visit California

Request for Proposals

Data & Analytics Development Partner

February 11, 2025

To All Prospective Bidders:

Visit California, a privately funded nonprofit corporation, is seeking a qualified Data & Analytics partner capable of delivering exceptional quality services for a wide range of organizational needs 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.

The total budget for this RFP is, on average, US$1,500,000 - US$2,500,000 per year.

The annual contract period for the Scope of Work contained within this RFP will be approximately July 1, 2025, to June 30, 2026. 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), February 21, 2025.

Sincerely,

Caroline Beteta

Caroline Beteta
President and Chief Executive Officer
Visit California

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 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.

2. Purpose And Vision

2.1 Purpose

The purpose of this RFP is to seek and retain a qualified Data & Analytics Development partner to assist Visit California with its Data Program initiatives, which primarily operates within the systems of Salesforce (and associated addons FinancialForce, Service Cloud, CRM Analytics, etc.), Tableau, Data Cloud, and BigQuery. This RFP scope includes roadmap development for the Data & Analytics Program, maintenance, development, and administration. This includes:

- Enhancing and automating processes throughout organization
- Maintaining technical stewardship
- Managing development branches and peer review processes

- Adding key components and/or packages to enhance organizational use and adoption of the Salesforce platform
- Enhancing and maintaining data integrity and security between Salesforce environment and other integrated platforms.
- Developing and implementing new enhancement requests, features, and apps
- Designing and enhancing Salesforce/Tableau reports and dashboards

2.2 Vision

Our vision is to build and maintain strong long-term relationships with our key stakeholders by creating personalized experiences across all our touchpoints. We seek to effectively anticipate stakeholder needs and communicate key information on a consistent basis. Our stakeholders' support and loyalty is our highest priority.

Our vision also includes the continued development of a best-in-class suite of systems, centered around Salesforce, that are customized and configured to our specific needs; implement efficient and effective workflows and processes around Salesforce; deploy solutions and enhancements in a timely and cost-effective manner; ensure superior training of technical and line staff; realize full user adoption; and achieve a noticeable, positive improvement with stakeholder relationships.

We are looking for a partner who can help us in achieving this vision. We have built a highly customized and highly technical system to meet our unique organizational goals. We need a partner who can quickly adapt to non-standard SFDC development and workflows in order to help meet our organizational vision.

3. Contract Term

The proposal will be based on a full fiscal year (July 1, 2025 – June 30, 2026) of activities. 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, and consistency of price and scope of work continuity.

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

Visit California will fund the annual contract to $1,500,000 – $2,500,000 (USD)

The budget includes allocations for the following services:

- Salesforce, FinancialForce, Data Cloud, Tableau, BigQuery Governorship
- Managed Services
- Data & Analytics Program Planning and Execution
- New Enhancements/Projects as prioritized throughout the contract term

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.

If selected as a finalist, Visit California will share the details of an assignment to be completed and presented during the oral presentations. Respondents will have access to the Visit California team for questions during that window. The specific assignment, which will relate to leveraging Artificial Intelligence against real Visit California data, will be shared at the same time for all finalists, along with a sample data set to be used during the development of the problem solution.

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
February 11, 2025	RFP public announcement/release
By February 21, 2025 (by 4:00pm PST)	**Deadline for agencies to submit *Intent to Bid* and Questions**
February 28, 2025	Posting of Q&A on website
March 25, 2025 (by 4:00pm PST)	**Deadline for the agencies to submit proposal**
April 1, 2025	Compliance review completed – Committee review begins
Week of April 7, 2025	Finalists selected and notified
Weeks of April 14 & 21, 2025	Discovery/Pre-Calls with qualified proposers (if applicable)
Week of June 9, 2025	Management conducts oral interviews
Week of June 16, 2025	Selected proposer announced – contract negotiations begin
August 1, 2025	Commencement date of new contract

7. Current Infrastructure

Our current Data & Analytics program requires integrations and/or interaction with the following systems. Each system will have some dependencies (though some may be managed by other teams outside of Data & Analytics).

