

A photograph of a forest path with large trees and two people walking away. The path is dirt and leads into a dense forest of tall, thin trees. Two people are walking away from the camera on the path. The trees have thick trunks and green foliage. Sunlight filters through the canopy.

**Request for Proposals**

**AUSTRALIA  
MARKETING  
SERVICES**

visit  
**California**





February 26, 2018

To All Prospective Bidders:

Visit California, a privately funded nonprofit corporation, is seeking destination marketing representation in Australia to promote California as a premier travel destination.

The California Travel and Tourism Commission d.b.a. 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, that may include television and online advertising, content marketing to include Website, social media, content series, visitor publications and maps, cooperative programs with traditional and non-endemic partners, public relations and travel trade programs – all designed to promote California to consumers, media and the travel trade industry. For more details, please visit <http://tourism.visitcalifornia.com> in the "Travel Industry" section. The localized Australian consumer site can be viewed at <http://visitcalifornia.com.au>.

The purpose of this Request for Proposal (RFP) is to seek and retain a qualified agency to act as the Visit California in-market specialist for marketing and sales representation in Australia to promote California as a premier travel destination.

The total budget for this RFP, including public relations, travel trade, content management and administration and overhead is USD \$1,500,000 per year. The annual contract period for the Scope of Work contained within this RFP will be approximately July 1, 2018 to June 30, 2019. Visit California may renew the contract each subsequent year for a five-year period, at its discretion. Visit California reserves the right to adjust both the subject budget and related services.

Attached is a RFP for those capable of meeting minimum requirements and carrying out the scope-of-work. All proposals 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 4:00 p.m., Pacific Standard Time (PST), March 6, 2018.**

Sincerely,



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

Caroline Beteta  
President and Chief Executive Officer  
Visit California

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**VISIT CALIFORNIA**

**Request for Proposals**

***Marketing Services: Australia***

# **PART I**

## **BACKGROUND**



## **1. INTRODUCTION TO VISIT CALIFORNIA**

California is the leading visitor destination in the United States with more than \$130 billion in travel and tourism related spending in 2017. This spending directly supported over one million jobs and generated over \$10 billion in state and local tax revenues. Among California's export-oriented industries, tourism is the fourth 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 increase market share and put California in a strong competitive position.

### 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 premier travel destination. While these two partners (Visit California and Division of Tourism) are separate legal entities, they are commonly referred to jointly as Visit California.

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-five of the commissioners are elected by the approximately 17,000 assessed California businesses, and the governor appoints 12. The board meets three times a year to help direct Visit California's programs and activities. A 34-member statewide Marketing Advisory Committee also provides input in developing the Marketing Plan.

## **2. RFP PURPOSE & AGENCY EXPERTISE REQUIREMENTS**

### RFP Purpose

The purpose of this RFP is to seek and retain a qualified agency to act as the Visit California's local travel marketing agency in Australia, promoting California as a premier travel destination.

### Agency Expertise

Your agency should be a local expert in the Australian travel space (Travel Trade Marketing and Communications) along with consumer marketing and owned channel management localized for the Australian audience.

### Overview of Agency Scope of Work



Visit California seeks a company to develop and execute a comprehensive, targeted, creative and brand-aligned program using a variety of channels which may include:

- Travel trade marketing, training, partner coops, trade shows, and/or sales missions;
- Public relations, earned media, digital influencers, and/or media outreach;
- Content marketing to include Visit California's owned channels and assets such as localized website, industry and consumer newsletters and social media channels; and
- Cooperative and partnership programs with trade partners (airlines, tour operators, etc.), media (broadcast opportunities and programming) and non-endemic partners (local brands in the consumer or travel product space).

### **3. CONTRACT TERM**

The initial contract term shall be one year. Visit California reserves the right to renew its agreement prior to the end of each contract term for a total of five years, provided funding to do so is appropriated for this purpose in subsequent budgets. There will be an oral review approximately six months after the contract date 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 USD \$1.5 million annually. Funding at this level is dependent on an overall Visit California budget of USD \$116 million or more. 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 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 top finalists chosen by the evaluation committee will be asked to provide oral presentations to the evaluation committee and allow the committee to conduct in-person office visits. All proposers and key team members working on the account should ensure they are available for the on-site visits during the dates presented in the Tentative Schedule. After the oral presentations, there will be a question and answer period. You will



be notified of the total presentation time. 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 C.

