



Request for Proposal (RFP)# 24-05

Tourism Brand Messaging and Strategy Update

Issue Date: September 27, 2023

Last Day for written questions: October 13, 2023

Proposal Due Date and Hour: October 26, 2023 3:00 p.m.

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

On behalf of

Montgomery County Regional Tourism

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Tourism Brand Messaging and Strategy Update

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ATTACHMENT A: Terms and Conditions

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COUNTY OF MONTGOMERY, VIRGINIA
RFP # 24-05

ISSUE DATE: SEPTEMBER 27, 2023

Brand Messaging and Strategy Update

(TO BE COMPLETED AND RETURNED)

GENERAL INFORMATION FORM

QUESTIONS: All inquiries for information regarding this solicitation should be directed to: Jeff Groseclose, CPPB, VCO, VCA, Procurement Manager, Phone: (540) 382-5784; faxed to (540) 382-5783, or e-mail: mcpurchasing@montgomerycountyva.gov.

DUE DATE: Sealed Proposals will be received until **October 26, 2023**, 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 N/A
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# 24-05
Brand Messaging and Strategy Update

I PURPOSE: The intent and purpose of this Request for Proposal (RFP) is to establish a contract through competitive negotiation with one or more qualified contractors for tourism brand messaging and strategy update for the County of Montgomery County, Virginia herein after referred to as “County.”

II BACKGROUND:

A. General 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 2020 population of 100,839. (This includes two incorporated towns, Blacksburg and Christiansburg, with a combined population of approximately 67,365.)

The County is governed by an elected seven member Board of Supervisors who appoints a County Administrator.

B. Specific Background

The Montgomery County Regional Tourism office is seeking an agency to assist with a brand and messaging strategy update. Using information collected through a needs assessment, asset inventory, and business research, the vendor will instruct Montgomery County Regional Tourism how to update their positioning strategy, select a new URL (uniform resource locator), naming convention and voice to better promote the area's assets and to provide a more memorable and engaging visitor experience. The estimated budget for this project is \$30,000 to \$35,000.

Montgomery County tourism experienced extreme disruption during and immediately following COVID. Like many other communities, Montgomery County's economic impacts with employment, expenditures, labor income, land, local and state tax receipts declined dramatically.

The Montgomery County Regional Tourism office was created in 2011 and serves the county along with the towns of Blacksburg and Christiansburg. The two towns and the county currently fund the program through contributions of their lodging taxes. The program

continues to build upon the “Go to town!” brand which was launched in 2015. The marketing plan includes traditional marketing elements such as: print, radio, broadcast, earned media, direct marketing through trade and consumer shows and sales missions. In the past several years, more focus has been placed on digital and online media including a website, social media channels, and digital advertising. In 2023, a new Visitor Guide rolled interactive QR codes to provide better access to accurate information, as well as tracking of print materials and how they are used.

The tourism program has collected years (2016-2018, 2022) of consumer data (demographic and behavioral) from an annual visitor profile study conducted each year. Other accessible research is related to the economic impact of visitation to the area as commissioned by the Virginia Tourism Corporation, and the impact of Virginia Tech Football as conducted by the Virginia Tech Office of Economic Development. An integrated marketing project was begun for the program, but the consulting agency succumbed to the fiscal impacts of COVID-19 and went out of business. The program launched its Digital Experience Platform (DXP) based Virtual Visitor Center through iTi-Digital in late Spring 2023, which provides real time updates to places of interest and events happening in the area. This interactive software provides visitors with up to date information that is easily filtered, shared, and navigated.

III STATEMENT OF NEED:

The County requires the services of a qualified Contractor, which can provide a plan for a brand and messaging strategy update for Montgomery County Regional Tourism per the Statement of Need and requirements herein.

A. SPECIFICATIONS AND REQUIREMENTS:

Market Research - Stakeholder Needs Assessment Survey

To develop an effective tourism program, Montgomery County needs to understand where the tourism and hospitality-based businesses are today, what they need most from a newly reimagined program, and what kinds of resources and support they can provide each other in the process. The brand messaging and strategy update will allow the tourism program to adjust to revised market conditions and consumer expectations.

By conducting a needs assessment survey, the County will have an opportunity to re-engage local stakeholders, update contact lists, and serve as a more effective facilitator, connector, and resources for the community. All the while, ensuring they are positioned to effectively bring new resources and information more quickly to local businesses, and allowing the County to right-size future promotional plans in collaborative partnership with the private sector.

