



# REQUEST FOR QUALIFICATIONS MARKETING SERVICES

August 15, 2018  
Montgomery County, NC



## 1. **PUBLIC NOTICE**

Pursuant to NCGS 143-64.31 the County of Montgomery (hereafter MC) and the Montgomery County Tourism Development Authority (hereafter TDA) solicits statements of interest and qualifications for the selection of a marketing firm to perform the functions identified herein. Information related to this solicitation, including the RFQ document and any future addenda, shall be available on the MC's website [www.montgomerycountync.com](http://www.montgomerycountync.com).

Any questions, clarifications, or requests for information regarding this RFQ shall be directed **in writing** to the RFQ Coordinator:

Chris Hildreth  
Director of Development & Infrastructure  
102 East Spring Street  
Troy, NC 27371  
(910) 576-4221 ext. 1307  
[chris.hildreth@montgomerycountync.com](mailto:chris.hildreth@montgomerycountync.com)

Any future clarifications, modifications to this solicitation, or directives issued regarding this RFQ, shall be issued in writing as an addendum. Respondents must acknowledge addenda received as part of their submissions.

## 2. **RFQ SCHEDULE & RESPONSE SUBMISSION**

The following is the proposed schedule for firm selection. Timely delivery of submissions is at the risk of the Respondent. Any submittals received after the deadline will be rejected.

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|------------------|--|
| A. Aug. 15, 2018 | RFQ Released / Advertised  |
| B. Aug. 24, 2018 | Last day to submit written requests for information / clarifications     |
| C. Aug. 31, 2018 | <b>Submissions due by 2:00p.m.</b> ; evaluation of qualifications begins |
| D. Sep. 05, 2018 | Interviews with short-listed respondents begin                           |

Interested firms or individuals may submit sealed responses by mail or hand delivery to:

**MC Request for Qualifications – Marketing Services**  
Attn: Chris Hildreth, Director of Development & Infrastructure  
102 East Spring Street – 3<sup>rd</sup> Floor  
Troy, NC 27371

### 3. **BACKGROUND & INTENT**

MC and the TDA seek to utilize revenue collected from occupancy taxation to attract tourists residing outside of the vicinity of the County to the forest, lakes, parks, towns, events, and businesses within Montgomery County. The marketing envisioned will take place mainly on a regionalized level (from 30-120 miles from the County) and will include both broad based marketing for static tourism areas (like lakes and forests) and short term, audience targeted social media based marketing for one-two day events and festivals. ***This project will be deemed a success based upon the increase of such tourists to the County over the duration of the campaign.***

The stakeholders of the County are not soliciting for a tourism study or a tourism asset inventory. Strengths, weaknesses, opportunities, and threats of tourism related activities in the County are well-known. Needed enhancements to our assets are both recognized and desired, but in the case of publically owned areas (such as the national forest) such improvements can only be funded trickle-down by the attraction of more tourists. ***The movement of new tourists to the County is the goal of this project.***

The County recognizes that it is not currently a stand-alone destination per se and that effective marketing may include collaborations with neighboring Counties. Such marketing relationships are acceptable to the stakeholders of the County, as long as the marketing strategies being utilized are effective.

***MC and the TDA intend to adopt a marketing / promotion / advertising budget between \$35,000-\$150,000 per year for a period of no less than three (3) years to cover the costs of a multi-staged plan for consultation, development, implementation, and analysis of marketing / promotion / advertising product.*** The budget shall be approved by the Board of County Commissioners and will be set based upon the thoroughness, timeliness, and thoughtfulness of the work performed during each progressive stage, and the projected/potential return on investment.

### 4. **SCOPE OF SERVICES**

The TDA and MC desire results: the delivery of new tourists to the County. The purpose of this project is to provide the marketing guidance and marketing materials to help promote the assets of the County in order to achieve the objective. This project is envisioned as a multi-year ongoing interaction between the chosen firm, the TDA, and the stakeholders engaged in tourism activities. As such, the ideal firm can provide both expertise in the ongoing planning and evaluation of tourist related assets, as well as the delivery and execution of marketing materials derived from those planning and evaluation sessions. The firm selected will be given the latitude to produce the materials necessary to increase tourism. While a 3 minute tourism activities video for the County website may be a visible sign of marketing and a boilerplate project in marketing campaigns, if such a video doesn't have the real potential to attract additional tourists then it should not be part of this project. The firm selected will be provided with all the necessary information and access in order to produce marketing materials and will be at liberty to utilize that information/access to the best effect possible. The firm will, however, be asked to provide data to support its recommendations and actions.