***Please note: Upon completing the selection process under this RFP, Visit California will notify the winning Proposer and all other Proposers who were not selected. Visit California's deliberations are confidential. Accordingly, while we understand that non-selected proposers may wish to ascertain reasons for their non-selection, Visit California is unable to respond to any subsequent questions and/or requests for information as to why a company was not selected.***

## 6. TENTATIVE SCHEDULE

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

<b>February 26, 2018</b>	RFP public announcement
<b>March 6, 2018 (4:00 pm PST)</b>	<b>Deadline for agency to submit <i>Intent to Bid</i> &amp; questions</b>
<b>March 9, 2018</b>	Q&A provided to proposers
<b>April 17, 2018 (4:00 pm PST)</b>	<b>Deadline for agency to submit proposal</b>
<b>April 27, 2018</b>	Compliance review completed – Committee review begins
<b>Week of May 7, 2018</b>	Finalists selected and notified (actual notification date varies)
<b>May 14 - 16, 2018</b>	Pre-calls with finalists
<b>May 30 – June 1, 2018</b>	Management conducts oral interviews in Australia
<b>Week of June 18, 2018</b>	Selected proposer announced (actual notification date may vary)
<b>July 1, 2018</b>	Commencement date of new contract

## 7. MINIMUM REQUIREMENTS

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

### Questions

All Proposers wishing clarification of this RFP must submit questions via email to: RFP Submissions [rfps@visitcalifornia.com](mailto:rfps@visitcalifornia.com) by the date and time referenced in Section 7, Tentative Schedule. ***Prior to submitting questions, please review the questions and answers located on our website at: <http://industry.visitcalifornia.com/About-Visit-California/Requests-for-Proposals>.***

### Notice of Intent to Bid

Notice of Intent to Bid, Attachment A, must be received by **March 6, 2018** 4:00 pm, PST. 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.

### Budget Form

A complete Budget Form (Attachment B) must be included, and must include all requested budget line items. All costs associated with the Scope of Work 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 proposers agree that budget costs submitted with their proposals are valid for 180 days from the date Visit California receives your proposal.

### Financial Statements

Proposers are required to demonstrate financial viability for maintaining an account of this size. Please provide **one copy** of GAAP / IAS compliant financial statements, including but not limited to:

- Income Statement; and
- Balance Sheet.

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, please complete, sign, and return the NDA (Attachment D) along with your *Intent to Bid* form by the date specified in the Tentative Schedule.

Financial Statements are not required to be audited.

*Please note that financial statements are not optional, but a minimum requirement, even for private companies. Proposers who do not provide financial statements will not be considered.*

#### Financials for Joint Proposals

If proposal is a joint proposal, you must submit financial statements for both Proposers.

#### Experience and Competencies

- Your company must have at least five years' experience as an in-market specialist for destination marketing organizations.
- Your company must have core competencies in at least three of the following areas.
  - Travel Trade Marketing and Sales;
  - Public Relations / Media Relations;
  - Digital / Owned Channel Assets; and/or
  - Marketing services and partnership marketing.

#### Conflicts of Interests

Your company must not have any direct interest in any tour wholesaler companies, general travel agencies, or commercial or charter airlines based in Australia.

#### Reserved Rights

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; and

- Not select a vendor and award a contract from this RFP.

### Contract Award

The Scope of Work and all tasks involved will be subject to negotiation between Visit California and the Awardee for the initial contract period. The details of your proposal will be used to negotiate the contract scope of work, and to evaluate your overall proposal as described in Attachment C, Written & Oral Proposal Evaluation Criteria.

## **8. BILLING & RELATED REQUIREMENTS**

### **8.1 Contract Requirements & W-8**

Winner of RFP will be required to abide by Visit California contracting requirements. This includes the conditions and terms contained within our standard Contract Template. ***Please review this template prior to submitting a proposal to ensure these terms are acceptable.*** The standard Contract Template and information on contracting requirements can be found at <http://industry.visitcalifornia.com/About-Visit-California/Requests-for-Proposals/>

You will also be required to submit United States Internal Revenue Service (IRS) Form W-8BEN-E.

### **8.2 Internal Control Structure**

As an attachment to your proposal, please provide a detailed discussion of your internal control structure for ensuring the following controls are in place and operating effectively:

- Controls for ensuring exchange rates are calculated properly;
- Controls for ensuring the accuracy of invoices from Proposer's sub-contractors, and the accuracy of invoices provided to Visit California; and
- Controls for ensuring that no expenses are incurred without prior approval.

### **8.3 Billing**

We limit contractor invoicing to two invoices per month. One invoice shall be for Administration & Overhead. The other invoice shall be for out of pocket expenses. Receipts are required for all out of pocket expenses.

The budget for this RFP and all administrative and overhead payments shall be made in U.S. dollars. All program and out-of-pocket costs will be reimbursed in the currency in which they were incurred. The RFP budget shall not be adjusted for the rate of currency exchange.



