number of out-of-town visitors: 1,040

Projected number of hotel room nights utilized: 377

Describe the estimated media coverage of the event:

Bike MS: Bay to Bay has a media partnership with KTLA 5, which broadcasts to Los Angeles and the surrounding communities. KTLA is the #1 watched news channel in LA, with an estimated viewership of 196,000 per quarter hour. They film segments at the finish line and start line in Carlsbad. In addition, the Bike MS National series can spotlight our event through their social media, which has 18,000 followers nationwide. Carlsbad will also be recognized on our website, e-communications, and social media.

### Experience with Proposed Program/Event

Has the program/event taken place before in Carlsbad? *If so, how many times has it taken place?*

Yes, Bike MS: Bay to Bay has taken place in Carlsbad for the last 13 years.

Describe program/event history, compliance, success, etc.:

Bike MS: Bay to Bay is in its 43rd year, and is the 3rd largest/most successful Bike MS event in the country. Since its inception, it has raised over 40 million dollars to support our mission. Many Bike MS participants have been riding with us for over a decade, and some have even done so for all 43 years so far! Due to our success, in 2024 we were selected as a pilot site for an elevated event experience production plan that will be rolled out nationwide.

### Financial Capabilities/Budget

Describe other funding sources and amounts including committed funds and potential matching funds:

We also receive the following funding from: Monster Energy- \$30,000, Experian- \$30,000, McGrory Family- \$35,000, KPMG- \$12,500, Fedex- \$15,000, Bristol Meyer Squibb- \$10,000 and Deloitte- \$3,000

Describe how grant funds would be used:

Grant funds will be used to market the event and recruit participants outside the City of Carlsbad, which will in turn drive revenue for our event as well as Carlsbad itself.

### Applicant Background

This applicant is a (an):

☒ Nonprofit ☐ For-Profit ☐ Local Public Agency ☐ Individual ☐ Other

Years in Business: 1977 Number of Employees: 21 Number of Volunteers: 430+



List any other organizations, agencies, or businesses partnered on this application.

N/A

### Marketing Requirement

Explain how the Carlsbad brand identity would be featured in advertising and/or at the event.

The City of Carlsbad/Visit Carlsbad will be recognized on our website, e-communications, social media, print materials, signage, and in our overnight celebration, at wrap-around events, and in media coverage regarding the event.

### Reporting Requirements

Depending on the grant amount and type of program/event, a report on how granted funds were spent, event budget, number of room nights generated, proof of event marketing, and/or a media coverage recap may be required to be filed with Visit Carlsbad within 30 days of the event conclusion. Proof of program expenses (e.g., receipts) are required to be retained for two years during which time Visit Carlsbad reserves the right to audit the records.

Visit Carlsbad will provide the applicant with any necessary reporting requirements prior to the distribution of funds. As noted in the grant guidelines, if a grant-funded event fails to take place, or misses its target by more than 50%, the grant recipient may be required to return all or a portion of granted funds to Visit Carlsbad.

The applicant acknowledges and agrees to adhere to the reporting requirements described above.



I acknowledge reporting requirements

### Certification

I, the undersigned, do hereby attest that the above information is true and correct to the best of my knowledge and that if funds are awarded, all requirements will be met.

Authorized Signature: \_\_\_\_\_



Name: Renata Sahagian

Title: Chapter President, Pacific South Coast

Date: 1/24/25

Clear Application

Print Application

### Submittal Information

To submit your application, email application and attachments to [eventgrants@visitcarlsbad.com](mailto:eventgrants@visitcarlsbad.com) with the subject: **Event Grant Application**.

Allow two business days to acknowledge submittal. Visit Carlsbad will keep applicants informed of progress during consideration. If you have questions about the application, please email [eventgrants@visitcarlsbad.com](mailto:eventgrants@visitcarlsbad.com).



## Event Grant Application Supplement

much detail as possible in the "Description" column. Add other categories as necessary in the blank rows provided.

