

# MEXICO MARKETING SERVICES

## Request for Proposal



visit  
**California**



September 7, 2021

To All Prospective Bidders,

Visit California, a privately funded nonprofit corporation, is seeking a qualified agency to provide destination representation in Mexico 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 Brand 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 <https://industry.visitcalifornia.com>.

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

**The annual contract period for the Scope of Work contained within this RFP will be from July 1, 2022 to June 30, 2023.**

**The total budget for this RFP, including public relations services, travel trade management, partnerships, owned channel activities, content and administration and overhead is on an average (without brand advertising dollars, funded separately) US\$750,000 – US\$1,100,000 per fiscal year period.**

**Visit California may renew the contract each subsequent year for a five-year period, at its discretion. Visit California reserves the right to adjust the budget and related services.**



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.

The last day to submit a Notice of Intent to Bid (a non-binding document) is November 5, 2021 no later than 4:00 p.m., Pacific Daylight Time (PDT).

Sincerely,

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

Caroline Beteta  
President and Chief Executive Officer  
Visit California

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## **Request for Proposal Marketing Services - Mexico**

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

California is the leading visitor destination in the United States peaking at US\$140.6 billion in 2019 for travel and tourism related spending prior to the pandemic. 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 maintain California's position as a top destination in the U.S.

#### **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 marketing budget is directly derived from assessed businesses in the travel and tourism industry, car rental assessment, and a small contribution from the State. Visit California operates under the auspices of the Governor's Office of Business and Economic Development.

Visit California's 37-member board of commissioners is composed of individuals from all 12 designated regions of California. Members represent five principal industry sectors: Accommodations, Restaurants and Retail, Attractions and Recreation, Transportation and Travel Services, and the Passenger Car Rental Industry. Twenty-four of the commissioners are elected by the approximately 18,500 assessed California businesses; the governor appoints 12; and the 37th is the director of the Governor's Office of Business and Economic Development. The Commission meets three times a year to direct Visit California's programs and activities. A 34-member statewide Marketing Advisory Committee also provides input in developing the marketing plan.



## 2. PURPOSE OF RFP

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

Your company goal, in relation to this work, is to increase the number of Mexican visitors to California; with a focus on travelers arriving by air, and act as Visit California's agent in Mexico. Your company will be required to develop a proactive marketing program that enhances the position of Visit California to key travel trade influencers and media outlets in Mexico. You 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. Your company will also be directly responsible for the management of Visit California's owned channels, such as localized consumer Website, e-marketing, social media management and content localization, together with airline relationships, partnerships, and management of cooperative programs.

Your company will be responsible for coming up with a strategic and proactive marketing program to key travel trade audiences – travel agents and tour operators, along with industry decision makers. These programs should be designed to inspire and educate with a goal of increasing sales. You will also be required to create a public relations strategy that will focus on securing placements across broadcast, digital and print media channels and engage with key digital influencers to reinforce California's position as an ultimate vacation destination. You will work with airline carriers and key marketing partners to develop and secure partnership opportunities.

As we begin recovery and reactivate in a post pandemic environment, Visit California is interested in your evaluation and insight into the Mexican market's potential as it relates specifically to California. We request that you identify key opportunities which you will expand on within your proposed plan. Please outline key competitive or environmental factors of potential concern, especially as the landscape is quickly evolving, and address these in detail, in the appropriate section of your proposal.

The detailed level of budget and staffing resources for activities outlined in the Scope of Work will be mutually agreed upon by the appointed contractor and Visit California in a contractual format.



### **3. CURRENT STRUCTURE**

Visit California has been investing in the Mexican market for almost 15 years. Except for 2020, the State has consistently invested in, public relations programs, travel trade initiatives, consumer website, social media, digital strategy, and content tools, with an average of US\$750,000 – US\$1,200,000 in expenditures. These same amounts are budgeted for the fiscal year 2022/23 and for future years. Additionally, through a third- party agency, there has been direct to consumer brand advertising funding that compliments these targeted trade, partnerships, public relations, and owned channel efforts.

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. Beyond the global target audience, localized audience nuances have been developed using Havas Media, Visit California's global media buying agency. Havas Media provides a proprietary consumer insight study that uses a single-source measurement of consumers' interaction and engagement with a broad range of media touch points.