## **9. AGENCY GOALS & KEY ACTIVITY REQUIREMENTS**

### Overall Goal

The goal of your company in relation to this work is to help increase the number of Australian visitors to California while acting as the Visit California liaison in Australia.

### Requirements & Responsibilities

- Develop a proactive marketing program that enhances the position of Visit California as a premier travel destination to consumers in Australia.
- Promote California to potential visitors using a variety of marketing channels that include public relations, travel trade, consumer website, social media, digital strategy and publications. The contractor will work with staff, and other agencies appointed by Visit California to ensure that California is prominently positioned with consumers, key travel trade and public relations influencers.
- Create consumer content strategy including content distribution, creation and localization. Management of Visit California's owned channels, such as consumer Website, e-marketing, social media management, and publications localization. This includes coordinating with other agencies under the Visit California agency ecosystem that are also working on our behalf in the Australian market.
- Develop a robust marketing program to key travel trade audiences – travel agents and tour operators – designed to inspire and educate on what California has to offer to increase share of featured product as well as sales. Airline, OTA and retail partnerships are important to Visit California's strategy in Australia market.
- Develop a public relations 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.
- Develop consumer marketing programs which may include consumer activations, off-line brand immersive experiences and other tactics, in partnership with endemic and non-endemic companies and brands to increase awareness of the California brand.

## **10. CURRENT STRUCTURE**

### Brand Media

With about 591,000 visitors to California in 2017, Australia is a key source of the state's international tourism, and it is only expected to grow.

For Australia, under the direction of our global brand agency MeringCarson, we have a comprehensive "Always On" campaign including television, OTV, social and digital elements. All brand planning, creative and media buying is the responsibility of our global brand agency and should not be included in your RFP. However, we do look to our



selected in-country marketing agency to assist with localization of California brand and provide input and local insight to our global brand agency. *(Please note, the budget for brand advertising is separate and not included within this RFP or related budget.)*

Visit California has identified a consistent worldwide target audience to allow for greater efficiency in planning and deploying media and marketing programs on a global basis. This generalized target takes into consideration age, income and travel propensity.

For Australia specifically, the brand **Dream Big** primarily focuses on the showing the California attitude and diversity, while California is seen as similar in many ways to Australia and offers similar lifestyles, the accessible abundance and compact diversity along with the Hollywood lifestyle helps set the California brand apart. Visit California has expanded brand efforts through television and digital advertising, supporting more established efforts with media and travel trade.

#### Website

Central to Visit California's website strategy is a mobile first mentality. With strong content strategy in place, the website functions as the hub for Visit California's digital ecosystem. In addition to driving content consumption, the site has an increased focus on driving consumer action. Whether that action is a link through to an industry partner, an opt-in to a Visit California publication (printed or digital) or a social share or follow, the website creates a stronger connectivity across all Visit California consumer connections channels. The consumer website can be found at <http://www.visitcalifornia.com.au>.

#### Social Media

While the website will continue to serve as the hub for the digital ecosystem, Visit California recognizes the importance of connecting with consumers in their preferred environment and has worked to create a platform across a core suite of those environments while monitoring to ensure balance. Visit California currently utilizes a localized Website (<http://www.visitcalifornia.com.au>) and localized social media sites such a Facebook (<http://www.facebook.com/VisitCaliforniaAustralia>).

#### Publications

Visit California will continue to use its tried and true distribution vehicle – California Visitor's Guide and Road Trips to balance inspiration and utility to a highly qualified audience. The fully localized Australian visitor guide can be found at <http://www.visitcalifornia.com.au>.

#### E-Marketing

Working with Visit California's Consumer Content team, assist in updating, creating and finalizing the E-Newsletter Editorial Calendar ensuring content is scheduled 3 months in advance. Once the editorial copy and imagery is provided for each E-Newsletter deployment, market to provide feedback and localizations using the internal platform

(Kapost). After each deployment, market to review metrics and provide insights to help reach goals and meet KPIs.

#### Market Highlights

- 2017 Australia Key Stats to California (projected).
- 591,000 Visitors (projected for 2017).
- 608,000 Visitors (projected for 2018).
- 929 million in visitors spending.
- 43.5% California Market Share.
- 8.5 average nights in California.
- \$1699 average spend per trip.
- 86 weekly nonstop flights to California, representing 24,933 weekly nonstop seats.



**VISIT CALIFORNIA**

**Request for Proposals**

***Marketing Services - Australia***

# **PART II**

# **PROPOSAL**



## **1. PROPOSAL STRUCTURE**

Your proposal shall contain the following sections:

- Company Background;
- Conflict of Interest Requirements;
- Company Management & Staff;
- Sub-Contractor Requirements;
- Marketing Proposal and Scope of Work;
- Budget Form; and
- Financials (submitted separately in sealed envelope).