**Event/Program Name:** MS Bike

Category	Description	Amount
Digital Advertising (Search engine marketing, display advertising, social media advertising, email marketing)	Includes costs for search engine marketing, social media advertising, email marketing. Targeted ads specifically to riders outside of Carlsbad/SD	\$ 10,000
Print Advertising (Magazines, newspapers, billboards)		
Broadcast Advertising (Television, radio)		
Creative Production (Filming video content, creating a website, printing flyers)	Website creation and upkeep, all print material to be used at promotional events	\$ 5,000
Direct Mail		
Operational Costs	Staff time for promoting the ride through wrap-around campaign events and interaction with our constituents outside of Carlsbad	\$ 2,500
	(attending other cycling and community events in San Diego, Orange County, San Bernadino, Riverside County, etc. to promote our ride. Includes staff time, travel, lodging, meals, etc.)	
In-Person Promotion	Production costs for training rides, happy hours, stewardship events, meetings, and other events that promote the ride to our non-carlsbad constituents	\$ 5,000
Wrap Around Events		\$ 2,500
Total		<u>\$ 25,000</u>



# EVENT GRANT APPLICATION

July 1, 2024 - June 30, 2025

## Applicant Information

Name of Proposed Program/Event: Challenge Walk MS: Southern California

Name of Applicant/Organization: National Multiple Sclerosis Society

Address: 9915 Mira Mesa Blvd Ste 325, San Diego, CA 92131

Contact Name: Danielle Gerlach

Title: Manager, Emerging Events

Email: danielle.gerlach@nmss.org

Phone: 925-786-9377

Federal Tax ID #: 13-5661935

## Amount of Grant Request:

\$ 5,000

## Total Event Budgeted Expenses:

\$ 145,000

This application is for:



Placemaking Event



Brand Positioning Event



Room Night Driving Event

## Program/Event Description *(Use additional pages if necessary):*

Proposed date or timeframe of event: November 7-9, 2025

Is the date firm? Yes

**Describe your program or event:** *Include potential alignment with key experience pillars, whether the event is a new event and if there is potential to establish as a marquee recurring event for Carlsbad.*

The National Multiple Sclerosis Society hosts an annual 3 day, 50 mile walk event called Challenge Walk MS: Southern California starting in Oceanside and leading participants through Carlsbad and down the coast of San Diego, ending in the Mission Bay area. This event raises funds to change the world for people affected by multiple sclerosis through programs and services, research to slow and reverse progression of the disease, connections to others living with and affected by MS, and ultimately to finding a cure.

**Describe how the program/event will benefit tourism in Carlsbad:**

Every year, Challenge Walk MS brings together 250+ participants, volunteers, and sponsors from local communities and beyond to celebrate the resiliency of the nearly 1 million people living with MS in the United States. The first day of our event starts in Oceanside and leads walkers all the way through Carlsbad's coast and through many small businesses where participants are able to shop and grab food and coffee/drinks along the way benefiting local businesses and showcasing Carlsbad as a beautiful destination city.

Projected number of out-of-town visitors: 180

Projected number of hotel room nights utilized: \_\_\_\_\_

Describe the estimated media coverage of the event:

Challenge Walk MS has partnered with NBC 7 in the past to promote the event and they have featured interview's with our chapter president who has spoken on the event. Nationally we also have a large social spend for advertisement on social media sites such as Facebook and Instagram. Challenge Walk MS also has it's own Facebook page for event specific updates and interactions with 900 current members.

### Experience with Proposed Program/Event

Has the program/event taken place before in Carlsbad? *If so, how many times has it taken place?*

Yes, this event has taken place in Carlsbad for the last 25 years

Describe program/event history, compliance, success, etc.:

Our event has been successfully running for 25 years with 2024 bringing in \$550,000 in revenue and this year's goal set at almost \$600,000, all supporting our mission of a world free of MS. We ensure compliance with all city and state regulations and work with permitting agencies and local law enforcement to ensure a safe and successful event. Our participants are the main driver of our event and are heavily dedicated to the mission and the event itself. Recent successful marketing and recruitment strategies have resulted in a surge of first-time participants, driving significant growth in both fundraising and involvement which we hope will continue to fuel the awareness and success of this event.

