

# MONTEREY

MONTEREY COUNTY CONVENTION  
& VISITORS BUREAU

## REQUEST FOR PROPOSAL (RFP)

Creative and Media Buying Agency Services

The Monterey County Convention & Visitors Bureau (MCCVB) is seeking a full-service agency to come on board as an agency of record, providing creative and media buying services to develop the Monterey County brand and promote tourism to the County. The selected agency will assist in the development and execution of effective, integrated marketing programs that:

- 1) Drive overnight visitation
- 2) Solidify and reinforce Monterey County as a premier tourism destination

The purpose of this RFP is to seek and retain a qualified creative and media buying agency to work with the Marketing Communications team in planning, developing and executing marketing programs that integrate Paid, Earned and Owned channels to achieve the goals within MCCVB's strategic business plan.

Included below is an RFP for those able to carry out the scope of work. All proposals will be carefully reviewed and evaluated based on the criteria noted. The initial Scope of Work contained within this RFP will be approximately July 26, 2021 to June 30, 2022. The first contract may be pro-rated depending on the date of completion of this RFP.

Please note, at this time MCCVB does not have a creative or media buying agency of record, however the organization is currently engaged with 62ABOVE (creative) and MBuy (media buying) on a project basis and will continue working with these agencies throughout the RFP process.

**Any questions you may have to clarify this RFP are due to MCCVB no later than 5:00 p.m. PST, Thursday, June 17. Responses are due to MCCVB no later than 5:00PM PST on Friday, June 25 submitted via email to [marketing@seemonterey.com](mailto:marketing@seemonterey.com).**

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## MCCVB “ABOUT US”

MCCVB is the Destination Marketing Organization (DMO) for the County of Monterey, made up of nine jurisdictions and a vibrant local industry that includes hundreds of hotels and resorts, major attractions, renowned wineries and restaurants, and a variety of additional businesses that fuel the tourism economy. The Monterey County region includes the Monterey Peninsula, Big Sur, North County, South County and the Salinas Valley. Monterey County boasts major tourism attractions and resorts such as the Monterey Bay Aquarium, Cannery Row and Pebble Beach Resorts. The county offers hundreds of other diverse and engaging tourism offerings and events, as well as one of the most famous roadways in the world – Highway 1. For a full review of all Monterey County has to offer visit our website at [SeeMonterey.com](http://SeeMonterey.com).

MCCVB oversees the production of a variety of marketing activities that may include television and online advertising, content marketing to include website, social media, content series, collateral and maps, cooperative programs and public relations programs – all designed to promote Monterey County to consumers, meeting/group planners, media, and the travel trade industry.

**The current MCCVB business plan can be viewed [here](#).**

### Brand Positioning + Personality

Monterey County is located on the stunning central coast in California. The Monterey County destination brand is based on the idea of “invigorating the soul.” The experience is so inspiring and life enriching that our taglines encourage making the most of every moment: “*Grab Life by the Moments*” and for group travel, “*Inspired Moments in Meetings*.” Note: we are not looking to re-brand at this time, however we are looking for an agency partner to start working with now that can lead us through a rebrand in the next few years as part of a larger organizational transformation.

We used consumer research to derive the destination brand as “Monterey,” (consumers recognize the geographic area as “Monterey” + find the name to be highly inspirational) an umbrella identity. The brand marketing program involves and promotes the Monterey County product from Seaside to Soledad, Moss Landing to Big Sur, Carmel-by-the-Sea to Pebble Beach and each and every life-enriching moment within. A key challenge is ensuring travelers connect this array of amazing places with the brand name “Monterey”.

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## Target Markets + Audience

The MCCVB focuses on three audience groups – the primary focus for the agency is domestic leisure and group, with possibility of growing the program internationally as travel returns.

