



# AGENDA

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## Visit SLO CAL Marketing Committee

### Visit SLO CAL Marketing Committee Meeting

Tuesday, November 10, 2020

8:30 am - 10:00 am

Video Conference – URL: <https://zoom.us/j/412892721> Meeting ID: 412 892 721

Call-in Phone Number (669) 900-6388

1. CALL TO ORDER
2. PUBLIC COMMENT (On Non-Agenda Items)

**CONSENT AGENDA** – *motion required*

**L. Verbeck**

3. **Approval of October 13, 2020 Minutes**  
*Staff will ask for Committee approval of the October 2020 Meeting Minutes.*

**BUSINESS ITEMS**

**L. Verbeck**

4. **Visit SLO CAL AOR Recommendation** (30 minutes) – *motion required*  
*Staff and Marketing Committee members on the selection committee to present recommendation*
5. **October Marketing & Trade Update** (45 minutes)  
*Staff will review highlights from October and discuss current and future activities*
6. **Marketing Committee Member Application Approval** (10 minutes) – *motion required*  
*Kathleen Naughton, Executive Director, SLO Coast Wine Collective*

### ADJOURN

Brown Act Notice: Each speaker is limited to 2 minutes of public comment for items not on the agenda. Public comment for each agenda item will be called for separately and is also limited to 2 minutes per speaker. State law does not allow the Marketing Committee to discuss or take action on issues not on the agenda, except that members of the Committee may briefly respond to statements made or questions posed by the person giving public comment. Staff may be directed by the Committee to follow-up on such items and/or place them on the next Committee agenda. The order of agenda items is listed for reference and items may be taken in any order deemed appropriate by the Marketing Committee.

ADA Notice: Meeting facilities are accessible to persons with disabilities. If you require special assistance to participate in the meeting, notify Brendan Pringle at (805) 541-8000 at least 48 hours prior to the meeting.



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#### 1. CALL TO ORDER: Lisa Verbeck

**PRESENT:** James Allen, Audrey Arellano, Terrie Banish, Jocelyn Brennan, Molly Cano, Cheryl Cuming, Gordon Jackson, Stacie Jacob, Megan Leininger, Joel Peterson, John Sorengfrei, Jill Tweedie

**ABSENT:** Ashlee Akers, Lori Keller, Lindsey Roberts

**STAFF PRESENT:** Kyla Boast, Chuck Davison, Taylor Grantham, Ashley Mastako, Eric Parker, Vanessa Rodriguez, Lisa Verbeck

**AGENCY REPRESENTATIVES PRESENT:** Angela Berardino, TURNER PR; Brooke Burnham, Arrivalist; Kayla Coe, Miles Partnership; Katie Cook, Simpleview; Nate Huff, Miles Partnership; Jessica Ireland, Sunshine & Bourbon; Keith Ireland, Sunshine & Bourbon; Nilesh Patel, Sunshine & Bourbon; Mina Robertson, Miles Partnership; Jordan Spallas, Miles Partnership; Amber Steffens, TURNER PR; Ali Webb, Sunshine & Bourbon.

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Call to Order by Verbeck at 8:30 am.

#### 2. PUBLIC COMMENT (On Non-Agenda Items)

None.

#### 3. Approval of September 8, 2020 Minutes

Public Comment – None

Committee Discussion – None

**ACTION:** Moved by Banish/Cano to approve the minutes

**Motion carried: 9:0:3  
Jacob, Arellano and Leininger abstained.**

#### 4. VSC Update

Verbeck updated the Marketing Committee on Visit SLO CAL staff changes. Visit SLO CAL recently welcomed Eric Parker as Digital Marketing Specialist and Annie Aguiñiga Frew as Director of Community Engagement and Advocacy. She also gave an update on the agency RFP process which includes seven agencies and will involve three Marketing Committee members who will help score the proposals. Additionally, she gave an update on VSC's Equity & Inclusion efforts and tracking.

## **BUSINESS ITEMS**

### **5. September Marketing & Trade Update**

Boast shared an update on recent trade efforts which included a virtual agriculture and culinary destination training and virtual adventure through SLO CAL. She will be attending Travel Weekly's Western U.S. Virtual Expo which will include ten one-to-one appointments. Currently working on upcoming sales workshop with Booking.com and Hotel Beds.

Keith Ireland, Sunshine & Bourbon, gave the Committee an update on creative including the current Visit California in-state campaign which features "The California Less Travelled" and included video units, social and paid search.

Kayla Coe, Miles Partnership, provided information on initial campaign performance and noted that volume and delivery were off to a strong start. Partner referrals were up 245% and the dedicated newsletter sent out to Visit California's audience had a 27% open rate.

Nate Huff, Miles Partnership, gave an update on Google DMO, a program designed to provide tools and tactics to improve the completeness, quality and accuracy of destination content across Google Maps, Destination Travel Guides and more. This program has seen significant participation in image uploads from communities, as well as information on the Google My Business checkup tool allowing businesses to login and self-assess in order to optimize their listing.

Rodriguez outlined the newsletter overhaul as well as the success of Instagram stories, which have created great engagement.

Katie Cook, Simpleview, provided an update on the website and said that September was looking strong and that Visit SLO CAL was currently pacing towards 2021 goals. Current priorities include working to optimize the website and providing recommendations for updating and creating content.

Amber Steffens, TURNER PR, gave a review of Q1 which included 21 articles focused on wellness and outdoor adventure. She also gave an update on the charcuterie board activation, which has already begun seeing media leads in response.

Mastako provided the Committee with an update on Spartan Race which is taking place April 9 & 10, Visit SLO CAL is currently working with multiple communities to upgrade the race to a US National Series, which would result in added marketing and exposure. She also gave an update on Google DMO program and let partners know that a list with unclaimed businesses and tokens would be distributed soon and that all partner listings would be upgraded to "enhanced listings" providing partners with a free added benefit and a better user experience for consumers.