Please ensure your proposal includes the following:

- A detailed table of contents or index which lists each key section of your proposal;
- Page numbers; and
- Tabs or other methods to identify key sections of your proposal.

Please also place sections of your proposal in the order they are presented within this RFP.

## **2. COMPANY BACKGROUND**

Please include the following items:

- A letter of interest;
- A description of your company's primary services;
- The year in which your company was formed;
- Your company's experience in marketing and specifically within the tourism industry;
- Your company's experience within key disciplines, such as travel trade, communications, consumer marketing, etc.;
- The address from which the primary work on the contract would be performed;
- Numbers of total employees and contractors, within Australia and worldwide, if applicable;
- A current and past client list; and
- List of research companies / services to which your agency subscribes.

### **3. CONFLICT OF INTEREST**

- Please list all tourism-related clients for whom you have acted in country during the past 24 months. Please include a brief description of the type of activity and services you provide.
- Please include a statement that you have no conflict of interest between any of your existing contracts. Client relationships that could potentially be a conflict of interest should be listed and include a discussion of how you will resolve the potential conflict of interest.

### **4. COMPANY MANAGEMENT & STAFF**

Please include the following items:

- The contract manager for this scope of work; and
- The individuals who will be conducting the day to day work.

For all individuals assigned to this account, please provide:

- Current resumes/biographies demonstrating qualifications related to this RFP; and
- Length of time with your company.

### **5. SUB-CONTRACTORS<sup>1</sup>**

Please identify all proposed subcontractors for work that exceeds USD \$5,000 annually. For each sub-contractor:

- Document which portions of service they will perform;
- Describe their ability to perform the work;
- Provide the name and background of their company, if applicable; and
- Provide resumes and/or biographies of staff assigned to your account.

### **6. MAIN SCOPE OF WORK CATEGORIES**

The main Scope of Work categories included within the contract resulting from this RFP will include:

- Public Relations and Communications;
- Travel Trade;

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<sup>1</sup> 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.

- Consumer Content Distribution and Owned Channel Management<sup>2</sup>;
- Consumer Marketing, Cooperative and Partnership programs; and
- Account Administration.

## **7. PROPOSAL PROGRAMMING TIMEFRAME & BUDGET**

Initial and subsequent year contracts are based on 12-month periods and budgets. However, for the purposes of this proposal, *please base your work plan on two (2) years of activities and a USD \$3 million budget.*

## **8. PROPOSAL NARRATIVE**

Each proposer must include a complete and detailed discussion, in a narrative format, for each of the items listed in the following section. The discussion of these items will be used to evaluate the proposer's qualifications for effectively delivering the requirements outlined within this RFP.

Your discussion should include:

- Details and strategies of how you intend to accomplish the tasks involved;
- Your experience in accomplishing those tasks;
- Estimated timeframes for accomplishing those tasks;
- An implementation schedule; and
- Any deliverables you may provide that will be derived from those tasks.

In addition, you should also include:

- A discussion of any relevant managerial experience;
- Examples of any relevant past projects that demonstrate your skills and qualifications; and
- Any other relevant information and evidence to support your skills and qualifications for successfully executing this scope of work and meeting our objectives.

## **9. PROPOSAL SCOPE OF WORK**

### **Overview**

Please provide a detailed, narrative discussion of the following items:

- Australian market overview;

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<sup>2</sup> Global content creation will be funded separately. Your proposal need only include a staffing plan for this item.

- Conditions in the marketplace - trends, shifts and opportunities;
- Competitive analysis for California from the Australian perspective; and
- Marketing objectives.

### **Key Scope of Work Categories**

Please provide a detailed marketing strategy for the following items (*detailed descriptions are included in the subsequent sections*):

- Public Relations and Communications;
- Travel Trade;
- Consumer Marketing, Cooperative and Partnership Programs; and
- Consumer Content Distribution and Owned Channel Management.

### **Communications**

- **Public Relations Strategy.** Public Relations strategy(s) to include, but not be limited to, the identification of potential story angles against market niches; support needed to achieve destination coverage; identification of unconventional means to gain exposure; target publications that align with the targeted lifestyle segments; identification of media vehicles from traditional print to social media.
- **Global Digital Influencer Strategy.** Working closely with Visit California Headquarters<sup>3</sup>, you will develop a cohesive global digital influencer strategy to expand the reach of Dream Big aspirational messaging and harness the power of multi-channel media personalities. Standards of audience reach, content quality and brand alignment will be established as part of this- streamlined approach, with further localization as appropriate for the market. Dedicated digital influencer programs such as press trips to meet the specialized needs of this audience and leverage the development of content.
- **Communications Strategy.** Communication strategy(s) to build and strengthen communication with appropriate California destination, attraction, lodging, and tourism service providers in order to expand the reach and voice of the California travel product.
- **Scope of Work Duties.** Examples of current duties which may be included in the awarded Scope of Work include:

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<sup>3</sup> Headquarters is based in Sacramento, and consists of your Country Director, International Public Relations Manager, and Australia Travel Trade Manager, who are all based in Sacramento, California along with content and owned channel management team members.



- Target appropriate consumer and trade media, along with key opinion leaders and influencers that are appropriate for the California brand and secure positive publicity;
- Create a stable of engaged digital influencers to provide California constant engagement on social channels;
- Generate qualified press leads for California travel industry;
- Develop and maintain ongoing electronic media database accessible by Visit California;
- Organize and host familiarization trips for traditional media and digital influencers;
- Coordinate media receptions and special events (if applicable);
- Proactive pitch development and execution to media audience about leisure travel to California and Visit California promotional activities;
- Leverage in-market contacts to explore new promotional partnerships to extend the California brand in Australia;
- Maintain and utilize Visit California's media portal for all reporting such as press clippings, ROI, media Website and newsletters; and
- Assist with crisis communications support as needed.

### **Travel Trade**

- **Travel Trade Strategy.** Travel Trade strategy to include, but not be limited to, the identification of new initiatives to promote California during the course of the year to the Travel Trade; the determination of new strategies to participate in targeted co-opportunities with airlines and travel trade, and cooperative marketing opportunities targeting key niche audiences in Australia. Develop a progressive strategy to align Travel Trade distribution channels and opportunities for partnerships, including identifying actions to align with wholesalers, on-line travel agencies (OTAs), airlines, and retail travel agencies.
- **Events Strategy.** Working closely with Visit California, identify and develop a schedule for participation in industry events, tradeshow, sales missions, workshop presentations, and seminars that reflect participation level consistent with Visit California goals. This will also include the expansion of product development in the Australian market.
- **Educational Strategy.** Educational strategy(s) and activities to educate and train tour operators and retail agents about California, including but not limited to familiarization trips; use of "California STAR" platform and travel trade engagement

and training. Visit California's on-line training program and other creative vehicles to educate and communicate our destination product. California STAR is a dynamic trade resource that is an interactive showcase to act as a planning and sales resource. The platform includes collateral, images, video, itineraries and other resources all to further assist members of the trade on the wealth of destinations and activities that California offers. <http://www.star.visitcalifornia.com>

- **Scope of Work Duties.** Examples of current duties which may be included in the awarded Scope of Work include:
  - Provide bi-annual brochure analysis utilizing Visit California's travel trade portal;
  - Develop and maintain list of top-producing tour operators;
  - Maintain regular contacts via sales calls, meetings, and travel trade newsletters;
  - Develop and maintain information on the travel trade Website;
  - Utilize and update California's STAR (online training) platform;
  - Develop and expand engagement of travel agents via utilization of the California STAR training platform;
  - Conduct regular educational seminars with travel trade in Australia;
  - Generate qualified leads for California travel industry;
  - Organize and host familiarization trips for product managers and travel agents;
  - Represent California at selected travel trade shows and events in market to be jointly determined by Visit California;
  - Coordinate co-operative trade programs with select travel partners; and
  - Form a trade advisory board consisting of key tour operators, airlines, OTAs and other trade influencers and meet with board annually.

### **Consumer Marketing, Cooperative and Partnership Program**

- **Consumer Marketing Strategy.** Please note that advertising is handled outside of this RFP scope of work by our global brand agency.

Visit California has identified a consistent worldwide target audience to allow for greater efficiency in planning and deploying media and marketing programs on a global basis. This generalized target takes into consideration age, income and travel propensity.



For Australia, under the direction of our global brand agency MeringCarson, we have a comprehensive “Always On” campaign including television, OTV, social and digital elements. The brand campaign primarily focuses on the showing the California attitude, while California is seen as similar in many ways to Australia and offers similar lifestyles, the accessible abundance and compact diversity along with the Hollywood lifestyle helps set the California brand apart. Visit California has expanded brand efforts through television and digital advertising, supporting more established efforts with media and travel trade.

