



TOURISM AUTHORITY

# BRAND AGENCY CREATIVE & MEDIA SERVICES

## Request for Proposal





# REQUEST FOR PROPOSAL

## SAN DIEGO TOURISM AUTHORITY

### BRAND AGENCY – CREATIVE & MEDIA SERVICES

February 14, 2024

To All Prospective Bidders:

The San Diego Tourism Authority invites you to submit a competitive proposal for a brand agency to include creative and media services. The purpose of this Request for Proposal (RFP) is to seek and retain a qualified Agency of Record (AOR). The contractual period, based on the initial scope of work contained within this RFP, will be a 3-year contract beginning July 1, 2024, with annual negotiation of agency compensation based on SDTA funding, with the option to renew mutually agreed upon by both parties.

The San Diego Tourism Authority (SDTA) is the sales and marketing engine for the San Diego region. The organization is recognized as San Diego's umbrella Destination Marketing Organization (DMO), charged with monitoring the health of the tourism industry and promoting all areas of the region. Incorporated in 1954, the SDTA is a private, not-for-profit 501(C)(6) member organization comprised of over 900 businesses and governed by a 19-member board of directors composed of industry and non-industry representatives.

The SDTA serves the local community by stimulating inbound travel to San Diego. The annual operating budget includes private source revenue (primarily in the form of member dues and advertising) and funds from the San Diego Tourism Marketing District (self-assessed by hotels located within the City of San Diego as a percentage of room revenues).

#### **Vision**

Leading San Diego to be the most desirable destination.

#### **Mission**

To drive visitor demand to economically benefit the San Diego Region.

#### **Our Diversity, Equity, Inclusion and Accessibility Statement**

In San Diego, we believe tourism is for all. SDTA is committed to creating an inclusive workplace and destination where everyone is welcome, valued, and empowered to thrive.

All information contained in this RFP is confidential and proprietary information of SDTA and its selection committee and must be treated as such by your organization and may not be used for any other purpose but your agency's RFP response.



For directions on completing your proposal, refer to the table of contents in Part II – Proposal section. It is important that you comply with all the requirements by completing the documentation as specified and submitting a proposal in accordance with the RFP. Failure to do so will result in your proposal not being considered. All proposals submitted will be carefully reviewed and evaluated based on the criteria noted in the attached document. All participants will be notified that their proposal was successfully received.

Please submit any questions you may have regarding clarification of this RFP, to Jason Pacheco, RFP administrator at [jpacheco@bricmarketinggroup.com](mailto:jpacheco@bricmarketinggroup.com) and cc [kvkapich@sandiego.org](mailto:kvkapich@sandiego.org); [kyap@sandiego.org](mailto:kyap@sandiego.org) and [garroyo@sandiego.org](mailto:garroyo@sandiego.org) by **Friday, February 23, 2024 no later than 5:00 p.m., Pacific Standard Time (PST).**

Sincerely,

A handwritten signature in black ink, appearing to read "Kerri".

Kerri Verbeke Kapich  
Chief Operating Officer  
San Diego Tourism Authority

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**Request for Proposal**

**BRAND AGENCY  
CREATIVE & MEDIA SERVICES**

**PART I**

**BACKGROUND**

## 1. OVERVIEW

San Diego Tourism Authority (“SDTA”), a nonprofit corporation, is inviting selected agencies to respond to our Request for Proposal (“RFP”) for a Brand Agency of Record (“AOR”) to provide creative and media services.

## 2. RFP PURPOSE

The purpose of this RFP is to seek and retain a qualified brand agency of record responsible for general account stewardship including strategic planning, advertising campaign development and management, production and creative services, media planning and buying; including Domestic U.S. and Global markets, promotional and added value elements, and research insight and analytics including market research, advertising awareness and ROI to increase brand awareness and consideration for the San Diego Tourism Authority (SDTA).

## AGENCY OBJECTIVES

### PRIMARY

Plan, develop, execute, and track results for SDTA’s brand advertising program.

