



## **Request for Proposal (RFP): DESTINATION MASTER PLAN**

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<b>Issued by:</b>	<b>San Diego Tourism Marketing District Corporation</b>
<b>Contact:</b>	<b>Mr. Lorin Stewart, Executive Director</b>
<b>Date Issued:</b>	<b>September 3, 2014</b>
<b>Response Deadline:</b>	<b>September 19, 2014</b>
<b>Proposal Deadline:</b>	<b>October 17, 2014</b>

*This Request for Proposal is confidential and proprietary to the San Diego Tourism Marketing District Corporation.*

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## **Overview**

The San Diego Tourism Marketing District Corporation invites proposals from established consulting firms for the development of a 20-year tourism master plan for San Diego, with the possibility of one or more updates at 5-year intervals. The purpose of the 20-year tourism master plan is to provide a roadmap to maintain and enhance San Diego's lodging industry's competitive positioning relative to other desirable tourism destinations and to anticipate the future state of tourists' needs and tourist markets. The current and future needs of group meetings and conventions are also a priority, as well as growing future markets such as China.

The ideal consulting firm will have expertise in the field of destination and resort planning and a successful track record with the complexities of multiple public and private stakeholders. A successful tourism master planning process would possibly result in additional services required approximately every five years in order to update the master plan.

As used herein, the term "TMD" / "SDTMD" shall refer to the San Diego Tourism Marketing District Corporation, a nonprofit, mutual-benefit corporation formed by the San Diego lodging industry that is dedicated to improving lodging room night consumption in the City of San Diego.

**Negotiations.** Proposals, negotiations, discussions, demonstrations and tests may or may not be entered into or required of bidders submitting proposals, which in the sole judgment of the TMD are worthy of continued consideration.

**Non-Disclosure.** All information about San Diego, tourism stakeholders and respective businesses and organizations in greater San Diego included in this Request for Proposal (RFP) and all Appendices attached hereto should be considered proprietary information. The TMD requires you to keep this information confidential. It is the TMD's express wish to partner with a few select providers. No news release, public announcements, or reference to this RFP or any phase of the project described herein, shall be made without the prior written consent of the TMD.

## **Proposal Terms, Requirements and Instructions**

### 1. Schedule of Activities

1.1 Upon receipt of this request, Bidder will contact the party in 8.2 below to provide the Name, Title, Mailing Address, Phone and Fax numbers for a single, central contact within the Bidder's organization for coordination of all questions, clarifications and follow-up requests.

1.2 Following are key dates for this proposal. The TMD, may, at its discretion, extend these dates.

<b><u>Activity</u></b>	<b><u>Completion Date</u></b>
Notification of intent to submit	September 19, 2014
Submission of Questions/ Additional Data Requests	October 3, 2014
RFP Closing Date	October 17, 2014
Contract award target date	October 31, 2014

### 2. PROPOSAL SUBMISSION

2.1 Completed proposals must be submitted to the TMD by 5:00 p.m. on October 17, 2014. Send one electronic copy on a CD and 3 hard copies to the following address. Facsimile proposals will

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not be considered.

Mr. Lorin Stewart  
Executive Director  
San Diego Tourism Marketing District Corporation  
8880 Rio San Diego Drive, Suite 800  
San Diego, CA 92108  
(619) 209-6108  
[lstewart@sdtmd.org](mailto:lstewart@sdtmd.org)

2.2 Bidders have the sole responsibility for delivery of their proposal on or before the deadline. Proposals received after the time specified will be considered late and may be disqualified at the TMD's discretion.

2.3 Bidder's responses to this RFP become the property of the TMD. Under no circumstances is the TMD bound to return or destroy bidder proposals. Regardless of the Bidder selected, the TMD reserves the right to use any information presented in the proposal to the TMD's benefit. Proprietary information submitted in this RFP must be so identified by the Bidder.

### 3. COMPLETENESS OF PROPOSAL

3.1 Prior to the submission of Bidder's proposal, Bidder shall make and be deemed to have made a careful examination of the scope of the RFP. Bidder should become informed as to the requirements detailed in the RFP and will be required to comply with all applicable codes and regulations.