- **Cooperative and Partnership Strategy.** In order to expand our “Always On” programming of Paid, Owned, Earned, Trade and Shared (POETS) strategy, Visit California looks to the local agency to identify, negotiate and facilitate partnerships to expand the California brand and maximize budget with programs designed to reach the Australian consumer.
- **Scope of Work Duties.** Examples of current duties which may be included in the awarded Scope of Work include:
  - Brand Marketing Responsibilities. All brand planning, creative and media buying is the responsibility of our global brand agency and should not be included in your RFP.
  - In Country Marketing Activity. We do look to our selected in-country marketing agency to assist and provide input and local insight to our global brand agency. Some examples may include identifying and managing partnerships with entities/disciplines such as: travel trade, airlines, broadcast and media outlets, digital influencers along with non-endemic partners.
  - Cooperative and Partnership Programs. In order to extend our reach and visibility to the consumer, Visit California will look to an agency to assist with consumer facing activations and partnerships, all designed to expand the California brand to the Australian consumer. Local agency would be responsible for development and oversight of partnerships and local cooperative marketing programs, under the direction of Visit California headquarters.

### **Consumer Content Distribution & Owned Channel Management**

Central to Visit California's website strategy is a *mobile first* mentality. With strong content strategy in place, the website functions as the hub for Visit California's digital ecosystem. In addition to driving content consumption, the site has an increased focus on driving consumer action. Whether that action is a link through to an industry partner, an opt-in to a Visit California publication (printed or digital) or a social share or follow, the website creates



a stronger connectivity across all Visit California consumer connections channels. The consumer website can be found at <http://www.visitcalifornia.com.au>.

- **Strategy.** As the key element to direct to consumer communication, please include an owned channel strategy, including social media strategies and evaluation of the most appropriate in-market platforms.

The owned channel strategy consists of four key components: content localization, content creation, content management through Visit California's platform, and content distribution through partnership.

- **Scope of Work Duties.** Examples of current duties which may be included in the awarded Scope of Work include:
  - Work closely with the Visit California content team on development and execution of content strategy and content localization across all Visit California owned channels;
  - With Visit California content and brand team, recommend content that will need to be created for consumer engagement (will be funded from a separate budget);
  - With Visit California content team, create content distribution strategy for maximum impact and reach of target audience;
  - Work with Visit California on an annual localized content calendar;
  - Translate and provide localization of Facebook post, or content on any other relevant social media channel, as provided by Visit California HQ; and
  - Execute Website updates.

#### **Account Administration – Scope of Work Duties**

- Provide Visit California a written monthly progress report on activities and accomplishments;
- Progress Report is to be received by the 10th of the succeeding month in which the activities were performed. Sample progress report will be provided to the selected bidder upon request;
- Provide detailed back-up and appropriate receipts for all monthly expenses related to billable services and out-of-pocket purchases. This documentation shall be submitted monthly along with monthly invoice and report and is subject to audit at Visit California discretion;



- Provide annual top-line report that includes a competitive analysis indicating the state of the industry, California's position in the market, and issues that could adversely or positively affect the destination's strategic position;
- Store and maintain adequate amounts of Visit California collateral and promotional items; and
- Maintain a dedicated business phone/fax/e-mail contact for trade and press inquiries about California and be able to disseminate appropriate information expediently.

### **Agency Video**

Visit California's selection committee would like to know more about your agency and its personnel. Please submit no more than a five-minute video (with a link to your video – e.g. on your website, youtube.com, vimeo.com, etc.) within your proposal that (1) introduces us to each member of your staff who will be working on this account, (2) has each staff person discuss their experience within their area of expertise, and (3) presents your office space. Video does not have to be high quality in production and can be done with a Go Pro level of camera.

### **10. DELIVERY OF PROPOSAL**

Each bidder is required to deliver **ten** hard copies in addition to an electronic version of their proposal. Only **one** copy of Financial Statements is required. Electronic versions of the proposal must be in PDF format and sent to RFP Submissions at [rfps@visitcalifornia.com](mailto:rfps@visitcalifornia.com). Hard copies must be sent by courier such as FedEx or UPS to:

Visit California  
Request for Proposal: Marketing Services - Australia  
Attn: RFP Submissions  
555 Capitol Mall, Suite 1100  
Sacramento, CA 95814 USA

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



**VISIT CALIFORNIA**

**Request for Proposals**

***Marketing Services - Australia***

# **PART III**

# **ATTACHMENTS**

**Intent to Bid**

**Budget**

**Evaluation Criteria**

**Non-Disclosure Agreement**



**ATTACHMENT A**

**NOTICE OF INTENT TO BID  
MARKETING SERVICES - AUSTRALIA**

**Due: March 6, 2018**

**4:00 PM PST**

**Send to:**

Debi Himovitz  
Contracts Manager  
rfps@visitcalifornia.com

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

## ATTACHMENT B

### BUDGET FORM MARKETING SERVICES - AUSTRALIA

FINANCIAL BUDGET				
Budget Line Items	Activities / Description			Program Cost
Communications/Public Relations				
Travel Trade				
Marketing, Co-op & Partnerships				
Owned Channels				
Account Administration (include only your retainer / fee)				
Other (include any other expenses not included above)				
Total Cost				

  

STAFFING BUDGET				
Title	Years with Company	Years in RFP Field	Hourly Rate	% Time Assigned to Account
			Total FTE's	

## SAMPLE OF PROPOSED BUDGET FORM

Example of how to complete the budget form. Numbers provided are examples only.