1. **Brand Management:** Strategic stewardship of SDTA’s advertising activities, creative brief development, account service and planning review, monitor and manage budgets and timeline.
2. **Marketing and Advertising Planning:** Develop recommendations for an Advertising Plan that supports the strategies set forth by SDTA. Including Strategic Direction, Creative Strategy, Brand Stewardship, budget management and financial accountability.
3. **Media Buy:** Execute the media plans presented in the Advertising Plan and approved by SDTA. Execution includes overall management of campaigns, trafficking advertising deliverables, maintaining media optimizations, provide monthly reporting and performance insights, manage cancellations, auditing and payment to media vendors.
4. **Creative Development/Production:** Concept creative materials/campaign elements including concepting, copywriting, art direction, production and traffic coordination as described in the Advertising Plan. Once approved, produce and traffic final approved advertising materials to run/air on behalf of SDTA.

## SECONDARY:

- **Research:** Work with SDTA's Research and Brand Marketing team in implementing advertising awareness tracking and ROI measurements, brand health research, target market research, audience development analysis and other projects as needed.
- **Account Stewardship:** Attend SDTA's board meetings as requested, prepare quarterly reports, a fiscal year end recap and a monthly budget recap. Arrange for storage and shipment of materials and documents as directed by SDTA.
- **Miscellaneous:** Provide creative input and support for other projects and work collaboratively with other SDTA agency vendors both global and domestic.

## 3. CONTRACT TERM

SDTA is seeking a 3-year contract and the initial contract term may be pro-rated depending on the completion of this RFP. Following the expiration of the initial contract term, both parties may, at their mutual discretion, agree to extend the contract for an additional year upon terms to be negotiated. All contracts are subject to review by the San Diego Tourism Authority (SDTA).

This project will be awarded upon signing an agreement or contract outlining terms, scope, budget, and other necessary items. The San Diego Tourism Authority (SDTA) will negotiate any additional terms upon selection, including but not limited to a non-disclosure agreement. Final terms of the contract would be agreed upon once the agency partner is selected.

## 4. EVALUATION PROCESS & CRITERIA

SDTA will form a selection committee to review, evaluate and score the written proposals. Evaluation of submissions will be based on the criteria shown for each component; each criterion will be scored according to the degree of responsiveness presented in the evaluation proposal. The criteria for the scoring of the proposals are included as **Attachment B - Written Proposal Evaluation Criteria**.

The top finalists chosen by the selection committee will be asked to provide an oral presentation. All proposers and key team members working on the account should ensure they are available during the dates presented in the Tentative Schedule. After the oral presentations, there will be a question, and answer period. You will be notified of the total presentation time. In addition to key management, key personnel performing day-to-day activities will be requested to attend.

*Please note: Upon completing the selection process under this RFP, SDTA will notify the winning Proposer and all other Proposers who were not selected. SDTA's deliberations are confidential. Accordingly, while we understand that non-selected proposers may wish to*



*ascertain reasons for their non-selection, SDTA is unable to respond to any subsequent questions and/or requests for information as to why a company was not selected.*

## 5. SCHEDULE

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

FEBRUARY 14, 2024	PUBLIC ANNOUNCEMENT OF RFP
<b>FEBRUARY 23, 2024</b>	<b>DEADLINE FOR AGENCIES TO SUBMIT QUESTIONS</b>
BY MARCH 8, 2024	ANSWERS TO Q/A SENT TO ALL PROPOSERS
<b>MARCH 29, 2024</b>	<b>DEADLINE FOR AGENCIES TO SUBMIT A PROPOSAL</b>
APRIL 1 – 12, 2024	SELECTION COMMITTEE EVALUATES PROPOSALS & NOTIFICATION TO FINAL CANDIDATES
WEEK OF APRIL 15, 2024	WRITTEN REVIEW AND FINALIST SELECTION
WEEK OF APRIL 22, 2024	PRE-CALLS WITH FINALISTS
<b>JUNE 5 - 6, 2024</b>	<b>FINALISTS IN-PERSON PRESENTATIONS</b>
WEEK OF JUNE 17, 2024	ANNOUNCEMENT OF WINNING BID AND INITIATE CONTRACT NEGOTIATIONS
JULY 1, 2024	SDTA FY 2025 BEGINS COMMENCEMENT DATE OF NEW CONTRACT TO BE NEGOTIATED

## **6. BUDGET**

SDTA's annual estimated budget for this Scope of Work shall be approximately \$32-35 million inclusive of agency fees, media buying and creative production.