Market Research: Asset Inventory

Because the Montgomery County tourism industry experienced such significant market disruption over the last three years, there is an urgent need to update the County’s asset and contact records. Staff is aware of the need for an asset inventory due to missing or inaccurate website listings and significant business model changes not being reflected in current promotional materials.

Incomplete/inaccurate information is frustrating to visitors who rely on these to plan their trips and is currently resulting in a negative impact on local tax revenues. Refreshed information will need to be recollected, verified, and updated sector-by-sector across all existing local tourism corridors and industry segments so it can then be redistributed to appropriate stakeholders in an organized and reliable fashion, corrected on the website, and on printed promotional materials.

Branded Communication Platform

During social isolation associated with COVID-19, there was an increase with telephone messaging to the tourism offices. This situation helped to amplify the fact the URL <GoToMontVA.com> in use by the tourism office for website was problematic with pronunciation when advising callers to visit tourism website. Frequently, tourism staff had to attempt to spell URL phonetically to effectively convey. This was not always effective. A user-friendly URL is sought to help in the recovery efforts of the regional tourism. With a Virtual Visitor Center now launched, it too in need of an associated dedicated URL. The current URL is <vc-GoToMontVA.com>.

Develop new URL to replace <GoToMontVA.com> and <vc-GoToMontVA.com>

The County prefers the URL to have a geographic or themed name instead of locality name

Part and parcel to the revised URL will be a need to develop comparable social media metadata tags, such as hashtags.

Positioning and Messaging Strategy Update

Using the information collected through the needs assessment, asset inventory, and business research, Montgomery County will update their positioning strategy, selecting UR(s), metadata tags, naming convention and voice to better promote the area's assets and provide a more memorable and engaging visitor experience.

This strategic shift will further support future county tourism investment and resources, providing a roadmap for both short-and-long term tourism recovery efforts.

The effort will focus on three strategic areas of improvement:

- Brand Narrative Evolution
- Destination Gap Assessment and Opportunity Mapping
- Area Promotion and Digital Accessibility

B. EXCEPTIONS: Any and all deviations from, or exceptions to, the above specifications and requirements must be listed and prominently displayed in proposal materials and should be clearly stated by the offeror in a separate section titled "Exceptions".

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 to include:

- a. **One (1) original and four (4) paper copies of the entire proposal INCLUSIVE OF ALL ATTACHMENTS.** Any proprietary information should be clearly marked.
- b. **One (1) electronic copy** in WORD format or searchable PDF (USB/Flash Drive) of the entire proposal as one document, **INCLUSIVE OF ALL ATTACHMENTS** mailed along with the hard copy above. Any proprietary information should be clearly marked.
- c. Should the proposal contain **proprietary information**, provide **one (1) redacted** electronic copy in WORD format or searchable PDF (USB/Flash Drive) of the entire document **INCLUSIVE OF ALL ATTACHMENTS. All identified proprietary information should be blacked out.** This USB/Flash Drive should be marked ***“Redacted Copy”***.
- d. Response shall be submitted to:

Jeff Groseclose, CPPB, Procurement Manager
Montgomery County Purchasing Department
755 Roanoke Street, Suite 2C
Christiansburg, VA 24073

Identify on outside of envelope: **Sealed RFP # 24-05**

RFP Due date/Opening date and hour: **October 26, 2023, 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. Identify your agency's departments and specify whether the functions are performed in-house or outsourced. Also include the number of full-time personnel and breakdown according to function.
 - 3. Describe your agency's experience in tourism-related accounts.
 - 4. What is your agency's billing policy regarding: a. Frequency of billing to the client b. Terms of payment

(media, productions, fees) c. Billing time increments less than one hour (e.g., 15 minutes, 30 minutes)

5. What is your hourly rate?

6. Provide an explanation of how your agency measures/determines the effectiveness of advertising/marketing programs and campaigns including return on investment (ROI). (Limit to one page)

7. Plan and approach to meeting statement of needs.

8. Written qualifications pertaining to the scope of work.

9. Describe your familiarity with the New River Valley, Southwest Virginia, and Virginia travel and tourism markets.

10. Describe familiarity with travel and tourism trends in the recovery phase from COVID-19.

11. Please provide number of years your firm has been in business.

12. Please provide staff size and provide details on your capacity for taking on this project with a tight quick timeline.