1. Leisure travelers are broken into three regional categories:
  - o Drive Markets: San Francisco Bay Area, California's Central Valley, Los Angeles and Southern California – this group makes up 90% of visitors to Monterey County.
  - o Regional Markets: Washington, Oregon, Arizona, Colorado, Nevada and Texas.
  - o Long-haul/National Markets: Midwest, including Chicago and East Coast including New York, Boston.
  - o The Monterey Regional Airport (MRY) has non-stop flights from Portland, Seattle, San Diego, Phoenix, Denver, Dallas, Las Vegas, Los Angeles, Orange County and San Francisco. Major international airports nearby include SFO, OAK and SJC – all within a 1.5 to 2 hour drive.
2. Group business is broken down by group type/industry and region:
  - o Group type/industry: corporate and incentive groups, meeting and conference planners, state and regional associations.
  - o Region: similar to leisure markets with direct sales efforts in Northern California, Southern California, Washington, Oregon, Arizona and Nevada, with a sale persons focused on the Midwest and Northeast to be added.
  - o The Monterey Conference Center is a central driver for larger group business in Monterey County that creates compression and pushes business throughout the county.
3. International targets from key markets:
  - o FITs (free independent travelers)
  - o Travel trade and tour operators
  - o Countries that are anticipated to make quick returns to international travel, including Mexico, UK, Canada, and possibly China, Australia and Western Europe.

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## Our Team

Though our entire Marketing Communications team works collaboratively to achieve common goals, the selected agency's primary points of contact will be our Director of Marketing Communications and Marketing Manager, with support from the Digital Marketing Specialist and Group Marketing Coordinator. The agencies may also interact with the Public Relations Manager and VP of Business Development for certain projects. Team structure is outlined below, with positions in green to be filled shortly.



MCCVB is committed to diversity, equity and inclusion, striving to ensure that all members of the organization, current and future, feel welcome and have an equal opportunity to connect, belong, and grow. It is expected that any agencies MCCVB works with hold the same values and commitment within their own organizations.

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## SCOPE OF WORK

The Marketing Communications team manages a number of responsibilities including (but not limited to):

- Setting marketing strategy that supports organizational strategy and goals
- Managing budgets
- Integrating all aspects of marketing communication including advertising, digital, PR, branded content, social media, group sales, sponsorships, etc.
- Liaising with Monterey County tourism stakeholders including board leadership, committees and other stakeholders
- Guiding marketing activities designed to showcase Monterey County's wide range of tourism experiences
- Targeting local, regional, national, niche and industry market segments
- Tracking and reporting out on measurable outcomes from marketing communication activities

Agency teams will be required to collaborate to form strategic recommendations and efficiently execute MCCVB's marketing program, including research and information sharing, planning, optimization, analytics and reporting. MCCVB is seeking not simply an "ad agency", but a long-term partner that will be integral in these efforts and share a dedication to success.

### **The general Scope of Work includes the following:**

**Strategy:** Working closely with our team, collaborate on strategy to develop, execute, and track results against an annual marketing plan that supports the strategies set forth by MCCVB. Includes strategic direction, creative strategy, brand development and stewardship, media plan, and cooperative plan.

**Creative & Production:** Develop a holistic approach to brand advertising including concepting creative materials and campaign elements. Produce creative, provide strong yet attainable recommendations for consideration, and manage the process of working with subcontractors as needed. Bring to final form the approved advertising materials to run/air on behalf of MCCVB.

Creative materials may include but are not limited to:

- print advertising
- broadcast (TV/CTV, radio, video) assets
- digital banners
- signage, collateral, sales materials, etc.

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In doing so, the agency will adhere to the existing [MCCVB Brand Standards & Style guide](#).

**Content Planning:** Work with MCCVB to develop a comprehensive, integrated content marketing plan that leverages market intelligence to shape strategy and includes goals specific to the agency's scope; defined target markets, audiences and opportunities; strategies/tactics to achieve success; specific action steps that guide and track workload; and measurable outcomes.