This budget also includes brand creative AOR compensation and bonus for services outlined in this Scope of Work. Services include concepting, ideation and strategy for the brand advertising campaigns by third party AOR contractors, including local market concept adaptation.

AOR compensation does not include costs related to tactical development and execution of Creative such as third-party vendor costs including photography, film production, usage including talent, music, etc.

SDTA reserves the right to adjust both the budget and related services.

## **7. PAYMENT**

The budget for this contract is established annually upon the signing of the Service Agreement by both parties. All payments shall be made in U.S. dollars. This includes but is not limited to all programs, account administration, and out-of-pocket costs.

## **8. FINANCIAL STATEMENT**

Proposers must provide evidence of financial stability. In addition, the proposer must document sufficient financial statements or audit reports.

Please provide:

- Income Statement; and
- Balance Sheet

Financial Statements must be the most current annual statements available, along with any subsequently produced interim or quarterly statements. Financial statements are to be submitted in a sealed envelope. After review, all financial statements will be destroyed or returned to Proposer.

Financial Statements are not required to be audited.

At its sole discretion, San Diego Tourism Authority (SDTA) may reject any proposal based on its subjective appraisal of the proposer's financial stability.

## 9. REFERENCES

Provide three current client references and one client who has left the agency in the past 1-2 years. If possible, the references should be organizations that worked with the same key account team members that will be servicing SDTA's account. For current clients, provide a contact name, contact information, and a description of services and number of years as a client. For the former client, provide all of the above plus a brief description of why they switched agencies.

## 10. PROPOSAL COSTS & RESERVED RIGHTS

Costs for developing proposals and related presentations are entirely the proposer's responsibility and shall not be reimbursed by SDTA.

All proposals submitted shall become the property of SDTA and shall not be returned to the Proposer. SDTA 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; and
- Not select a vendor and award a contract from this RFP.

SDTA shall retain the RFP, and all related terms and conditions, exhibits and other attachments, in their original form in an archival copy.

## 11. OFFICIAL CONTACT

SDTA requests that the Proposer designate one person to receive all communications for clarification and verification of information related to this proposal. Please identify this point of contact in your written proposal.

## 12. THIRD-PARTY AGENCY

BRIC Marketing Group, an independent third-party agency, has been contracted to coordinate and execute all administrative functions that include distribution, collection of information, and communication pertaining to the RFP process. **Please DO NOT contact SDTA directly with any questions regarding this RFP.**

### 13. SUBMISSION INSTRUCTIONS

**ALL PROPOSALS ARE REQUIRED TO BE SUBMITTED BOTH ELECTRONICALLY AND BY HARDCOPY WITH DELIVERY BY MARCH 29, 2024 (DEADLINE DATE).**

Electronic versions of the proposal must be in PDF format and e-mailed to:

**Jason Pacheco**  
**RFP Administrator**

Email address: [jpacheco@bricmarketinggroup.com](mailto:jpacheco@bricmarketinggroup.com)

With a carbon copy (cc) to:

[kvkapich@sandiego.org](mailto:kvkapich@sandiego.org); [kyap@sandiego.org](mailto:kyap@sandiego.org); [garroyo@sandiego.org](mailto:garroyo@sandiego.org)

Twelve (12) hard copies of the proposal, should be sent by courier (i.e., FedEx, UPS) to:

**San Diego Tourism Authority**  
**Request for Proposal: Brand Agency RFP**

Attn: Ms. Gabby Arroyo- Barrales  
750 B Street, Suite 1500  
San Diego, CA 92101

Proposals received after the Proposal Due Date and Time will be considered late and shall not be accepted.

