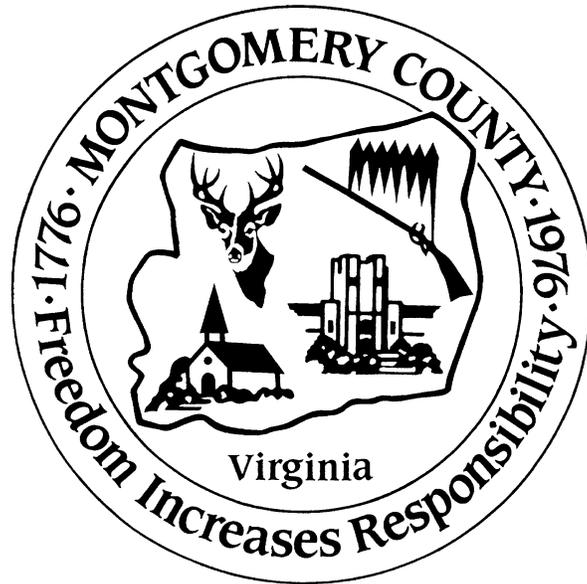


# MONTGOMERY COUNTY VIRGINIA



Request for Proposal (RFP)# 14-24  
Brand Development for Tourism Destination  
Issue Date: January 13, 2014  
Proposal Due Date and Hour: February 11, 2014 3:00 p.m.

Montgomery County Purchasing Department  
755 Roanoke Street, Suite 2C  
Christiansburg, VA 24073-3179

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**Request for Proposal Number 14-24**

**Brand Design for Tourism Destination**

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ATTACHMENT A: Terms and Conditions

ATTACHMENT B: Montgomery County Standard Contract (sample)

COUNTY OF MONTGOMERY, VIRGINIA  
RFP # 14-24

ISSUE DATE: JANUARY 13, 2014  
BRAND DESIGN For Tourism Destination

(TO BE COMPLETED AND RETURNED)  
GENERAL INFORMATION FORM

**QUESTIONS:** All inquiries for information regarding this solicitation should be directed to: Heather M. Hall, C.P.M., Procurement Manager, Phone: (540) 382-5784; faxed to (540) 382-5783, or e-mail: [hallhm@montgomerycountyva.gov](mailto:hallhm@montgomerycountyva.gov)

**DUE DATE:** Sealed Proposals will be received until **February 11, 2014**, up to and including **3:00PM**. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

**ADDRESS:** Proposals should be mailed or hand delivered to: **Montgomery County Purchasing Department, 755 Roanoke Street, Suite 2C, Christiansburg, Virginia 24073-3179**. Reference the Due Date and Hour, and RFP number in the lower left corner of the return envelope or package.

**COMPANY INFORMATION/SIGNATURE:** In compliance with this Request For Proposal and to all conditions imposed herein and hereby incorporated by reference, the undersigned offers and agrees to furnish the services and goods in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Full Legal Name (print)		Federal Taxpayer Number (ID#)	Contractor's Registration
Business Name / DBA Name / TA Name and Address		Payment Address	Purchase Order Address
Contact Name/Title		Signature (ink)	Date
Telephone Number	Fax Number	Toll Free Number	E-mail Address

**COUNTY OF MONTGOMERY**  
**RFP# 14-24**  
**Brand Development for Tourism Destination**

**I PURPOSE:**

The intent and purpose of this Request for Proposal (RFP) is to establish a contract through competitive negotiation for Regional Tourism Brand Development for the County of Montgomery, Virginia herein after referred to as “County”, and the Towns of Blacksburg and Christiansburg. The tourism program is specifically seeking the development of a brand through research and analysis to establish messaging and brand expression.

The County is the fiscal agent for the newly formed Montgomery County/Blacksburg/Christiansburg Regional Tourism Program. A Tourism Operating Board was established to provide oversight of the tourism office and is comprised of the County Administrator and the Town Managers. The Tourism Operating Board will have final acceptance authority of the work performed. The Board will be engaged periodically throughout the project for comment and assessment at appropriate stages. The Executive Director for Tourism will coordinate the completion of the project with the selected consultant and arrange all meetings with the Tourism Operating Board and Committees and any other public or stakeholder meetings that may be proposed.

