



C o u n t y o f S a n L u i s O b i s p o

# GENERAL SERVICES AGENCY

Janette D. Pell, Director

Helen McCann, Department Administrator

**SAN LUIS OBISPO COUNTY TOURISM  
BUSINESS IMPROVEMENT DISTRICT (CBID)  
REQUEST FOR PROPOSAL PS-#1141  
SHOULDER SEASON CAMPAIGN/PROMOTION**

August 5, 2011

The San Luis Obispo County Tourism Business Improvement District (CBID) is currently soliciting proposals for professional services for the FY 2011 2012 Shoulder Season Promotion (November 2011 – June 2012).

Each proposal shall specify each and every item as set forth in the attached specifications. Any and all exceptions must be clearly stated in the proposal. Failure to set forth any item in the specifications without taking exception may be grounds for rejection. The CBID and the County reserves the right to reject any and all proposals and to waive any irregularity or informality in any proposal or in the Request for Proposal process, as long as, in the judgment of the CBID and the County, such action will not negate fair competition and will permit proper comparative evaluation of the proposals submitted.

This Request for Proposal is posted on the County's Purchasing website at [http://www.slocounty.ca.gov/GSA/Purchasing/Current Formal Bids and Proposals.htm](http://www.slocounty.ca.gov/GSA/Purchasing/Current%20Formal%20Bids%20and%20Proposals.htm). Any changes, additions, or deletions to this Request for Proposal will be in the form of written addenda issued by the County. Any addenda will be posted on the website. Prospective proposers must check the website for addenda or other relevant new information during the response period. The County is not responsible for the failure of any prospective proposer to receive such addenda. All addenda so issued shall become a part of this Request for Proposal.

If your firm is interested and qualified, please submit ten (10) copies and two (2) electronic copies, one each in Microsoft Word and Adobe PDF formats on CD of your proposal by 3:00 p.m. on Thursday, August 25, 2011 to:

County of San Luis Obispo  
Phill Haley, GSA - Purchasing  
1087 Santa Rosa Street  
San Luis Obispo, CA 93408

If you have any questions about the proposal process, please contact me. For technical questions and information contact Nikki J. Schmidt, County Administrative Office, at (805) 781-5496.

All questions pertaining to the content of this Request for Proposal must be made in writing via e-mail to Nikki Schmidt at: [nschmidt@co.slo.ca.us](mailto:nschmidt@co.slo.ca.us). All questions will receive a response within 3 business days. The question and its response will be posted (anonymously) on the County's Purchasing website (link above). The County reserves the right to determine the appropriateness of comments / questions that will be posted on the website.

PHILL HALEY  
Buyer – GSA - Purchasing  
[phaley@co.slo.ca.us](mailto:phaley@co.slo.ca.us)

**LOCAL VENDOR PREFERENCE**

The County has established a local vendor preference. When quality, service, and other relevant factors are equal, responses to Requests for Proposals will be evaluated with a preference for local vendors. Note the following exceptions:

1. Those contracts which State Law or, other law or regulation precludes this local preference.
2. Public works construction projects.

A "local" vendor preference will be approved as such when, 1) The vendor conducts business in a fully staffed office with a physical address within the County of San Luis Obispo; 2) The vendor holds a valid business license issued by the County or a city within the County; and 3) The vendor has conducted business at the local address for not less than six (6) months prior to the due date of this Request for Proposal.

Proposals received in response to this Request for Proposal will be evaluated by the CBID Advisory Board and/or sub-committee at the CBID Advisory Board (hereinafter known as Selection Committee) considering the local vendor preference described above when quality, service and other relevant factors are equal. The burden of proof will lie with proposers relative to verification of "local" vendor preference. Should any questions arise, please contact a buyer at (805) 781-5200.

	YES	NO
Do you claim local vendor preference?		
Do you conduct business in an office with a physical location within the County of San Luis Obispo?		
Business Address: _____ _____		
Years at this Address: _____		
Does your business hold a valid business license issued by the County or a City within the County?		
Name of Local Agency which issued license: _____		

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

Authorized Individual: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Dated: \_\_\_\_\_

**GOALS AND OBJECTIVES OF THE CBID**

The strategic goals are based on the interconnection of the economy, the environment and consumers. The achievement of each of these goals will create a balanced and sustainable approach for tourism promotion.

**Economic**

Effectively promote tourism in a way that optimizes recreation, agriculture and history; and contributes to increased occupancy, overall economic prosperity, increased employment and for the unincorporated area of the county while working to support the rural small town attributes.

**Consumer**

To attract visitors through the development of a unincorporated area of San Luis Obispo County brand and education by specifically developing an appreciation of the scenic qualities, geography, history, recreation, attractions and ambiance, i.e., the key benefits and attributes the unincorporated areas of the county and region offers.

**Environment and Natural Resources**

To protect and preserve the aesthetic, historical, agricultural and cultural foundations of San Luis Obispo County.

In order to achieve the overall strategic goals stated above and to develop a sustainable tourism marketing program, the CBID must successfully position and differentiate the destination, optimize technology and focus on a multi level integrated approach.

**Objectives**

To position the San Luis Obispo County Tourism Business Improvement District (CBID) as a key contributor to increasing the number of visitors inquiring about overnight stays in the CBID region, which in turn promotes the economic well being of our constituents (motels, hotels, B&Bs and vacation rentals).

1. Become a primary component to driving increased TOT, which in turn increases overall occupancy for CBID constituents.
2. Build and strengthen the CBID brand by positioning the destination as truly unique and different from its competitive set.
3. Target improved occupancy by increasing new visitor and repeat visitors and length of stay from target market/segments utilizing a mix of elements including special events, advertising and promotions with an emphasis on the shoulder season.

4. To develop and implement countywide partnerships with the CBID being a catalyst so that all area stakeholders see their competition as those outside San Luis Obispo County.

**Primary Target Markets**

Greater Bay Area (including San Francisco, Oakland & San Jose)  
Greater Los Angeles Area (including LA, Orange County & the Inland Empire)  
Central Valley Area (including Fresno & Bakersfield)  
Southern CA including San Diego  
Central Coast including Santa Barbara, Ventura, Monterey, Carmel & Salinas

**Demographic & Psychographic Segmentation:**

- Adults 35-64
- \$100,000+HHI
- Discretionary spending for travel
- Ability to travel mid-week and off-season
- Interested to travel with children (if applicable)
- Interested in natural surroundings/environment
- Young at heart mindset
- Like a small community experience
- Appreciation for and active recreation based outdoor lifestyle

The focus on the CBID efforts centers around the California drive markets with a secondary focus on regional markets including Arizona, Nevada, Colorado and Texas. Furthermore, in conjunction with our vision to compete outside our County, the CBID wants to explore strategies that pull visitors from our neighboring competitors ~ Santa Barbara and Monterey counties.

**PROJECT SCOPE**

To keep the presentations focused, we ask that you emphasize how you and your agency will assist the CBID in achieving three (3) priorities for 2011-12, as listed below:

1. Build occupancy among constituent lodging properties in the off season
2. Build California market visitation
3. Drive increased Unique Visitors

The successful proposer will be expected to plan, develop and implement a promotional campaign on the CBID's behalf that meets the above priorities, while functioning within the framework outlined in the approved Marketing Plan. All campaigns are subject to CBID Advisory Board review and approval prior to implementation.

The CBID wants to focus on driving occupancy for our constituents during Shoulder Season, which we define as November through June.

The CBID is searching for a relationship with a partnering company that offers:

- Strategic recommendations based on market research and industry knowledge;
- Plan provided based on effectively reaching defined target markets and key audiences;
- Cost negotiations with an emphasis on value add;
- Exploration of all communication channels, including new and upcoming ideas;
- Explore coop and niche opportunities;
- Emphasis of the WineCoastCountry brand in strategy and creative execution;
- Provide measurement tools to clearly demonstrate ROI as all efforts must be trackable;
- Creative and innovative plan that highlights your firms unique approach

### **SLO CBID PROGRAM ADMINISTRATION**

The proposer's ability to create a professional, ongoing relationship with the CBID CAO and Advisory Board is key to the success of the implementation of all plans done on behalf of the CBID. The CBID is seeking a company or companies that can:

- Ensure clear progress reports so that the CBID CAO can maintain good communication flow between the Advisory board, the Board of Supervisors, Administrative Office and the lodging businesses with the CBID;
- Provide weekly status updates to CBID CAO for incorporation within CBID Advisory Board meetings;
- Prepare and present a quarterly report on past activities and upcoming plans;
- Provide bookkeeping and financial reporting to closely manage and monitor specified budget.

### **CBID SHOULDER SEASON CAMPAIGN ESTIMATED BUDGET**

The estimated overall budget for the Shoulder Season promotional campaign is:

- Up to \$202,000

Proposers should indicate whether they intend to provide services based on a flat fee or accept a commission on media placements. If the proposer determines the flat-fee model is best suited for this plan, then the proposer is required to dedicate the commissionable amount back in to the program. Note that costs for website hosting and maintenance do not need to be included in the campaign plan.

Proposer fees and expenses related to implementing your suggested programs and administrative support activities should be estimated **separately** within the budget noted above. Please include a detailed rate structure for all individuals who will be involved in servicing this project.

### **Proposal Evaluation Criteria**

1. Amount of the proposed fee for service
  - As noted above, your budget should include an per hour rate structure for staff proposed to be assigned to this project and promotional activities, agency fees and

expenses should be itemized separately.

2. Understanding of the nature of services desired by CBID, and ability to present a comprehensive and inventive plan
3. Experience in performing the type services desired by CBID
4. Responsiveness to the RFP and completeness of the proposal

The Selection Committee, in its sole discretion, may assign rating weights to the above criteria. The Committee may also consider any other factors that it considers relevant to making its recommendations.

### Estimated Project Schedule

Note: this project schedule may be revised at the sole discretion of the CBID Advisory Board.

- Release RFP August 5, 2011
- RFP Deadline August 25, 2011
- Proposals reviewed August 29 – Sept 2
- Finalists Confirmed September 2, 2011
- Finalists present plan to CBID Board September 9, 2011
- Final firm selection and notification September 14, 2011
- Selected Firm presents plans for implementation September 28, 2011
- Launch Shoulder Season Promotion November 1, 2011

### PROPOSAL SUBMITTAL AND SELECTION

1. All proposals, consisting of 10 (ten) copies, and 2 (two) electronic copies, one each in Microsoft Word and Adobe PDF formats on CD must be received by mail, recognized carrier, or hand delivered no later than **3:00 p.m. on August 25, 2011**. Late proposals will not be considered.
2. All correspondence should be directed to:

San Luis Obispo County  
General Services Agency  
1087 Santa Rosa Street  
San Luis Obispo, CA 93408  
ATTENTION: PHILL HALEY  
Telephone: (805) 781-5904

3. All costs incurred in the preparation and submission of proposals and related documentation will be borne by the proposer.
4. It is preferred that all proposals printed on two sides. Proposals should be stapled only without binding, binders, or folders. No props or display items should accompany proposals. Proposals shall not be more than ten (10) double sided pages.
5. Selection of qualified proposers will be by the Selection Committee using an approved County procedure for awarding professional contracts. Selection will be made on the basis of the proposals as submitted, although the County reserves the right to interview applicants as part of the selection process. The proceedings of the Selection Committee are confidential, and members of the Selection Committee are not to be contacted by the proposers.
6. This request does not constitute an offer of employment or to contract for services.
7. The CBID and the County reserves the option to accept or reject any or all proposals, wholly or in part, received by reason of this request, and make more than one award, or no award, as the best interests of the CBID and the County may appear.
8. All documents submitted to the County in response to this Request for Proposal will become the exclusive property of the CBID and the County and may be returned to the proposer or kept by the CBID and the County, in the CBID and the County's sole discretion.
9. All proposals shall remain firm for ninety (90) days following closing date for receipt of proposals.
10. The CBID and the County reserves the right to award the contract to the firm who presents the proposal which in the judgment of the CBID and the County, best accomplishes the desired results, and shall include, but not be limited to, a consideration of the professional service fee.
11. Selection will be made on the basis of the proposals as submitted. The Selection Committee may deem it necessary to interview applicants. The County of San Luis Obispo retains the right to interview applicants as part of the selection process. Any contract awarded pursuant to this Request for Proposal will incorporate the requirements and specifications contained in this Request for Proposal. All information presented in a proposer's proposal will be considered binding upon selection of the successful proposer, unless otherwise modified and agreed to by the County during subsequent negotiations.
12. Any contract awarded pursuant to this Request for Proposal will incorporate the requirements and specifications contained in this Request for Proposal. All information presented in a proposer's proposal will be considered binding upon selection of the successful proposer, unless otherwise modified and agreed to by the County during subsequent negotiations.

13. Under the provisions of the California Public Records Act (the "Act"), Government Code section 6252 et seq., all "public records" (as defined in the Act) of a local agency, such as the County, must be available for inspection and copying upon the request of any person. Under the Act, the County may be obligated to provide a copy of any and all responses to this Request for Proposal, if such requests are made after the contract is awarded. One exception to this required disclosure is information which fits within the definition of a confidential trade secret [Government Code section 6254(k)] or contains other technical, financial or other data whose public disclosure could cause injury to the proposer's competitive position. If any proposer believes that information contained in its response to this Request for Proposal should be protected from disclosure, the proposer MUST specifically identify the pages of the response that contains the information by properly marking the applicable pages and inserting the following notice in the front of its response:

***NOTICE:** The data on pages \_ of this response identified by an asterisk (\*) contain technical or financial information, which are trade secrets, or information for which disclosure would result in substantial injury to the proposer's competitive position. Proposer requests that such data be used only for the evaluation of the response, but understands that the disclosure will be limited to the extent the County considers proper under the law. If an agreement is entered into with the proposer, the County shall have the right to use or disclose the data as provided in the agreement, unless otherwise obligated by law.*

The County will not honor any attempt by proposer to designate its entire proposal as proprietary. If there is any dispute, lawsuit, claim or demand as to whether information within the response to the Request for Proposal is protected from disclosure under the Act, proposer shall indemnify, defend, and hold harmless, the County arising out of such dispute, lawsuit, claim or demand.

14. As explained in item 1 above, electronic copies of your proposal must be included. For archival purposes at least one electronic copy should include all documents being submitted combined into one Adobe Acrobat (pdf) file on a CD, using this convention for the file name: FIRM NAME + RFP NUMBER

*Example:* Your firm, Acme Inc., is responding to RFP PS-#1101. Your Adobe Acrobat (pdf) file would be named: **Acme 1101**

### **PROPOSAL FORMAT**

A qualifying proposal must address all of the following points:

1. Project Title



2. Applicant or Firm Name

3. Firm Qualifications

- a. Type of organization, size, markets served (geographic and industries), professional registration and affiliations.
- b. Agency personnel and experience relevant to the tourism/travel industry. Include strategic value the agency can bring to the table beyond simple program execution.
- c. Outline of two (2) projects completed within the last two (2) years that are directly related to this project.
- d. Qualifications of consultants, subcontractors, or joint venture firm, if appropriate.
- e. Provide name, address, e-mail and phone number of three (3) client references from recent related projects. *Do not include any letters of references, brochures or flyers.*

4. Understanding of and Approach to the Project

All submitting firms will be evaluated systematically based on the ability to demonstrate innovation and how well the agency recommendations fit within the stated goals and objectives as outlines within the CBID's approved Marketing Plan.

- a. Agencies philosophy and approach, as defined by suggested strategies and tactics.
- b. Proposed elements of the plan, including a media placement and all other related activities.
- c. Experience and role of staff members who will work on this account, and an indication of information and participation required by CBID staff.
- d. Indication of time frame necessary to complete the project once a Notice to Proceed is issued.

5. Fees and Insurance

- a. Propose total fixed fees to complete project as described under Project Scope.
- b. The selected Consultant will be required to provide insurance coverage in the amount of \$ 1,000,000 General Liability Insurance and \$ 1,000,000 of Professional

Liability Insurance. This amount of insurance coverage shall be reflected in your estimated professional fee.

- c. The Consultant shall provide within five (5) days after the Notice of Award is issued a certificate of liability insurance naming the County of San Luis Obispo and its employees and officers as additionally named insured. This shall be maintained in full force and effect for the duration of the contract and must be in an amount and format satisfactory to the County of San Luis Obispo.
- d. Indemnification: Consultant shall defend, indemnify and hold harmless the County of San Luis Obispo, its officers and employees from all claims, demands, damages, costs, expenses, judgments, attorney fees, liabilities or other losses that may be asserted by any person or entity, and that arise out of or are made in connection with the acts or omissions relating to the performance of any duty, obligation, or work hereunder. The obligation to indemnify shall be effective and shall extend to all such claims and losses, in their entirety, even when such claims or losses arise from the comparative negligence of the County of San Luis Obispo, its officers and employees. However, this indemnity will not extend to any claims or losses arising out of the sole negligence or willful misconduct of the County of San Luis Obispo, its officers and employees.

The preceding paragraph applies to any theory of recovery relating to said act or omission, by the Consultant, or its agents, employees, or other independent contractors directly responsible to Consultant including, but not limited to the following:

1. Violation of statute, ordinance, or regulation.
2. Professional malpractice.
3. Willful, intentional or other wrongful acts or failures to act.
4. Negligence or recklessness.
5. Furnishing of defective or dangerous products.
6. Premises liability.
7. Strict Liability.
8. Violation of civil rights.
9. Violation of any federal or state statute, regulation, or ruling resulting in a determination by the Internal Revenue Service, California Franchise Tax Board or any other California public entity responsible for collecting payroll taxes, when the Consultant is not an independent contractor.

It is the intent of the parties to provide the County of San Luis Obispo the fullest indemnification, defense, and "hold harmless" rights allowed under the law. If any word(s) contained herein are deemed by a court to be in contravention of applicable law, said word(s) shall be severed from this contract and the remaining language shall be given full force and effect.

## **BACKGROUND**

The San Luis Obispo County Business Tourism Improvement District (CBID) is currently soliciting proposals for Should Season promotional services. The expected duration of this project is approximately 8 months from November, 2011 thru June, 2012, with the opportunity to extend the project timeframe as needed.

In the spring of 2009, the Board of Supervisors, upon the recommendation of the lodging businesses in the unincorporated areas of San Luis Obispo County, approved the formation of a tourism business improvement district (BID) for specific portions of unincorporated areas of the County (map attached). As a result, beginning July 1, 2009, all lodging businesses (defined as hotels, motels, bed and breakfasts, and vacation rentals), within the designated area, were assessed 2% of the paid rent charged per occupied room night. This 2% is being collected by the San Luis Obispo County Tax Collector and held in a fund designated exclusively for the promotion of tourism within the boundaries of the CBID.

The BID ordinance included the creation of a seven (7) person Advisory Board from lodging owners, and/or their designees, from within the boundaries of the CBID. The CBID Advisory Board was appointed by the Board of Supervisors on June 9, 2009. The ordinance requires that half of the funding be directed at programs that will benefit the CBID region as a whole and the remaining half of the funds be divided, proportionately, among the local areas that comprise the CBID region. These funds must, by law, be used to promote tourism to the benefit of those local areas exclusively. Any and all CBID programs must be approved by the Advisory Board before they can begin.

In February 2010, the Advisory Board contracted the role of Chief Administrative Officer. The overall role of this position is to work in conjunction the CBID Advisory Board, stakeholders and other organizations with a primary focus to guide the organization to implement strategies to increase occupancy within the CBID region, and in turn it becomes a stronger economic driver within our County. The CAO will serve as the main contact for the agency or agencies, functioning as the liaison between the Advisory Board and all other entities.

The approved CBID Marketing Plan, Executive Summary, Mission, Vision & Core Value and all Advisory Board minutes are posted on [www.YourCBID.com](http://www.YourCBID.com) and [www.WineCoastCountry.com/members](http://www.WineCoastCountry.com/members). Currently the CBID is working on Phase I, which will launch in September 2010 and includes the brand, the website and the development of a 6-minute video.

The CBID began FY 2010|2011 with a newly developed brand ~ WineCoastCountry ~ and the introduction of that brand to our tourism partners on June 26, 2010, with a request to move forward

based on the CBID's vision to compete outside our County, and also asked for the formation of the BID Alliance.

As summer 2010 approached, the website ~ [www.WineCoastCountry.com](http://www.WineCoastCountry.com) ~ was our next priority. The CBID focused their efforts to launch the website by the end of September 2010, in time to debut our brand at Sunset's Savor the Central Coast.

With our primary marketing tools in place, the CBID prepared for the launch of the 2010 2011 Shoulder Season Campaign. Our eye was set on meeting our mission ~ to increase the economic well being of our constituents.

The goal of the CBID targeted 2 keys areas: to drive web traffic to the new site and in turn increase qualified referrals to our lodging partners. Basically, the CBID would only deem our efforts a success if we put SLO County on the radar of other Californians. With 86% of the sunshine state residents traveling on vacation within their own state boundaries, this opportunity was large and untapped.

The CBID focused on 6 key initiatives:

1. driving website traffic to push leads to our constituents
2. editorial coverage based on an aggressive out of area PR campaign
3. launch a shoulder season promotion to drive business during the off season
4. implement 7 local funding programs to give 1% of the assessment back to the community that created it in order to develop local tourism efforts
5. build and nurture collaborative partnerships
6. and create the framework for the CBID's brainchild the "Highway 1 Loop"

The Shoulder Season Campaign, which included several components all with the same purpose ~ get more "heads in beds" starting in November 2010 through June 2011:

- digital media campaign that would drive web traffic with over 148 million on line impressions
- in area & out of area PR plan that would generate feature stories & nationwide press coverage
- monthly e-newsletter to encourage visitor engagement & to build our consumer database
- coop ad campaign, in partnership with the VCB & BID Alliance, focusing on CA travelers
- constituent outreach, including formation of the local fund boards, a portal to provide information and promote transparency, a quarterly e-newsletter, How To Videos to provide training
- an partnership with HearstCastle.com to encourage overnight stays amongst the 7 million annual visitors, many of whom currently do not spend the night in SLO County

The Outcome of the 2010 2011 Shoulder Season campaign is summarized below:

1,500 pages with 522 PLAY, EAT & EVENTS

Visitors to WCC.com: 110,271

UV: 94,541

Page Views: 430,434

8,500 e-subscribers

Face Book visits to WCC.com: 12,614

Likes: 1,173

Impressions: 150,273

YouTube channel views: 5,440

Twitter followers: 214

Advertising impressions: 103,772.995 (not yet complete. Projected at 147,000,000)

Traffic to WCC.com from ad buy: 86,366

Out of Area PR: 126 articles with 176,752,364 impressions

From FAM Trips: 28 articles with 8,046,426 impressions

In county PR: 12 articles with 274,342

Starting with a November 2010 as the measurement baseline, TOT has increased 12% on average throughout the 10 region area that makes encompasses the CBID. The CBID acknowledges that our efforts are not solely responsible for affecting a change in TOT – our eye is on progress as we hold ourselves accountable for results, provide transparency to our constituent's and continue to pursue our mission to increased occupancy.