3.2 Bidder must identify the RFP name on its proposal and the proposal must be signed by an authorized official of Bidder's company.

3.3 Bidder must comply with all terms and requirements identified in the RFP.

3.4 If Bidder rejects any of the provisions of this RFP, Bidder must identify the rejection(s) clearly at the beginning of its response and must specify reason(s) for rejected provision(s), offer an alternative to the rejected provision(s), and explain how Bidder's alternative(s) will provide equal or better functionality. Unless rejection(s) are specifically noted by Bidder, Bidder will have been deemed to have accepted all terms and requirements identified in the RFP.

3.5 Bidder's proposal must contain the answers to all questions posed in all sections of this RFP. Bidder should answer questions as concisely as possible. This can be accomplished by filling in the appropriate response after each question in the RFP. Failure to address any of the requirements in this RFP could subject Bidder's proposal to rejection.

### 4. REVISION TO RFP

4.1 In the event it becomes necessary to revise any part of the RFP, an addendum will be provided to all Bidders who received the original RFP. Any written addendum required under the terms set forth in this RFP shall be given and be deemed to have been duly served if delivered electronically by email to the designated representative of the Bidder .

4.2 The TMD reserves the right to issue revisions to this RFP at any time prior to the closing date.

5. EVALUATION AND SELECTION CRITERIA

5.1 The TMD will use the following criteria to evaluate each proposal.

- Knowledge of the applicable field of expertise and applicable practices.
- Technical capabilities of the vendor.
- Adequacy and completeness of the proposal with regard to the information specified in this RFP.
- Compliance with the terms, conditions, and other provisions contained in this RFP.
- Qualifications, financial position, and experience of the Bidder.
- Content of the Bidder's proposal.
- Proposed pricing in Bidder's proposal.
- Information supplied by references provided by the Bidder.
- Abilities of resources assigned to project by Bidder.
- Creativity and completeness of Bidder's proposal and alternative proposals.
- Knowledge of tourism planning, destination and resort development and master planning, and long-term strategic planning

5.2 Results of this analysis will be the major influencing factor in the decision making process. However, without knowing the exact circumstances that will exist at the time of the decision, other factors may also influence the decision.

6. COST OF PROPOSAL

6.1 The TMD will not assume any expense incurred by Bidder in preparation of the response to this RFP and also will not return the proposal to the Bidder after a decision is made.

7. STANDARD PROVISIONS

7.1 This RFP is not an offer to enter into an agreement with any party, but rather a request to receive proposals from persons interested in providing the services outlined within this request.

7.2 Oral and written communications between the TMD and Bidder on the subject matter of the RFP or Bidder's proposal during the selection process will not be legally binding.

7.3 Bidder proposals shall be considered and treated by the TMD as offers to enter into an agreement.

7.4 Proposals submitted in response to this RFP should not be construed as an obligation on the part of the TMD to award a contract for any or all services. Failure of the TMD to select a bidder shall not result in any claim whatsoever against the TMD. If a contract does result from this RFP, the TMD reserves the right to award all items or any combination of items at the TMD's discretion.

7.5 Any additional or different terms and conditions proposed by Bidder are rejected unless expressly assented to in writing by the TMD.

7.6 The information contained in this RFP may change by either additions or deletions before actual issuing of a contract.

7.7 Proposals submitted in response to this RFP will be considered firm offers for a period of 120 days from bid close date. However, in the event Bidder reduces the price of any item or service provided in Bidder's initial bid response, Bidder agrees to immediately pass these reductions on to the TMD by submitting a revised proposal. Bidder warrants that prices provided in Bidder's proposal are no greater than prices being charged any other customer for similar services and schedules with similar specifications.

7.8 Bidder must strictly adhere to the delivery dates or lead times identified in Bidder's proposal. Failure to meet these delivery dates may constitute a material breach of Bidder's performance. If the TMD awards a contract to Bidder as a result of this RFP and subsequently is forced to procure additional or alternative services due to Bidder's inability to meet the established delivery date, Bidder will be responsible for any re-procurement costs suffered by the TMD.

7.9 The TMD and Bidder shall be excused from performance and shall not be liable for any delay in delivery or for non-delivery, in whole or in part, caused by the occurrence of any contingency beyond their reasonable control where the TMD and Bidder have exercised reasonable care in the prevention thereof.

7.10 Bidder acknowledges that Bidder is, and that the TMD relies upon Bidder as, an expert fully competent in all phases involved in the performance of the provisions of this RFP. The TMD neither accepts responsibility for, nor relieves Bidder from responsibility for the performance of, all provisions and terms and conditions of this RFP.

7.11 Bidder is responsible for the identification and interpretation of any applicable laws, regulations, and statutes that affect the delivery of goods and/or services specified in this RFP. It is the responsibility of Bidder to assure that these goods and/or services systems meet the requirements of those laws, including, but not limited to, the Employee Retirement Income Security Act, and the federal securities laws and all regulations and other guidance promulgated thereunder.

## 8. CLARIFICATIONS AND INTERPRETATION OF RFP

8.1 If Bidder discovers an inconsistency, Bidder should contact Lorin Stewart at (619) 209-6108 or via email at [lstewart@sdtmd.org](mailto:lstewart@sdtmd.org). Addenda will be provided to all Bidders per Section 4.1 above.

8.2 If Bidder has questions or requires clarification of the RFP, Bidder should submit Bidder's request to Lorin Stewart at (619) 209-6108 or via email at [lstewart@sdtmd.org](mailto:lstewart@sdtmd.org). A copy of each question submitted by Bidder along with the TMD's response will be provided to all Bidders who receive the original RFP either in writing or electronically by email. The questioning Bidder's name will not be revealed. The TMD reserves the right to not answer any or all questions as deemed appropriate by the TMD. Bidder must identify any proprietary information in any question that should be removed prior to the TMD providing a response.

## 9. NEGOTIATIONS AND CONTRACT AWARD

9.1 Upon receipt of this RFP document, Bidder shall cease any and all discussions regarding this RFP opportunity with all TMD personnel and Board Members and shall only communicate with the TMD per the instructions identified in Section 8.2 above.

9.2 In no event should the Bidder enter into discussions or negotiations concerning this RFP with any representative of the TMD during the bid process. Should the TMD determine that the Bidder will be considered further, a representative of the TMD will contact the Bidder to arrange for negotiation sessions to commence.

9.3 IMPORTANT: FAILURE TO COMPLY WITH THE REQUIREMENTS IDENTIFIED IN 9.1 AND 9.2 ABOVE WILL BE A BASIS FOR DISQUALIFYING A BIDDER'S BID.

9.4 The TMD reserves the right to negotiate with any and all Bidders who receive this RFP.

9.5 The TMD reserves the right to select, at its discretion, any proposal, or to reject any or all proposals submitted, or to defer the decision, or to enter into negotiations with any party to provide such services whether a recipient of the RFP or not.

## 10. CONTRACT REQUIREMENTS

10.1 If selected, Bidder shall provide to the TMD, within 14 days of selection, a draft agreement including a full description of the services to be provided by Bidder as outlined in the proposal. Bidder should also be prepared to include any or all statements made in Bidder's proposal or made during the negotiation sessions with the TMD. All general conditions of this RFP and its requirements may be included in any contract award at the TMD's discretion.

## Request for Proposal & Description of Services

### **Section I: Current Situation**

The purpose of this request is to secure an outside service for:

#### **SAN DIEGO TOURISM MARKETING DISTRICT CORPORATION:**

##### **Mission**

The San Diego Tourism Marketing District (SDTMD) is a nonprofit, mutual-benefit corporation dedicated to improving lodging room night consumption in the City of San Diego.

##### **Purpose**

SDTMD provides a private, nonprofit funding vehicle to stimulate City of San Diego lodging room demand through tourism promotion, marketing and advertising programs. The judicious allocation of these resources creates a positive economic impact on lodging businesses in the City of San Diego.

The SDTMD is seeking an established consulting firm to assist in the development of a 20-year tourism master plan for City of San Diego. The purpose of the 20-year tourism master plan is to provide a roadmap to maintain and enhance San Diego's lodging industry's competitive positioning relative to other desirable tourism destinations and to anticipate the future state of tourists' needs and tourist markets. The current and future needs of group meetings and conventions are also a priority, as well as growing future markets such as China.

The ideal consulting firm will have expertise in the field of destination and resort planning and a successful track record with the complexities of multiple public and private stakeholders. A successful tourism master planning process would possibly result in additional services required approximately every five years in order to update the master plan.

### **Section II: Description of Services Needed**

This section identifies the potential scope of this project and an overview of the services/deliverables to address. Listed below are the services that the TMD will expect from the Bidder and should be included in your pricing. Unless otherwise stated, it will be assumed your firm will be offering the full scope of each service, which will be included in your bid. Bidder is encouraged to recommend additional best practices not included herein, based upon the services they provide to existing clients.

Once a contractor is selected, a planning meeting will be held to determine the best plan for destination and key stakeholder research and a project launch followed by full-scale project management, adhering to an agreed upon timeline.

#### **Master Planning Expertise and Strategic Consulting**

Development of long-term recommendations for San Diego as a tourism and meeting destination that will increase the transient occupancy tax (TOT) for the City of San Diego to \$300 million by 2020, with subsequent continued growth.

- Written and electronic document as deliverables in the form of a 20-year master plan with a target completion date of June 30, 2015.
- Include maps and images for current and future state including site options
- Include community (realm) architecture style and color palette recommendations



- Prioritize needs based upon market opportunity and greatest current and future visitor impact
- Make recommendations regarding infrastructure needs
- Consider transportation implications and recommendations including air travel, train, car, and boat or ship
- Provide analysis of strengths, weaknesses, opportunities, threats (SWOT)
- Consider future meeting and convention needs as well as the planned expansion of the San Diego Convention Center
- Consider future retail and culinary trends and needs
- Consider future experience and nightlife needs
- Consider future medical tourism needs
- Consider future tech-industry needs such as biomedical and clean-tech
- Consider future research institution and university needs such as UCSD
- Consider any product shortfalls, inefficiencies, or desirability. For example, if San Diego has enough hotels, does San Diego have the right property style and mix to meet the needs of the future?
- Consider efforts to maximize the “economy of scale” between current organizations tasked with selling and marketing the City of San Diego such as San Diego Tourism Authority, the San Diego Convention Center Corporation, the Port of San Diego, the San Diego Sports Commission, etc. Seek to address any unnecessary organizational overlaps / redundancies in order to reduce the resulting operational frictions and marketplace confusions historically detrimental to selling and marketing the City of San Diego.
- Consider existing master plans and publicly-noticed projects for the Port of San Diego, Chula Vista and the South Bay, the San Diego/Tijuana Mega Region Border Project, Charger Stadium, the Gaslamp, Little Italy, as well as San Diego’s many beach communities. How can these plans be integrated to achieve the best result for lodging businesses in the City of San Diego?
- Market expertise and strategic consultation regarding best practices for long-term destination development, redevelopment and enhancement

### **Competitive Benchmarking**

- Provide information regarding best practices of tourism and resort destinations
- Competitive tourism destination suggestions include Hawaii, Orlando, Anaheim/Orange County
- Competitive meeting and convention destination suggestions include Chicago, Las Vegas, Los Angeles, San Francisco, Orlando and Anaheim.
- Provide relevant comparisons for before and after competitor master planning, as well as published information regarding impact and performance.

### **San Diego Current State Assessment**

#### Research

##### Stakeholder Interviews

- San Diego TMD Board of Directors and Staff
- Key Stakeholders as designated by TMD Staff
- San Diego Tourism Authority
- Port of San Diego
- San Diego Regional Airport Authority
- San Diego Convention Center Corporation
- San Diego top clients (i.e. Expedia, Comicon)
- City of San Diego

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- San Diego Economic Development Corporation (EDC)
- San Diego Chamber of Commerce
- Transportation providers
- Attractions (i.e. SeaWorld, San Diego Zoo, U.S.S. Midway)
- Hotel executives as assigned by TMD staff
- San Diego Restaurant Association
- Gaslamp Association
- San Diego Craft Beer executives as assigned by the TMD

#### Consumer Focus Groups

- Include focus groups from top feeder markets as assigned by the TMD in coordination with the San Diego Tourism Authority.
  - Examples include Los Angeles, Phoenix, San Francisco, Denver, Las Vegas
- If sub-contracted, the TMD must approve the third party research firm. Bidder to supply necessary background and references.