All questions and requests for additional information and submission concerning this RFP should only be directed to:

**Jason Pacheco**  
**RFP Administrator**

Direct : +1 707 815 4200

E-mail : [jpacheco@bricmarketinggroup.com](mailto:jpacheco@bricmarketinggroup.com)

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**BRAND AGENCY  
CREATIVE & MEDIA SERVICES**

**PART II**

**SCOPE OF WORK**



## 1. BRAND AGENCY SCOPE OF RESPONSIBILITIES

### CORE AREAS 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 and understanding of brand in a global marketplace, and the shifting dynamics of how consumers receive and use information today.

- **Strategic Planning:** Give us an overview of your strategic account 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 and promotional efforts, into the overall strategy.
- **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.
- **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 are the determining elements that make your purchasing decisions? Optimization strategy? Co-op Strategy? Give us an overview of your philosophy as it relates to planning and buying media domestically and internationally, for a budget of our size and tracking/optimizing metrics similar to those used by SDTA.
- **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?
- **Research & Analytics:** Provide an overview of how you determine success. 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.

## 2. BRAND AGENCY SCOPE OF WORK

- Provide advertising planning and brand stewardship throughout the length of the engagement, including overall strategic direction, creative strategy, and media strategy domestically/globally.
- Provide annual marketing and competitive analysis, as well as industry and competitive insights, to inform the strategic direction of the program of work.

- Provide guidance and collaboration within larger holistic research discipline to shape and inform program of work tracking and measurement of ROI.
- Provide creative services, including development and production of brand advertising, content, and consumer promotions.
- Provide media planning and buying services, including negotiating, buying, optimizing, reconciling, auditing, billing and payment.
- Provide 24/7/365 access to campaign management and analytics via a dashboard to demonstrate effectiveness of each campaign against established KPIs.
- Provide campaign analytics reporting based on the needs and timing of each digital campaign; including monthly, mid-campaign and final campaign reports.
- Oversee all project management to ensure program of work meets expectations from a timing, budgetary and quality standpoint.
- Produce informative and engaging materials to present at BOD and Committee meetings.
- Adhere to SDTA policies, process and standard approval timelines for contracts, check requests and payment unless prior approval and consent has been provided by SDTA staff.

### **Brand Advertising Planning and Research**

- Development of annual brand advertising plans for domestic/international markets and dynamic updates as needed.
- Alignment with SDTA research to collaborate and apply findings and industry trends and develop appropriate and agreed to measures for brand advertising program of work.
- Collaborate with SDTA and external research partners to conduct market research to inform creative direction/ideation.
- Collaborate with SDTA earned and owned teams to develop integrated cross-channel programming.

### **Brand Stewardship**

- Serve as primary contact and provide project management and general strategy support for brand advertising program of work across markets.

- BOD or stakeholder presentation preparation as required throughout each fiscal year, including creating portions of presentation decks, writing and/or providing key inputs gathering necessary materials required for presentations and reporting.
- Overall management of AOR Team, including AOR global subcontractors, coordinating schedules, communicating project status, managing account administration, and ensuring best practices are followed.
- General administrative account oversight including preparation and delivery of status reports, meeting notes, estimate/work order approvals, media authorization approvals, etc.
- General financial management including billing coordinator to provide monthly invoicing and supporting documentation for AOR and all subcontractors, budget tracking and budget forecasting.

### **Media Planning and Buying**

- Lead media planning process and development and execution of annual paid media plans for all domestic/ international markets including consumer direct and trade audiences (Professional Meetings, Groups and Event Planners, Travel Trade)
- Development and updating of media flowcharts as needed/requested and at minimum monthly.
- Review and provide recommendation on strategic partnership opportunities (e.g., Brand USA) as needed.
- Review and provide evaluation of global media opportunities as requested.
- Auditing of media invoices from all AOR subcontractors and vendors, including, but not limited to:
  - Comparing each invoice to terms of agreement, work orders, media authorizations and noting any discrepancies;
  - Confirming that any work invoiced has been completed per terms of the agreement, including that those items have been received, item quality, item quantity, individual and total charges, etc.;
  - Ensuring invoices include complete and comprehensive descriptions for each line item, and that an audit trail exists for tracing all expenses back to Client's work authorization; and
  - Ensuring that all media ran according to terms and that any credits have been properly calculated and credited.