#### **Public Relations**

As part of its overall media outreach and public relations strategy, Visit California hosts a variety of events and works with journalists to communicate its travel trade programming, and promote the entire State through the power of earned media, events, and stakeholder communications. A comprehensive public relations plan is an integral part of Visit California's overall effort, across a variety of marketing disciplines, and across our paid and owned media. This ensures that all forms of communications and messages are carefully linked together to highlight the many unique experiences and range of destinations throughout the State and to support key marketing messages and initiatives.

#### **Travel Trade**

To increase visitation and spend in California, an integral part of Visit California's strategy is to ensure the State is prominently positioned within key travel trade distribution networks globally. Visit California works with the travel trade industry to develop strong partnerships and to create new and innovative travel products that include all 12 tourism regions of the State. A great effort has been put into developing and promoting CALIFORNIA STAR, a dynamic trade-focused platform that helps drive sales and expand agent knowledge regarding the diversity of California experiences through training and interactive sales components, turning agents into expert brand ambassadors.

#### **Partnerships**

A key component of Visit California's travel marketing plan is to develop marketing partnerships to increase visitation as well as provide support for global programming. To



expand reach and to maximize resources, it is important for the in-market agency work closely with airlines, along with endemic and non-endemic brands in market with the goal of increasing California's presence in the market.

### **Owned Channel Management (website, e-marketing, social media management)**

Visit California has created a comprehensive on-line marketing and communications strategy, with language and content customization on a market-by-market basis.

- Website  
Visit California maintains localized Websites in all key global markets, which [www.visitcalifornia.com/mx](http://www.visitcalifornia.com/mx) serves as the foundation for the Visit California owned platform in Mexico. Central to the updated website approach is a mobile first mentality. With a strong content strategy in place, the website functions as the hub for Visit California's digital ecosystem to enhance our "Always On" consumer global strategy.
- 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 a localized Facebook page to speak to in-market consumers.
- Paid Traffic Driving Activity  
To extend the reach of the owned channel platforms, paid SEM and social media activity will be employed to support traffic, acquisition, and engagement strategies.
- Consumer E-newsletter  
The Visit California E-newsletter features content created for [www.visitcalifornia.com/mx](http://www.visitcalifornia.com/mx). This newsletter is distributed monthly with the intent of helping highly qualified Mexican audiences get inspired, dream about, and plan their California holiday. Current distribution is close to 29,000 subscribed users.

Visit California has the following digital channels in Mexico:

- URL: [www.visitcalifornia.com/mx](http://www.visitcalifornia.com/mx)
- Facebook: <https://www.facebook.com/VisitCaliforniaMexico/>

### Market Highlights

In 2020, Mexico was California's largest international market. The key audience, travelers by air, this segment spent approximately US\$866 million in California representing a 9.9-night average stay, and a US\$1,560 average spend per visitor.



#### **4. CONTRACT TERM**

The proposal will be based on a full fiscal year (July 1, 2022 – June 30, 2023) of activities. Visit California reserves the right to renew its agreement prior to the end of each contract term for a total of five (5) 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 prior to renewal. . Proposed renewals are also assessed according to program direction, funding, and consistency of price and scope of work continuity.

#### **5. AVAILABLE FUNDS**

**Visit California fund the contract to US\$750,000 – US\$1,200,000**

The budget includes allocations for the following services:

- Market Intelligence
- Media and public relations services and activations
- Travel Trade training and market activations
- Travel Trade and Partnerships
- Co-Op program activations
- Owned channel(s) management
- Account Administration and Overhead

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.

#### **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 (virtually or in-person) to the evaluation committee and allow the committee to possibly conduct in-person office visits (at the discretion of the committee). All proposers should ensure they are available for interviews during the dates presented in the Tentative Schedule. After the oral presentations, there will be a question-and-answer period. The total presentation time shall not exceed two hours. 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 D.

*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.*

## 7. PROPOSED SCHEDULE

Given the current uncertainties of global travel during these past 18 months, this schedule will remain flexible and can be altered at any time at the discretion of the Commission.