Verbeck let the Committee know that there would be no December meeting.

Public Comment – None.

Committee Discussion – In regards to Spartan Race, Peterson questioned attendance and whether the event was going to be able to happen.

### **6. Marketing Committee Member Updates**

Sorgenfrei gave an update on their campaign with SF Gate, which included stories, a digital component and social media contest. He also updated Committee on the Pismo Beach Clam Festival, which is open for voting and features local restaurants.

Public Comment – None.

Committee Discussion – None.

## **ADJOURNMENT**

Meeting adjourned at 9:26 am



September 11, 2020

To All Prospective Bidders:

Visit SLO CAL, a nonprofit countywide Destination Marketing & Management Organization (DMMO), is seeking a qualified full-service marketing agency, with tourism experience, to grow the Visit SLO CAL brand and promote tourism to San Luis Obispo County.

The San Luis Obispo County Visitors and Conference Bureau, dba Visit SLO CAL, is a non-profit 501(C)(6). San Luis Obispo County tourism is marketed exclusively by Visit SLO CAL which renewed the countywide Tourism Marketing District (TMD), a 1.5% assessment on overnight lodging stays in San Luis Obispo County, in January 2020 for a 10-year term.

Visit SLO CAL oversees the production of a variety of activities, including marketing and advertising, travel trade and group sales, tradeshow, communications and public relations, research, visitor publications, cooperative programs, promotions and events – all designed to promote SLO CAL® to travelers, visitors and the travel trade both domestically and internationally.

The purpose of this request for proposal (RFP) is to seek and retain a qualified full-service marketing agency to promote the SLO CAL brand and San Luis Obispo County tourism. The results of these efforts will benefit Visit SLO CAL assessed lodging businesses, as well as seven in-county community Destination Marketing Organizations by increasing tourism revenue. There will also be secondary benefits to restaurant, craft beverage, transportation, activity, event and retail businesses as tourists partake in our county's assets.

**The contract period for the Scope of Work contained within this RFP will be approximately January 1, 2021 to June 30, 2022, or 18 months with the option to renew annually for 2 additional years. Visit SLO CAL's fiscal year runs from July 1<sup>st</sup> through June 30<sup>th</sup>. Therefore, the first 6 months of the contract will be funded on a project basis, based on the approved annual budget and current revenues and is subject to change. Moving forward, the budget for this contract could potentially scale to \$3 million annually over the next three years. We reserve the right to adjust this amount based on the content of the proposals, related factors and the economic environment of our industry.**

Attached is an RFP to be filled out by those capable of meeting minimum requirements and carrying out the scope of work. All responses will be carefully reviewed and evaluated based on the criteria noted in the attached document. Any questions you may have to clarify this RFP are due to Visit SLO CAL, via email, no later than 12:00 p.m., Pacific Daylight Time (PDT) September 21, 2020.

Sincerely,

Lisa Verbeck  
CMO

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## VISIT SLO CAL

### Request for Proposal Marketing Agency

#### INTRODUCTION

San Luis Obispo County is a leading tourism destination on the Central Coast of California. Located halfway between San Francisco and Los Angeles the destination is home to more than 18 unique communities, 250+ wineries, hundreds of recreation trails, over 80 miles of coastal access and beaches in addition to the iconic Hearst Castle.

#### About Visit SLO CAL

Visit SLO CAL (VSC) is a team of destination marketing and management professionals who work with, and on behalf of, our community, our local investors and our partners to promote SLO CAL® (San Luis Obispo County, California) to both domestic and international visitors. As the countywide nonprofit destination marketing and management organization (DMMO) for SLO CAL, VSC's goal is to collaborate with partners to build the SLO CAL brand through a data-driven, efficient and innovative marketing and sales program while simultaneously enhancing the resident quality of life. VSC aims to establish SLO CAL as a favorite West Coast destination, it's the California Less Traveled<sup>SM</sup>, known for its signature slower pace of life and unique mix of incredible, immersive guest experiences.

Prior to 2017, the destination lacked a unified identity creating canalization between the seven municipalities and DMOs across the county. Research showed the destination was losing market share to its competitive set. In 2015 the first countywide Tourism Marketing District was established, authored and managed by Visit SLO CAL. In 2017, VSC launched the first-ever countywide destination brand, SLO CAL. SLO CAL united the entire county through a new logo, trademarked slogan, brand promise, iconic still images and engaging video, which were incorporated throughout VSC's marketing efforts, including advertising, public relations, social media, the SLOCAL.com website, promotional videos and email marketing. SLO CAL established a geographical location for the county while at the same time representing its unique pace of life and personality. The brand evokes feelings of relaxation and the freedom to experience life at your own pace (Life's Too Beautiful To Rush<sup>TM</sup>) — the SLO CAL way of life.

Our marketing strategy will continue to focus on expanding the brand presence for SLO CAL; growing awareness of the SLO CAL brand and developing a house of brands approach to showcase the destinations that make up SLO CAL. We look to develop a stronger and deeper engagement with visitors and driving demand for visitation to the county. While SLOCAL.com was re-launched in Feb. 2018 to embody the SLO CAL brand through a more robust user experience, all-new content, video and imagery it is now time for a refresh.