The brand created should reflect the unique assets of the area which would best appeal to our target markets. This “brand” will be used in all future tourism marketing materials and activities of the Montgomery County/Blacksburg/Christiansburg Regional Tourism Office. This project will set the foundation for the development of expanded tourism marketing efforts over the next several fiscal years. It will aid marketing efforts of presenting the individual localities as a single destination.

**II BACKGROUND:**

Montgomery County is located in the southwestern part of Virginia in the region known as the New River Valley. This region takes its name from the New River, the nation's oldest and the world's second oldest river, and includes the counties of Floyd, Giles, Montgomery, Pulaski, and the City of Radford. The County has a land area of 393 square miles and lies in the broad picturesque area between the Appalachian Plateau and the Blue Ridge Mountains. Topography varies from gently rolling to steep mountainous terrain, with elevations varying from 1,300 to 3,700 feet above sea level. The majority of the County is at an elevation of 2,000 feet.

Today the Towns of [Blacksburg](#) and [Christiansburg](#), the County seat, are the population centers of the County and are located approximately 35 miles southwest of the City of Roanoke. Blacksburg is home to [Virginia Polytechnic Institute and State University](#) (Virginia Tech). Founded in 1872 as a land-grant college, Virginia Tech is the largest university in Virginia and one of the country's leading research institutions. The County had a 2011 population of 94,996. (This includes two incorporated towns, Blacksburg and Christiansburg, with a combined population of approximately 63,661)

- A. The County and the Towns of Blacksburg and Christiansburg formed a **joint tourism program** in 2011. It is funded by a percentage of the occupancy tax collected by the County and the Towns. An operating board and tourism development advisory committee were established the same year. An Executive Director of Tourism was hired to manage the program in September, 2012. The director enlisted the assistance of the Virginia Tourism Corporation to facilitate a strategic planning process. Members from the tourism operating board, tourism development council and additional representatives from business, higher education, government and citizenry participated in this process. The three-year plan was formally adopted by the three localities in October 2013.
- B. Five goals are identified in the **tourism strategic plan**. Of those goals, **increasing marketing for the destination** is number one in priority. Many marketing tools need to be developed for this new tourism office. These include: letterhead, notecards, rack cards, visitors guide, website (static and mobilized) and promotional items such as; giveaways and logoed clothing. Prior to heavy investment into these items, it is critical that the three localities agree on the banner under which we will market ourselves. We are in the unique position at this early juncture to have the “brand” be the cornerstone upon which the remainder of the program will be built. While the strategic plan will be able to provide some insight into the community’s current thoughts on branding, additional research will be needed to accurately determine what brand would resonate with the consumer. The brand will be critical to effectively “form and wrap” the content for future marketing activities.

- C. The Montgomery County/Blacksburg/Christiansburg Regional Tourism Office desires to have a brand delivered by the end of May, 2014.

### **III STATEMENT OF NEED:**

#### **A. Scope of Services**

The County seeks qualified Offerors to:

1. Inventory and assess all recent studies and reports, filling in with research through industry accepted survey methods, to identify the appropriate target market for the area. Provide a comprehensive evaluation of the identity and branding needs of the newly formed program to most effectively “speak to” the visitor, the external stakeholder.
2. Facilitate a series of visioning sessions to gather input from partnering stakeholders.
3. Develop strategies and tactical plans to position the messaging statements based on qualitative research and analysis of quantitative data.
4. Recommend specific elements to convey the brand. These would relate to visual elements, printed collateral, print advertising, web elements, media placement, public relations, and events.
5. Define how the core message could be expandable to the broader regional partners and assets.
6. Work with tourism agency to develop a detailed brief of project for stakeholders.
7. Work with tourism agency to host an unveiling of the brand in the community. The event will include a presentation of the new brand to the community. Prior to or during this visit, the chosen contractor must train the tourism staff on how to update and maintain the branding files and collateral materials via presentation and follow-up with the brand standards and detailed instructions. These instructions will likely be used by interns and volunteers, it is IMPORTANT that the brand standards are clear, user-friendly, and detailed.

#### **B. Project Deliverables**

The following are proposed minimum project deliverables:

1. A brand platform including:
  - a. The brand platform should include a positioning concept/design (“the brand”) as agreed on by the Tourism Operating Board, tagline (if recommended), brand image, strategy, promise, key drivers and messages.
  - b. A tourism logo
    - i. All logos must be created to work in both black and white and color and provided in a variety of formats for print and electronic usage. Logos will be used for marketing, administrative and promotional purposes.
  - c. A brand standards manual and full package of branding files
    - i. The branding style should be comprehensive and include step-by-step instructions on the proper use of the branding materials. Branding files should be named clearly and organized. The brand standards guide should also include the taglines and written descriptions of how to talk about and use the new brand as a whole.

