



# Request for Proposal

Domestic  
Public Relations  
Services

visit  
California



To All Prospective Bidders:

Visit California is seeking Public Relations (PR) representation to promote California as a premier travel destination in the United States.

The California Travel and Tourism Commission, dba Visit California, is a private non-profit 501(C)(6) funded by assessed businesses that have an interest in promoting tourism to California. California Tourism is marketed exclusively by Visit California. The Tourism Assessment Program was created under the California Tourism Marketing Act in 1995 with the passage of SB 256. The legislation authorized self-imposition of an assessment by businesses that benefit from travel and tourism. It also authorized the establishment of a non-profit, public benefit corporation, Visit California, to oversee the promotion of California as a premier travel destination.

Visit California oversees the production of a variety of marketing activities, including on and offline advertising, visitor publications and maps, cooperative programs, PR and tradeshow – all designed to promote California to travelers, tourists and the travel trade. For more details please visit <http://tourism.visitcalifornia.com> in the "Travel Industry" section.

**The contract period for the Scope of Work contained within this RFP will be from July 1, 2015 to June 30, 2016. Visit California will initially fund the contract for the first year up to \$300,000. Visit California may renew the contract each subsequent year for a three year period, at its discretion.**

Attached is a RFP for those capable of meeting minimum requirements and carrying out the scope-of-work. All responses will be carefully reviewed and evaluated based on the criteria noted in the attached document.

**Notice of Intent to Bid (a non-binding document), as well as any questions you may have to clarify this RFP are due to Visit California no later than 5:00 p.m., Pacific Daylight Time (PDT), February 27, 2015.**

Sincerely,

A handwritten signature in black ink that reads "Caroline Beteta".

Caroline Beteta  
President and Chief Executive Officer  
Visit California

## Table of Contents

<b>Introduction</b> .....	4
<b>Purpose</b> .....	5
<b>Contract Term</b> .....	5
<b>Available Funds</b> .....	5
<b>Evaluation Process &amp; Criteria</b> .....	6
<b>Tentative Schedule</b> .....	6
<b>Agency Objectives</b> .....	6
<b>Proposal Requirements</b> .....	7
Minimum Requirements.....	7
Description of Proposer.....	8
Scope of Work.....	10
Innovation Case Study.....	12
Budget / Bid.....	12
<b>Billing &amp; Related Requirements</b> .....	14
<b>Delivery of Proposal</b> .....	14
<b>Attachment A – Intent to Bid</b> .....	15
<b>Attachment B – Proposal Resources</b> .....	16
<b>Attachment C – Written Proposal Evaluation Criteria</b> .....	17
<b>Attachment D – Oral Interview Criteria</b> .....	18

## VISIT CALIFORNIA

### Request for Proposal Domestic Public Relations

#### 1. INTRODUCTION

California is the leading visitor destination in the United States with almost \$110 billion in travel and tourism related spending in 2013. This spending directly supported jobs for 965,800 Californians and generated \$7.1 billion in state and local tax revenues. Among California's export-oriented industries tourism is the fifth largest employer. Since 1998, consistent investment in the California Tourism program (a joint marketing venture of Visit California and the California Division of Tourism) has helped to reverse a decade-long decline in domestic market share and put California in a strong position to weather the recent economic storm.

#### **About Visit California**

Visit California is a not-for-profit, 501(C)(6) corporation formed in 1998 to work jointly with the State of California's Division of Tourism to implement the annual marketing plan, which promotes California as a travel destination. While these two partners (Visit California and Division of Tourism) are separate legal entities, they are commonly referred to jointly as California Tourism.

From 1998 to 2003, California Tourism consisted of the originally conceived private-public joint marketing venture partnership of Visit California and the State of California. The primary source of the California tourism marketing budget is now directly derived from assessed businesses in the travel and tourism industry, car rental assessments, and a small contribution from the State.