**Media Planning & Buying:** Develop and prepare media plans for each target market, primarily leisure and group, possibly some international. Utilize research and market insights to develop strategic recommendations for budget allocation, market prioritization, and channel mix. Leverage paid media partnerships and placements as a means to effectively distribute and amplify owned and earned content. Provide MCCVB with insights on emerging trends and new media to continually evolve and reach the target audience.

Execute offline and online media plans with strategic and cost effective planning, buying and audits. Execution includes placement, optimization, cancellations, auditing, payment to vendors, and billing.

Work with the MCCVB to develop cooperative marketing programs to amplify the efforts of our members and stakeholder businesses and support MCCVB's overarching objectives.

**Reporting & Analytics:** Regular monthly reporting on campaign and brand continuity program performance utilizing expertise, agency tools, data, partnerships, and other resources to manage program efficiency and performance. End of campaign wrap up reports, including screenshots of all assets, dashboard of goal performance and executive summary of key takeaways that include qualitative and quantitative results mapping to larger objectives.

Continue to look for ways to evolve measurement and reporting to show the bigger picture and communicate value to MCCVB stakeholders.

**Research:** Participate as needed in customer insight, creative testing and segmentation research. Provide data, creative assets and/or insights as requested for MCCVB Market Intelligence research and reporting. Connect with research partners including SMARI and Destination Analysts as needed.

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**Account Support:** Maintain regular communication on all activities/production development and provide an annual summary of all activities. Attend on-site meetings throughout the duration of the agency relationship as needed, at agency expense.

Provide clear budgets and plans outlining when payment and materials are due for paid insertions prior to placing insertions. Provide year-ahead estimated budget breakout for expected costs upon receiving annual budget at the start of the fiscal year. Agency and client will review and client will approve before work begins.

Collaborate with other agencies supporting MCCVB marketing communication efforts. Currently, the MCCVB maintains contracted agency relationships with:

- Fahlgren Mortine, Public Relations
- Simpleview, SEO and Digital Development

*It is also requested that agencies have bandwidth to take on special or out-of-scope projects, to be discussed and agreed upon on a case-by-case basis.*

## AGENCY SELECTION CRITERIA

**Agency selection will be based on the following criteria:**

- Track record in building uncommonly successful, or out-of-the-box content marketing campaigns with measurable ROI
- Ability to deliver exceptional and innovative integrated work while strictly adhering to ROI/KPI metrics
- Highly creative and enthusiastic people across all parts of the agency (even accounting) and cultural fit with MCCVB team
- Familiarity with MCCVB brand and Monterey County product and how this knowledge is integrated into the proposal
- Experience in the travel trade/tourism/hospitality industry, associations and not-for-profit organizations, and/or group sales/meetings advertising
- Capabilities in goal setting, strategic planning, client/agency communication and measurable outcomes with proven ability to turn research and insights into innovative messaging
- Ability to integrate owned media content and public relations efforts
- Budget management, experience delivering cost-effective solutions and ability to negotiate favorable media rates
- Turnkey administrative and account support, from strategic level planning to concise day-to-day communication to timely billing that aligns with budget plans provided by the MCCVB

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- Experience with international markets (as a plus, not a requirement)
- Level of experience of agency personnel who will take active, day-to-day responsibility for this account and adapt to customer needs
- Proximity to Monterey County and availability to meet with the MCCVB team in market
- Fee/Cost proposal that is reasonable and appropriate for the SOW, providing maximum services in relation to fees charged

## MEASURING SUCCESS

The #1 goal for MCCVB is increasing overnight visits. The marketing communications team's overarching goal is to increase intent to visit, as measured by our research partner SMARI. In addition to this goal, the team has a set of strategic and tactical metrics to measure success, which are tracked monthly.