#### **C. Related Experience**

Proposal should address your overall capabilities to lead the destination branding process. Please include resumes of the individuals who will perform the work outlined in this proposal. Clearly define the team member roles and define capabilities and experience conducting similar work of each. Particular interest will be focused on the experience and availability of the assigned primary project manager.

#### **D. Industry Knowledge**

Proposal should include detailed experience in marketing for economic development and tourism. Include a brief synopsis explaining your philosophy on Destination Branding. Include a description of your discovery process, including primary and secondary resources, and the protocol followed to arrive at a branding platform. Discuss your organization's unique, value-added services and areas in which you differentiate yourself from other vendors as it relates to branding. Include any awards or industry distinctions your company has received for brand design and development.

**E. Research Capability**

Proposal should illustrate ability to gather and effectively use research to assist the branding process. A list of any tasks that will be subcontracted and a list of the subcontracting firms should be submitted. The ideal firm will be able to either perform these tasks in-house or operate as the lead contractor and sub-contract the individual work items and create a final, comprehensive work product. The County of Montgomery reserves the right to approve any sub-contractor of the lead contracting firm's team.

**F. Proposed Action Plan, Time Frame and Expectations**

Include a proposed project management plan for the entire project. Details should include stage identification of the process, expected deliverables with the estimated time frame for each along with anticipated start and end times, and assessment intervals. The plan should include discussion of project purpose and goals, tools used for managing and communicating - especially for budgets and approvals, expected times to see representations, ideas, art-work, etc.

**G. Client References**

Provide three professional references for similar work that has been performed by your firm including the names, addresses, titles and telephone numbers of the person most familiar with the work. Executive summaries of other brands that the agency has developed are highly recommended.

**H. Ownership of Product**

All work performed on behalf of the Montgomery County becomes the property of Montgomery County including, but not limited to, designs, brand standards, hard copies, files, data bases, research, etc. All final reports prepared under the contract shall be the property of Montgomery County and may not be used or reproduced in any form without the explicit written permission of Montgomery County.

**IV PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:**

**A. GENERAL REQUIREMENTS:**

1. RFP Response: In order to be considered for selection, Offerors must submit a complete response to this RFP. One (1) original and nine (9) copies of each proposal plus one thumb drive of the proposal must be submitted to:

Heather M. Hall, C.P.M., Procurement Manager  
Montgomery County Purchasing Department  
755 Roanoke Street, Suite 2C  
Christiansburg, VA 24073-3179

Identify on outside of envelope: **Sealed RFP # 14-24**

RFP Due date/Opening date and hour: **February 11, 2014, 3:00 P.M.**

The Offeror shall make no other distribution of the proposal.

2. Proposal Preparations:

- a. Proposal shall be signed by an authorized representative of the Offeror. All information requested should be submitted. The Procurement Manager will review all proposals to ensure required information is included. Failure to submit all information requested may result in a request to submit the missing information.

Proposals which are substantially incomplete or lack key information may be rejected as incomplete. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.

- b. Proposals will be reviewed and evaluated by a Committee as designated by the County.
  - c. Proposal should be prepared simply and economically, providing a straight forward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
  - d. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, subletter, and repeat the text of the requirements as it appears in the RFP. If a response covers more than one page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.
  - e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.
  - f. Ownership of all data, materials and documentation originated and prepared for the County pursuant to the RFP shall belong exclusively to the County and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protections of Section 2.2-4342D of the Code of Virginia, in writing, either before or at the time the data or other materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and will result in rejection of the proposal.
- B. SPECIFIC REQUIREMENTS:** Proposals should be as thorough and as detailed as possible so that the County may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following information/items as a complete proposal:
1. The return of the RFP general information form and addenda, if any, signed and completed as required.
  2. Please provide three (3) recent references, similar to Montgomery County, for whom you have provided the type of services described herein. Include the date(s) services were furnished, the client name, address and the name, phone number and email address of the individual Montgomery County has your permission to contact.
  3. Discuss Related Experience, your Industry Knowledge, your Research Capability, your Proposed Plan and Time Frame and all other aspects of Section III., Statement of Need.