Visit California operates under the auspices of the Governor's Office of Business and Economic Development. Michael E. Rossi, Senior Advisor for Jobs and Business Development, Office of the Governor, currently serves as Chair of the organization.

Visit California's 37-member board of commissioners is composed of individuals from all 12 designated regions of California. Members represent five principal industry sectors: Accommodations, Restaurants and Retail, Attractions and Recreation, Transportation and Travel Services, and the Passenger Car Rental Industry. Twenty-four of the commissioners are elected by the approximately 9,500 assessed California businesses; 12 are appointed by the Governor; and the 37th is the director of the Governor's Office of Business and Economic Development. The Commission meets three times a year to direct Visit California's programs and activities. A 34-member statewide Marketing Advisory Committee also provides input in developing the marketing plan.

## **2. PURPOSE**

The purpose of this request is to seek and retain a qualified agency to act as the Visit California Public Relations (PR) representative in the U.S. market, promoting California as a premier travel destination. Visit California seeks a company to develop and execute a comprehensive, targeted, creative and brand-aligned PR program using a variety of channels and leveraging Visit California's advertising and marketing initiatives. Visit California sees itself as a leader and a trusted source for content about destinations and experiences in the State and anticipates its growing content assets will be important in establishing and maintaining relationships with traditional media outlets and social media key influencers.

PR and earned media are as valuable as ever to generate demand for the California experience through credible third party editorial content. PR generated editorial enables Visit California to dive deep into storytelling around the five experience pillars with diverse coverage that highlights the breadth of the tourism product statewide. Your company is being asked to craft a PR strategy that will focus on securing placements across broadcast, digital and print media channels and engaging digital influencers to reinforce California's position as a dream destination and hotbed of innovation.

## **3. CONTRACT TERM**

The successful proposer will enter into a contract for services with Visit California. The duration of the initial contract between Visit California and the successful proposer is expected to begin upon the date of contract approval (approximately July 1, 2015) and terminate on June 30, 2016. Visit California reserves the right to renew its agreement prior to the end of each contract term for a total of three years, providing funding to do so is appropriated for this purpose in subsequent budgets. There will be a six month oral review in 2015 and subsequent reviews annually in each year the contract is renewed. Proposed renewals are also assessed according to program direction, funding, and consistency of price and scope of work continuity.

## **4. AVAILABLE FUNDS**

Visit California will initially fund this contract up to \$300,000 for services rendered for the first year. Funding at this level is dependent on an overall Visit California budget of \$100 million. Visit California reserves the right to adjust both the budget and related services.



**5. EVALUATION PROCESS & CRITERIA**

Visit California will form a committee to evaluate the written proposals. The criteria for the scoring of the written proposals is included as Attachment C. The committee may at any time during the evaluation process seek clarification from Proposers regarding any information contained within their proposal. Final scores for each Proposer will reflect a consensus of the evaluation committee. Any attempt by a proposer to contact a member of the evaluation committee outside the RFP process, in an attempt to gain knowledge or an advantage may result in disqualification of Proposer.

The finalists chosen by the evaluation committee will be asked to provide oral presentations to the evaluation committee at Visit California's office in Sacramento, California. After the oral presentations, there will be a question and answer period. In addition to Proposer management, key personnel performing day to day activities will be requested to attend. The criteria for the scoring of the oral presentations is included as Attachment D.

**6. TENTATIVE SCHEDULE**

This tentative schedule may be altered at any time at the discretion of Visit California.