FINANCIAL BUDGET				
Budget Line Items	Name of Program	Program Cost		
Communications/Public Relations	Press FAM to Southern California	\$5,000		
Travel Trade	Monthly consumer email marketing distribution	\$5,000		
Marketing, Co-op & Partnerships	Co-op project	\$5,000		
Owned Channels	Content curation and development	\$50,000		
Account Administration <i>(include only your retainer / fee)</i>	Retainer	\$30,000		
Other <i>(include any other expenses not included above)</i>	Out of pocket expenses	\$5,000		
Total Cost		\$100,000		

  

STAFFING BUDGET				
Title	Years with Company	Years in RFP Field	Hourly Rate	% Time Assigned to Account
Director	10	15	\$100	25%
Travel Trade Manager	8	10	\$75	50%
PR Manager	5	7	\$50	50%
Content Coordinator	2	3	\$40	100%
			Total FTE's	2.25



## ATTACHMENT C

### WRITTEN & ORAL PRESENTATION / POPOSAL EVALUATION CRITERIA

Written proposals will be reviewed, evaluated and scored by an evaluation committee. The evaluation committee may, if they deem necessary, select certain proposers for oral interviews. Interviews apply only to the top finalists, as determined by the evaluation committee. Evaluation of written and oral proposals will be based on the following criteria.

	Max. Points	Score
<b>1. OVERALL EXPERIENCE OF FIRM</b>	20	
Our evaluation will include an assessment of such items as the history of your company, your experience as it relates to the requirements within this RFP, evidence of past performance, and related items.		
<b>2. SCOPE OF WORK</b>	20	
Our evaluation will include an assessment of the quality of proposed strategies, creativity, detail of plan, ROI measurement systems, and related items.		
<b>3. FAMILIARITY WITH VISIT CALIFORNIA BRAND &amp; PRODUCT</b>	10	
Our evaluation will include our assessment of your understanding of our organization and how you integrated this knowledge into your proposal, cultural fit, and related items.		
<b>4. QUALIFICATIONS OF PERSONNEL</b>	10	
Our evaluation will include an assessment of the qualifications, experience, and creativity of your managerial team, staff, and subcontractors, and related items.		
<b>5. CAPABILITIES</b>	20	
Our evaluation will include an assessment of your past performance related to developing effective public relations / marketing programs.		
<b>6. COST EFFECTIVENESS</b>	20	
The maximum services are provided in relation to the fees charged and value of overall project. The budget is reasonable and appropriate.		
<b>TOTAL POINTS</b>	<b>100</b>	



## ATTACHMENT D

### NON-DISCLOSURE AGREEMENT (Proposal Information)

THIS NON-DISCLOSURE AGREEMENT ("**Agreement**") is made as of \_\_\_\_\_ ("**Effective Date**") by and between \_\_\_\_\_, a \_\_\_\_\_ ("**Disclosing Party**"), and the California Travel and Tourism Commission, a California non-profit mutual benefit corporation dba Visit California ("**Receiving Party**"), on the following terms and conditions:

1. Background and Purpose. Receiving Party has issued a request for proposal to which Disclosing Party intends to respond with a proposal (the "**Proposal**"). The proposal and supporting documentation will contain certain financial and other business information that is considered confidential and proprietary information by the Disclosing Party (the "**Confidential Information**"). The Disclosing Party has agreed to provide and the Receiving Party has agreed to hold and use the Confidential Information pursuant to the terms and conditions of this Agreement.

2. Requirement to Retain Confidentiality. The Confidential Information is regarded by the Disclosing Party as highly valuable and is not known publicly. Its continued value depends, in part, on retaining its confidential nature. The requirements of this Agreement will apply to the Confidential Information for a period of three (3) years from the Effective Date.

3. Use or Disclosure of Confidential Information. The Receiving Party recognizes that the improper use, disclosure or release of all or any portion of the Confidential Information could cause substantial damage to the Disclosing Party and its affiliates and damage his potential opportunities and revenues, and otherwise have a detrimental impact on the Disclosing Party. Accordingly, all Confidential Information received by the Receiving Party shall be (a) used solely for the purpose of the Receiving Party's evaluation of the Proposal, and (b) kept confidential and shall not be disclosed by Receiving Party in any manner whatsoever, in whole or in part, to any person who is not a party to this Agreement, or (ii) used or included in any information or reports disclosed or distributed by the Receiving Party to any person who is not a party to this Agreement; provided that Receiving Party is authorized to disclose the Confidential Information to affiliates, attorneys, agents, representatives, or employees of the Receiving Party who will review the Confidential Information in connection with the Proposal, subject to the terms and conditions of this Agreement.