In 2013 Visit SLO CAL began working to form a countywide Tourism Marketing District. The San Luis Obispo County Tourism Marketing District (SLOCTMD) is an assessment district that provides specific benefits to payors, by funding marketing, advertising, promotions, and sales efforts for assessed businesses. Each of the jurisdictions within the Tourism Marketing District (TMD) had benefitted for several years from local districts funding local marketing. This countywide TMD is a cooperative effort to collectively market all that the County has to offer for the benefit of assessed lodging businesses. The countywide TMD was approved in June 2015 and began operation July 1, 2015. Last January, the district was renewed for a 10-year term, beginning July 1, 2020 and extending through June 30, 2030 with a 50% increase in revenue.

Visit SLO CAL's Board of Directors is comprised of 19 members, 18 of which are from the lodging industry. A Marketing Committee, made up of destination managers and marketing professionals, also provides

input in developing the strategic marketing plan and direction through their recommendations to the Board.

## **PURPOSE**

The purpose of this request is to seek and retain a qualified full-service marketing agency to expand the current brand platform into a house of brands model and promote San Luis Obispo County tourism. The results of these efforts will benefit Visit SLO CAL's assessed lodging businesses, as well as in-county DMOs by increasing tourism revenue.

## **CURRENT STRUCTURE**

Visit SLO CAL currently operates without a creative agency of record. If the current project-based agency does not successfully bid, a transition period for the outgoing agency and successful proposer will be established. The intent is to have an agency in place to assist in the evolution of the brand. Selected agency must work closely with our existing digital and PR agencies to ensure an integrated marketing approach. The marketing agency will work collaboratively with all necessary partners.

## **CONTRACT TERM**

The successful proposer will enter into a contract for services with Visit SLO CAL. The duration of the initial contract between Visit SLO CAL and the successful proposer is expected to begin January 1, 2021 and terminate on June 30, 2022 unless renewed. Visit SLO CAL reserves the right to renew its agreement prior to the end of each contract term for a total of two (2) years, providing funding to do so as appropriated for this purpose in subsequent budgets. There will be reviews annually in each year the contract is renewed. Proposed renewals are also assessed according to program direction, funding, and consistency of price and scope of work continuity.

## **AVAILABLE FUNDS**

Visit SLO CAL will initially fund this contract up to \$1.5 million for services rendered for the 18-month term.<sup>1</sup> Funding at this level is dependent on the overall approved Visit SLO CAL budget. This budget figure is based on brand evolution, creative production, strategy execution, media planning and placement (both offline and online), social strategy and execution account management fees, and out-of-pocket expenses. However, Visit SLO CAL reserves the right to adjust both the budget and related services.

## **EVALUATION PROCESS & CRITERIA**

Visit SLO CAL will form a committee to evaluate the written proposals. The criterion for the scoring of the proposals is included as Attachment C. The committee may at any time during the evaluation process seek clarification from Proposers regarding any information contained within their proposal. Final scores for each Proposer will reflect a consensus of the evaluation committee. Any attempt by a Proposer to contact a member of the evaluation committee outside the RFP process, in an attempt to gain knowledge or an advantage, may result in disqualification of Proposer.

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<sup>1</sup> The budget for this contract could potentially scale to \$3 million annually over the next three years. Funding for Jan-June 2021 is to be negotiated.



The top three to five finalists chosen by the evaluation committee will be asked to provide in-person oral presentations, to include a small assignment, to the evaluation committee in San Luis Obispo County. After the oral presentations, there will be a question-and-answer period. In addition to Proposer management, key personnel performing day-to-day activities will be requested to attend.

As a quasi-public agency, Visit SLO CAL is subject to the Brown Act and California Public Records Act. As such, if you are a finalist, your response will appear in our Marketing Committee agenda packet which is a document of public record.

## TENTATIVE SCHEDULE

This tentative schedule may be altered at any time at the discretion of Visit SLO CAL. All times are PDT.

<b>09/11/20</b>	RFP dissemination
<b>09/21/20, 12:00pm</b>	<b>Q &amp; A and Notice of Intent to Bid (if not already submitted) due</b>
<b>09/28/20</b>	Q & A response sent to agencies
<b>10/5/20, 12:00pm</b>	<b>Proposals due</b>
<b>Week of 10/12/20</b>	3-5 finalists chosen and notified of final presentation dates and times
	Marketing Committee reviews finalists' proposals (10/13)
<b>10/26 &amp; 10/27</b>	Oral presentations by finalists, Marketing Committee invited to join, scorecards reviewed, final recommendation made
<b>11/10</b>	Marketing Committee approves final recommendation to Board of Directors
<b>11/18</b>	Board of Directors Approval
<b>Week of 11/23/20</b>	Selected proposer announced & contract negotiations begin
<b>12/2020 – 1/1/2021</b>	Start date / transition – Mid-December to early January 2021

## AGENCY OBJECTIVES

- Build awareness of the SLO CAL brand while educating consumers on the unique destinations that make up the county
- Drive demand for visitation to the county
- Develop stronger and deeper engagement with visitors
- Execute and track results for Visit SLO CAL's brand marketing programs

### Evaluation for depth and execution of a brand refresh:

Visit SLO CAL will engage in consumer research for its core target markets (Primary DMAs –Los Angeles, San Francisco – Secondary DMAs based on direct air service in place or scheduled for 2021 – Dallas, Denver,

Phoenix, Portland, San Diego, Seattle). Agency would need to establish a timeline and deliverables for research.

**Website Redesign:**

Visit SLO CAL's site is outdated and provides a limited experience for consumers interested in traveling to our region. The winning proposer shall conduct a review, provide a timeline, design concepts and wireframes for a new and mobile-optimized website experience in this FY. Simpleview will develop the new website and may also take part in the redesign. The new site will include maintaining lodging booking functionality. The website is geared towards consumers; however, both Visit SLO CAL lodging investors media and tourism partners will utilize the Visit SLO CAL site to gather member information and update their consumer facing business pages. Visit SLO CAL staff will use a CMS to keep content current.