- Attending internal SDTA staff meetings (as needed) to provide media intelligence, recommendations and thinking.
- Partnership development with key media vendors to enhance overall value and surface new opportunities for SDTA (e.g., Trip Advisor, Skift, OTA Partners, etc.)

### **Creative Concepting, Development and Execution**

- Concepting, development and execution of brand, consumer, meetings & groups and trade advertising campaigns including offline (e.g., television, print/magazine, out-of-home) and digital (e.g., video, rich media, flash/static banners, social) globally
- Serve as primary brand stewards globally advising SDTA and its other consultants as required.
- Oversight of AOR subcontractors for development and execution of brand advertising campaigns, including local market ideation, programming, and adaptation of client's brand advertising assets.

### **Deliverables**

- Status reports in conjunction with designated SDTA integrated status meetings.
- Meeting notes/conference reports.
- Media flowcharts.
- Annual media leverage and added value report.
- AOR points-of-view (POVs).
- Competitive spending reports (annual).
- Monthly trend reports.
- Digital campaign reporting and analytics.
- Production estimates (for hard costs).
- Work orders.
- Media buy authorizations.
- Monthly budget tracking report.
- Monthly invoices provided by the end of each month.
- Presentations (as required).
- Annual work plan.
- Creative briefs.

- Media briefs.

## **Brand Advertising Activities**

### **Objectives**

- Foster awareness of San Diego, to drive awareness, consideration, and conversation to travel to San Diego.
- Support City of San Diego and San Diego Tourism Marketing District Hotels to drive greater economic impact.
- Create engagement with SDTA branded content across channels to drive interest, investigation and sharing.

### **Scope**

- Media strategy and planning: development of annual strategic media plans, with refinements as necessary throughout the fiscal year.
- Program buy-in presentation of media strategy and media plans to members of client team and other client Consultants as needed.
- Media operations: deployment of approved media connections plans, including:
  - management and oversight of external buying agencies;
  - negotiation and placement of cross-channel media programs (e.g., television, print, digital, out-of-home, social); and
  - negotiation and placement of co-op buys when applicable.
- Creative concepting, production and deployment: development and execution of annual brand advertising/branded content campaigns with refinements as necessary throughout fiscal year, including:
  - Shooting/producing brand television commercial(s) and other branded video content;
  - Estimating and invoicing talent costs for all applicable uses domestically and internationally;
  - Management and monitoring of asset usage rights and lifecycles;
  - Trafficking dubs to cable and broadcast TV networks both domestically and internationally according to approved media buys;
  - Developing and producing website content as dictated by content and media plans;



- Designing and producing digital advertising executions as dictated by media plans;
- Designing and producing other advertising executions (e.g., print, out-of-home) as dictated by media plans;
- Overseeing agency subcontractors for development and execution of brand advertising campaigns;
- Updating Brand Guidelines as needed for key targets including leisure and international travelers, meeting planners;
- and delivering final creative/art files for SDTA archiving.

### **Domestic and International Program Components as Applicable:**

- National or spot market television – cable, broadcast, specialty, network, video-on-demand, OTT.
- National digital – online television, video, display, social, SEM and/or other digital tactics.
- Digital co-op program(s).
- Out-of-home (including experiential activations)
- Print.

### **Campaign Management & Analytics:**

#### **Objectives**

- Provide detailed and comprehensive analysis of historical data to determine the effectiveness of each campaign in terms of key ROI metrics.
- Track and analyze SDTA's marketing program to understand how it is working against established campaign objectives, as well as the overarching goal of increasing key ROI metrics.

#### **Scope**

- Provide SDTA access to AOR analytics dashboard, for campaign performance data in alignment with designated campaign metrics and KPIs.
- Provide digital campaign management, analysis and reporting, including time-specific brand and cooperative campaigns, and ongoing annual campaigns (social/SEM) Media RFP only.
- Provide annual advertising effectiveness and ROI research support, including:

- Briefing research vendor(s) on annual program of work;
- Guiding questionnaire development;
- Providing creative assets for testing ;
- Reviewing surveys in advance of launch;
- Providing media spend by market;
- Participating in research debriefs; and
- Providing analysis and recommendations for program of work adjustments based on research findings.