**V. EVALUATION AND AWARD OF CONTRACT:**

- A. Award of Contract:** Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposal, including price, if so stated in the Request for proposal. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, Montgomery County shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. Montgomery County may

cancel the Request for Proposal or reject proposals at any time prior to an award, and is not required to furnish a statement of the reason why a particular proposal was not deemed to be the most advantageous. (Section 2.2-4359D, Code of Virginia.) Should Montgomery County determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms, and conditions of the solicitation and the contractor's proposal as negotiated. See Attachment B for sample contract form.

**B. Evaluation Criteria:** Proposals shall be evaluated by the County using the following criteria:

<u>EVALUATION CRITERIA</u>	<u>WEIGHT</u>
1. Method and plan for providing services	30
2. Price and Fees	30
3. Qualifications and experience	30
4. References	10

**VI RESERVATION OF RIGHTS:** Montgomery County reserves the right to award in part or in whole, to one or more vendors, or to reject any or all proposals, whichever is deemed to be in its best interest.

**VII OPTIONAL PRE-PROPOSAL:** An optional pre-proposal conference will be held January 28, 2014 at 2:00 p.m. at 755 Roanoke Street, Suite 2E, County Administration Conference Room. The purpose of this conference is to allow potential Offerors an opportunity to present questions and obtain clarification relative to any facet of this solicitation.

While attendance at this conference will not be a prerequisite to submitting a proposal, offerors who intend to submit a proposal are encouraged to attend. If you plan to attend the pre-proposal, please call Jessica Hamrick by January 27, 2014 at (540) 382-5784 or email [hamrickjn@montgomerycountyva.gov](mailto:hamrickjn@montgomerycountyva.gov). Directions to the Montgomery County Government Center can be found by entering this link <http://www.montgomerycountyva.gov/content/1146/98/175/3053.aspx>

Bring a copy of this solicitation with you. Any changes resulting from this conference will be issued in a written addendum to this solicitation.

**VIII CONTRACT ADMINISTRATION:** Lisa Bleakley, Executive Director of Tourism, or her designee, shall be identified as the Contract Administrator and shall use all powers under the contract to enforce its faithful performance. The Contract Administrator, or her designee, shall determine the amount, quantity, acceptability, fitness of all aspects of the services and shall decide all other questions in connection with the services. The Contract Administrator, or her designee, shall not have the authority to approve changes in the services which alter the concept or which call for an extension of time for this contract. Any modifications made must be authorized by the Montgomery County Purchasing Department through a written amendment to the contract.

**IX PAYMENT PROCEDURES:** The County will authorize payment to the Contractor after receipt of Contractor's correct invoice for services rendered. Invoices shall be sent to:  
 Montgomery County Tourism  
 Attn: Lisa Bleakley, Executive Director of Tourism  
 755 Roanoke Street, Suite 2E  
 Christiansburg, VA 24073

**X CONTRACT PERIOD:** The term of this contract is for one year or as negotiated. There will be an option for four (4) one-year renewals or as negotiated.

**ATTACHMENT A  
TERMS AND CONDITIONS**

**GENERAL TERMS AND CONDITIONS**

[http://www.montgomerycountyva.gov/filestorage/1146/98/175/703/rfp\\_terms\\_and\\_conditions.pdf](http://www.montgomerycountyva.gov/filestorage/1146/98/175/703/rfp_terms_and_conditions.pdf)