**Marketing and Advertising Planning:** Develop recommendations for a Marketing and Advertising Plan that supports the strategies set forth by Visit SLO CAL. Includes Strategic Direction, Creative Strategy, Brand Refresh and Stewardship, Media Plan and Cooperative Plan.

**Media Buy:** By April 2021, develop and plan a FY21/22 campaign, to be approved in May and executed at the start of FY21/22. Execution includes placement, optimization, cancellations, auditing, payment to vendors and billing.

**Concept Development/Production:** Concept creative materials/campaign elements (online, print, broadcast, etc.) As an example, from this year, please see the 2020/21 Marketing and Advertising Plan in Attachment A. Once approved, produce and bring to final form the approved advertising materials to run/air on behalf of Visit SLO CAL. Specifically VSC is looking to develop a house of brands (HOB) approach that honors the experience of our individual destinations. Once developed, agency will develop a co-op framework that allows partners to use the HOB assets.

**Social Strategy and Implementation:** Develop and execute a paid social strategy that aligns to VSC's brand messaging and takes into account organic channels and builds upon the existing content calendar.

Secondary:

**Account Stewardship:** Attend Visit SLO CAL's marketing committee meetings (monthly via teleconference and quarterly in person), prepare monthly reports, periodic reports and a monthly recap for marketing committee meetings, including budget, and arrange for storage and shipment of materials and documents as directed by Visit SLO CAL.

**Miscellaneous:** Provide creative input and support for other projects, and work collaboratively with other partner agencies.

**Brand partnership:** Target and nurture marketing partnerships that align with our brand and target audience to increase SLO CAL brand awareness.

**PROPOSAL REQUIREMENTS**

Proposals must address each item listed within the following sections, giving specific details of

techniques to be used in meeting these requirements. The proposal should describe how the Proposer intends to perform the scope of work during an 18-month period and shall be subject to negotiation between Visit SLO CAL and the Awardees' for the initial contract period. The information provided will be used to negotiate the contract scope of work, and to score proposals as described in Attachment C, Proposal Evaluation Criteria.

Proposals must be based on a funding level of \$1.5 million per fiscal year. If additional funding becomes available, this budget may increase. See Attachment A for links to Visit SLO CAL's public documents related to strategic planning.

## Minimum Requirements

**Questions:** All Proposers wishing clarification of this RFP must submit questions via email to: [Lisa@SLOCAL.com](mailto:Lisa@SLOCAL.com) by the date and time referenced in the Tentative Schedule and note "Agency RFP Questions" in the subject line. Questions must be categorized based on scope of work.<sup>2</sup>

**Notice of Intent to Bid (non-binding):** All Proposers interested in responding to this RFP must submit Attachment B, Notice of Intent to Bid by the date and time referenced in the Tentative Schedule.

**Annual Billings:** Proposers must have 2019 annual revenue over \$7 million. Include clients and budgets.

**Experience:** Domestic media planning and buying experience – both online and offline – in at least five markets, one of which must be major metropolitan media markets with populations of two million plus. Please list markets in which your agency has experience and what media vehicles were planned and purchased. If using a subcontractor, provide a signed letter of commitment that includes the name of the subcontractor, their annual billings and the information requested above regarding domestic media planning and buying. All media planning/buying subcontractors must also meet the stated minimum requirements.

**References:** Provide three client references. At least two of the three must be current clients and at least one of the three must be tourism-related. Include client name, contact information, and the engagement start and end dates.

**Organizational structure** – Provide an overview of your agency ownership as well as any diversity and inclusion policy you have in place and how you are managing to that.

**Sample reporting** - Provide sample reporting out documents for weekly and monthly status updates, project management, media performance and billing.

**Financial Statements:** Proposers are required to demonstrate financial viability for maintaining an account of this size. Provide GAAP compliant financial statements, including but not limited to:

- Statements of Financial Position
- Statements of Activities
- Statements of Cash Flows

All of the above Financial Statements must be the most recent statements available, but no more than

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<sup>2</sup> Costs for developing proposals are entirely the responsibility of the proposer and shall not be reimbursed by Visit SLO CAL. This RFP is not subject to and State or County government contracting rules and regulations and Visit SLO CAL reserves the right to modify any and all terms and conditions in its sole and absolute discretion.

12 months old. Financial statements are to be submitted in a sealed envelope. After review, all financial statements will be destroyed or returned to Proposer. If Proposer would like a Non-Disclosure Agreement (NDA) signed, the NDA request must be received along with the Q&A by the date specified in the Tentative Schedule. VSC reserves the right to use its own NDA.

Contract Requirements: Winner of RFP will be required to abide by Visit SLO CAL contracting requirements.

Coverage must be at least as broad as:

