



Advertising Agency of Record and Media RFP

December 17, 2020





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To All Prospective Bidders:

Visit California, a privately funded nonprofit corporation, is seeking a global creative and a global media agency to develop the California brand and promote tourism to the State of California.

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://industry.visitcalifornia.com>.

The purpose of this Request for Proposal (RFP) is to seek and retain a qualified global creative and a global media agency to develop and execute a strategic paid advertising plan for Visit California. The initial Scope of Work contained within this RFP will be approximately July 1, 2021 to June 30, 2022. The first contract may be pro-rated depending on the date of completion of this RFP.

Attached is an 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), December 22nd, 2020.

Sincerely,

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

Caroline Beteta
President and Chief Executive Officer
Visit California



Table of Contents

PART I - BACKGROUND

Introduction to Visit California	6
RFP Purpose & Budget	6
Agency Requirements	7
Overview of Scope of Work.....	8
Contract Term	11
Evaluation Process & Criteria	11
Tentative Schedule.....	12
Questions.....	13
Minimum Requirements	13
Internal Controls.....	16
Current Structure	16

PART II - PROPOSAL

Proposal Structure	18
Company Background	18
Company Management & Staff.....	18
Major Clients	19
Account Planning and Research.....	19
Amount of Company Billings.....	19
References	19
Proposal Scope of Work.....	20
Delivery of Proposal	25

PART III – ATTACHMENTS

Attachment A – Notice of Intent to Bid..... 27

Attachment B – Compensation Form..... 29

Attachment C – Written & Oral Proposal Evaluation Criteria..... 30

Attachment D – Non-Disclosure Agreement..... 31

Attachment E – Strategic Framework 34



VISIT CALIFORNIA
Request for Proposals

PART I
BACKGROUND



1. INTRODUCTION TO VISIT CALIFORNIA

California is the leading visitor destination in the United States (US) with more than \$145 billion in travel and tourism related spending in 2019. This spending directly supported 1.2 million jobs and generated over \$12.2 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 20,000 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 & BUDGET

The objective of this RFP is to obtain competitive proposals from qualified proposer(s) in order to award one or more contracts to develop and execute a strategic paid advertising program for Visit California within the following two (2) components:

- Component 1: Creative and Production
- Component 2: Media Strategy, Planning and Buying

The purpose of dividing the work into two components is to provide Visit California greater access to the most creative, innovative, and efficient proposers to carry out the project. Agencies may bid on one or both components, should they choose.



The contract period for the Scope of Work contained within this RFP will be approximately July 1, 2021 to June 30, 2022, or 12 months.

Visit California's fiscal year runs from July 1st through June 30th. The first fiscal year of the contract will be funded between \$33 - \$43 million.

This budget figure is based on brand development, creative production, talent fees, strategy execution, media planning and placement (both offline and online), account management fees, and out-of-pocket expenses. However, Visit California reserves the right to adjust both the budget and related services.

Moving forward, the budget for this contract could potentially scale to \$65 million annually over the next two to five years.

The approximate budgets for each component¹, inclusive of all creative, production, and media costs, along with agency fees, for Fiscal Year 2021 – 2022 are: Creative and Production: \$5 - \$7 million and Media Strategy, Planning and Buying: \$28 - \$36 million.

3. AGENCY REQUIREMENTS

Annual Revenues: Proposers must have 2019 annual revenues over \$40 million.

Experience: International creative and international media planning and buying experience – both online and offline – in at least four markets worldwide with at least one being non-English speaking. If you did not provide this in response to the RFQ, please list markets in which your agency has experience and what media vehicles were planned and purchased.

If using a subcontractor, provide a signed letter of commitment that includes the name of the subcontractor, their annual billings and the information requested above regarding international media planning and buying. All media planning/buying subcontractors must also meet the stated minimum requirements.

¹ Visit California is interested to see your budget ratio recommendations.



4. OVERVIEW OF SCOPE OF WORK

INTEGRATED OVERVIEW

Creative and media teams will be required to collaborate to form strategic recommendations and efficiently execute Visit California's brand advertising program, including research and information sharing, planning, optimization, analytics and reporting.

Collaborative Planning & Execution: develop, execute, and track results against an annual Marketing and Advertising Plan that supports the strategies set forth by Visit California. Includes strategic direction, creative strategy, brand development and stewardship, media plan, and cooperative plan.

Destination Stewardship: integrate this core principle into each facet of this scope of work, deepening Visit California's purpose to protect the state's natural resources, infrastructure, and local communities by marketing every region of California in a unique and deliberate way.