<b>September 7, 2021</b>	RFP public announcement
<b>By November 5, 2021 (by 4:00pm PDT)</b>	<b>Deadline for the agencies to submit <i>Intent to Bid</i></b>
<b>By November 19, 2021</b>	<b>Deadline for the agencies to submit Questions</b>
<b>Week of December 6, 2021</b>	Posting of Q&A on website
<b>By January 7, 2022 (by 4:00pm PST)</b>	<b>Deadline for the agencies to submit proposal</b>
<b>Week of January 28, 2022</b>	Compliance review completed – Committee review begins
<b>Week of February 21, 2022</b>	Finalists selected and notified
<b>Week of February 28, 2022</b>	Pre-calls with qualified proposers (if applicable)
<b>Week of April 11, 2022</b>	Management conducts oral interviews (in market/or virtually)
<b>Week of April 25, 2022</b>	Selected proposer announced – contract negotiations begin
<b>July 1, 2022</b>	Commencement date of new contract

## 8. PROPOSAL REQUIREMENTS

### 8.1 Minimum Requirements

#### **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 returned by **November 5, 2021** at 4:00 pm, PDT. The notice must be submitted via e-mail to [rfps@visitcalifornia.com](mailto:rfps@visitcalifornia.com). The Notice of Intent to Bid is non-binding; however, it ensures the receipt of all addenda related to this RFP. Proposals will be accepted only from applicants who submitted a timely Notice of Intent to Bid.

#### **Budget Form**

A complete Budget Form (Attachment B) must be included and be complete before submission. 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.

#### **Financial Statements**

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

- Income Statement; and
- Balance Sheet

All the above Financial Statements must be the most recent statements available, but no more than 12 months old. Financial statements can be submitted on-line or be submitted in a sealed envelope and address and mailed to Mr. Matt Sabbatini, COO, RFP Submissions -Visit California at the address listed on page 19. 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 E) along with your *Intent to Bid* form by the date specified in the Tentative Schedule.

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



*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.*

### **Other Minimum Requirements**

- Must be a business entity registered in Mexico.
- Agency must have at least five years' experience in the capacity of marketing and sales representation in Mexico.
- Agency must be a full-service tourism marketing agency and be able to show competency in the travel trade, PR, consumer, digital/ social and cooperative marketing.
- Agency must not have any direct interest in any tour wholesaler companies, general travel agencies, or commercial or charter airlines based in Mexico.

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:

- Adjust the RFP timeline.
- Reject any and all bids.
- Waive any or all mandatory requirements if no proposers meet one or more of the requirements.
- Cancel this RFP.
- Revise the amount of funds available under this RFP.
- Amend this RFP as needed;<sup>1</sup> and
- Not select a vendor and award a contract from this RFP.

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

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

## **8.2 Description of Proposer**

### **Services and Activities**

- Provide a letter of interest and executive summary of the proposal.
- Provide a description of the nature of the proposer's services and activities.
- Provide the year in which the company was formed.

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<sup>1</sup> If RFP is amended, Visit California will send an addendum to all Proposers.

- Note the company's history and expertise in marketing and specifically within the tourism industry, if any.
- List the address from which the primary work on the contract would be performed (if applicable).
- List the size of the agency by headcount for operations within Mexico.
- List the number of full-time and part-time employees. Do not list any sub-contractors in this section.

### **Conflict of Interest**

- The proposer shall list all tourism-related clients for whom it has acted in the country during the past 24 months.
- The proposer must certify that there is no conflict of interest between any existing contracts. Client relationships that could potentially be a conflict of interest must be listed together with a discussion of how the Proposer will resolve the potential conflict of interest and receive approval from other clients, if needed, prior to the oral interviews.

### **Personnel / Management**

- The proposer shall identify:
- The contract manager for this work; and
- The individuals who will be conducting the day-to-day work.
- For all individuals assigned to this account, please provide:
- Overall experience in marketing accounts; and
- Current resumes/curriculum vitae (CV) demonstrating qualifications related to this RFP. Include the length of time with the agency.
- Provide an organizational chart for the management and staff that will be assigned to this account.

### **Subcontractors**

- The proposer should identify all proposed subcontractors for work that exceeds US\$5,000 and document which portions of service will be performed by subcontractors and their ability to perform the work. For each subcontractor, please provide the name and background of their company, if applicable. Additionally, the proposer should submit resumes of the proposed subcontractor's key personnel, including those conducting day to day work.