1. **Web Visits:** increasing website visits has been and will remain a key metric. While overall focus is to increase numbers (quantitative), qualitative considerations are also important. The goal is to increase the overall number of unique visits and ensure the right traffic.
2. **Partner Handoffs:** while attracting traffic to the MCCVB site is important, just as important is moving users down the funnel and sending them directly to stakeholder and business sites to book, reserve, buy, etc. This metric allows MCCVB to show value by bringing customers directly to stakeholders' digital door.
3. **Website RFP Submissions:** a key metric for group business, meetings, and conferences in support of the Business Development team, showing group marketing efforts are driving qualified and interested users to the site.
4. **Social Engagement:** MCCVB considers a like, share, comment or video play on any of MCCVB's social platforms an engagement. With engagement rates typically above industry average, this is a valuable metric showing success in both paid and owned efforts.

Additional metrics may be added to show success in different and specific ways. The agency should be prepared to work with MCCVB to find ways to effectively communicate metrics and results to the board and stakeholders.



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## BUDGET & TERM

Proposed monthly agency fees should include work as identified in the scope above – with the exception of media and production hard costs – in the range of \$18,000-\$20,000 per month. Within MCCVB’s annual media budget, there are allocations for leisure, group, luxury and international markets, as well as different budget amounts for traditional and digital media. The full media budget for the year is available upon request.

MCCVB will consider proposals that demonstrate the ability to fulfill the requirements of this RFP within this range. Please outline specific budget considerations for fee, production, expenses, etc.

The term of the agreement with the selected agency will commence on or around July 26, 2021 and extend to June 30, 2022. The term may be extended in one year increments for a total of 2 years (thru June 30, 2024) based on an annual review of accomplishment and subject to approval by MCCVB CEO. Each annual review will allow for consideration of adjustments in agency scope and fees. MCCVB reserves the right to cancel contracted services for any reason with 60-day written notice.

## PROPOSAL STRUCTURE AND REQUIREMENTS

**Please include the following sections and items within your proposal, with clarity and brevity in mind.**

1. Company background and how your agency differentiates itself
2. Company leadership and day-to-day account staff
3. Initial ideas that demonstrate how your agency’s experience and capabilities can address the following areas of opportunity:
  - **Responsible Travel:** The notion of “over tourism” continues to be of concerns for many destinations, especially as the world comes out of the pandemic. Discuss how your agency would integrate responsible and sustainable travel messaging into a marketing plan, and how it would support MCCVB’s mission to grow Monterey County tourism while balancing quality of life for our residents and natural environment.
  - **Meetings and events:** Monterey County is an inspiring destination for meetings, conferences and incentive travel. The return of the group business segment will play a very important role in Monterey County’s tourism and economic recovery. How can your agency help us reach this critical segment to drive and grow group/meeting business?

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- **Always-on vs. campaign programming:** High season in Monterey County is generally June – August, shoulder seasons are April/May and September/October and off-season typically November – March. How can your agency help promote our destination and push visitation during these different times? Describe how your agency would approach an annual paid media program that balances campaign heavy periods, shoulder seasons and always-on programming.
  - **Owned media strategy:** While the execution of MCCVB's owned programming is done in-house, how would your agency help take our website, blog and social content strategy to the next level and integrate paid and owned media programs? How can you work with our PR agency to include earned media in the mix as well?
  - **Solidifying the brand:** Monterey County is a world-class destination. How would your agency help to communicate and solidify the Monterey County brand as a premier travel destination?
4. Account management procedures and how your agency balances strategic and tactical duties, including who will provide strategic leadership and who the main point of contact will be
  5. Your agency's billing and reconciliation processes and amount of annual company billings
  6. Current client list, including identifying any that might pose a conflict of interest with MCCVB
  7. Three client references that your agency has worked with on similar programs with the expectation that MCCVB will contact – agencies understand that by providing references they are giving MCCVB permission to contact.

## SUBMISSIONS

**All proposals should be submitted in a PDF format to [marketing@SeeMonterey.com](mailto:marketing@SeeMonterey.com). Proposals must be received via email by 5:00 p.m. PST on Friday, June 25.** Any proposals received after this time or via any other channels may be disqualified and deleted. MCCVB does not take responsibility for any technical issues related to agency submissions nor receipt confirmation from MCCVB.