Cooperative Marketing: develop cooperative marketing programs to amplify the efforts and investments of the California tourism industry (DMOs and assessed businesses) and support Visit California's overarching objectives.

Owned Channel Integration: provide strategic input and develop synergies with Visit California's editorial and social teams to create a seamless consumer user experience.

Analytics & Reporting: utilize expertise, agency tools, data, partnerships, and other resources to manage program efficiency and performance. Frequently provide detailed reports that include qualitative and quantitative results mapping to larger objectives. Provide insights and recommendations to continually evolve measurement sophistication.

Research: Work with Visit California's research team in implementing tracking research and other projects as needed.

Account & Financial Stewardship: Attend Visit California board meetings (three per year), prepare periodic reports and a monthly budget recap, and arrange for storage and shipment of materials and documents as directed by Visit California.



Miscellaneous: Provide creative input and support for other projects and work collaboratively with global trade and public relations agencies once Visit California resumes international marketing.

CREATIVE & PRODUCTION:

Creative Strategy: develop a holistic approach to client brand advertising, integrating interactive, including social, into the overall strategy.

Audience Segmentation, Profiling and Targeting: utilize research to identify macro and micro consumer trends that influence and guide creative strategy. This will include close collaboration with the media team.

Cooperative Marketing: develop assets with creative extension opportunities for California's tourism industry to form unified and/or synergistic campaigns that amplify Visit California and partner investments. May include industry relations responsibilities.

Concept Development/Production: concept creative materials/campaign elements (TV, online, etc.). Once approved, produce, and bring to final form the approved advertising materials to run/air on behalf of Visit California.

Talent Relationships & Selection: provide strong yet attainable recommendations for consideration, outside of Visit California's existing network, negotiate partnerships and fees, and manage the process of working with talent while creating assets.

Innovation: provide Visit California with insights on emerging trends to continually evolve messaging and reach the target audience.

Analytics: plan, track, and report campaign performance, measurements, and insights to maintain consistent and efficient stewardship of programs.

Budget, Auditing & Compliance: plan, monitor, and report budget and cost Management.

MEDIA:

Media Planning & Buying Strategy: utilize research and market insights to develop strategic recommendations for budget allocation, market prioritization, and channel mix (annual plan and individual campaigns).

Media Buying: execute an offline and online media plan with strategic and cost-effective planning, buying and audits. Execution includes placement, optimization, cancellations, auditing, payment to vendors, and billing.

Audience Segmentation, Profiling and Targeting: utilize research to identify macro and micro consumer and media landscape trends that influence and guide media strategy.

Data: Capture and utilize first-party data, alongside data partnerships, to inform media recommendations, audience targeting, and messaging approach. This will include close collaboration with the creative team.

Innovation: provide Visit California with insights on emerging trends and new media to continually evolve and reach the target audience.

Analytics: plan, track, and report campaign performance, measurements, and insights to maintain consistent and efficient stewardship of programs.

Budget, Auditing & Compliance: plan, monitor, and report budget and cost management. Conduct post-buy auditing and reconciliation of media programs. Comply with third-party audit of media billings and reconciliation.

PROPOSAL REQUIREMENTS

Proposals must address each item.

5. CONTRACT TERM

The successful proposer will enter 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, 2021) and terminate on June 30, 2022.

Visit California reserves the right to renew its agreement prior to the end of each contract term for a total of five (5) years, providing funding to do so is appropriated for this purpose in subsequent budgets. There will be a 6-month oral review in 2021 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.

6. EVALUATION PROCESS & CRITERIA

Visit California will form a committee to evaluate the written proposals. The criteria for the scoring of the proposals are 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, 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. All proposers and key team members working on the account should ensure they are available during the dates presented in the Tentative Schedule. This may be conducted either via Video or Face to Face depending on the situation with COVID-19.



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 are included as Attachment C.

Please note: Upon completing the selection process under this RFP, Visit California will notify the winning Proposer(s) 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.

7. TENTATIVE SCHEDULE

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

December 17, 2020	RFP Released
December 22nd (4:00 pm PST)	Deadline for agency to submit Intent to Bid & written questions
January 2021	Q&A sessions for Agencies
March 10, 2021 (4:00 pm PST)	Deadline for agencies to submit proposal
March 17 / 18, 2021	Compliance review completed – Committee review begins
April 8, 2021	Finalists selected and notified (actual notification date may vary)
April 27-28, 2021	Pitch presentations in Sacramento or virtual (TBD)
May 7, 2021	Selected proposer announced (actual notification date may vary)
July 1, 2021	Commencement date of new contract

8. QUESTIONS

All Proposers wishing clarification of this RFP must submit questions via email to RFP Submissions 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>.***

9. MINIMUM REQUIREMENTS

Proposals may be rejected if minimum requirements are not met.