- The use of subcontractors is subject to approval by the President and CEO of Visit California. Therefore, not all work recommended by the proposer will necessarily be approved and not all subcontractors listed in the Proposal will necessarily be selected. The proposer must make it clear to any subcontractors included in the proposal that even if the proposer is selected, the subcontractors may not necessarily be selected.

### **8.3 Marketing Proposal**

Your proposal should be based on a full year of activities. Each proposer must include a complete and detailed discussion, in a narrative format, for each of the items listed below. 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 the 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.

Please note that 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, Proposal Evaluation Criteria.

- Mexico market overview
- Conditions in the marketplace
- Key shifts and challenges for the market in the COVID environment and into recovery
- Competitive analysis
- Marketing objectives
- Provide an outline of the strategic planning process as it relates to the time allocated to strategy vs. execution.
- Current and past client list.
- Marketing strategy and overview for the following budget line categories



### **Public Relations**

- Public Relations strategy(s) to include, but not be limited to, the identification of potential story angles against market niches; 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 to broadcast opportunities.
- Working closely with Visit California HQ, development of a cohesive global digital influencer strategy to expand aspirational messaging and harness the power of multi-channel media personalities. Dedicated digital influencer programs such as press trips, content partnerships and aligned programs to enhance travel trade and other programs to meet the specialized needs of this audience and leverage the development of content.
- Communication strategy(s) to build and strengthen communication with appropriate California industry partners, keeping them apprised of activities occurring in the market.

### **Travel Trade**

- Identification of new initiatives to promote California during the year, to the Travel Trade.
- Provide strategies and tactics to develop/cultivate the leisure business from key accounts.
- Retail strategy(s) to align with 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, both in communicating as well as stimulating arrivals to the destination.
- Identification and development of a schedule for participation in industry events, tradeshow, workshop presentations, and seminars that reflect participation level consistent with Visit California goals.
- Educational strategy(s) and activities to educate and train tour operators and retail agents about California, including but not limited to "California STAR", Visit California's on-line training program and other creative vehicles to educate and communicate our destination product. The program can be viewed at [star.visitcalifornia.com](http://star.visitcalifornia.com) and select Mexico.

### **Partnerships**

- To maximize funds, working closely with airlines, endemic and non-endemic partners, to develop marketing programs that have a direct-to-consumer reach and provide maximize exposure and reach for California and our partners.



### **Owned Channels**

- 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.

### **Other Requirements**

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 (to be shot on a mobile device to have a relaxed look and feel, professional quality is not needed) with your proposal that (1) introduces us to each member of your staff who will be working on this account, and (2) has each staff person discuss their background within their area of expertise. Please submit this video for evaluation with your written proposal package.

**Please submit programming for a 12-month period of activity at (2) funding levels:**

- **US\$750,000 (minimum budget) - to reflect core activations**
- **US\$1,200,000 (maximum budget) - to reflect additional activations**

### **8.4 Scope of Work**

The following Scope of Work is designed to provide guidance for determining your total costs.

#### **Public Relations**

- Target appropriate Tier 1 and Tier 2 trade media that are appropriate for the California brand and secure positive publicity. Provide a "most wanted" media list for key media targets for the year.
- Develop partnerships with key media influencers in the market to help extend the California message to varied audiences.
- Issue and distribute news releases and media newsletter on a regular basis including "What's New in California".
- Generate qualified press leads for the California travel industry.
- Develop and maintain an ongoing electronic media database accessible by Visit California.
- Maintain the online press room in Visit California's media portal.
- Organize press familiarization trips.
- Schedule media appointments at trade shows.





- 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.
- Provide creative ideas for unique partnerships to leverage resources.
- Leverage in-market contacts to explore new promotional partnerships to extend the California brand in Mexico.
- Provide monthly PR activity and results report.
- Provide monthly press clippings report.
- Assist with crisis communications support as needed.
- Work with Visit California headquarters office on crisis communication outreach as needed.