- i. Commercial General Liability Insurance Policy (“CGL”). Insurance Services Office (ISO) Form CG 00 01 covering CGL on an “occurrence” basis for bodily injury and property damage, including products-completed operations, personal injury and advertising injury, with limits no less than **\$1,000,000** per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.
- ii. Business Automobile Liability Policy (“BAL”). ISO Form Number CA 0001 covering, Code 1 (any auto), or if Agency has no owned autos, Code 8 (hired) and 9 (non-owned), with limit no less than **\$1,000,000** per accident for bodily injury and property damage.
- iii. Workers’ Compensation and Employers’ Liability Insurance Policy (“WC/EL”). Insurance as required by the State of California with statutory limits, and Employer’s Liability Insurance with limit of no less than **\$1,000,000** per accident for bodily injury or disease. If Agency will provide leased employees, or, is an employee leasing or temporary staffing firm or a professional employer organization (PEO), coverage shall also include an Alternate Employer Endorsement (providing scope of coverage equivalent to ISO policy form WC 00 03 01 A) naming the Client as the Alternate Employer, and the endorsement form shall be modified to provide that the Client and the County will receive not less than thirty (30) days advance written notice of cancellation of this coverage provision. If applicable to Agency’s operations, coverage also shall be arranged to satisfy the requirements of any federal workers or workman’s compensation law or any federal occupancy disease law. If Agency maintains higher limits than the minimums shown above, Client shall be entitled to coverage for the higher limits maintained by Agency.
- iv. Professional Liability/Errors and Omissions. Insurance covering Agency’s liability arising from or related to this Agreement, with limits of not less than **\$1,000,000** per claim and **\$2,000,000** aggregate. Further, Agency understands and agrees it shall maintain such coverage for a period of not less than three (3) years following this Agreement’s expiration, termination or cancellation.
- v. Additional Insured  
The County of San Luis Obispo (the “**County**”), and Visit SLO CAL, and each of their officers, officials, employees, and volunteers are to be covered as insureds on the auto policy with respect to liability arising out of automobiles owned, leased, hired or borrowed by or on behalf of Agency and on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of Agency including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to Agency’s insurance (at least as broad as ISO Form CG 20 10, 11 85 or both CG 20 10 and CG 20 37 forms if later revisions used).
- vi. Primary Coverage  
For any claims related to this Agreement, Agency’s insurance coverage shall be primary insurance as respects the County and Client. Any insurance or self-insurance maintained by the County or Client shall be excess of Agency’s insurance and shall not contribute with it.
- vii. Waiver of Subrogation

Agency grants the County and Client a waiver of any right to subrogation which any insurer of the Agency may acquire against the County or Client by virtue of the payment of any loss under such insurance.

viii. Deductibles and Self-Insured Retentions

Any deductibles or self-insured retentions must be declared to and approved by the County or Client. Client may require Agency to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.

ix. Acceptability of Insurers

Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, unless otherwise acceptable to Client.

x. Claims Made Policies

If any of the required policies provide coverage on a claims-made basis:

- i. The retroactive date must be shown and must be before the date of the contract or beginning of the contract work.
- ii. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the contract work.
- iii. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a retroactive date prior to the contract effective date, Agency must purchase "extended reporting" coverage for a minimum of five (5) years after completion of the contract work.

xi. Separation of Insureds

All liability policies shall provide cross-liability coverage as would be afforded by the standard ISO (Insurance Services Office, Inc.) separation of insureds provision with no insured versus insured exclusions or limitations.

xii. Verification of Coverage

The Agency must furnish original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this Section.

xiii. Special Risks or Circumstances

The County of San Luis Obispo reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

All proposals submitted shall become the property of Visit SLO CAL and shall not be returned, with exception to aforementioned financials, to the Proposer. Visit SLO CAL also reserves the right to:

Reject any and all bids;

Waive any or all mandatory requirements, if no Proposers meet one or more of those requirements;

Cancel this RFP;

Revise the amount of funds available under this RFP;

Amend this RFP as needed<sup>3</sup>; and

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<sup>3</sup> If RFP is amended, Visit San Luis Obispo County will send an addendum to all Proposers.

Not select a vendor and award a contract from this RFP.

All Proposers agree that budget costs submitted with their proposals are valid for 180 days from the date Visit SLO CAL receives their proposal.

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

## **Description of Proposer**

### **Services & Activities:**

- Provide a letter of interest and an executive summary of your proposal.
- Provide a description of the nature of the Proposer's services and activities. Provide the year in which your company was formed. Note your company's history and expertise in travel and tourism advertising. List the address from which the primary work on the contract would be performed and size of agency by headcount. List the number of full and part-time employees. Do not list any subcontractors in this section.

### **Conflicts of Interest:**

- List all tourism-related clients for whom you have acted in the United States during the past 18 months.
- You must certify that there are no conflicts 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. **The respondent cannot currently be working with a DMO located in San Luis Obispo County or a direct competitor such as Santa Barbara, Monterey or Sonoma County.**

### **Personnel/Management:**

Identify those individuals on the Proposer's account team who will manage the contract work. Identify specific individuals who will be conducting day-to-day activities. Identify all personnel assigned to this account by position title and their role as staff or contractor. Include a description of the duties for each position title.

Note who will be the contract manager and primary contact.

- For all individuals, please document overall experience on tourism accounts, and include current resumes/biographies. Provide education, experience and expertise with pertinent information demonstrating qualifications for this RFP. Include length of time with agency, and length of time in any previous related positions. Do not exceed two pages per person.
- Include a detailed organizational chart for your entire organization, and an organizational chart for the management and personnel that will be assigned to this account, and their role as staff or contractor.
- Please indicate availability and accessibility of agency resources and staff devoted to this campaign.

### **Subcontractors:**

- Identify all proposed subcontractors for work that exceeds \$25,000 annually and document which portions of service will be performed by subcontractors and their ability to perform the work. Additionally, Proposer should submit signed letters of commitment for all proposed subcontractors and resumes/biographies of proposed subcontractor's key personnel, including those conducting day to day activities. Resumes/ biographies should detail education, experience, and key timeframes for all individuals on the account. Do not exceed two pages per person.
- The use of subcontractors is subject to approval by the President and CEO of Visit SLO CAL. 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. In the case subcontractors are approved, their costs will be the responsibility of the agency and should be included in the proposal and Scope of Work (SOW).

## **Scope of Work**

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

**Evaluation for depth and execution of a brand refresh:** Given recent 2020 target consumer data will be available to the winning Proposer, provide an overview of how your team determines the depth of a refresh, and a work plan for a house of brands approach.