**Any questions related to the RFP** must be sent to [marketing@SeeMonterey.com](mailto:marketing@SeeMonterey.com) and received no later than 5:00 p.m. PST on Thursday, June 17. Questions will be addressed as quickly as possible and in the order received. MCCVB will not take responsibility for the completeness or timeliness of answers.

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**Notifications will be made by Wednesday, June 30** to let agencies know whether there is a desire to move forward in the selection process with presentations. MCCVB will make best efforts to ensure such emails are received but not take responsibility if for any reason they are not.

Agencies that are selected for presentations will have the opportunity to submit questions prior to presenting and in person during Q&A portion of the presentation.

Submitting agencies signify understanding and agreement with these terms by responding to the RFP and will adhere to the following terms:

- Do not contact any MCCVB Board Member, staff member, or members of the evaluation taskforce. Any contact with these individuals will automatically disqualify the agency. All inquiries must be sent to [marketing@SeeMonterey.com](mailto:marketing@SeeMonterey.com).
- All ideas and concepts shared with MCCVB in this RFP process are submitted in a non-proprietary manner. Presented ideas and concepts are available to use by MCCVB without any liability and do not constitute a formal agreement nor requirement for compensation. Proposals will not be returned to submitting agencies.
- MCCVB reserves the right to change any part of this RFP, the process and/or altogether cancel at any point and for any reason without any liability to submitting parties.
- Agencies understand that any information provided in a proposal that is found to be untruthful or otherwise a misrepresentation will automatically disqualify the submitting agency. In addition, should untruths or misrepresentation be found with the selected agency after contracting, such would be grounds for immediate termination of the contract without any liability from MCCVB.
- All information (written or spoken) shared by MCCVB is deemed confidential and shall not be shared with outside parties.

## TIMELINE

The following is the approximate timeline and process for agency solicitation, evaluation and selection. MCCVB reserves the right to alter this timeline and will provide participating agencies notification of such adjustments.

- RFP distributed: Friday, June 11
- Agency questions deadline (via email only): Thursday, June 17
- **RFP submission deadline: Friday, June 25 at 5:00 p.m. PST**

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- Agencies notified of selection to move forward with presentations:  
Wednesday, June 30
- Agency presentations (at agency expense): Week of July 5
- Final selection and agency notified: no later than July 15
- Contract development: Week of July 19
- Agency start date: July 26

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## APPENDIX

### A. HELPFUL LINKS

Below are some links that may be helpful in developing your proposal. If you have any questions or need additional information, please direct your inquiries to [marketing@SeeMonterey.com](mailto:marketing@SeeMonterey.com).

- [FY2020-21 Business plan](#)
- [Blog Monterey](#)
- [Past Presentations and Reports](#)
- [Logo](#) and [Brand One Sheet](#)

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## B. PROPOSAL EVALUATION SCORECARD

Proposals will be reviewed, evaluated, and scored by the MCCVB Marketing Communications team and a small industry task force. Upon evaluating and scoring the proposals, the task force may decide to select proposers for presentations. Evaluation of written proposals and presentations will be based on the scorecard below.

<b>AGENCY NAME:</b>	Maximum Points	Agency Score
<b>Overall Agency Experience</b>	10	
Agency history, capabilities, related experience, examples of past work, and other items outlined in the RFP.		
<b>Scope of Work</b>	15	
Quality of proposal, details of strategies and tactics, creativity, ROI/measurement, etc.		
<b>Team Qualifications</b>	10	
Account team structure, qualifications, experience, and creativity of agency leadership, account team, and staff.		
<b>Familiarity with Monterey County &amp; MCCVB</b>	5	
Agency's understanding of the destination and demonstration of knowledge within the proposal; organizational culture fit.		
<b>Budget</b>	10	
Reasonable and appropriate fees for outlined scope of work.		
<b>TOTAL</b>	50	