### **Travel Trade**

- Develop and maintain a list of top-producing tour operators.
- Maintain regular contacts via sales calls, meetings, and travel trade newsletters.
- Develop and distribute regularly scheduled travel trade newsletter to the key travel trade.
- Organize and host individual or group familiarization trips.
- Maintain existing online training program (CA STAR) and conduct educational seminars with the travel trade in
- Mexico. Meet annual registration goals to increase STAR registration and graduation rates.
- Generate qualified leads for the California travel industry.
- Promote and support airline-sponsored or wholesale company-sponsored programs – training, familiarization trips, others.
- Represent California at selected travel trade shows and events in market to be jointly determined by Visit California.
- Maintain membership in the key professional associations that promote travel and tourism.
- Develop and manage California sales mission in the market (if applicable).
- Coordinate cooperative trade programs with select travel partners.
- Form a tour operator advisory board (known as California Advisory Board) consisting of key tour operators and meet with the board annually.



### **Partnerships**

- Identify and help build strategic partnerships with key distribution partners to promote California and drive traffic across the portfolio.
- Facilitate, negotiate, and assist in the management of potential partnerships which may include collecting assets, reviewing, and managing media plans, and provide reporting of results of the program.

### **Owned Channel Management**

- Work with Visit California on an annual localized content calendar.
- Develop and maintain a content calendar for social channels based on the Visit California HQ calendar, along with the creation of localized posts. Generally, an 80% (HQ) and 20% (In market) posting cadence.
- Translate and provide localization of Social posts or content on any other relevant social media channel, as provided by Visit California HQ.
- Execute Website updates.
- Maintain consumer newsletter database.
- Work closely with the Visit California content team on the development and execution of content strategy and content localization across all Visit California owned channels.

### **Account Administration**

- Provide Visit California a written monthly progress report on activities and accomplishments.
- Monthly report to be received by the 10th of the succeeding month in which the activities were performed. A sample progress report will be provided to the selected bidder upon request.
- Provide detailed backup and appropriate receipts for all monthly expenses related to billable services and out-of-pocket purchases. This documentation shall be submitted monthly along with a monthly invoice and report and is subject to audit at Visit California discretion.
- Store and maintain adequate amounts of Visit California collateral and promotional items.
- Maintain a dedicated business phone/e-mail contact for trade and press inquiries about California and be able to disseminate appropriate information expediently.



## **9. BILLING & RELATED REQUIREMENTS**

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

The 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/>

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

### **9.2 Internal Control Structure**

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.

### **9.3 Billing**

Visit California limits contractor invoicing to two invoices per month. One invoice shall be for Administration & Overhead. The other invoice shall be for the project and out-of-pocket expenses. Receipts are required for all project and out-of-pocket expenses.

## **10. PROPOSAL SUBMISSION**

Each bidder is required to deliver an electronic/PDF version of their proposal. Electronic versions of the proposal must be in PDF format and sent to RFP Submissions at [rfps@visitcalifornia.com](mailto:rfps@visitcalifornia.com). You also have the option of delivering a hard copy of the proposal, but this is completely optional. If you would like to submit a hard copy it must be sent by courier such as FedEx or UPS by January 7, 2022 to:

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



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



**ATTACHMENT A**

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

**Due: November 5, 2021**

4:00 PM PDT

**Send to:**

rfps@visitcalifornia.com

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



**ATTACHMENT B**

**BUDGET FORM  
MARKETING SERVICES - MEXICO**

FINANCIAL BUDGET				
Budget Line Items	Name of Program			Program Cost
Communications/Public Relations				
Travel Trade				
Owned Channels				
Account Administration				
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. The 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	Training to Volaris call center agents		\$2,500	
Owned Channels	Paid social post on Facebook		\$2,000	
Account Administration	Retainer		\$50,000	
	Office Travel - OOO		\$30,000	
Total Cost			\$89,500	

  

STAFFING BUDGET				
Title	Years with Company	Years in RFP Field	Hourly Rate	% Time Assigned to Account
Director	10	15	\$135	25%
Travel Trade Manager	8	10	\$75	50%
PR Manager	5	7	\$75	50%
Content Coordinator	2	3	\$50	100%
			Total FTE's	2.25

**ATTACHMENT C**  
**(For Informational Purposes Only)**

**WRITTEN & ORAL 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.

	<b>Max. Points</b>	<b>Score</b>
<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 and experience of your managerial team, staff, 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, travel trade product development and general management functions.		
<b>6. COST EFFECTIVENESS</b>	20	
The maximum services are provided in relation to the fees charged and the value of the 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 of 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 another 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 Visit California

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

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

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

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

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

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