A. **CONSULTATION/PRIORITY LISTING:** The first component of the project shall be for the selected firm to meet with the stakeholders to better understand the places, events, characteristics, and opportunities that exist within Montgomery County. The firm will be expected to be familiar with the number and type of current visitors, current capacities, and the local visions for tourism

growth and enhancement. The firm will hear from TDA members, County staff, the five municipalities, Uwharrie National Forest representatives, Cube Hydro and Duke-Progress (entities holding FERC licenses for the lakes), and from the private businesses catering to tourism related events and rentals. The result of this portion of the project shall be the compilation of a priority list of the County's assets based on potential return on investment from marketing promotion. list will be driven by the concept that the infusion of a marketing dollar translates to an increase in tourists. Preference will be given to the assets/events having the potential for the most growth. The methodology for the formulation of this list shall be clearly identified by the firm in the report issued. CONSULTATION is expected to last 1-2 months.

- B. ROADMAP: The second component of the project shall be for the selected firm to (1) develop a detailed three year marketing plans for the top three prioritized tourist assets and (2) a general marketing campaign for the en masse tourist assets of the County. The plans shall include marketing specifics (type of advertising, location, and frequency) as well as the rationale and consumer-driven data behind the recommendations. The plans shall include budget estimates for each level of these three year plans. The plan shall be approved by the TDA and a budget presented to the County Commissioners for funding. The firm is expected to present the ROADMAP proposal to both the TDA and to the Board of Commissioners during a public meeting. ROADMAP is expected to last 3 months.
- C. IMPLEMENTATION: The third component of the project shall be for the execution of the roadmap. The firm is expected to manage not only the work to be performed in-house for the creation of the marketing materials, but also the administrative functions of coordination with outside parties/vendors to ensure execution of the plans as intended. The County shall pay all third parties directly upon the receipt of invoices approved under the ROADMAP. Invoices shall be paid monthly. IMPLEMENTATION is expected to last three years.
- D. ONGOING EVALUATION: As stated, this project is envisioned as a fluid, non-static, interactive process. The goal is not to produce brochures which will be outdated by the time their printed. The selected firm is being given the latitude and the resources to produce quick, targeted marketing decisions in order to attract tourists to events and areas of the County. As such, the firm must stay engaged and help not only market on a timely basis but also to help evaluate local initiatives to determine the likelihood of their success for inclusion in County marketing materials. It is an assumption of this project that the firm selected will, by virtue of having successfully marketed and promoted tourism related features, possess current knowledge of what's popular to tourists and that the firm will, as part of the ongoing evaluation process, will disseminate that information and assist local stakeholders in enhancing their particular tourism activity. It is expected that success will be built upon success, and the firm selected must be dedicated to the entire process. This ongoing evaluation will include, with approval from the TDA, pre-event consultation services to assist event organizers, attendance at marketed events, and post-event feedback. It is also expected, that if an event is deemed unsatisfactory by the firm, that the firm will report such failures to the TDA in order that future marketing will be adjusted accordingly.

**5. GOVERNANCE & COPYRIGHT:**

The firm shall report directly to the TDA. The firm shall report quarterly before the TDA in a public meeting to review the materials produced, provide progression reports, and to review prior quarter expenditures. The firm shall report once a year to the County Board of Commissioners in a public meeting to present an annual State-of-Tourism Report. All materials created for this project shall become the property of Montgomery County and the County shall have the right to reproduce the materials at-will.

**6. ALTERATIONS TO SCOPE/PLAN:**

The scope and process described herein is for the purposes of (1) garnering a consensus from the stakeholders involved, (2) keeping the guiding principals at the fore-front throughout the process, and (3) guidance for the firms submitting qualifications for the project. Notwithstanding the methodologies stated, it is understood and expected that the process will morph once a firm is chosen and their expertise is applied.

**7. QUALIFICATIONS**

The following qualifications have been deemed as the minimum performance standards in order to deliver the work product desired:

- A. Firm whose primary business is in marketing/promotion/advertising and/or event promotion;
- B. Firm whose client list includes marketing/promotion/advertising and/or event promotion work for at least two (2) Municipalities, Counties, or Tourism Development Authorities in North Carolina within the last three (3) calendar years;
- C. Firm whose work above has included the development and implementation of marketing materials in a digital form for website and social media platforms;
- D. Firm consisting of at least three (3) full-time employees with professional work experience in marketing/promotion/advertising and event promotion.