#### San Diego Mapping

- Assess and map realms of San Diego including, but not limited to:
  - The Big Bay
  - The Gaslamp
  - Little Italy
  - Bankers Hill
  - Hillcrest
  - Balboa Park
  - Point Loma
  - Mission Bay
  - Mission Valley
  - La Jolla
  - Interstate 15 Corridor (Rancho Bernardo)

#### Event Development

- Create and recommend concepts for sustainable, profitable events that San Diego could build over time.
- Consider seasonality of such events and hotel needs periods
- Consider existing events hosted by San Diego, profitability and ranking as provided by the TMD, and potential of these events to generate room night consumption in the City of San Diego.
- Consider events that have the greatest appeal to the top spending visitors, top feeder markets, and top clients. Conduct preliminary consumer quantitative testing or focus groups to support.
- Events should be on brand for San Diego and ownable ... seen as a "proper fit"
- Events may be related to niche groups/enthusiasts, sports, culture, culinary, entertainment/music, or any other viable concept.
- Examples of such destination-owned events are Coachella in Palm Springs, the Surfing Championships in Huntington Beach, New Year's Eve in New York City or Las Vegas, or the New Orleans Jazz Festival.
- Strong event concepts would draw from out-of-town areas and drive room nights for hotels. It's important to factor overnight draw in to the quantitative or focus group research related to event concepts.
- San Diego's assets such as the high-tech industry, clean-tech industry, biomedical industry, research institutions and universities, medical tourism, number of beaches and golf courses, availability of gaming, and booming craft beer industry could all be considered.
- San Diego also has one of the largest "Pride" festivals in the U.S., thus offering strong appeal for the LGBT community of travellers.

### **Icon Concept Development**

- Develop concepts and location recommendations for an icon that would be memorable and unique to San Diego, similar to the Golden Gate Bridge, the Hollywood Sign, or the St. Louis Arch.
- San Diego lacks the anchor of an iconic image that is a unique identifier for the location.
- San Diego seeks to set itself apart and create a strong visual connection with travellers' "must do" or "bucket list."
- All visitors should seek to take a photo/selfie and share the icon through social media. All visitors should aspire to see the San Diego icon.
- Consider San Diego's history, culture and brand personality
- Consider multiple sites prior to making recommendations
- Provide multiple concepts including artist renderings

### **San Diego Attribute Development**

- San Diego has often been described as "vanilla" during consumer focus groups during the ranking process of destination attributes. Example attributes are as follows-
  - Nightlife
  - Culinary Experiences
  - Theme Parks
  - Good Places to Take Children
  - Cultural Attractions
  - Sports
  - Beaches
  - Sunny Weather
  - Beautiful Scenery
  - Good Places for Couples/Romance
  - Beer Scene/Wine Scene
  - Hiking/Nature
  - Water sports/boating
  - Shopping
  - Sightseeing
- TMD and the San Diego Tourism Authority may choose to provide examples of the most recent brand attribute research.
- Bidder should consider this feedback and provide recommendations regarding which destination attributes San Diego should strive to own and which future enhancements would secure strong positioning.
- Example – Orlando owns the position as the destination for theme parks.

### **Meetings and Presentations to Key Stakeholders**

- Bidder will be expected to provide in-person updates per the agreed upon timeline. These meetings are intended to serve as checkpoints in the process, seek client feedback, and engage key stakeholders.
- Bidder may be expected to present the recommendations and the San Diego 20-Year Tourism Master plan to individuals or groups as directed by the TMD. Such groups may include, but not limited to the TMD Board of Directors, San Diego Tourism Authority Board of Directors, or the San Diego City staff or City Council, as well as various County authorities.