**SPECIAL TERMS AND CONDITIONS**

1. **ADVERTISING:** In the event a contract is awarded for supplies, equipment, or services resulting from this solicitation, no indication of such sales or services to Montgomery County will be used in product literature or advertising. The Contractor shall not state in any of the advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.
2. **AUDIT:** The Contractor hereby agrees to retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. Montgomery County, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
3. **AVAILABILITY OF FUNDS:** It is understood and agreed between the parties herein that Montgomery County shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
4. **CANCELLATION OF CONTRACT:** Montgomery County reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the Contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
5. **SPECIAL OR PROMOTIONAL DISCOUNTS:** The Contractor shall extend any special promotional sale prices or discounts immediately to Montgomery County during the term of the contract. Such notice shall also advise the duration of the specific sale or discount price.
6. **IDENTIFICATION OF PROPOSAL ENVELOPE:** The signed proposal should be returned in a separate envelope or package, sealed and addressed as follows:  
Montgomery County  
Purchasing Department  
755 Roanoke Street, Suite 2C  
Christiansburg, VA 24073-3179  
Reference the opening date and hour, and RFP Number in the lower left corner of the envelope or package.  
No other correspondence or other proposals should be placed in the package. Proposals may be hand delivered to the Montgomery County Purchasing Department.
7. **INDEPENDENT CONTRACTOR:** The contractor shall not be an employee of Montgomery County, but shall be an independent contractor. Nothing in this agreement shall be construed as authority for the contractor to make commitments which shall bind Montgomery County, or to otherwise act on behalf of Montgomery County, except as Montgomery County may expressly authorize in writing.
8. **INSURANCE:**  
By signing and submitting a proposal under this solicitation, the Offeror certifies that if awarded the contract, it will have the following insurance coverages at the time the work commences. Additionally, it will maintain these during the entire term of the contract and that all insurance coverages will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.  
During the period of the contract, Montgomery County reserves the right to require the Contractor to furnish certificates of insurance for the coverage required.  
**INSURANCE COVERAGES AND LIMITS REQUIRED:**
  - A. Worker's Compensation - Statutory requirements and benefits.
  - B. Employers Liability - \$100,000.00
  - C. General Liability - \$500,000.00 combined single limit. Montgomery County and the Commonwealth of Virginia shall be named as an additional insured with respect to goods/services being procured. This coverage is to include Premises/Operations Liability, Products and Completed Operations Coverage, Independent Contractor's Liability, Owner's and Contractor's Protective Liability and Personal Injury Liability.
  - D. Automobile Liability - \$500,000.00The contractor agrees to be responsible for, indemnify, defend and hold harmless Montgomery County, its officers, agents and employees from the payment of all sums of money by reason of any claim against them arising out of any and all occurrences resulting in bodily or mental injury or property damage that may happen to occur in connection with and during the performance of the contract, including but not limited to claims under the Worker's Compensation Act. The contractor agrees that it will, at all times, after the completion of the work, be responsible for, indemnify, defend and hold harmless Montgomery County, its officers, agents and employees from all liabilities resulting from bodily or mental injury or property damage directly or indirectly arising out of the performance or nonperformance of the contract.
9. **MINORITY BUSINESS, WOMEN-OWNED BUSINESSES SUBCONTRACTING AND REPORTING:** Where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such business to minority and/or women-owned businesses. Names of firms may be available from the buyer and/or from the Division of Purchases and Supply. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office the following information: name of firm, phone number, total dollar amount subcontracted and type of product/service provided.
10. **OWNERSHIP OF PRINTING MATERIALS:** All artwork, camera-ready copy, negative, dies, photos, and similar materials used to produce a printing job shall become the property of Montgomery County. Any furnished materials shall remain the property of Montgomery County. All such items and materials shall be delivered to Montgomery County in usable condition after completion of the work, and prior to submission of the invoice for payment.

**ATTACHMENT B  
COUNTY OF MONTGOMERY  
STANDARD CONTRACT**

**Contract Number:**

This contract entered into this \_\_\_ day of, 201\_\_, by \_\_\_\_\_ hereinafter called the “Contractor” and the County of Montgomery, called the “County”.

**WITNESSETH** that the Contractor and the County, in consideration of mutual covenants, promises and agreements herein contained, agree as follows:

**SCOPE OF SERVICES:** The Contractor shall provide the services to the County as set forth in the Contract Documents.

**CONTRACT PERIOD:** The initial contract period is \_\_\_\_\_ through \_\_\_\_\_.

**COMPENSATION AND METHOD OF PAYMENT:** The Contractor shall be paid in accordance with the Contract Documents.

**CONTRACT DOCUMENTS:** The Contract Documents shall consist of signed Contract, the statement of need, general terms and conditions, special terms and conditions, specifications, and other data contained in this Request For Proposal Number, dated \_\_\_\_\_, together with all written modifications thereof, the proposal submitted by the Contractor dated \_\_\_\_\_ and the Contractor’s letter dated \_\_\_\_\_, all of which contract documents are incorporated herein.

In **WITNESS WHEREOF**, the parties have caused this Contract to be duly executed intending to be bound thereby.

**CONTRACTOR:**

**COUNTY OF MONTGOMERY:**

By: \_\_\_\_\_ By:

Title: \_\_\_\_\_ Title: