



visit  
California

# Request for Proposals

**Call Center,  
Warehousing, &  
Fulfillment  
Services**



October 27, 2023

To All Prospective Bidders:

Visit California, a privately funded non-profit corporation, is seeking a qualified company to provide **Call Center, Warehousing & Fulfillment Services** to support our mission of promoting 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, which 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 total budget for this RFP is, on average, US\$350,000 per year. The annual contract period for the Scope of Work contained within this RFP will be March 12, 2024, to March 11, 2025. Visit California may renew the contract each subsequent year for a three-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.

**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), November 10, 2023.**

Sincerely,

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

Caroline Beteta  
President and Chief Executive Officer  
Visit California

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## 1. Introduction

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 Office of Tourism to implement the annual Marketing Plan, which promotes California as a premier travel destination. While these two partners (Visit California and Office 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. 24 of the commissioners are elected by the approximately 18,500 assessed California businesses; the governor appoints 12; and the 37<sup>th</sup> 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.

Visit California oversees the production of a variety of marketing activities, including on and offline advertising, visitor publications and maps, cooperative programs, public relations and travel trade programs – all designed to promote California to consumers, media and travel trade industry. For more details, visit [industry.visitcalifornia.com](http://industry.visitcalifornia.com). Also visit



[travelmattersca.com](http://travelmattersca.com), the site produced by the Public Affairs unit about the economic impact of tourism and the effort to make the industry more sustainable.

## 2. Purpose And Company Expertise Requirements

### 2.1 Purpose

The purpose of this RFP is to seek and retain a qualified company to provide **Call Center, Warehousing and global order Fulfillment Services** for California travel literature and promotional items ordered by consumers via our call center and website.

## 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 three (3) 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, consistency of price and scope of work continuity.

The proposal will be based on a contract term of March 12, 2024 – March 11, 2025.

Within the given contract term, we seek your recommendations on reasonable milestones and target dates for project deliverables based on this scope of work.

## 4. Available Funds

We are seeking quality, cost-effective services. **Visit California will fund the contract up to \$350,000 (USD) annually.**

Visit California reserves the right to adjust both the budget and related services.

The budget for this RFP shall be made in U.S. dollars.

## 5. 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 B**. 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 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.

*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 RFP Schedule

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



| Deadline                                | RFP Event  |
|---|--|
| October 27, 2023                        | RFP public announcement                                      |
| By November 10, 2023<br>(by 4:00pm PST) | <b>Deadline for agencies to submit <i>Intent to Bid</i></b>  |
| By November 10, 2023<br>(by 4:00pm PST) | <b>Deadline for agencies to submit <i>Questions</i></b>      |
| November 17, 2023                       | Posting of Q&A on website                                    |
| December 11, 2023<br>(by 4:00pm PST)    | <b>Deadline for the agencies to submit proposal</b>          |
| December 18, 2023                       | Compliance review completed – Committee review begins        |
| Week of January 8, 2024                 | Finalists selected and notified                              |
| Week of January 15, 2024                | Discovery/Pre-Calls with qualified proposers (if applicable) |
| Week of February 5, 2024                | Management conducts oral interviews                          |
| Week of February 12, 2024               | Selected proposer announced – contract negotiations begin    |
| March 12, 2024                          | Commencement date of new contract                            |

## 7. Minimum Requirements

### 7.1 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 6, 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>

## 7.2 Notice of Intent to Bid

Notice of Intent to Bid (**Attachment A**) must be returned by November 10, 2023, at 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.

## 7.3 Budget Form

A complete Budget Form (**Attachment C**) must be included in the excel file format provided with this RFP, and must include all requested budget line items 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. All proposers agree that budget costs submitted with their proposals are valid for 180 days from the date Visit California receives your proposal.

## 7.4 Financial Statements

Proposers are required to demonstrate financial viability for maintaining an account of this size. Please provide **one copy** of GAAP / IAS compliant YoY Comparative 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 can be submitted on-line or be submitted in a sealed envelope addressed and mailed to Compliance Officer, RFP Submissions - Visit California at the address listed on page 18. 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.

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.*

## **7.5 Other Minimum Requirements**

We seek a partner with the following minimum experience:

- At least five years' experience providing Call Center, Warehousing & Fulfillment Services.

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
- Award all, part, or none of this RFP to any number of proposers.
- 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; and
- Not select a vendor or 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. Content of 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 in sections 8.1 – 8.6 and 9.2 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 B**, Proposal Evaluation Criteria.

### 8.1 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.
- Note the company's history and expertise as it pertains to this RFP, including relevant case studies.
- Note your company's global reach – specifically any global storage and shipping capabilities.
- List the address from which the primary work on the contract would be performed (if applicable).
- List the size of the organization by headcount.

- List the number of full-time and part-time employees. Do not list any sub-contractors in this section.
- Provide a current and past client list.

## **8.2 Conflict of Interest**

- 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.

## **8.3 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 with these type of accounts; and
- Current resumes/curriculum vitae (CV) demonstrating qualifications related to this RFP. Include the length of time with the agency, as well as length of time in the industry; and
- Provide an organizational chart for the management and staff that will be assigned to this account.

## **8.4 Subcontractors**

The proposer should identify all proposed subcontractors for work that exceeds US\$5,000. For each subcontractor:

- Document which portions of service will be performed by subcontractor;
- Describe their ability to perform the work;
- Provide the name and background of their company, if applicable;

and

- 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.

## **8.5 Project Management Philosophy & Methodology**

The proposer shall identify:

- Preferred project management methodology and the organization's overall philosophy/strategy for adoption with new customers.
- Proposed approach to implement this methodology in the first 30, 60, and 90 days of being awarded this RFP.
- Proposed onboarding schedule, including all relevant meetings and proposed attendees.
- Defined discovery process for new feature requests and/or enhancements.
- What tools/resources will be used to effectively implement this philosophy/methodology.
- Defined Project team roles and responsibilities, both for organization and for Visit California.
- Proposed process for change management.
- Proposed communication methods and channels.
- Proposed process for managing the triple constraint triangle (time, scope, and money) with projects.



## 8.6 Proposal Scope of Work

### *Overall Project Vision*

Company will provide call center, warehousing and global order fulfillment services for California travel literature and promotional items ordered by consumers via our call center and website.

Currently VCA produces the following consumer collateral materials:

| Publication  | Size      | Weight   | # in Box   | Box Size   | Box Weight   |
|--|-----------|----------|--|--|--|
| California Visitor's Guide (annual in Jan)   | 8 x 10.5  | 14.6 oz. | 34   | 10 <sup>5</sup> / <sub>8</sub> x 8 <sup>1</sup> / <sub>8</sub> x 8   | 26.46 lbs.   |
| California Road Trips (annual in May)  | 7 x 10    | 2.2 oz.  | 140  | 10 <sup>1</sup> / <sub>8</sub> x 7 <sup>1</sup> / <sub>8</sub> x 13 <sup>1</sup> / <sub>4</sub> -<br>12 <sup>3</sup> / <sub>4</sub> - 12 <sup>1</sup> / <sub>4</sub> | 18.56 lbs.   |
| California Map (annual in Jan)   | 5.5 x 8.5 | 1.6 oz.  | 150  | 11 <sup>1</sup> / <sub>2</sub> x 9 x 7   | 14.9 lbs.  |
| International Visitor's Guides (bi-annual):<br>UK, IN, AUS/NZ,<br>Scandinavia, JP, KR,<br>CN, HK, TW, DE, FR,<br>IT, BR, and MX. | 7 x 10    | 2.2 oz.  | Varies:<br><br>Between<br>n 60-70<br>per<br>case | 10 <sup>1</sup> / <sub>8</sub> x 7 <sup>1</sup> / <sub>8</sub> x 13 <sup>1</sup> / <sub>4</sub> -<br>12 <sup>3</sup> / <sub>4</sub> - 12 <sup>1</sup> / <sub>4</sub> | Weight varies:<br><br>between 11.86<br>lbs. - 13.99 lbs. |

Historically, (data from 2019), fulfillment requests come in several forms, as listed below:

| Market   | Request Type  | Packet Contents            | 19/20 Approximates      |
|--|---|----------------------------|-------------------------|
| US & Canada (and all other countries outside of VCA international designated markets – Example – Russia) | Single Packet Request<br>- CVG, Road Trips, Official State Map                | Polybagged<br>CVG, RT, OSM | 200,000 single requests |
| Mexico (includes Spain and Argentina)  | Single Packet Request<br>- Mexico IVG, Official State Map                     | Polybagged IVG, OSM        | 1,000 single requests   |
| Brazil   | Single Packet Request<br>- Brazil IVG, Official State Map                     | Polybagged IVG, OSM        | 600 single requests     |
| India  | Single Packet Request<br>- India IVG, Road Trips, Official State Map          | Polybagged IVG, RT, OSM    | 400 single requests     |
| Scandinavia – (includes Denmark, Finland, Iceland, Norway, Sweden)                                       | Single Packet Request<br>- Scandinavia IVG, Road Trips, Official State Map    | Polybagged IVG, RT, OSM    | 500 single requests     |
| China Markets – including Taiwan and Hong Kong   | Single Packet Request<br>– China, Taiwan or Hong Kong IVG, Official State Map | Polybagged IVG, OSM        | 300 single requests     |
| Japan  | Single Packet Request<br>- Japan IVG, Official State Map                      | Polybagged IVG, OSM        | 150 single requests     |
| Korea  | Single Packet Request<br>- Korea IVG, Official State Map                      | Polybagged IVG, OSM        | 400 single requests     |

|  |   |  |                                  |
|--|---|--|----------------------------------|
| Italy  | Single Packet Request<br>- Italy IVG, Official<br>State Map | Polybagged IVG,<br>OSM                             | 1,500 single requests            |
| US & Canada  | Bulk Request, CVG   | Bulk box of single<br>California Visitor<br>Guides | 4,000 cases (160,000<br>singles) |
| All Markets (US, CA, UK,<br>AU, IN, SCAN, DE, MX,<br>IT, FR, BR, CN, JP, KR) | Bulk Request, Map   | Bulk box of single<br>Official State<br>Maps       | 2,000 cases (400,000<br>singles) |
| All English Speaking<br>Markets (US, CA, UK,<br>AU, IN, SCAN)                | Bulk Request, Road<br>Trips                                 | Bulk Box of Single<br>Road Trips                   | 1,500 cases (150,000<br>singles) |

Additional factors / considerations:

- Majority of orders come in through a web-based form hosted and managed by VisitCalifornia.com. Please make any recommendation for your preferred order intake system
- APIs and a secure FTP should be available for two-way exchange with VCA, and other potential vendors as directed by VCA.
- The selected vendor shall have the ability to provide shipping confirmations with tracking details if applicable so VCA can generate triggered e-mail communication regarding order status.
- VCA will work with selected vendor to devise business rules and process to handle duplicate orders and incorrect orders that need to be suspended.
- VCA expects that selected vendor will have address verification processes in place.
- Current expectation is that selected vendor will deliver packages for mailing to the USPS or other shipping facility within three (3) business days from the date of receiving request.
- Selected vendor shall be able to provide an average of 15,000 cubic feet of enclosed warehouse storage for VCA collateral.
- Selected vendor shall be able to provide real time inventory information to VCA through a user-friendly online tool, or through reports provided by the account manager.

- Selected vendor will update VCA on all postage rate increases and will continually look to find alternative, more cost-effective shipping methods
- Selected vendor will be able to manage international shipping to consumers within VCA's 14 target markets (US, UK, AUS/NZ, IN, SCANDINAVIA, DE, FR, IT, JP, KR, CN, MX, BR and Canada). Other, limited international shipping may be required.
- Ideally, chosen vendor would have distribution hubs internationally that can be utilized for international shipping.

### **Call Center Services**

- Contractor shall process information requests for individuals who want to speak with a live agent when ordering printed Visitor Guides and Maps.
- Contractor shall designate an account manager, who shall oversee all operational aspects of VCA's account as well as serve as the main point of contact for the VCA Publications Manager. This manager will advocate on behalf of VCA in suggesting ways to improve service levels and processes.
- Contractor shall RespOrg 3 toll-free numbers owned by VCA (if needed) and assign one Contractor area code and number for the RespOrg numbers to be pointed.
- Agents shall also have access to a comprehensive list of FAQs to answer commonly asked questions, which Contractor and VCA will work together to compile and maintain. Account Manager will work to update FAQ on a quarterly basis, taking into account any new questions asked by consumers.
- Contractor shall maintain an upfront Interactive Voice Response (IVR) system capable of capturing caller data and processing basic requests for information.
- Contractor shall record all calls received and will provide specific recordings to VCA upon request.
- Contractor shall place call recordings into an FTP site accessible by VCA personnel. This FTP site would hold the last 30 days of call recordings, after which the FTP would automatically purge recordings older than 30 days. VCA can download call recordings from the FTP site to keep them permanently.
- Specified calls shall be patched / warm transferred to VCA personnel.
- Bi-weekly calls with Fulfillment Contractor and VCA shall be set and determined upon completion of agreement.
- Call center hours: 24 hours per day, seven days per week.
- Scripts to be provided by VCA, but format shall be created by Contractor.

- Contractor shall forward orders to VCA's fulfillment contractor.
- Contractor shall be responsible for data entry via written and email requests.

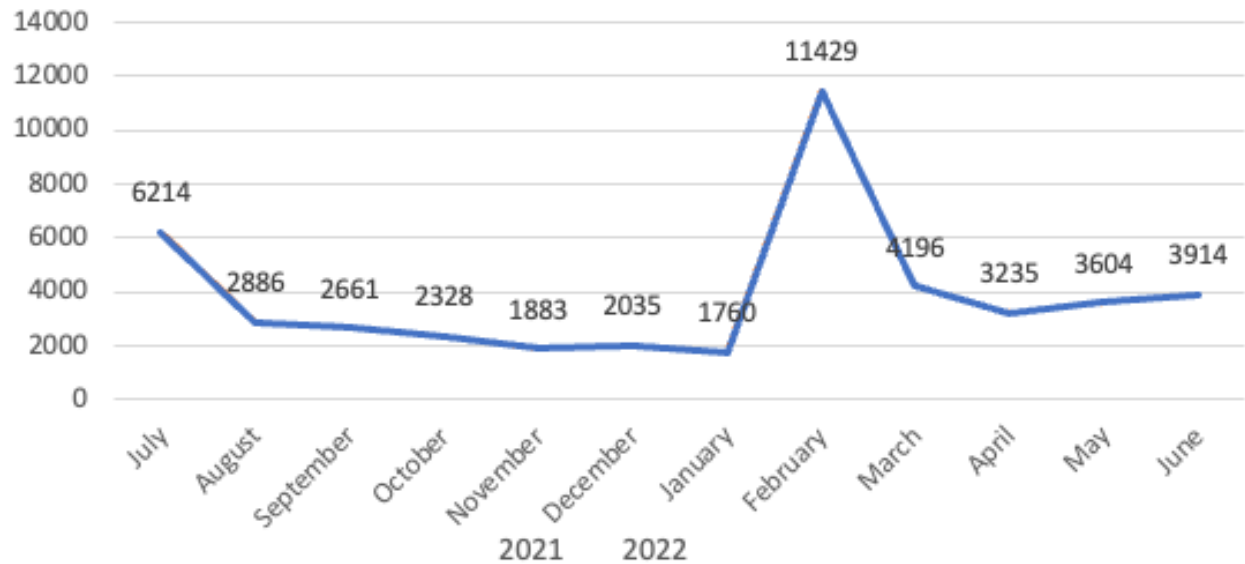
### **Call Center Reporting**

Contractor shall provide reports via email: weekly, monthly, and quarterly basic call metrics, and will quantitatively demonstrate orders sent through to the Fulfillment contractor. This data should be segmented into international orders, and bulk orders v. single information requests.

### **Additional Data**



## 2021 - 2022 Shipped Orders



### DNIS Performance by Month

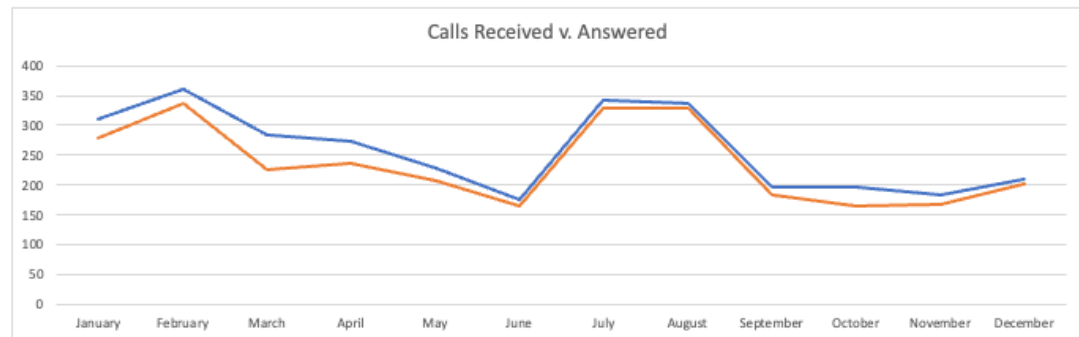
[MVB] 5111 - 7666 Visit California (800) 621-0021

7/1/2022 - 6/30/2023 - 00:00 - 24:00

Created on 10/10/2023 11:20:59 AM by 401

| Activity period | ACD calls offered | ACD calls handled | Calls abandoned (short) | Calls abandoned (long) | Calls interflowed | Calls requested | Answered by ACD group 1 | Answered by ACD group 2 | Answered by ACD group 3 | Answered by ACD group 4 | Average speed of answer (hh:mm:ss) | Average delay to abandon (hh:mm:ss) | Average delay to interflow (hh:mm:ss) | ACD handling time (hh:mm:ss) | Average ACD handling time (hh:mm:ss) | Service level % | Answer %     |
|-----------------|-------------------|-------------------|-------------------------|------------------------|-------------------|-----------------|-------------------------|-------------------------|-------------------------|-------------------------|------------------------------------|-------------------------------------|---------------------------------------|------------------------------|--------------------------------------|-----------------|--------------|
| January         | 311               | 279               | 1                       | 32                     | 0                 | 1               | 279                     | 0                       | 0                       | 0                       | 00:00:10                           | 00:00:34                            | 00:00:00                              | 03:41:19                     | 00:00:48                             | 86.5%           | 89.7%        |
| February        | 360               | 336               | 1                       | 24                     | 0                 | 1               | 336                     | 0                       | 0                       | 0                       | 00:00:07                           | 00:00:39                            | 00:00:00                              | 03:57:10                     | 00:00:42                             | 92.2%           | 93.3%        |
| March           | 284               | 227               | 8                       | 57                     | 0                 | 0               | 227                     | 0                       | 0                       | 0                       | 00:00:11                           | 00:00:39                            | 00:00:00                              | 02:53:07                     | 00:00:46                             | 76.4%           | 79.9%        |
| April           | 274               | 237               | 58                      | 37                     | 0                 | 0               | 237                     | 0                       | 0                       | 0                       | 00:00:09                           | 00:00:33                            | 00:00:00                              | 02:38:01                     | 00:00:40                             | 82.1%           | 86.5%        |
| May             | 229               | 207               | 32                      | 22                     | 0                 | 1               | 207                     | 0                       | 0                       | 0                       | 00:00:08                           | 00:00:32                            | 00:00:00                              | 02:36:22                     | 00:00:45                             | 88.2%           | 90.4%        |
| June            | 175               | 166               | 30                      | 9                      | 0                 | 0               | 166                     | 0                       | 0                       | 0                       | 00:00:18                           | 00:00:52                            | 00:00:00                              | 01:47:34                     | 00:00:39                             | 89.1%           | 94.9%        |
| July            | 341               | 329               | 0                       | 12                     | 0                 | 0               | 329                     | 0                       | 0                       | 0                       | 00:00:10                           | 00:00:40                            | 00:00:00                              | 02:44:23                     | 00:00:30                             | 85.6%           | 96.5%        |
| August          | 336               | 328               | 7                       | 8                      | 0                 | 0               | 328                     | 0                       | 0                       | 0                       | 00:00:10                           | 00:02:14                            | 00:00:00                              | 02:21:48                     | 00:00:26                             | 92.6%           | 97.6%        |
| September       | 197               | 184               | 20                      | 13                     | 0                 | 1               | 184                     | 0                       | 0                       | 0                       | 00:00:33                           | 00:00:30                            | 00:00:00                              | 01:52:42                     | 00:00:37                             | 72.6%           | 93.4%        |
| October         | 198               | 165               | 55                      | 33                     | 0                 | 1               | 165                     | 0                       | 0                       | 0                       | 00:00:34                           | 00:00:44                            | 00:00:00                              | 01:35:46                     | 00:00:35                             | 68.2%           | 83.3%        |
| November        | 184               | 167               | 40                      | 17                     | 0                 | 1               | 167                     | 0                       | 0                       | 0                       | 00:00:43                           | 00:00:48                            | 00:00:00                              | 01:14:26                     | 00:00:27                             | 62.0%           | 90.8%        |
| December        | 210               | 203               | 30                      | 7                      | 0                 | 0               | 203                     | 0                       | 0                       | 0                       | 00:00:10                           | 00:00:37                            | 00:00:00                              | 01:40:46                     | 00:00:30                             | 93.3%           | 96.7%        |
| <b>Totals</b>   | <b>3099</b>       | <b>2828</b>       | <b>282</b>              | <b>271</b>             | <b>0</b>          | <b>6</b>        | <b>2828</b>             | <b>0</b>                | <b>0</b>                | <b>0</b>                | <b>00:00:15</b>                    | <b>00:00:41</b>                     | <b>00:00:00</b>                       | <b>29:03:24</b>              | <b>00:00:37</b>                      | <b>83.6%</b>    | <b>91.3%</b> |





ACD Calls Offered  
ACD Calls Handled

|                   | 23-Jan | 23-Feb | 23-Mar | 23-Apr | 23-May | 22-Jun | 22-Jul | 22-Aug | 22-Sep | 22-Oct | 22-Nov | 22-Dec |
|-------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| ACD Calls Offered | 311    | 360    | 284    | 274    | 229    | 175    | 341    | 336    | 197    | 198    | 184    | 210    |
| ACD Calls Handled | 279    | 336    | 227    | 237    | 207    | 166    | 329    | 328    | 184    | 165    | 167    | 203    |

Please base your bids on the following Scope of Work and key activities:

- **Reporting**
- **Global Coverage Locations / Languages**
- **Daily Service Level Requirements / Activities by Language**
- **Current State of the fulfillment and call center process**
- **Desired Future State of the fulfillment and call center process**
- **Key Deliverables to be Addressed in Proposal**
- **Project Approach**
- **Project Timeline**
- **Other Service Activities / Requirements**
- **Project Management / Communication**
- **Training / User Adoption**

## 9. Billing and Related Requirements

### 9.1 Contract Requirements & W-8 / W-9

The winner of the 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 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 or W-9.