13. Please provide expertise and qualification details for staff members that will be assigned to this project.

14. Please provide 3 recent references, similar to Montgomery County, for whom you have provided the type of services described herein **specifically for travel and tourism**. Include the date(s) services were provided, the client name, address and the name and phone number of the individual Montgomery County has your permission to contact.

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(s) which, in its opinion, has made the best proposal, and shall award the contract to that offeror(s). Montgomery County reserves the right to award more than one contract as a result of this solicitation. 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:

Each proposal will be evaluated on the following criteria:

	<u>EVALUATION CRITERIA</u>	<u>WEIGHT</u>
1.	Qualifications and experience	30
2.	Capabilities, Skills and Capacity	20
3.	Method and plan for providing services	25
4.	Cost of Services	15
5.	References	10

VI OPTIONAL PRE-PROPOSAL CONFERENCE: A pre-proposal conference will be held at **3:00 pm on October 12, 2023** at 755 Roanoke Street, Christiansburg, VA 24073 in Multipurpose Room #2 (MP2). 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. Potential offerors may also attend by teleconference.

Email mcpurchasing@montgomerycountyva.gov no later than 5:00 pm on October 11, 2023 to pre-register for the conference and to receive instructions for attending in person or by teleconference. If you do not pre-register by this deadline, there is no guarantee you will receive instructions prior to the meeting to attend via teleconference.

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

Potential offerors are encouraged to submit written questions before the conference so questions may be addressed during the meeting. Written questions must be submitted by email to Jeff Groseclose at mcpurchasing@montgomerycountyva.gov no later than close of business on October 13, 2023.

VII CONTRACT ADMINISTRATION:

David Rotenizer, Executive Director, or his 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 their 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 their 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.

- VIII PAYMENT PROCEDURES:** Payment for services will be made within 30 days of receipt of invoice, or receipt of goods or services, whichever is later. 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 Regional Tourism
Attn: David Rotenizer
200 Clay Street, SW
Blacksburg, VA 24060

- IX CONTRACT PERIOD:** The term of the contract for the will be until the scope of work is complete to the satisfaction of Montgomery County and Montgomery County Regional Tourism, or as negotiated. A term contract with a one-year contract period with up to four (4) optional annual renewal periods (or as negotiated) may also be considered for potential future work.

- X PRICING SCHEDULE:**

The proposal should include a clear pricing schedule to provide services as described above.

ATTACHMENT A

TERMS AND CONDITIONS

GENERAL TERMS AND CONDITIONS

https://montgomerycountyva.gov/docs/default-source/purchasing-solicitations/rfp_terms_and_conditions.pdf?sfvrsn=ecfd231d_2

SPECIAL TERMS AND CONDITIONS

1. **ADDITIONAL GOODS AND SERVICES:** The County may acquire other goods and services that the supplier provides than those specifically solicited. The County reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services as negotiated under the same terms and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products components, accessories, subsystems, or related services that are newly introduced during the term of the contract. Such additional goods and services will be provided to the County at favored nations pricing. The exact pricing of these goods and services will negotiated and determined at the time of procurement.
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. **AUTHORIZED USERS:** Additional State agencies, institutions and/or other public bodies may be added or deleted to receive the goods or services resulting from this solicitation. Montgomery County Purchasing Department shall be notified by the contractor or the specific agency intending to use the contract to determine if a written modification to the contract is necessary. Such modifications, when/if required, shall name the specific agency added or deleted and the effective date.
4. **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.
5. **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.
4. **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.
5. **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 - \$500,000.00

The 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.

6. **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.
7. **PROPOSAL ACCEPTANCE PERIOD:** Any proposal received in response to this solicitation shall be valid for (90) days. At the end of the (90) days the proposal may be withdrawn at the written request of the Offeror. If the proposal is not withdrawn at that time it remains in effect until an award is made or the solicitation is cancelled.
8. **UNIQUE ENTITY IDENTIFIER:** Contractor agrees they are registered with Sam.gov or will register upon award. The contractor either has, or will obtain, a Unique Identity Identifier (UEI) number and agrees to provide the UEI number to the County upon award.

**ATTACHMENT B
COUNTY OF MONTGOMERY
STANDARD CONTRACT**

Contract Number:

This contract entered into this ____ day of, 202__, 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:

By: _____

Title: _____

COUNTY OF MONTGOMERY:

By: _____

Title: _____