**Website Redesign:** Provide an overview of how your agency approaches website design. Discuss a strategy to develop a desktop and mobile-optimized design that not only meets the technical and communication requirements for Visit SLO CAL, its lodging partners and members, but ensures an engaging, memorable experience to consumers, encourages repeat visits over time and incorporates current technology, customer experience and trends.

**Strategic Planning:** Discuss your strategic media and communications planning process. What goes into the development of a plan? What type of research do you do? Etc.

**Advertising Campaign Development:** Demonstrate how your agency develops a holistic approach to client brand advertising, integrating interactive, including social, into the overall strategy. Include how your media planning has changed due to barriers effecting traditional frequency/reach via TV – e.g. video on demand, recording devices, etc. How does your agency approach extend beyond the 30-second spot? Exemplify how your agency has evolved based on the way consumers receive and use information today.

**Production/Creative:** Do you do production in-house? If not, how do you manage production? Is your creative team located in the office that this account will be managed? Show current and/or past client examples of how your brand development moves across all mediums. Provide a rate card for your production services.

**Media Planning & Buying:** Provide us with your process in deciding where, when, and how to purchase media. What tools or analytics do you use? What elements determine your purchasing decisions? Optimization strategy? Monthly reporting examples? Co-op strategy and concepts (please provide examples or case studies of big picture co-op productions facilitated in the past)? Give us an overview of your philosophy as it relates to planning and buying media domestically for a budget of our size and tracking/optimizing to metrics.

**Promotional and Strategic Partnerships:** Where do strategic partnerships or alliances fit into your overall approach? How have you used strategic partnerships to extend a client's budget and exposure? Please

provide examples or case studies of big picture strategic partnerships you have facilitated in the past.

**Social Media:** Show us how you integrate social media into a brand strategy and how you would approach a social strategy. Visit SLO CAL currently manages all social profiles internally but is interested in hearing your thinking on how a brand our size should resource to efficiently manage a global social footprint. At a minimum, we would look to the winning Proposer to provide the overarching social strategy and guidance on implementation.

**Research & Analytics:** Provide an overview of how you determine success. What are the analytic tools or services that you use, and what type of information will you be reporting back to Visit SLO CAL monthly as it relates to meeting our objectives? Please define how your analytics can be converted into insights, and how the insights will help guide us in making decisions on how we market in the future. What research will you require to execute the work?

**Travel and Administration:** The Proposer should estimate travel (attend multi-day Visit SLO CAL Marketing Committee meetings twice a year), monthly meetings, communication and postage/shipping expenses expected to incur during contract period, and any additional reserve funds to be held for marketing contingencies. Travel and per diem expenses shall not exceed rates authorized by Visit SLO CAL's Travel and Expense Policy.

### **Innovation Case Study**

Visit SLO CAL is constantly seeking new opportunities to connect with our target audiences and build and leverage the power of the SLO CAL brand. Provide a case study that demonstrates how your agency has pushed a client beyond the norm for their industry and achieved success. The example does not have to be tourism specific but ideally would show how you successfully developed an integrated campaign or developed co-operative marketing platform.

### **Work Plan**

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

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

- Evaluation for depth and execution of a House of Brands strategy;
- Website Redesign;
- Strategic Communications and Content Planning;
- Advertising Campaign Development;
- Production/Creative Services;
- Media Planning & Buying;
- Social Media Strategy;
- Promotional & Strategic Partnerships; and
- Research & Analytics.



**Budget**

Proposer shall provide an overview of how they would allocate Visit SLO CAL’s budget using percentages. These allocations will be used to demonstrate your firm’s philosophy on resource allocation and compensation. If commission or other fees are part of the media or production breakdown, Proposers must list the percentage rates of those commissions and fees. Please also provide your point of view on compensation – commission, retainer, hourly fees or any hybrid approach.

**Budget Format**

The table presented below is the minimum acceptable budget format. Additional detail may be provided if applicable.

CATEGORY	% OF TOTAL BUDGET	COMMISSION % OR HOURLY RATE (if applicable)
REBRAND		
WEBSITE REDESIGN		
STRATEGIC COMMS PLANNING		
ADVERTISING CAMPAIGN DEVELOPMENT		
PRODUCTION / CREATIVE		
MEDIA BUYING / PLACEMENT		
PROMOTIONAL & STRATEGIC PARTNERSHIPS		
RESEARCH & ANALYTICS		
TRAVEL & ADMINISTRATION		
AGENCY FEE		
OTHER		
<b>TOTAL</b>		

**Internal Control Structure**

Please provide a discussion of your internal control structure for ensuring key controls are in place and operating effectively for such items as:

- Sales and use taxes;
- Reconciliation of pre-paid media;
- Media performance reconciliations; and
- Expense approvals.

**BILLING & RELATED REQUIREMENTS INVOICES**

Please identify any discounts you offer for payment within certain timeframes. For example, ‘payment within 10 days of invoice’ or something similar.

Please identify all acceptable methods of payment.

## **DELIVERY OF PROPOSAL**

Each bidder is required to deliver six typed copies in addition to an electronic version of the proposal.

Electronic versions of the proposal must be in BOTH Word and PDF formats and delivered on a digital storage device or emailed to [Lisa@SLOCAL.com](mailto:Lisa@SLOCAL.com). Any print or brand creative samples should be submitted with proposal.