### Financial Capabilities/Budget

Describe other funding sources and amounts including committed funds and potential matching funds:

Our sponsorship revenue has a goal of \$15,000 this year with \$5,000 committed from Hoag Hospital and asks out to Biogen, Elevate Movement, and TG Therapeutics. The bulk of our fundraising comes from our participants who have a \$2,500 participation minimum which they raise through various fundraising efforts. Matching funds may be requested by participants through their company's matching gifts programs.

Describe how grant funds would be used:

If funded, we'd invest these funds into marketing and recruitment for the Challenge Walk MS: Southern California event, highlighting the City of Carlsbad and Visit Carlsbad as proud supporters of the event and the MS movement. This in turn will drive revenue and participation from local communities and beyond benefitting both our event and Carlsbad as a whole.

### Applicant Background

This applicant is a (an):



Nonprofit



For-Profit



Local Public Agency



Individual



Other

Years in Business: 79 Number of Employees: 21 Number of Volunteers: 500+

List any other organizations, agencies, or businesses partnered on this application.

N/A

### Marketing Requirement

Explain how the Carlsbad brand identity would be featured in advertising and/or at the event.

The City of Carlsbad and Visit Carlsbad would be featured on our website, e-communicatons, social media, print materials, signage, and at our kick off and nightly programs.

### Reporting Requirements

Depending on the grant amount and type of program/event, a report on how granted funds were spent, event budget, number of room nights generated, proof of event marketing, and/or a media coverage recap may be required to be filed with Visit Carlsbad within 30 days of the event conclusion. Proof of program expenses (e.g., receipts) are required to be retained for two years during which time Visit Carlsbad reserves the right to audit the records.

Visit Carlsbad will provide the applicant with any necessary reporting requirements prior to the distribution of funds. As noted in the grant guidelines, if a grant-funded event fails to take place, or misses its target by more than 50%, the grant recipient may be required to return all or a portion of granted funds to Visit Carlsbad.

The applicant acknowledges and agrees to adhere to the reporting requirements described above.

Danielle Gerlach  
Digitally signed by Danielle Gerlach  
Date: 2025.03.20 13:16:40 -07'00'

I acknowledge reporting requirements

### Certification

I, the undersigned, do hereby attest that the above information is true and correct to the best of my knowledge and that if funds are awarded, all requirements will be met.

Authorized Signature: Danielle Gerlach Digitally signed by Danielle Gerlach  
Date: 2025.03.20 13:16:40 -07'00'

Name: Danielle Gerlach

Title: Manager, Emerging Events

Date: 3/20/2025

Clear Application

Print Application

### Submittal Information

To submit your application, email application and attachments to [eventgrants@visitcarlsbad.com](mailto:eventgrants@visitcarlsbad.com) with the subject: **Event Grant Application**.

Allow two business days to acknowledge submittal. Visit Carlsbad will keep applicants informed of progress during consideration. If you have questions about the application, please email [eventgrants@visitcarlsbad.com](mailto:eventgrants@visitcarlsbad.com).



## Event Grant Application Supplement

much detail as possible in the "Description" column. Add other categories as necessary in the blank rows provided.

**Event/Program Name:** MS Walk

Category	Description	Amount
Digital Advertising (Search engine marketing, display advertising, social media advertising, email marketing)	Digital advertising through national and local social media pages including our national Facebook page, national X/Twitter page, and national Instagram page, as well as our local Challenge Walk MS focused Facebook page. National budget for search engine and display advertising. Email marketing to all registered and non-registered participants from FY22-FY25, Partners in MS Care including UCSD, UCI, The Neurology Center, Adapt Functional Movement, sponsor contacts including Biogen, Hoag Hospital, TG Therapeutics, and Elevate Movement.	\$ 4,500
Print Advertising (Magazines, newspapers, billboards)		
Broadcast Advertising (Television, radio)	Local partnership with NBC 7 - donated television air time with local president Renata Sahagian for promoting local events including Challenge Walk MS	\$ -
Creative Production (Filming video content, creating a website, printing flyers)		
Direct Mail	Promotional flyers and brochures to Challenge Walk participants both registered and not yet registered as well as packet mailings to Partners in MS Care (UCSD, UCI, The Neurology Center, Adapt Functional Movement, Hoag Hospital)	\$ 500
Operational Costs		
Total		<u><u>\$ 5,000</u></u>



# EVENT GRANT APPLICATION

July 1, 2024 - June 30, 2025

## Applicant Information

Name of Proposed Program/Event: Carlsbad Marathon, Half Marathon, 5K & Kids Marathon Mile

Name of Applicant/Organization: In Motion, Inc.