Notice of Intent to Bid

Notice of Intent to Bid, Attachment A, must be received by **December 22nd, 2020** 4:00 pm, PST. The notice must be submitted via e-mail to 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.

Compensation Form

A complete Compensation 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 US 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.

Annual Report and/or Financial Statements

Proposers are required to demonstrate financial viability for maintaining an account of this size. For Proposers who did not submit financial statements with the RFP, please provide GAAP compliant financial statements, including but not limited to:

- Statements of Financial Position.
- Statements of Activities; and
- Statements of Cash Flows.

All 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.

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.



Audit Requirements

You must agree to allow Visit California or its representatives to audit on media, financial and contractual media commitments. Please indicate your agreement to these terms within your proposal.

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 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.

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

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.

The successful 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/>

10. INTERNAL CONTROLS

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, including how rates are calculated.
- Controls for ensuring the accuracy of invoices from your suppliers and the accuracy of invoices your company will provide to Visit California; and
- Controls for ensuring that no expenses are incurred without prior approval.

11. CURRENT STRUCTURE

As the core consumer agencies, the brand and media agencies and the consumer content and publishing services partner must work closely together to ensure a seamless brand experience for potential visitors. Collaboration may include strategy, planning and execution to ensure Visit California's paid advertising program is driving highly qualified consumers to its owned channels and facilitating conversion into loyal followers.

Visit California's global agency infrastructure consists of the following:

- Brand agency (currently Mering)
- Global media agency (currently Havas)
- Consumer content and publishing services partner (Meredith)
- Website development firm (Appnovation)
- Social media agency partners (Destination Think – written content and ICUC – moderation)
- Plus 13 international travel trade and PR consultant and/or project-based agencies around the world.



VISIT CALIFORNIA
Request for Proposals

PART II
PROPOSAL

- **PROPOSAL STRUCTURE**

Your proposal shall contain the following sections and/or items:

- Company Background.
- Company Management & Staff.
- Major Clients.
- Account Planning and Research.
- Amount of Company Billings.
- References.
- Scope of Work discussion.
- Budget Form (See attachment B); and
- Annual Report and/or Financials (financials may be 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.

- **COMPANY BACKGROUND**

Please include the following items:

- A description of your company's primary services.
- The year in which your company was formed.
- Your company's experience in global creative and global media planning and buying and specifically within the tourism industry, if applicable.
- The address from which the primary work on the contract would be performed.
- Numbers of total employees.
- Please list locations of all your global offices.
- Please provide your West Coast US location, or other location from which the primary work on the contract would be performed.

- **COMPANY MANAGEMENT & STAFF**

Please include the following items:



- The contract manager 'global lead' for this scope of work.
- The individuals who will be conducting the day-to-day work; and
- Team structure locally and globally.

For all individuals assigned to this account, please provide:

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

Please describe any services and/or expertise that may be provided by third parties.

- **MAJOR CLIENTS**

- Please provide current major client names, locations, and activities for each, as well as longevity of relationship.
- Please describe your experience managing tourism or tourism related clients, if any.
- Please list all tourism related clients across any relevant global offices during the past 12 months, and please address any potential conflicts of interest with Visit California.

- **ACCOUNT PLANNING AND RESEARCH**

- Account planning and research disciplines are critical aspects of this Scope of Work. Briefly describe your agency's commitment to, competency in, and relevant processes to both disciplines.

- **AMOUNT OF COMPANY BILLINGS**

- Please provide the dollar amount of your annual company billings.
- Please describe how Visit California would rank in your agency based on our billings in the annual range of \$33 - \$43 million.

- **REFERENCES**

- Please provide a minimum of three current customer references and one former customer reference.
- Please provide prior notice to those customers whose names are submitted as a reference as we may contact them. They should be willing to answer questions concerning your company's performance and programs.

- **PROPOSAL SCOPE OF WORK**

Please include a complete, detailed discussion for each of the items listed below. This narrative will be used to evaluate proposer qualifications for effectively delivering the requirements outlined within this RFP.

CREATIVE & PRODUCTION

For each of the following project areas, the Proposer should prove capability; describing strategies to be used and quality controls. Sufficient detail must be given and must include examples of past projects, ability to meet deadlines, and managerial experience. The Proposer should demonstrate knowledge and understanding of brand in a global marketplace, and the shifting dynamics of how consumers receive and use information today.