System	Purpose
Salesforce (SFDC)	CRM
Salesforce Data Cloud	Datawarehouse & ETL tool
Salesforce Communities	Customer Billing Portal
FinancialForce	ERP
DocuSign	CLM & eSignature
Nintex	SFDC Document generation
NICE inContact	Call Center
Zoom	VOIP (used with NICE inContact)
Own{backup}	SFDC/FFA Data/Metadata backup
Dell Boomi	iPaaS
Google Cloud Platform	Datawarehouse & backup
Tableau	BI Reporting
Vena	FP&A
Chrome River	Procure-to-Pay
Concur	T&E Management
PNC Bank, N.A	Customer/Vendor Banking Interactions
Monday	Project Management
Atlassian (Jira, Confluence)	Agile sprint management & documentation
CVENT	Event management

8. Key Business Processes

Visit California currently leverages its Salesforce environment and other data tools for the following key business processes:

- Tourism Assessment Program
- Enterprise Resource Planning (ERP) System
- Tourism Stakeholder and Marketing Management
- Data Aggregation, Standardization, and Reporting
- Data Governance and Trust

8.1 Tourism Assessment Program

Salesforce is an integral part of our ability to fulfill the legislative requirements set forth in the California Tourism Marketing Act. The Tourism Assessment program requires a select group of California businesses (our customers) to submit financial information and potentially pay an assessment fee. Salesforce Communities provides the interface for our customers and allows them to submit data to enhance our records.

The Office of Tourism team also utilizes integrated soft phone technology to record interactions via phone, email, and chat. Contact management and access to the customer interface is managed through Salesforce.

For additional detail on the Tourism Assessment Program – or other detailed data processes at Visit California – proposers can request an NDA to address specific questions.

Current Challenges Include:

- Lack of automation with repetitive processes.
- Prevention of duplicate record creation.
- Limited automated activity creation for emails, calls and chats.
- Customer Request creation and management.
- Notice process management.

Potential future state:

- Improved customer experience through additional access to account details and business statistics.
- Automated business acquisition processes.
- More fluid notice timeline.
- Improved priority outreach and follow-up lists.
- Improved reporting for database and account health.

8.2 Enterprise Resource Planning System

Visit California currently uses a suite of services to fulfill its operational and financial needs. This includes the use of FinancialForce as its accounting system, which is used for customer billing, vendor management, and core accounting functions. Other systems are integrated, or will eventually be integrated, to fulfill other needs, including contract lifecycle management, RFP management, asset management, procure-to-pay, and financial planning and analysis.

Some current challenges include:

- System integrations and process automation between systems.
- Current state of FinancialForce workflows.
- User permissions and profiles.

Potential future state:

- Automated integrations between all financial systems.
- Complete implementation of ancillary functions and modules in FinancialForce.
- Centralized user permissions and profiles for all financial systems.

8.3 Tourism Stakeholder and Marketing Management

Tourism industry businesses provide Visit California funding to market California to the world. Consequently, Visit California must regularly communicate its activities and results to these stakeholders. This communication occurs within the following primary processes:

- Outside sales meetings
- Executive presentations to tourism related groups and organizations
- Mail and email campaigns

Currently, these processes are not fully standardized or automated. As part of continued Salesforce development, we seek to improve upon and standardize these processes, and automate key aspects to gain additional data accuracy and operational efficiencies. In addition, an important element of these processes is the gathering of activities and results data from disparate sources. We seek to include that data within Account and Contact records whenever possible. These activities and results data is currently gathered both manually and electronically. Some of this information is currently contained within Salesforce, and we continue to centralize more of this data into Salesforce. Outside sales meetings

We have 10 liaisons, serving six California regions and our industry partners, as well as an industry relations manager and a director, who oversee these liaisons. These liaisons meet one-on-one with Tourism Industry stakeholders as well as attend and speak at group events.

Our 'sales' meetings are educational in nature and do not involve actual sales. The objective of these meetings is to make regular contact with key stakeholders to inform them of the results we are achieving via use of their funding, and ultimately secure their continued support. Liaisons log in to Salesforce to review their accounts, which is based on their geographic location. After meetings, liaisons log their activities and update contact information as necessary. Customer account lists are geographically based, with minor overlap in some regions. Reports are generated within Salesforce for the Industry Relations team.

Some current challenges include:

- Inconsistencies in building routes for liaisons from period to period.
- Heavily dependent on business analyst to build prioritized account lists for liaisons to contact. This includes a lack of automation for assigning accounts to Liaisons.
- Salesforce App does not work consistently and/or smoothly for end users.
- Poorly built integrations and processes with email, calendar, and tasks for liaison team.
- Lack of dashboards for both liaison activities management and industry relations manager oversight.
- Email contact activity not integrated or easily captured within current CRM.

- Inability to efficiently manage and keep up-to-date voting rosters within our Salesforce structure. Currently have to manage in MS Excel.

Potential future state:

- Standardized rules to ensure consistent monthly contact lists.
- Integration with stakeholders' social media to gain insights
- Ability to target each sales meeting to each stakeholder's needs and preferences.
- Processes to identify and update contacts who've changed accounts/companies.
- Greater analytics and reporting capabilities.
- Build a meetings route inside SF and the ability to export to 3rd Party mapping/guidance solutions (e.g., Apple Maps, Google Maps, MapQuest).
- Advanced mapping capabilities to identify stakeholders enroute to a location.
- Automated process to update published content mentions/links on the account page.
- Automated email integration.
- Account's social media pages auto populated.

Executive presentations to tourism related groups and organizations

Our CEO regularly speaks to key groups of stakeholders. These speeches include standardized content as well as specific content directed to each audience. When speeches are calendared, our staff sends out information requests to key staff requesting specific activities and results data. Some of this data is contained within disparate systems. Other data must be manually gathered.

Some current challenges include:

- Manually gathering electronic and non-electronic data.
- Limited data available within Salesforce.
- Staff time/burden.
- Lack of standardized approach for gathering and reporting data.
- Once gathered, data is not always entered into Salesforce for future use.
- Lack of visibility of data enterprise-wide.

Potential future-state:

- Key data attached to account and contact records
- Standardized processes for gathering and reporting
- Reduced staff burden
- Readily available activities and results data for developing presentations to any audience

Mail and Email Campaigns

We utilize mail and email to keep key stakeholders apprised of our activities and results. We extract contacts from our Salesforce and stratify this data to target specific groups of contacts. We use MailChimp for email campaigns.

Some current challenges include:

- Data integrity
- Data analyst assistance is required to extract and perfect contact lists.
- Integration between Salesforce and MailChimp is limited, one direction, and naming/tagging taxonomy is not aligned with other systems
- Lack of visibility of data.

Potential future state:

- Ability of staff to self-serve data as needed.
- Email campaigns within Salesforce.
- Campaign insights and results within Salesforce.

8.4 Data Aggregation, Standardization, and Reporting

Visit California has many distinct teams operating in many different capacities and providing value to tourism in the state in unique ways. These differences are a value-add, but also create siloes and make it difficult to share data and insights across teams. When users make decisions relating to the structure of their data, this can often be done without alignment to existing organizational practices such as naming conventions or a unified tagging taxonomy.

Some current challenges include:

- Siloed data sets across many different platforms and local machines
- Data is not standardized to similar definitions, primary keys, or tagging naming conventions, leading to difficulties joining source data together
- Reporting infrastructure is limited to simple reports that take significant time and resources to create and/or modify, and are only used by power users.
- Reporting that alerts users to trends or areas of opportunity either do not exist or are lagging behind the opportunity to act on the insight.

Potential future state:

- Ease of data integration between core data sources, and processes to incorporate new sources into our tech stack
- Alignment of data towards a standardized data model that ensures definitions stay consistent and data quality is easier to manage
- Opportunity to develop regular reports and analyses that support key business decisions across all departments and even ad-hoc use cases.
- Utilization of AI to identify standardization opportunities, clean data, and join together multiple systems
- Utilization of Salesforce Marketing Cloud (or comparable software) to unify data from multiple systems and segment that data in order to feed analyses and/or marketing efforts for other teams.

8.5 Data Governance and Trust

As users at Visit California enter data on a more regular basis, governance of the data, the workflows within these systems, and trust of the data are critical functions for the Data & Analytics team to maintain. While the specific data is owned by users across the company, how that data is stored, connected to other systems, visualized, and refreshed impact the experience of stakeholders.

Some current challenges include:

- Not all teams are entering data into Salesforce or systems that connect to Salesforce
- Data ownership is not clearly defined for the majority of workflows and objects.

- Documentation is limited and/or not maintained, resulting in difficulty improving old processes without substantial historical context.
- Organizational alignment on new systems or eliminating redundant systems is difficult to obtain, resulting in gridlock or duplicated efforts.

Potential future state:

- Clearly defined documentation on the data owner, definitions of existing data sources, and expectations for SLAs on refresh time and validation.
- Reporting that monitors established data quality metrics and pushes that to end users, alerting them to data validation opportunities
- A Data Governance Board is established within Visit California that helps stakeholders follow a set of policies and procedures to reduce redundancy in new tools and updates to existing data.
- Data & Analytics fosters a data-driven culture within the organization by providing training and education to all stakeholders.

9. Proposal Requirements

9.1 Questions

All Proposers wishing clarification of this RFP must submit questions via email to: RFP Submissions rfps@visitcalifornia.com by the date and time referenced in Section 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

9.2 Notice of Intent to Bid

Notice of Intent to Bid **(Attachment A)** must be returned by **February 21, 2025, at 4:00 pm, PST**. The notice must be submitted via e-mail to rfps@visitcalifornia.com. The Notice of Intent to Bid is non-binding; however, it ensures the receipt of all addenda related to this RFP. Proposals will be accepted only from applicants who submitted a timely Notice of Intent to Bid.