## Bidder Response Information

### Section I: General Bidder Information

1. BACKGROUND
  - a. Provide a brief summary describing your organization, its history, structure and ownership. Include the full name, address and phone number for your corporate headquarters. Provide a copy of your most recent annual report (or report to employees/partners.)
  - b. How long your company has provided these consulting services and what percentage of your organization's business do these services represent?
  - c. What is total number of organizations for whom you provide each of these services? How many people do you employ to handle these services?
2. REFERENCES
  - a. Provide four (4) references from clients for which you provide these services.
  - b. Provide two (2) clients for which your company lost projects in the last two (2) years, and the reason(s) why.
3. FINANCIAL RATING
  - a. Provide a copy of your company's latest audited financial statements (for year-end and the most recent quarter).
  - b. Describe any actions that any financial institution, local, state, federal agency or private organization has made or taken with respect to your organization or parent company.
4. ORGANIZATIONAL COMMITMENT
  - a. Does your firm plan to outsource any activities related to this bid to any third parties? If so, list any third parties employed and describe the functions they perform. Describe contractual arrangement with third party.

### Section II: Services

1. Describe your overall processes for each of the services requested.
2. Describe your approach to the services requested. Include an overall plan that incorporates timeline/key deadlines, actions, critical decision points, resources required and any associated risks.
3. Describe your understanding of the TMD's role in the process and the required time commitment.

### **Section III: Project Management**

1. Describe your project management plan and process, philosophies, and experience proposed to handle this project.
2. Outline your vision of the San Diego 20-Year Tourism Master Plan development including the number of representatives, the hierarchical level they represent, years of related experience, and additional qualifications.
3. What is the procedure for selecting and assigning the project manager(s) to client organizations? How many clients do your project managers handle? What are your project management "back up" arrangements?
4. What method does your organization normally use to communicate "best practices" to its clients?
5. How does the project manager educate and communicate with staff regarding contract specifications?

### **Section IV: Controls/Systems/Security**

Describe your hardware and software environment including software platform, system architecture.

1. What measures does your organization take to ensure the confidentiality of your client's data (e.g., confidentiality agreements with stakeholders, clients, third parties, etc.)?
2. What is your preferred format for receiving data or information?
3. Do your electronic data communications currently comply with HIPPA regulations?
4. Describe your security measures for data transmission.
5. What type of disaster recovery plan do you have for service and data recovery?

### **Section V: Pricing**

1. Please provide a not-to-exceed fee for the San Diego 20-Year Tourism Master Plan. Each quoted fee should be supported with a rate schedule that details the titles and responsibilities of personnel who will be performing this work. Fees should also include the level of consulting, system programming, or technical advice needed to complete the services requested in this RFP and all outside supplier expenses if applicable.
  - a. San Diego 20-Year Tourism Master Plan Development including the entire scope of work noted in the RFP document.

Total Not-to-Exceed Fee: \$ \_\_\_\_\_

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Based on the following project team and rate schedule:

<u>Position</u>	<u>Hr. Rate</u>	<u># hours</u>	<u>Total</u>
1.			
2.			
3.			

b. Expenses related to the development of the San Diego 20-Year Tourism Master Plan as noted in the RFP document.

- a. Travel Expense Policy and Guidelines Proposed
- b. Third Party Expenses (Research or other)
- c. Materials/Other Expenses

Total Not-to-Exceed Fee: \$ \_\_\_\_\_

**Section VI: Billing & Payment**

1. TMD will pay “net 60 days” upon completion of work and receipt of a valid invoice.
2. Provide a sample invoice showing the detail that you will include in billings.
3. Include and describe additional payment discounting opportunities.

**Section VII. Performance Guarantees and Continuous Improvement Outlook**

1. Please include the performance measures for these services. Describe the performance guarantees you are willing to provide, including the dollars you are willing to put at risk for each one.
2. The TMD expects the selected supplier to continuously improve and enhance the quality of programs offered.
3. Describe your process for continuous improvement.
4. How do you conduct research and benchmarking practices?
5. The TMD expects the supplier to provide all deliverables properly authenticated and endorsed by an authorized officer or principal of the organization.