Proposals may be sent by courier such as FedEx or UPS to:

Visit SLO CAL

Marketing Agency Request for Proposal

ATTN: RFP Submissions

1334 Marsh Street

San Luis Obispo, CA 93401

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

**ATTACHMENT A**  
**STRATEGIC PLANNING RESOURCES**

**2020/2021 Business & Marketing Plan:**

[https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/Business\\_Marketing\\_Plan\\_FY2020\\_21\\_digital\\_spreads\\_single\\_page\\_da06c0a1-ae16-419a-8f11-e1ca1f3425f1.pdf](https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/Business_Marketing_Plan_FY2020_21_digital_spreads_single_page_da06c0a1-ae16-419a-8f11-e1ca1f3425f1.pdf)

**Brand Guidelines**

[https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/Brand\\_Style\\_Guide\\_2018\\_with\\_Tra\\_demarks\\_compressed\\_c45d73a1-ef2d-44b7-88b4-754b468244b2.pdf](https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/Brand_Style_Guide_2018_with_Tra_demarks_compressed_c45d73a1-ef2d-44b7-88b4-754b468244b2.pdf)

**Management District Plan:**

[https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/VSC\\_MDP\\_8\\_5\\_19\\_c34892a9-b860-4600-b341-7afb8912fa59.pdf](https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/VSC_MDP_8_5_19_c34892a9-b860-4600-b341-7afb8912fa59.pdf)

**18/19 Annual Report:**

[https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/VSC\\_AnnualReport\\_18\\_19\\_WEB\\_afc3c97a-a626-41a2-a55e-64f837310815.pdf](https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/VSC_AnnualReport_18_19_WEB_afc3c97a-a626-41a2-a55e-64f837310815.pdf)

**Diversity & Inclusion Statement:**

<https://www.slocal.com/partners/equity-inclusion/>

**Strategic Direction 2023**

[https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/SD2023\\_Mat\\_ea7967d0-7879-467f-9382-55e0b1e79160.pdf](https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/slocal/SD2023_Mat_ea7967d0-7879-467f-9382-55e0b1e79160.pdf)

**ATTACHMENT B**

**INTENT TO BID**

**Marketing Services**  
**Due: September 21, 2020**  
12:00 PM Pacific Time

**Send to: Lisa Verbeck**  
Chief Marketing Officer  
[Lisa@SLOCAL.com](mailto:Lisa@SLOCAL.com)

Name of Proposer:

Contact Person:

Mailing Address:

Agency URL:

Telephone:

Fax Number:

Email Address:

Signed:

## ATTACHMENT C

### PROPOSAL EVALUATION CRITERIA

Proposals will be reviewed, evaluated and scored by an evaluation committee. Evaluation of proposals will be based on the following criteria for each component. Each criterion will be scored according to the degree of responsiveness present in the proposal being evaluated.

	<b>Max. Points</b>	<b>Score</b>
<b>1. OVERALL EXPERIENCE OF COMPANY &amp; DEMONSTRATED RESULTS</b>	10	
Our evaluation will include an assessment of the history of your company, your experience as it relates to the requirements within this RFP including tourism marketing, evidence of past performance, quality and relevance of past work, and references.		
<b>2. CREATIVITY</b>	20	
Our evaluation will include an assessment of the quality of proposed strategies, and creativity as demonstrated by the required project and past work.		
<b>3. FAMILIARITY WITH VISIT SAN LUIS OBISPO COUNTY &amp; TOURISM INDUSTRY</b>	15	
Our evaluation will include our assessment of your understanding of our organization, SLO CAL as a destination and the landscape of the countywide tourism industry and the industry as a whole in addition to how you integrated this knowledge into your proposal.		
<b>4. QUALIFICATIONS OF PERSONNEL</b>	10	
As reflected through the Overall Experience of Company & Demonstrated Results, our evaluation will also include an assessment of the qualifications and experience of your managerial team, staff, subcontractors and those managing our account day-to-day.		
<b>5. PLANNING &amp; INNOVATION</b>	20	
Ability of firm to think beyond the now and set San Luis Obispo County up to be at the forefront of the changing destination marketing landscape.		
<b>6. STRATEGIC THINKING/PLANNING APPROACH</b>	15	
Philosophy/approach to account planning, media planning and campaign development.		
<b>7. BUDGET APPROACH/COST EFFECTIVENESS</b>	10	
Effective and efficient delivery of quality services is demonstrated in relation to the budget allocation. The allocation is reasonable and appropriate. Approach to compensation structure is balanced and structured to maximize marketing investment.		
<b>TOTAL POINTS</b>	<b>100</b>	



# Visit SLO CAL MARKETING COMMITTEE APPLICATION FORM

NAME OF APPLICANT: \_\_\_\_\_

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

TOTAL YEARS IN HOSPITALITY INDUSTRY: \_\_\_\_\_

TOURISM-RELATED MARKETING EXPERIENCE:

## Employment History

CURRENT EMPLOYER: \_\_\_\_\_ YRS OF SERVICE: \_\_\_\_\_

TITLE: \_\_\_\_\_

PAST EMPLOYER: \_\_\_\_\_ YRS OF SERVICE: \_\_\_\_\_

TITLE: \_\_\_\_\_

## Community/Board Involvement

ORGANIZATION: \_\_\_\_\_ TITLE: \_\_\_\_\_

DATES OF INVOLVEMENT: \_\_\_\_\_

ORGANIZATION: \_\_\_\_\_ TITLE: \_\_\_\_\_

DATES OF INVOLVEMENT: \_\_\_\_\_

ORGANIZATION: \_\_\_\_\_ TITLE: \_\_\_\_\_

DATES OF INVOLVEMENT: \_\_\_\_\_

Individuals interested in serving on the Marketing Committee should send this **Application Form**, along with a **cover letter** and any background (**resume or list of key accomplishments** – no more than two pages total) to demonstrate their active role in marketing, branding, public relations or digital media as it relates to tourism in San Luis Obispo County, to [Jordan@SLOCAL.com](mailto:Jordan@SLOCAL.com). For more information, contact Visit SLO CAL at (805) 541-8000.