9.3 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.

9.4 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 28. 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.

9.5 Other Minimum Requirements

We seek a partner with the following minimum experience:

- At least five years in business.
- Experience with non-standard SFDC implementations and development with custom APEX code, processes, and integrations US-based, but may use off-shore support.
- Project team members with both advanced Salesforce and FinancialForce certifications (e.g., Certified Salesforce Architect, administrators, Developers, Specialists, etc.).
- Extensive project management experience and project management certifications (e.g., PMP Certified).
- Must use Agile project management and development methodology.
- Solutions Architecture experience.
- Experience in technical writing and procedural documentation.
- Branching and merging automation in development environments.
- A cloud-based project management system for which we can monitor performance, milestones, and overall implementation.
- Ability to comply with all applicable privacy regulations.

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 180 days from the date Visit California receives your proposal.

Proposals may be rejected if minimum requirements are not met.

10. Content of Proposal

Proposal Outline

Your proposal should adhere to the outline below. It should be based on a full year of activities.

- Cover Page
- Table of Contents
- Executive Summary (Section 10.1)
- Company Background (Section 10.1)
- Conflict of Interest (Section 10.2)
- Company Management & Staff (Section 10.3)
- Sub-Contractors (Section 10.4)
- Project Management Philosophy & Methodology (Section 10.5)
- Case studies / Discussion of Projects for Each Project Listed (Section 10.7)
- Systems Experience (Section 7)
- Current & Future States (Section 8 – discuss insights, experience, approaches, etc. for each of these items)
- Minimum Requirements (Section 9.5 – provide discussion / evidence for each item listed)
- Internal Control Structure (Section 11,2)
- References
- Detailed Budgets – Attachment C (Align budgets with projects listed in Section 10.7)
- Appendices (Any additional information you believe we will find useful)
- Financials (per Section 9.4, include either separately or within proposal)

Please ensure your proposal includes the following:

- A detailed table of contents or index which lists each key section of your proposal;

- Page numbers; and
- Tabs or other methods to identify key sections of your proposal.

Your proposal should be well organized and a total of 40 - 50 pages, excluding the appendices and financial report(s).

Place sections of your proposal in the order of the outline above.

Your discussions 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.

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.

10.1 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.
- 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.

10.2 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.

10.3 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:

- 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.

10.4 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.

10.5 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 sprint 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.

10.6 Biddable Services

The following list of desired services are designed to provide guidance for determining your total costs. Your budget form should conform to this list of service offerings. The proposal should also speak to these defined services as well.

Governorship

- Oversight of Visit California's Salesforce development processes, User Acquisition Testing (UAT), and agile workflow management
- Administration of development branching and peer reviews
- Maintaining our systems for data documentation and Service-Level Agreements (SLAs) between stakeholders and Operations
- System, process, and data documentation
- Supporting iterations between other tools and the Salesforce environment (e.g., Data Cloud connections, Tableau, CVENT, etc.)
- Support and Break Fix Services
- Assist a Visit California Data Governance Board review and enact decisions

Managed Services

Managed services include the following for Salesforce, FinancialForce, and other related systems in use for data management:

- System updates.
- Custom report writing.
- Customizations and custom app development/maintenance.
- System and User support.
- Custom-Built Billing Platform (Assessment notice process and customer web portal) maintenance.
- System integration.
- User administration.
- Data administration.
- System back-up administration.
- Performance checks and monitoring.
- User training.
- Other services as determined.
- Payment and lockbox process support.

Account Administration

- Provide Visit California written weekly and monthly progress reports based on stakeholder and project owner needs.
- Provide detailed backup and appropriate receipts for all monthly expenses related to billable services and out-of-pocket expenses. This documentation shall be submitted monthly along with a monthly invoice and report and is subject to audit at Visit California discretion.
- Maintain a dedicated business phone/e-mail contact for trade and press inquiries about California and be able to disseminate appropriate information expediently.