**Campaign KPIs** *(For example, current tracking by campaign objectives and strategies but could include):*

- **Delivery KPIs:**
  - Impressions.
  - Percentage Delivered (against goal).
  - SOV%.
- **Engagement KPIs:**
  - Visits / Cost-Per-Visit.
  - Time on Site.
  - Actions (e.g., partner referrals, downloads, shares, etc.).
  - Action / Engagement Rate.
  - Completion Rate (e.g., Pre-Roll).
- **Content KPIs:**
  - Views.
  - Completion Rate (long form).
  - Percentage complete.
  - Average duration viewed.
  - Engagement rate.
- **Social KPIs:**
  - Clicks.

- Likes.
- Shares.
- Comments.
- Actions (total).
- Action rate.
- **Efficiency KPIs:**
  - CPC.
  - CTR%.
  - Clicks.

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**BRAND AGENCY  
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**PART III**

**PROPOSAL STRUCTURE**

## **1. PROPOSAL CONTENT**

Your proposal shall contain the following sections and/or items in the order in which they appear:

- Executive Summary
- Company Background
- Company Management & Staff
- Active Client Listing
- Understanding Scope of Work
- Proposed Strategies to Drive Destination Demand
- Buying Power/Media Discounts/Negotiating
- Partner Engagement
- Data Base Tools for Media Tracking & Reporting
- Team Approach
- References
- Budget Form – Pricing & Fees (See attachment A) and;
- Annual Report and/or Financials

Please ensure your proposal includes the following:

- A detailed table of contents or index which lists each key section of your proposal;
- Page numbers; and tabs or other methods to identify key sections of your proposal.

Please also place sections of your proposal in the order they are presented within this RFP.

## **2. EXECUTIVE SUMMARY**

Provide an executive summary describing at a strategic level your agency's approach to working with SDTA. Highlight any unique skills or experience your team brings that would add value to SDTA's program. Summarize partner agencies you would engage (if any) on SDTA's behalf.

## **3. COMPANY BACKGROUND**

Please include the following items:

- A description of your company's primary services;
- The year in which your company was formed;



- Your company's experience in marketing and specifically any tourism experience you may have, if applicable;
- The California office address from which the primary work on the contract would be performed
- Numbers of total employees;
- Please list locations of all of your domestic and global offices (if applicable)
- List of research companies / services to which your agency subscribes.

#### **4. COMPANY MANAGEMENT & STAFF**

Please include the following items:

- The contract manager 'lead' for this scope of work
- The individuals who will be conducting the day-to day work; and
- Team structure and location assigned to SDTA business

For all individuals assigned to this account, please provide:

- Current resumes and/or biographies demonstrating qualifications related to this RFP
- Length of time with your company
- Account roles and responsibilities
- Percentage (%) of time they will be spend on the SDTA account

Please describe any services and/or media expertise that may be provided by third parties.

#### **5. SUB-CONTRACTORS**

Please identify all proposed subcontractors for work that exceeds USD \$5,000 annually. For each sub-contractor:

- Document which portions of service they will perform;
- Describe their ability to perform the work;
- Provide the name and background of their company, if applicable; and
- Provide resumes and/or biographies of staff assigned to your account.

## 6. ACTIVE CLIENT LISTING

Provide a listing of your top 10 active clients (ordered by agency billings), noting organization name, years as client, and category of services provided. Please indicate where SDTA would fall in relative size (spend) as a client.

## 7. UNDERSTANDING THE SCOPE OF WORK

Account planning and research disciplines are critical aspects of this Scope of Work. Provide an overview of your approach to the management of the SDTA account. Include an annual scope of work describing the services you would offer as Agency of Record. Note any additional optional services you think could be of value and indicate if they would be included in the annual SOW or available as needed at an additional cost.

## 8. PARTNER ENGAGEMENT

Identify any partnerships and/or relationships you propose in order to meet RFP requirements. Provide ownership information for any partner agency. Describe how the partner agency works as part of your team on behalf of clients and if they are client facing or behind the scenes. And provide detail on what the partner agency provides and how you expect the partner agency to work with SDTA.