<b>02/13/15</b>	RFP dissemination
<b>02/27/15, 5:00pm PDT</b>	<b>Intent to Bid and Q &amp; A due</b>
<b>03/06/15</b>	Q & A posted on website
<b>04/10/15, 5:00pm PDT</b>	<b>Proposals due</b>
<b>04/17/15</b>	Compliance review completed
<b>Week of 04/20/15</b>	Committee review completed and finalists chosen
<b>Week of 4/27/15</b>	Oral presentations by finalists
<b>Week of 05/04/15</b>	Committee review of finalists
<b>Week of 5/11/15</b>	Selected proposer announced & contract negotiations begin
<b>07/01/15</b>	Commencement date of new contract

**7. AGENCY OBJECTIVES**

The selected vendor will develop work that fits within Visit California's overall marketing strategy. The Visit California earned media program must achieve the following:

- Help increase domestic visitor arrivals to California via strategic publicity;
- Serve as a U.S. market media expert and resource;

- Create and execute innovative attention-getting PR campaigns, as stand-alone PR campaigns and as part of fully integrated marketing campaigns;
- Plan and execute media events;
- Build relationships with national media, especially broadcast; and
- Target key digital influencers.

## 8. PROPOSAL REQUIREMENTS

Proposals must address each item listed within the following sections, giving specific details of techniques to be used in meeting these requirements.

The proposal should describe how the Proposer intends to perform the scope of work during a 12-month period and shall be subject to negotiation between Visit California and the Awardee for the initial contract period. The information provided will be used to negotiate the contract scope of work, and to score proposals as described in Attachment C, Written Proposal Evaluation Criteria.

### 8.1 Minimum Requirements

Experience: A minimum of three years of tourism PR experience is required.

Location: A New York City based firm, preferably with a satellite office in California.

Financial Statements: Proposers are required to demonstrate financial viability for maintaining an account of this size. Please provide GAAP compliant Financial Statements, including but not limited to:

- Income Statement;
- Balance Sheet; and
- Statement of Cash Flows.

All of the above Financial Statements must be the most recent statements available, but no more than 12 months old. Financial Statements are to be submitted in a sealed envelope. After review, all Financial Statements will be destroyed or returned to Proposer. If Proposer would like a Non-Disclosure Agreement (NDA) signed, the NDA must be received along with the Q&A by the date specified in the Tentative Schedule.

Notice of Intent to Bid: Notice of Intent to Bid, Attachment A, must be received by **February 27, 2015 5:00 pm, PDT**. The notice must be submitted via e-mail to [rfps@visitcalifornia.com](mailto:rfps@visitcalifornia.com). The Notice of Intent

to Bid is non-binding; however, it ensures the receipt of all addenda related to this RFP. Proposals will be accepted only from applicants who submitted a timely Notice of Intent to Bid.

Questions: All Proposers wishing clarification of this RFP must submit questions via email to [rfps@visitcalifornia.com](mailto:rfps@visitcalifornia.com) by the date and time referenced in the Tentative Schedule. Questions must be categorized based on scope of work elements.<sup>1</sup>

Contract Requirements: Winner of the RFP will be required to abide by Visit California contracting requirements. Information on contracting requirements can be found at <http://industry.visitcalifornia.com/About-Visit-California/Requests-for-Proposals/>

#### Budget Forms

Three completed Budget Forms, Attachment B, must be included. (One Budget Form each for funding at \$200,000, for funding at \$300,000, and for funding your proposed Future Structure. See Section 8.5). All costs associated with the written proposal must be included in the format provided in U.S. dollars. Costs for developing proposals are entirely the responsibility of the Proposer and shall not be reimbursed by Visit California.

All proposals submitted shall become the property of Visit California and shall not be returned to the Proposer. Visit California also reserves the right to:

- Reject any and all bids;
- Waive any or all mandatory requirements, if no proposers meet one or more of those requirements;
- Cancel this RFP;
- Revise the amount of funds available under this RFP;
- Amend this RFP as needed<sup>2</sup>; and
- Not select a vendor and award a contract from this RFP.

All proposers agree that budget costs submitted with their proposals are valid for 180 days from the date Visit California receives your proposal.

***Proposals may be rejected if minimum requirements are not met.***

## **8.2 Description of Proposer**

- **Services & Activities:**

---

<sup>1</sup> This RFP is not subject to State contracting rules and regulations and Visit California reserves the right to modify any and all terms and conditions in its sole and absolute discretion.

<sup>2</sup> If RFP is amended, Visit California will send an addendum to all Proposers.



- Provide a letter of interest and an executive summary of your proposal.
- Provide a description of the nature of the Proposer's services and activities. Provide the year in which your company was formed. Note your company's history and expertise in the travel and tourism industry, if any. List the address from which the primary work on the contract would be performed and the size of company by headcount. List the number of full and part-time employees. Do not list any sub-contractors in this section.
- **Conflicts of Interest:**
  - List all tourism-related clients for whom you have acted in the United States during the past 12 months.
  - You must certify that there are no conflicts of interest between any existing contracts. Client relationships that could potentially be a conflict of interest must be listed together with a discussion of how the Proposer will resolve the potential conflict of interest.
- **Personnel / Management:**
  - Identify those individuals on the Proposer's account team who will manage the contract work. Identify specific individuals who will be conducting day to day activities. Identify all personnel assigned to this account by position title. Include a description of the duties for each position title.
  - Note who will be the contract manager and primary contact.
  - For all individuals, please document overall experience and include current resumes/biographies. Provide education, experience and expertise with pertinent information demonstrating qualifications for this RFP. Include length of time with current company, and length of time in any previous related positions. Do not exceed two pages per person.
  - Include an organizational chart for the management and personnel that will be assigned to this account, if applicable.
- **Subcontractors:**
  - Identify all proposed subcontractors, if any, and document which portions of service will be performed by subcontractors and their ability to perform the work. Additionally, Proposer should submit resumes/biographies of proposed subcontractor's key personnel. Resumes/biographies should detail education, experience, and key timeframes for all individuals on the account. Do not exceed two pages per person.
  - The use of subcontractors is subject to approval by the President and CEO of Visit California. Therefore, not all work recommended by the Proposer will necessarily be approved and not all subcontractors listed in the Proposal will necessarily be selected. The Proposer must make it clear to any subcontractors included in the Proposal that even if the Proposer is selected, the

subcontractors may not necessarily be selected.

### 8.3 Scope of Work

Proposals must address each item listed in the Work Plan below. Proposals should be based on two separate funding levels:

1. \$200,000; and
2. \$300,000.

Two separate work plans and budgets should be prepared for each budget amount. The proposed work plans should describe how the Proposer intends to perform the scope of work during a 12-month period. The work plans must include a schedule for completion of the tasks.

#### Overall Work Plan Requirements

- U.S. travel market overview and marketplace conditions impacting travel/potential PR initiatives.
- Competitive analysis.
- PR objectives.
- PR strategy and plan overview for each proposed budget line category. Suggested plan for demonstrating and maximizing R.O.I. should be included.
- Agency should note any strategic alliances which might augment PR program by providing possible cooperative funding for promotions.
- Agency should include any "big" or "out-of-the-box" ideas that would support Visit California's brand and publicity efforts.

#### Current Structure

Please develop two separate works plans to deliver the services below, using \$200,000 and \$300,000 funding levels. Include the overall work plan requirements listed above, discuss your approach to media relations and PR strategy as they relate to the items below, and discuss how you would manage this work.

Today, our current PR Agency:

- Works with the Visit California PR team to develop a strategic work plan, setting measurable earned media goals for each year;
- Maintains and audits a targeted media list;

- Proactively develops California pitches, press releases and story ideas for media and assists journalists with story development;
- Assists with reactive media requests and inquiries;
- Arranges and manages media appointments for Visit California PR staff in key domestic markets;
- Showcases California's tourism product through press trips that align with the five experience pillars and bring the Dream Big messaging to life;
- Develops dedicated digital influencer programs to meet the specialized needs of this audience and leverage the content they produce in partnership with Visit California;
- Supports broadcast productions to leverage mass reach media channels;
- Secures top tier media for Visit California's regular receptions in New York (annually), Los Angeles and San Francisco (every 18 months), as well as strategizes about new markets for events;
- Creates platforms for industry to engage with media in key U.S. markets;
- Emphasizes outreach to digital influencers in travel as well as Visit California's niche pillars;
- Collaborates with Visit California's brand agency and content development partner to create integrated strategic plans and to leverage value-added editorial opportunities;
- Develops a creative strategy to align with Visit California's global marketing efforts;
- Provides monthly documentation and reporting, as well as additional reports as requested; analyzes and transfers relevant data to Visit California's global reporting platform;

### Future Structure

While the current Visit California earned media strategy is sound, we are always seeking to innovate our programs and how we interact with potential visitors. The above structure should act as a foundation to your plan, but as a leader in the tourism promotion space, Visit California needs to stay on top of media trends and develop and deliver content in ways that are relevant to the media and ultimately the consumer. Given this need, this part of the RFP response is your chance to be creative. We would like you to show us how your firm would approach our earned media strategy if there were no constraints. In short, this is your chance to differentiate yourself and truly show us how you think.

Visit California looks to you to create a consumer earned media strategy that meets California media relations needs with any variety, mix, or number of vehicles deemed effective. Please note: The budget for this Future Structure is entirely up to your discretion. Therefore, please include a recommended budget to accompany your proposed future structure. This budget is in addition to the two budgets you will submit for the Current Structure funding levels.

#### **8.4 Innovation Case Study**

Innovation is a part of the Visit California DNA. In fact, it is one of the organization's guiding principles. Visit California is constantly seeking new opportunities to connect with our target audiences and build and leverage the power of the California brand. Provide a case study that demonstrates how your agency has pushed a client beyond the norm for their industry and achieved success. The example does not have to be tourism specific.

#### **8.5 Budget / Bid**

A completed Budget Form must be included in the format on the following page.

### Budget Form

Please include three separate budgets: (1) \$200,000 work plan budget; (2) \$300,000 work plan budget; and (3) Future Structure budget. In addition, please include one or more budget line items that clearly demonstrate your fees, retainer, etc. that allow us to easily compare proposals.

Budget Items	Name of Program	Program Cost	Staffing for Program
<i>(Please include any and all budget categories you deem appropriate to accomplish your work plans)</i>	<i>(Please provide specific programs, events, trips, promotions, etc.)</i>		
1.			
2.			
3.			
4.			
5.			
/	/	<b>Total Cost</b>	<b>Staffing Headcount</b>
		\$X	

## 9. BILLING & RELATED REQUIREMENTS

- Winner of the RFP will be required to abide by Visit California contracting requirements. Information on contracting requirements can be found at <http://industry.visitcalifornia.com/About-Visit-California/Requests-for-Proposals/>
- Winner of the RFP will also be required to submit Internal Revenue Service (IRS) Form W-9.
- Winner of the RFP may be required to obtain up to \$2 million in liability insurance, and as such, you should factor the insurance costs into your proposal.
- Contractor shall submit one monthly invoice with detailed documentation supporting work.

## 10. DELIVERY OF PROPOSAL

Each bidder is required to deliver 10 typed copies of the proposal, in addition to an electronic version of the proposal. Electronic versions of the proposal must be in PDF format and delivered on a digital storage device or emailed to [rfps@visitcalifornia.com](mailto:rfps@visitcalifornia.com). Proposals may not be faxed.

Proposals may be sent by courier such as FedEx or UPS to:

Visit California  
Domestic Public Relations RFP  
ATTN: RFP Submissions  
555 Capitol Mall, Suite 1100  
Sacramento, CA 95814 USA

**Proposals must be received by the date and time referenced in the Tentative Schedule. Late submissions will not be accepted.**



**ATTACHMENT A**

**INTENT TO BID**

**Domestic Public Relations RFP**

**Due: February 27, 2015**

5:00 PM Pacific Time

**Send to:**

Debi Robarts

Operations Coordinator

rfps@visitcalifornia.com

Name of Proposer:
Contact Person:
Mailing Address:
Agency URL:
Telephone:
Fax Number:
Email Address:
Signed

**ATTACHMENT B**  
**PROPOSAL RESOURCES**

- Visit California Mission:  
<http://industry.visitcalifornia.com/About-Visit-California/>
- 5 Year Strategic Marketing Plan:  
<http://industry.visitcalifornia.com/Market-Strategy/Strategic-Marketing-Plan/>
- 2014/15 Work Plan:  
<http://industry.visitcalifornia.com/Market-Strategy/FY14-15-Work-Plans-Draft/>
- Dream Big Dividend Work Plan (draft):  
<http://industry.visitcalifornia.com/Market-Strategy/Dream-Big-Dividend-Work-Plan-Draft/>

## ATTACHMENT C

### PROPOSAL EVALUATION CRITERIA

Proposals will be reviewed, evaluated and scored by an evaluation committee. Evaluation of proposals will be based on the following criteria for each component. Each criterion will be scored according to the degree of responsiveness present in the proposal being evaluated.

	Max. Points	Score
<b>1. OVERALL EXPERIENCE OF COMPANY / STAFF &amp; DEMONSTRATED RESULTS</b>	20	
Our evaluation will include an assessment of the history of your company, your experience as it relates to the requirements within this RFP, evidence of past performance, quality and relevance of past work, references, and related items.		
<b>2. SCOPE OF WORK</b>	30	
Our evaluation will include an assessment of the quality of your work plans including schedule, examples of past projects, ability to meet deadlines, managerial experience, and knowledge and understanding of brand in a global marketplace. We will evaluate both your proposal for the current as well as the future structures.		
<b>3. FAMILIARITY WITH VISIT CALIFORNIA &amp; TOURISM INDUSTRY</b>	15	
Our evaluation will include our assessment of your understanding of our organization and the tourism industry and how you integrated this knowledge into your proposal.		
<b>4. CREATIVITY / INNOVATION</b>	15	
Our evaluation will include an assessment of the quality of proposed strategies and creativity as demonstrated by the required project. This will also include an evaluation of your Innovation Case Study.		
<b>5. STRATEGIC PLANNING</b>	10	
Ability of firm to think beyond the now and set California up to be at the forefront of the changing travel trade media landscape.		
<b>6. BUDGET APPROACH / COST EFFECTIVENESS</b>	10	
Effective and efficient delivery of quality content and services is demonstrated in relation to the fee and value of overall project. The budget is reasonable and appropriate. Approach to fee structure is balanced and structured to maximize investment.		
<b>TOTAL POINTS</b>	<b>100</b>	

## ATTACHMENT D

### ORAL PRESENTATION EVALUATION CRITERIA

The evaluation committee may, if they deem necessary, select certain proposers for oral interviews. Interviews apply only to the top finalist(s), as determined by the evaluation committee. This oral interview will allow finalists to demonstrate their understanding of the project objectives, and to articulate their capability to meet or exceed the requirements of this RFP.

The evaluation committee reserves the option of conducting the interview via teleconference, or at the finalist's and/or the proposed subcontractor's site, or other designated site.

The evaluation committee reserves the right to designate one or more members of the committee to perform the oral interviews, if needed, so that grading of oral interviews may be done by fewer than the entire committee.

The following criteria will be used for scoring the oral interview.

1. Knowledge of California
2. Cultural fit with Visit California
3. Quality of proposed strategies and work samples
4. Measurement and ROI tracking mechanism
5. Staff expertise and professionalism
6. Staff creativity
7. Performance record/testimonials
8. Cost effectiveness
9. Understanding of brand and integration practices
10. Willingness to take direction