### 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 (if applicable);
- 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

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 (if applicable). Receipts are required for all out-of-pocket expenses.

The budget for this RFP and all 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.

## 10. Proposal Submission

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 by **December 11, 2023**, to:

Visit California  
Request for Proposal: Call Center, Warehousing & Fulfillment  
Services  
Attn: RFP Submissions  
555 Capitol Mall, Suite 1100  
Sacramento, CA 95814 USA

Please Note:

- **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

#### CALL CENTER, WAREHOUSING, AND FULFILLMENT SERVICES

**Due: November 10, 2023**

4:00 PM PST

**Send to:**

[rfps@visitcalifornia.com](mailto:rfps@visitcalifornia.com)

|                          |       |
|--------------------------|-------|
| <b>Name of Proposer:</b> |       |
| <b>Contact Person:</b>   |       |
| <b>Mailing Address:</b>  |       |
| <b>Agency URL:</b>       |       |
| <b>Telephone:</b>        |       |
| <b>Fax Number:</b>       |       |
| <b>Email Address:</b>    |       |
| <b>Signed:</b>           | <hr/> |

## ATTACHMENT B

### 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   |            |
|---|------------|
| <b>1. OVERALL EXPERIENCE OF FIRM</b>  |            |
| 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>20</b>  |
| <b>2. SCOPE OF WORK</b>   |            |
| Our evaluation will include our assessment of your represented ability to perform duties listed in the Scope of Work and your responses to the other proposal information requirements.                     | <b>20</b>  |
| <b>3. FAMILIARITY WITH VISIT CALIFORNIA BRAND &amp; PRODUCT</b>   |            |
| 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>10</b>  |
| <b>4. QUALIFICATIONS OF PERSONNEL</b>   |            |
| Our evaluation will include an assessment of the qualifications, experience, and creativity of your managerial team, staff, and subcontractors, and related items.  | <b>10</b>  |
| <b>5. CAPABILITIES</b>  |            |
| Our evaluation will include an assessment of your past performance related to this RFP areas.   | <b>20</b>  |
| <b>6. COST EFFECTIVENESS</b>  |            |
| The maximum services are provided in relation to the fees charged and value of overall project. The budget is reasonable and appropriate.   | <b>20</b>  |
| <b>TOTAL POINTS</b>   | <b>100</b> |

## ATTACHMENT C

### BUDGET FORM

#### CALL CENTER, WAREHOUSING, AND FULFILLMENT SERVICES

Please include the following information in your proposal. Please also include any other information that you believe is relevant and will help us with our decision in selecting the best company for our needs.

All of these items may not apply depending on your billing structure. Comprehensive information will help us make our decision, so please include as much detail about the services provided and their related costs as possible.

#### **Warehousing & Fulfillment Services**

- Postage & Shipping Materials
  - Envelopes
  - Label Production
- Handling
  - Data Entry
  - Packet Creation
  - Label Production
  - Misc./Other
- Technology
  - Data Management / Synchronization
- Warehouse Storage (Monthly)
- Account Management & Reporting
- Misc. / Additional Costs



### **Call Center Services**

- Monthly 800 Line Service Fees (three lines)
- Monthly Operator Services Fees
- Monthly Per-Package Plan Options
- Monthly Base Rates
- Monthly Patch Fees
- Monthly Technology and related fees
- Monthly Account Management and Reporting Fees
- Monthly Email Management
- Monthly Data Entry Fees



## 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:

RECEIVING PARTY:

\_\_\_\_\_

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

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

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

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

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

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

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