# KATHLEEN NAUGHTON

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Paso Robles, CA 93446 | C: 559-977-6768 | katnaughton30@gmail.com

November 2, 2020

Visit SLO Cal

RE: Visit SLO Cal Marketing Committee

Dear Marketing Committee,

I would like to express my interest in joining the Visit SLO Cal Marketing Committee. I would be ecstatic for the opportunity to represent the SLO Coast Wine Collective and help to promote all our region and San Luis Obispo County has to offer.

The people and businesses within this community that I have worked with are some of the best that I have met in my career and possess a passion and drive that is unmatched. As we continue to move forward through the steps of reopening San Luis Obispo County, keeping our residents safe, and to promote tourism to the region again, the role of this marketing committee is paramount and I would be privileged to be a part of it.

Throughout the course of my career, I have honed my abilities in project management, execution, and company growth. I am an astute problem-solver capable of prioritizing and managing complex projects with proficiency. In previous roles, I exercised skills in collaboration, communication and marketing and consistently contributed to team efforts and organizational improvements. I have proven to be effective and motivational, with proficiency in interpersonal and collaborative work. I enjoy brainstorming and coordinating efforts to achieve a common goal.

Please take a moment to review my enclosed resume. I am looking forward to your response and thank you for your consideration.

Sincerely,

Kathleen Naughton

# KATHLEEN NAUGHTON

Paso Robles, CA 93446 | C: 559-977-6768 | katnaughton30@gmail.com

## Summary

Accomplished manager with extensive experience in wine and craft beer sales, marketing, distribution and DTC networks covering from California to Washington DC. Proven ability to maintain a professional environment while successfully growing brands and sales teams to their best potential.

## Experience

- Executive Director/Marketing Coordinator** **10/2018 to Current**  
**SLO Coast Wine Collective** **San Luis Obispo, CA**
- Manage marketing and PR communications between Collective members and consumers through outlets such as the website, newsletters, consumer and trade events.
  - Manage Collective meetings including Board, Owner's, Consumer Engagement, Marketing and Finance.
  - Managed and executed the Harvest on the Coast Live Auction and Roll out the Barrels consumer events two years in a row.
  - Played an active role in the Strategic Plan process and created milestones to meet goals set in three year plan.
- Print Marketing Strategist** **08/2018 to 09/2020**  
**Casey Printing** **King City, CA**
- Collaborated with owners to launch new print marketing opportunities with wineries, distilleries, and breweries.
  - Manage sales territory spanning from King City to San Diego maintaining a current customer base of city municipalities, colleges, school districts, and locally owned businesses.
  - Acquired additional new customers in my territory by providing solutions to their marketing needs and delivering high-quality service and products.
  - Grew sales in my territory 10%-15% year over year.
- Marketing Director and Human Resources** **08/2016 to 08/2018**  
**Hearst Ranch Winery** **Paso Robles, CA**
- Worked with winery owners on yearly projections and create a marketing and sales plan for tasting rooms, DTC wine clubs, website, and distribution network.
  - Created sales goals and incentive structure for the DTC sales team.
  - Worked with Hearst Corp on a complete website rebuild with a focus on eCommerce and website traffic conversions.
  - Launched a high-end wine club and built all marketing materials and sales plan from the ground up.
  - Managed all HR responsibilities with the exception of payroll.
  - Directly managed and supervised a team of 15 employees and two tasting rooms.
- Office Manager** **06/2013 to 05/2016**  
**LAW ESTATE WINES** **Paso Robles, CA**
- Part of opening team for a new world class winery and tasting room in December 2013.
  - Hired and trained a sales and marketing team from the ground up.
  - Managed a team of six including tasting room hosts, graphic designer, social media marketer and sales representatives.
  - Responsible for building a story around our core brand by using online media marketing, unique and exciting collateral, quarterly newsletters, events, and local relationships to execute that story in the best way possible.
  - Managed direct-to-consumer sales, wine club, fulfillment and compliance software.
  - Lead a sales strategy that aided Law Estate Wines to sell out two consecutive vintages before projected dates.
  - Built and successfully maintained a professional and fun company culture that attracted great applicants and limited company turnover.
- Sales and Marketing Manager** **02/2011 to 06/2013**  
**FLYING DOG BREWERY** **Frederick, MD**
- On and off-premise account management and sales in the home market of Maryland and DC.
  - Created 30% sales growth in my market year over year.
  - Developed and executed territory-specific promotions and sales programs with distributors and retailers.
  - Worked successfully with distributors and customers in one of the only four-tier distribution systems in the US.
  - Increased market presence by creating a series of unique and exciting events to promote our brands and cross-promote with wineries and distilleries in my territories.
  - Worked closely with our design team to create customer-specific displays and collateral.
  - Successfully grew my market presence through social media networks, i.e Twitter, Facebook and Instagram.
- On and Off Premise Sales Manager** **08/2009 to 07/2011**  
**Calypso Organics** **Bethesda, MD**
- On and off-premise sales of organic wine in Maryland, DC, New York, and Pennsylvania.
  - Successfully built a customer base from the ground up and maintained profitable relationships with customers in a four-tier distribution system.



- Assisted in dealing with suppliers overseas and finding brands to build our distribution portfolio.

**Sales Manager**

**06/2006 to 06/2009**

**Young's Market Company**

**Fresno, CA**

- Created sales presentations to present to off-premise buyers for upcoming holidays and advertisements.
- Merchandised products and built creative displays for off-premise accounts.
- Maintained a professional and personable relationship with buyers and my team. Managed large retail chain accounts i.e. Walmart, Target and Save Mart

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**Education**

**Bachelor of Science: Psychology**

California State University Fresno

Fresno, CA

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**Credentials**

Level II Sommelier with the Court of Master Sommeliers

Cicerone with the Cicerone Certification Program

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**References**

Personal and professional references available upon request.