- **Strategic Planning:** Provide us an “insider’s look” at your strategic account planning process. What goes into the development of a plan? What type of research do you do? Etc.
- **Advertising Campaign Development:** Demonstrate how your agency develops a holistic approach to client brand advertising, integrating interactive, including social, into the overall strategy. Include how you collaborate with media planning and buying teams or agencies. Exemplify how your agency has evolved based on the way consumers are receiving and using their information today.
- **Production/Creative:** Do you do production in-house? If not, how do you manage production? Is your creative team located in the office that this account will be managed? Show current and/or past client examples of how your brand development moves across all mediums.
- **Promotional and Strategic Partnerships:** Where do strategic partnerships or alliances fit into your overall approach? How have you used strategic partnerships to extend a client’s budget and exposure?
- **Research & Analytics:** Provide an overview of how you determine success. What are the analytic tools or services that you use, and what type of information will you be reporting back to Visit California as it relates to meeting our objectives? Please define how your analytics can be converted into insights, and how the insights will help guide us in making decisions on how we market in the future.
- **Travel and Administration:** The Proposer should estimate travel (three Visit California board meetings per year), monthly meetings (can be done virtually), communication and postage/shipping expenses expected to incur during contract period, and any additional reserve funds to be held for marketing contingencies. Travel and per diem expenses shall not exceed rates authorized by Visit California’s Travel and Expense Policy.

MEDIA

- Describe your global media planning/buying expertise; your media research, planning and execution expertise.
- Provide a list of your offices or insight sources in any of following countries:
 - US,
 - Canada,
 - UK,
 - Mexico,
 - Australia,
 - China,
 - Brazil,
 - India,
 - Germany,
 - France,
 - Japan, and
 - South Korea.
- Provide a list of research tools and access to tools that you use to assist in the media planning/buying functions.
- Please explain your experience with using client first-party data, data partnerships and other sources to refine media strategy.
- Describe your philosophy and approach to media strategy, planning and buying.
- Describe your ideology and approach to media planning.
- Please explain how you provide budget allocation, strategic media mix guidance and market insight into planning recommendations.
- Describe your capabilities for digital media including online video, paid search, display advertising, native advertising, paid social, and online video in all Visit California priority geographies noted above.
- Describe your key differentiating factors as compared to other global media agencies including buying power and rankings.
- Describe your key agency strengths.
- Provide two to three case studies that demonstrate your company's media planning expertise and showcases how your teams have delivered innovative media platforms to clients.

- Describe your approach to collaborating with creative teams. Does media inform creative or does creative inform media? What integration best-practices have you experienced? Describe your tactical process for digital planning, buying and approvals, etc.
- Describe your capabilities for offline channels including television, outdoor, and print in all regions.
- Describe how you establish goals and benchmarks for awareness campaigns across all digital and offline channels. Please provide examples of how you have executed against awareness campaign goals for other clients.
- Describe how you provide guidance on new media or emerging trends for your clients.

MEASUREMENT/REPORTING

- Describe your process for frequency of viewing metrics, optimizations, reporting and communications with clients for media.
- Describe your documented processes for implementation and quality assurance to ensure effective launch and tracking of digital campaigns.
- Describe your ad serving platform(s) and optimization tools.
- Describe any other technologies that you employ, either proprietary or third party, that improve your ability to plan, execute, and/or optimize media programs for your clients.
- Describe your POV on media effectiveness and measurement in emerging markets like China and India.
- Describe your process for testing and optimizing a campaign after it launches.

ANALYTICS

- Please provide an overview of your analytics capabilities and infrastructure.
- Describe the Analytics and Reporting capabilities your company offers. Please provide specifics around how you approach attribution across channels and media placements.
- Describe your own analytics platform and/or how you integrate campaign data with existing analytics platforms.
- Describe the advanced analytics technologies that your agency employs.
- Describe the tools/research/services that you provide to help us understand if your clients are spending their advertising dollars effectively, how campaigns are performing compared to our industry, and how they are delivering strong return on advertising spend.
- Please provide two case studies demonstrating analytics competency.



WORK PLAN

Please submit a preliminary work plan or schedule for the completion of the following project tasks based on a contract period of July 1, 2021 – June 30, 2022. The objective of the work plan is to give Visit California an opportunity to study how Proposers would schedule various elements and distribute the workload among staff.