Address: 1782 La Costa Meadows Drive, Suite 102, San Marcos, CA 92078

Contact Name: Christine Adams Title: CEO

Email: christine@inmotionevents.com Phone: 760-277-0905 (cell)

Federal Tax ID #: 33-0142668

### Amount of Grant Request:

\$50,000

### Total Event Budgeted Expenses:

\$490,000

### This application is for:

☐ Placemaking Event ☒ Brand Positioning Event ☐ Room Night Driving Event

## Program/Event Description *(Use additional pages if necessary):*

Proposed date or timeframe of event: January 16 - 18, 2026 Is the date firm? Yes

**Describe your program or event:** *Include potential alignment with key experience pillars, whether the event is a new event and if there is potential to establish as a marquee recurring event for Carlsbad.*

Please see attached Addendum Supplement under Addendum A

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### Describe how the program/event will benefit tourism in Carlsbad:

Please see attached Addendum Supplement under Addendum B

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Projected number of out-of-town visitors: 3,200

Projected number of hotel room nights utilized: 300 +

Describe the estimated media coverage of the event:

Please see attached Addendum Supplement under Addendum C

### Experience with Proposed Program/Event

Has the program/event taken place before in Carlsbad? *If so, how many times has it taken place?*

Yes, 2026 will be the 35th year the event has taken place in Carlsbad.

Describe program/event history, compliance, success, etc.:

Please see attached Addendum Supplement under Addendum D

### Financial Capabilities/Budget

Describe other funding sources and amounts including committed funds and potential matching funds:

Please see attached Addendum Supplement under Addendum E

Describe how grant funds would be used:

Please see attached Addendum Supplement under Addendum F

### Applicant Background

This applicant is a (an):



Nonprofit



For-Profit



Local Public Agency



Individual



Other

Years in Business: 44 Number of Employees: 4 Number of Volunteers: 750



List any other organizations, agencies, or businesses partnered on this application.

N/A

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### Marketing Requirement

Explain how the Carlsbad brand identity would be featured in advertising and/or at the event.

Please see attached Addendum Supplement under Addendum G

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### Reporting Requirements

Depending on the grant amount and type of program/event, a report on how granted funds were spent, event budget, number of room nights generated, proof of event marketing, and/or a media coverage recap may be required to be filed with Visit Carlsbad within 30 days of the event conclusion. Proof of program expenses (e.g., receipts) are required to be retained for two years during which time Visit Carlsbad reserves the right to audit the records.

Visit Carlsbad will provide the applicant with any necessary reporting requirements prior to the distribution of funds. As noted in the grant guidelines, if a grant-funded event fails to take place, or misses its target by more than 50%, the grant recipient may be required to return all or a portion of granted funds to Visit Carlsbad.

**The applicant acknowledges and agrees to adhere to the reporting requirements described above.**

CA

I acknowledge reporting requirements

### Certification

I, the undersigned, do hereby attest that the above information is true and correct to the best of my knowledge and that if funds are awarded, all requirements will be met.

Authorized Signature: Christine Adams

Name: Christine Adams

Title: CEO

Date: 1/29/25

Clear Application

Print Application

### Submittal Information

To submit your application, email application and attachments to [eventgrants@visitcarlsbad.com](mailto:eventgrants@visitcarlsbad.com) with the subject: **Event Grant Application**.

Allow two business days to acknowledge submittal. Visit Carlsbad will keep applicants informed of progress during consideration. If you have questions about the application, please email [eventgrants@visitcarlsbad.com](mailto:eventgrants@visitcarlsbad.com).