4. Information Not Covered by Agreement; Disclosure under Legal Compulsion. Confidential Information shall not include such portions of the Confidential Information as are or become: (i) generally available to the public other than as a result of a disclosure in violation of this Agreement, (ii) available to a party to this Agreement on a non-confidential basis from a source (other than a party to this Agreement), which source is not prohibited from disclosing such Confidential Information by a legal, contractual, or fiduciary obligation, (iii) known by the Receiving Party prior to such disclosure as shown by credible evidence, or

(iv) subject to a governmental, judicial, or administrative order, subpoena or discovery request. If the Receiving Party receives any subpoena, order or other document legally compelling the Receiving Party to disclose any of the Confidential Information, the Receiving Party shall provide the Disclosing Party with prompt written notice of such request so that the Disclosing Party may seek a protective order or other appropriate remedy and/or waive compliance with the provisions of this Agreement. If such protective order or other remedy is not obtained or not requested, the Receiving Party agrees that it shall furnish only that portion of the Confidential Information that it is advised by counsel that it is legally required to disclose and shall exercise reasonable efforts to obtain assurance that confidential treatment will be accorded the Confidential Information so disclosed. Additionally, notwithstanding the foregoing, Disclosing Party acknowledges and agrees that Receiving Party is subject to the California Public Records Act, ("PRA") and shall provide any materials and make any disclosures required for Receiving Party to comply with the PRA.

5. Safeguard Confidential Information. The Receiving Party agrees to safeguard all Confidential Information in a secure place and restrict the disclosure of any Confidential Information as provided herein.

6. Property. The Confidential Information shall remain the exclusive property of the Disclosing Party. Upon the termination of the discussions regarding the Proposal the Receiving Party shall return any documentation or recordings of the Confidential Information, together with all copies thereof, immediately to Disclosing Party, provided that Receiving Party may retain a copy in its records, pursuant to its records retention policy, subject to the continuing obligation of confidentiality with respect to such Confidential Information.

7. Attorneys' Fees; Prejudgment Interest. If the services of an attorney are required by any party to secure the performance of this Agreement or otherwise upon the breach or default of another party to this Agreement, or if any judicial remedy or arbitration is necessary to enforce or interpret any provision of this Agreement or the rights and duties of any person in relation thereto, the prevailing party shall be entitled to reasonable attorneys' fees, costs and other expenses, in addition to any other relief to which such party may be entitled.

8. Severability. If any provision of this Agreement is held by a court of competent jurisdiction to be invalid or unenforceable, the remainder of the Agreement which can be given effect without the invalid provision shall continue in full force and effect and shall in no way be impaired or invalidated.

9. Governing Law. The rights and obligations of the parties and the interpretation and performance of this Agreement shall be governed by the law of California, excluding its conflict of laws rules.

10. Notices. All notices and communications pursuant to this Agreement shall be given in writing by personal delivery, prepaid first class registered or certified mail properly addressed with appropriate postage paid thereon, or facsimile transmission, and shall be



deemed to be duly given and received on the date of delivery if delivered personally, on the second day after the deposit in the United States Mail if mailed, or upon acknowledgment of receipt of electronic transmission if sent by facsimile transmission.

11. Waiver of Breach. No covenant or condition of this Agreement can be waived except by the written agreement of the party entitled to enforce the covenant or condition. Forbearance or indulgence by either party in any regard whatsoever shall not constitute a waiver of the covenant or condition to be performed by the other party.

12. Miscellaneous. This Agreement contains the entire understanding of the parties with respect to the matters described herein. This Agreement supersedes all prior and/or contemporaneous agreements and understandings between the parties, written or oral, with respect to the matters described herein. This Agreement may be executed in two or more counterparts, each of which shall be deemed an original document and all of which, taken together, shall be deemed to constitute but a single original document.

Each of the parties hereto has executed this Non-Disclosure Agreement as of the Effective Date first set forth above.

DISCLOSING PARTY:

\_\_\_\_\_

By:\_\_\_\_\_

Name:\_\_\_\_\_

Title:\_\_\_\_\_

RECEIVING PARTY:

California Travel and Tourism Commission,  
a California non-profit mutual benefit  
corporation dba Visit California

By:\_\_\_\_\_

Name:\_\_\_\_\_

Title:\_\_\_\_\_