The Work Plan should include a schedule for completion of the following project tasks:

Note: If you are not pitching to gain one or more of these responsibilities, please describe how you would collaborate with the partner agency assigned by Visit California to complete each task.

- Strategic Planning.
- Advertising Campaign Development.
- Production/Creative Services.
- Media Planning & Buying.
- Promotional & Strategic Partnerships; and
- Research & Analytics
- Success Measures & Reporting
- Budget Allocation (High-Level)

ACCOUNT MANAGEMENT

- Please provide your documented procedures for managing global accounts.
- Describe how our account will scale to be supported globally once Visit California resumes international marketing (estimating 2 years).
- Define how the supporting teams will manage strategic and tactical duties, including who will provide strategic leadership.
- Provide our main point of contact.
- Provide the number of other accounts our main point of contact and/or account manager will manage.
- Describe your communication model with global clients including frequency of communications, elevation protocols for issues that arise, etc.

IMPLEMENTATION

- Describe the on-boarding process for new clients and the migration of data from existing campaigns into your oversight, along with any associated costs.

BILLING/FINANCIAL

- Please describe your company's billing and reconciliation practices and processes.
- Provide a POV on how our global media programs could be audited to ensure impact, efficiency, and guaranteed delivery of media.
- The respondent awarded the contract must adhere to strict billing timelines and procedures to meet all billing deadlines. Please share your global best practices and processes around management of and submission of billing to give us an understanding of how the process is handled at the local level and the global level of your organization.
- Briefly describe your agency's best practices with regards to managing and billing foreign exchange rates. We are looking for you to share how your other global clients are managing global exchange rates, setting global exchange rates and at what points you evaluate exchange rates for them in planning, billing, invoices, and reconciliation process.

PERFORMANCE EVALUATION

- We would like to assess and adopt any appropriate existing procedures or practices that the selected agency considers particularly effective in evaluating performance.
- Please help us understand how your agency currently conducts client satisfaction studies and share any supporting questionnaires or documents.

- **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 your annual report and/or financial Statements is required. Electronic versions of the proposal must be in PDF format and sent to RFP Submissions at rfps@visitcalifornia.com. Hard copies must be sent by couriers such as FedEx or UPS to:

Visit California
Request for Proposals: Agency of Record &
Global Media Agency
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

PART III
ATTACHMENTS

Intent to Bid

Budget

Evaluation Criteria

Non-Disclosure Agreement

Strategic Framework



ATTACHMENT A

**NOTICE OF INTENT TO BID
Advertising Agency of Record &
Media RFP**

Due: December 22, 2020
4:00 PM PST

Send to:

Matthew Sabbatini
Chief Operating Officer
rfps@visitcalifornia.com

Page 1 of 2

Name of Proposer:
Contact Person:
Mailing Address:
Agency URL:
Telephone:
Fax Number:
Email Address:
Please indicate which components of this RFP your agency will respond to:
<input type="checkbox"/> Creative & Production
<input type="checkbox"/> Media Strategy, Planning, & Buying

NOTICE OF INTENT TO BID
Page 2 of 2

Will your response include services provided by another agency? If yes, please indicate name of the additional agency and which component they will be responsible for.

Yes No

Name of additional proposer:

Area of responsibility:

Creative & Production

Media Strategy, Planning, & Buying

Signed



ATTACHMENT B
COMPENSATION FORM

[Download the form.](#)



**ATTACHMENT C
WRITTEN & ORAL PRESENTATION / PROPOSAL 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
1. OVERALL EXPERIENCE OF FIRM	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.		
2. SCOPE OF WORK	20	
Our evaluation will include an assessment of the quality of proposed strategies, creativity, detail of plan, ROI measurement systems, and related items.		
3. FAMILIARITY WITH VISIT CALIFORNIA BRAND & PRODUCT	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.		
4. QUALIFICATIONS OF PERSONNEL	10	
Our evaluation will include an assessment of the qualifications, experience, and creativity of your managerial team, staff, subcontractors, and related items.		
5. CAPABILITIES	20	
Our evaluation will include an assessment of your capabilities and past performance related to global creative and media planning and buying.		
6. COST EFFECTIVENESS	20	
The maximum services are provided in relation to the fees charged and value of overall project. The budget is reasonable and appropriate.		
TOTAL POINTS	100	



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 because 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:

RECEIVING PARTY:

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

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____



ATTACHMENT E

**STRATEGIC FRAMEWORK and
RESEARCH AND TRENDS**

<https://industry.visitcalifornia.com/about/plans-publications/work-plan-chapters>

<https://industry.visitcalifornia.com/research/researchdashboard>