#### **Addendum A**

Describe your program or event:

The Carlsbad Marathon is an annual wellness event that includes a full marathon (26.2 miles), half marathon (13.1 miles), 5K (3.1 miles), Double Down Challenge (half marathon + 5K), Kids Marathon Mile at LEGOLAND and two-day pre-race expo/packet pick up event. Between all the events, there is something for all ages and abilities. Our January 2025 event attracted 8,657 registered participants, which was a growth of 11% over the previous year. In Motion, Inc., a second-generation, family-owned, and women-run corporation, produces the Carlsbad Marathon.

#### **Addendum B**

Describe how the program/event will benefit tourism in Carlsbad:

The Carlsbad Marathon is a well-respected, premier event that attracts runners to Carlsbad in January, an off-peak time of year for tourism but a time that has historically offered perfect racing weather. Runners come from all over the United States and, in 2025, from 15 countries. The full marathon is a Boston-qualifying event, and it and the half marathon are renowned for their beautiful coastal courses. Taking place on the three-day MLK weekend, we promote the race as the perfect winter "runcation" – a running event and vacation. Our website features a "Travel/Accommodations" page with links to hotels and information on other Carlsbad area attractions. Through the website, social media posts, and emails to registered participants, we encourage runners, even those residing in San Diego County, to make their race weekend memorable and relaxing by staying in Carlsbad and avoiding the stressful race morning drive.

#### **Addendum C**

Describe the estimated media coverage of the event:

We work with [TREAT Public Relations](#) to assist with strategic media outreach and public relations. Through their efforts, the 2025 Carlsbad Marathon secured 148 pieces of race coverage with an estimated 1.55 million views, up from the 84 pieces the previous year. [Click here](#) to view their 2025 post-race Coverage Book.

#### **Addendum D**

Describe program/event history, compliance, success, etc.:

The Carlsbad Marathon has had the privilege of having been awarded funds from the CTBID in the past. We are familiar with the CTBID's grant objectives and requirements. We will again have room blocks with West Inn & Suites, Staybridge Suites, and Holiday Inn Carlsbad – the site of our two-day pre-race expo/packet pickup event. In 2025, we have verified that between our three room blocks and rooms booked at Homes2 Suites, 287 room nights were booked – up from 211 in 2024. We are confident that hundreds more rooms were booked at other Carlsbad area hotels/motels/Bed & Breakfasts, as well as vacation rental properties.

**Addendum E**

Describe other funding sources and amounts, including committed funds and potential matching funds:

The event receives the bulk of its funding from participant entry fees. In 2026, we are budgeting for \$980,000 in entry fees. In addition, we typically receive sponsorship funds from two Carlsbad-based companies, Lexus Carlsbad and The Columbia Employee Store. Their combined support totals \$17,000 annually.

**Addendum F**

Describe how grant funds will be used:

Grant funds will help grow event awareness through advertising, key influencer partnerships, and collaborations with strategic events (see attached Event Grant Application Supplement – Funds Detail). They will also help offset the operational costs.

**Addendum G**

**Explain how the Carlsbad brand identity would be featured in advertising and/or at the event.**

Carlsbad is featured in the event name and logo, so it appears every time the event is mentioned in paid advertising, media mentions, social media posts, etc. In advertising the race, we use visually appealing race photography taken by our professional race photographer, which powerfully illustrates Carlsbad as a vacation destination. The Carlsbad Marathon has user-friendly and informative web pages at [www.inmotionevents.com](http://www.inmotionevents.com). In January 2025, the page had 81,970 visitors and 380,141 views, both significant increases over 2024, where we saw 60,006 visitors and 156,237 views.



## Event Grant Application Supplement

Please indicate how grant funds would be spent on marketing and/or operational costs with as much detail as possible in the "Description" column. Add other categories as necessary in the blank rows provided.