Data Modeling and System Architecture

- Provide guidance on system architecture, including designing schemas and ways in which data is organized that facilitate analysis, documentation, and maintenance of our data.
- Oversee Bronze, Silver, Gold data modeling practices across Salesforce Data Cloud and other tools such as Google BigQuery which can be supplemental in aggregating data into business-ready data sets. Some key data sets to be architected and subsequently modeled include but are not limited to:
    - Account Details – An aggregate, account-level table modeled off of the Salesforce account object and collecting relevant details to make insights and analyses about accounts intuitive and easier to access without significant joins complex reporting needs
    - Contact Details - An aggregate, contact-level table modeled off of the Salesforce contact object and collecting relevant details to make insights and analyses about contacts and their respective accounts intuitive and easier to access without significant joins complex reporting needs
    - Assessment Details – An aggregate table focused on the assessment process giving more details about historical assessment filings, payments, notices, and associated votes in a single table with intuitive
    - Business Level Touchpoints – An aggregate table of key touchpoints that Visit California has had with businesses across the state, giving clarity into the various ways that Visit California has engaged with or

supported these businesses through communications, marketing, assessment, and many other activities.

- Advise on best-in-class tools and support their solution design and implementation.
- Develop Data ownership guides that are available in SharePoint and Confluence, which describe Service Level Agreements for scope and expectations with stakeholders.
- Assess the integration needs and develop integrations (new data connectors, salesforce managed packages, other) with the following sources as examples:
    - Consumer Site (Drupal)
    - Industry Site
    - Airtable
    - Bynder
    - CVENT
    - Sprout Social
    - Google Analytics
    - Google Cloud Platform (BigQuery, Google Sheets, Cloud SQL, etc.)
    - Mailchimp

Continuous Analytics & Reporting

- Continuing a process that encompasses requirements gathering, project sizing, prioritization, and development.
- Ad Hoc reporting in Salesforce and Tableau to develop dashboards, analyses, presentations, etc. as deemed a priority and resourced appropriately.
- User Training for existing reporting and systems such as Tableau and Salesforce
- Troubleshooting access and usability through regular maintenance.

10.7 Potential New Enhancements / Projects

The following list of projects will require additional discovery and scoping. For purposes of the RFP, we are only looking for case studies and/or showcasing of how you could assist us with these types of projects. These projects may then be sub-awarded and/or bid out to potential proposers outside of the standard RFP services mentioned above. You may submit quotes or general estimates on what you typically charge on the projects similar to those below.

- Development of Salesforce Reports and Dashboards.
- MS Outlook integrations with Salesforce.
- Automation of all manual processes.
- Service Cloud Implementation (Call center and helpdesk ticketing).
- Marketing Cloud Implementation.
- CRM Analytics reporting development within Salesforce
- Event Management Platform Implementation/Integration.
- Contract Lifecycle Management (DocuSign CLM) enhancements.
- AI in existing systems for data cleaning, tagging, customer support, and more

11. Billing and Related Requirements

11.1 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.

11.2 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.

11.3 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.

Proposal Submission

Each bidder is required to deliver **ten** hard copies in addition to 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. Hard copies must be sent by courier such as FedEx or UPS by March 25, 2025, to:

Visit California
Request for Proposal: Data & Analytics Development Partner
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.**
- **No gifts can be accepted.**

ATTACHMENT A

NOTICE OF INTENT TO BID

Data & Analytics Development Partner RFP

Due: February 21, 2025
4:00 PM PST

Send to:
rfps@visitcalifornia.com

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

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
1. OVERALL EXPERIENCE OF FIRM	
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.	20
2. SCOPE OF WORK	
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.	20
3. FAMILIARITY WITH VISIT CALIFORNIA BRAND & PRODUCT	
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.	10
4. QUALIFICATIONS OF PERSONNEL	
Our evaluation will include an assessment of the qualifications, experience, and creativity of your managerial team, staff, and subcontractors, and related items.	10
5. CAPABILITIES	
Our evaluation will include an assessment of your past performance related to this RFP areas.	20
6. COST EFFECTIVENESS	
The maximum services are provided in relation to the fees charged and value of overall project. The budget is reasonable and appropriate.	20
TOTAL POINTS	**100**

ATTACHMENT C

BUDGET FORM

Data & Analytics Development Partner RFP

An excel version of both budget forms is required to be submitted, and can be found at: https://industry.visitcalifornia.com/about/request-for-proposals

PROPOSED BUDGET

Budget Line Items	Name of Service	Program Cost	% of Total
		$ -	**0%**
			0%
			0%
			0%
		-	**0%**
			0%
			0%
			0%
		-	**0%**
			0%
			0%
			0%
PROPOSED TOTAL		**$ -**	

STAFFING BUDGETS

Title	Years with Company	Years in Industry Field	Hourly Rate	% Time Assigned to Account
			Number of FTE's	0.00

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 Part 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 its 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:_____________________________