## 9. BUDGET FORM – PRICING & FEES

A complete Budget Form must be included, and you must include compensation information (**Attachment A - Budget Form**) and should detail administrative and overhead costs associated with managing the SDTA account. All costs related to the Scope of Work must be included in the format provided.

- **Account Management/ Agency Fees:** Including strategic planning, budgeting, buying, analysis, segmentation, reporting, educating and optimizing support across all channels. Provide detailed responses and assumptions of what services are included and separate by breaking out by channel if appropriate.
- **Media Commission (if applicable):** Include breakdown of media commissions by medium or media type.
- **Production Fees (if applicable):** Including assumptions across digital and OOH platforms and channels.
- **Other Fees:** Provide detailed pricing for all fees that were not included above. Please describe if there are any setup or onboarding fees for transitioning services.
- **External Partner Management Fees (if applicable):** Please include a separate menu for the management of third-party agencies.

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**PART IV**

**ATTACHMENTS**

**ATTACHMENT A**  
**BUDGET FORM - BRAND AGENCY**

**FINANCIAL / PRICING STRUCTURE**

Element	Description
<p>Given an overall budget of,\$32 - \$35 million, what percentage of this amount would your firm allocate to your compensation for the services outlined in the Scope of Work (pages 14 – 21)</p> <p>Please discuss the details of how you calculated your compensation percentage. E.g., commissions, hourly rates and billings, etc., and any other details which may help us compare your compensation to that of other agencies.</p>	
<p>Please describe the services that are included in your fees (i.e., strategy, implementation and ongoing management activities, research, billing/post buys etc...)</p>	
<p>Please provide any other information that will help us better understand your fees and pricing including in-house production support, compensation structure and mark up or buyouts where applicable.</p> <p>Please also include why you believe your structure is the most competitive and/or how it differentiates your company from your competitors.</p>	

**STAFFING BUDGET**

Title	Years with Company	Years in RFP Field	Hourly Rate	% Time Assigned to Account
			Total FTE's	

<b>STAFFING BUDGET (with sample data)</b>					
<b>Department – Position (examples)</b>	<b>Years with Agency</b>	<b>Years of Experience in Field</b>	<b>Hourly Rate</b>	<b>Annual Hours Applied to Account</b>	<b>% Time on Account</b>
Brand Management					
Director	5	10	\$100	2080	100%
Project Manager	6	8	\$80	1520	75%
Research					
Director	10	15	\$100	1080	50%
Analyst	8	8	\$75	520	25%
Creative					
Director	4	14	\$100	2080	100%
Manager	7	11	\$80	1520	75%
Media					
Sr. Media Planner	6	7	\$125	520	25%
Coordinator	1	1	80	1520	65%
Finance					
Billing Coordinator	1	7	\$75	1080	100%



## ATTACHMENT B

### WRITTEN PROPOSAL EVALUATION CRITERIA

Written proposals will be reviewed, evaluated, and scored by a selection committee. The selection committee may, if they deem necessary, select certain proposers for oral interviews. Interviews apply only to the top finalists, as determined by the selection committee. Evaluation of written proposals will be based on the following criteria.

	Max. Points	Score
<b>1. OVERALL EXPERIENCE OF FIRM</b>	20	
Our evaluation will include an assessment of such items as the history of your agency and team members, your experience as it relates to the requirements within this RFP, evidence of past performance, and related items.		
<b>2. SCOPE OF WORK</b>	25	
Our evaluation will assess your understanding of the scope of work and capabilities for promoting the San Diego Brand to targeted audiences including strategic planning, media solutions, creative development, and reporting.		
<b>3. CREATIVITY</b>	20	
Our evaluation will include an assessment of your approach to creative development, production and integration with media and research.		
<b>4. QUALIFICATIONS OF TEAM</b>	15	
Our evaluation will include an assessment of the qualifications, experience, and creativity of your managerial team, staff, subcontractors, and related items.		
<b>5. COST EFFECTIVENESS</b>	20	
Proposed compensation and structure. Evaluation of the maximum services provided in relation to the fees charged and the value of the overall project. The proposed budget is reasonable and appropriate.		
<b>TOTAL POINTS</b>	<b>100</b>	