Event/Program Name: **Carlsbad Marathon**

Category	Description	Amount
Digital Advertising (Search engine marketing, display advertising, social media advertising, email marketing)	Grant funds will be used to place strategic Facebook and Instagram ads. Direct emails will be sent through paid providers like RaceGrader, RacePlace, Texas Runner, and other strategic databases in key markets. Paid collaborations will be secured with running influencers and ambassadors with large followings who will promote the event to their followers. Lastly, funds will be used to pay for digital inserts in virtual race bags with other running events.	\$ 19,500
Print Advertising (Magazines, newspapers, billboards)	N/A	
Broadcast Advertising (Television, radio)	N/A	
Creative Production (Filming video content, creating a website, printing flyers)	Grant funds will be used for drone footage, and a videographer to use to create film reels for social media, and promo videos highlighting the race.	\$ 5,000
Direct Mail		
Media relations and marketing assistance	Grant funds will help pay for the services of Treat Public Relations (see Addendum C).	\$ 5,500
Operational Costs	Grant funds will help pay for operational costs which continue to rise between three and five percent year-over-year.	\$ 20,000
Total		\$ 50,000

# Carlsbad Marathon Media Summary 2025



**148**

**Pieces of Coverage**

Total number of online, offline and social clips in this book



**1.55M**

**Estimated Views**

Prediction of lifetime views of coverage, based on audience reach & engagement rate on social



**176M**

**Audience**

Combined total of publication-wide audience figures for all outlets featuring coverage



**119**

**Engagements**

Combined total of likes, comments and shares on social media platforms



**44**

**Avg. Domain Authority**

A 0-100 measure of the authority of the site coverage appears on. Provided by Moz



# EVENT GRANT APPLICATION

July 1, 2024 - June 30, 2025

## Applicant Information

Name of Proposed Program/Event: St. Michael's by-the-Sea: Jazz Fest

Name of Applicant/Organization: St Michael's By-the-Sea Episcopal Church

Address: 2775 Carlsbad Blvd Carlsbad, CA 92008

Contact Name: Doran Stambaugh

Title: Rector

Email: frdoran@stmbts.org

Phone: 760-729-8901

Federal Tax ID #: 51-0176460

## Amount of Grant Request:

\$ 5,000

## Total Event Budgeted Expenses:

\$ 51,900

This application is for:



Placemaking Event



Brand Positioning Event



Room Night Driving Event

## Program/Event Description *(Use additional pages if necessary):*

Proposed date or timeframe of event: September 27, 2025 Is the date firm? Yes

**Describe your program or event:** *Include potential alignment with key experience pillars, whether the event is a new event and if there is potential to establish as a marquee recurring event for Carlsbad.*

St. Michael's Jazz Fest is a free, 1-day community music festival returning for its second year in the heart of Carlsbad Village. The festival celebrates seminal American music from New Orleans—featuring traditional jazz, blues, and brass band performances by national, local, high school, college, and armed forces bands. Designed to foster cultural appreciation and community connection, the event provides a live platform for musicians of all ages and backgrounds to share their talents. Aligned with Carlsbad's experience pillars of community, arts & culture, and diversity, Jazz Fest has strong potential to become a signature annual event that enhances Carlsbad's cultural landscape and visitor appeal.

## Describe how the program/event will benefit tourism in Carlsbad:

St. Michael's Jazz Fest is expected to attract over 650 attendees from across San Diego County and throughout California. The festival draws a broad and diverse audience across age groups, ethnicities, and socioeconomic backgrounds—appealing to individuals, couples, and families alike. By offering a high-quality, family-friendly cultural event, the festival enhances Carlsbad's appeal as a vibrant, arts-rich destination. The festival increases regional visibility and drives tourism-related economic impact by encouraging spending on dining, lodging, and retail at local businesses. As the event continues to grow, it has the potential to become a signature attraction on Carlsbad's annual calendar, further boosting cultural tourism and community pride.

Projected number of out-of-town visitors: 300

Projected number of hotel room nights utilized: 1

**Describe the estimated media coverage of the event:**

The event is supported by a strategic outreach campaign that includes a dedicated website, regular email updates, social media engagement across multiple platforms, and community partnerships to amplify promotion. In its second year, the festival anticipates expanded media coverage through local and regional arts calendars, community newsletters, and potential features in San Diego-area newspapers and online publications. With continued outreach efforts and increased attendance, St. Michael's Jazz Fest is well positioned to gain broader recognition and media interest as a standout cultural event in North County.

**Experience with Proposed Program/Event**

**Has the program/event taken place before in Carlsbad?** *If so, how many times has it taken place?*

Yes, the inaugural event took place in September of 2024.

**Describe program/event history, compliance, success, etc.:**

St. Michael's is grateful to Visit Carlsbad for past support and is proud to offer its centrally located Carlsbad Village campus as a community arts resource. The inaugural Jazz Fest in September 2024 featured a weekend of performances by diverse local artists and headlined by Grammy Award-winning Rebirth Brass Band. The event drew over 800 attendees and created a vibrant, inclusive atmosphere celebrating the power of music. The festival was successfully executed in full compliance with city requirements, reflecting strong planning and community stewardship.

**Financial Capabilities/Budget**

**Describe other funding sources and amounts including committed funds and potential matching funds:**

St. Michael's by-the-Sea relies on a combination of grants, individual donations, and local business support to fund Jazz Fest. For 2025, committed funding includes a grant from the City of Carlsbad, nearly \$18,000 in individual contributions, and support from local businesses. Additional funding is anticipated from private donors and the County of San Diego. Although the event is free to attend, donations are encouraged to help sustain and grow the festival.

**Describe how grant funds would be used:**

A grant from Visit Carlsbad will ensure that St. Michael's Jazz Fest remains free and accessible to all, regardless of income. Funds will support essential expenses including musician fees and marketing—helping to create a high-quality, inclusive cultural experience for the Carlsbad community and its visitors.

**Applicant Background**

**This applicant is a (an):**

☒ Nonprofit ☐ For-Profit ☐ Local Public Agency ☐ Individual ☐ Other

Years in Business: 131 Number of Employees: 11 Number of Volunteers: 70-80

List any other organizations, agencies, or businesses partnered on this application.

N/A

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## Marketing Requirement

**Explain how the Carlsbad brand identity would be featured in advertising and/or at the event.**

Carlsbad's brand will be prominently featured across all promotional materials—including the event website, social media, signage, and stage acknowledgments—as a key supporter of the festival. Onsite branding and visitor materials will encourage attendees to explore Carlsbad's coastal charm, cultural offerings, and local businesses.

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## Reporting Requirements

Depending on the grant amount and type of program/event, a report on how granted funds were spent, event budget, number of room nights generated, proof of event marketing, and/or a media coverage recap may be required to be filed with Visit Carlsbad within 30 days of the event conclusion. Proof of program expenses (e.g., receipts) are required to be retained for two years during which time Visit Carlsbad reserves the right to audit the records.

Visit Carlsbad will provide the applicant with any necessary reporting requirements prior to the distribution of funds. As noted in the grant guidelines, if a grant-funded event fails to take place, or misses its target by more than 50%, the grant recipient may be required to return all or a portion of granted funds to Visit Carlsbad.

**The applicant acknowledges and agrees to adhere to the reporting requirements described above.**

☒ I acknowledge reporting requirements

## Certification

I, the undersigned, do hereby attest that the above information is true and correct to the best of my knowledge and that if funds are awarded, all requirements will be met.

Authorized Signature: Doran Stambaugh

Name: Doran Stambaugh

Title: Rector

Date: 6/29/2025

**Clear Application**

**Print Application**

## Submittal Information

To submit your application, email application and attachments to [eventgrants@visitcarlsbad.com](mailto:eventgrants@visitcarlsbad.com) with the subject: **Event Grant Application**.

Allow two business days to acknowledge submittal. Visit Carlsbad will keep applicants informed of progress during consideration. If you have questions about the application, please email [eventgrants@visitcarlsbad.com](mailto:eventgrants@visitcarlsbad.com).





## Event Grant Application Supplement

Please indicate how grant funds would be spent on marketing and/or operational costs with as much detail as possible in the "Description" column. Add other categories as necessary in the blank rows provided.

Category	Description	Amount
Digital Advertising (Search engine marketing, display advertising, social media advertising, email marketing)		
Print Advertising (Magazines, newspapers, billboards)	Coast News Advertising costs	\$ 400
Broadcast Advertising (Television, radio)		
Creative Production (Filming video content, creating a website, printing flyers)		
Direct Mail		
Operational Costs	Local Jazz Band	\$ 1,400
	Local Jazz Band	\$1200.00
	Local Jazz Band	\$1500.00
	Local High School Jazz Band	\$500.00
Total		\$ 5,000