**8. SUBMITTAL FORMAT**

Firms meeting the minimum qualifications should submit three (3) bound copies and one (1) USB-drive containing a digital copy of the complete response package in PDF format. Responses should be prepared as standard 8-1/2 x 11 portrait oriented paper. Pages containing organizational charts, matrices, or large diagrams may be printed on larger paper in order to preserve legibility. Responses shall be bound on left hand side, and limited to twenty-five (25) pages. At minimum, responses shall include the following:

- A. Statement of the firm's understanding of the intent of the project & scope of work solicited, the firm's specific qualifications / experience that aligns with the proposed work, and why the firm should be selected.
- B. Partial or full client list for last three (3) years from date of submittal;
- C. Partial or full list of management/staff with professional education and work experience;
- D. Identification of staff person(s) appointed to this project, and roles assigned to this project;
- E. Portfolio examples of marketing/promotion/advertising work and event promotion

**9. SELECTION**

The TDA will select the two (2) firms (ranked first and second) deemed most suitable for the project after each qualified firm is allocated thirty minutes during a normal business working day to present in-person (before the TDA Board, select County Commissioners, County staff, and County stakeholders engaged in the business of lodging, event promotion, and tourism). Firms will be expected to convey their qualifications, knowledge of the County, and a broad-based concept for marketing and promotion the tourist aspects of the County. The nature, scope, and materials used in these presentations are not restricted, other than those restricted by the confines of the public meeting space and available technology.

#### **10. ENGAGEMENT**

The first firm selected shall enter into negotiations with the TDA to confirm the scope of work, responsibilities, required deliverables, and determine an hourly rate for services (in-person and remote consultation) and a set rate for associated costs (travel, document production, etc.). The resulting contract shall provide for these services and must include a provision for termination by either party with or without cause. If the first firm and the TDA Board are not able to negotiate a reasonable fee schedule for services, the TDA may elect to enter negotiations with the second selected firm. Upon successful negotiations, a recommendation of the TDA, and approval of the Board of County Commissioners, a contract shall be executed between MC and the selected firm.

#### **11. GENERAL TERMS AND CONDITIONS**

- A. All costs associated with developing or submitting a qualifications statement in response to this Request, or to provide oral or written clarification of its contents shall be borne by the respondent. MC and the TDA assume no responsibility for these costs whether or not an agreement or contract is awarded.
- B. All questions and requests for information shall be submitted in writing as established in the RFQ Schedule. Oral and other interpretations or clarifications will be without legal effect.
- C. All Respondents are prohibited from making any contact with members of the Board of County Commissioners, the TDA members, or any employees of the County, other than in the manner and to the person designated herein. The County reserves the right to disqualify any Respondent found to have contacted the people listed above in any manner with regard to this RFQ.
- D. MC and the TDA reserves the right to waive informalities and irregularities, obtain clarification and/or additional information from any firm or individual in regard to its submission. MC also reserves the right to terminate this RFQ, and reissue a subsequent solicitation, and/or remedy technical errors in the RFQ process.
- E. MC and the TDA reserves the right to negotiate terms with other respondents should negotiations be terminated with the first selected respondent.
- F. Any agreements or contracts will be awarded to the Respondent(s) whose submittal(s) is deemed most advantageous to the stakeholders involved, as recommended by the TDA and approved by the Board of County Commissioners.
- G. This RFQ does not commit the TDA to make a recommendation of award or commit MC to enter into an agreement or contract. MC reserves the right to award one, more than one, or no contract(s) in response to this RFQ.
- H. Submittals and any other documents received from a Respondent in response to this request are public records and subject to public inspection and copying.

- I. The Public Records law (N.C.G.S. 132-1 et seq.) authorizes MC and the TDA to withhold from public inspection and copying legitimate and properly marked 'trade secrets'. If a record meets all of the following conditions:
  - i. It is a "trade secret" as defined in G.S. 66-152(3); and
  - ii. It is the property of a private "person" as defined in G.S. 66-152(2); and
  - iii. It is disclosed or furnished to the County in connection with a bid or proposal; and
  - iv. It is marked as "confidential" or as a "trade secret" at the time of its initial disclosure to the County.

If as part of Respondent's submittal, Respondent submits any record, or portion of a record, that Respondent considers to be a trade secret meeting the definition contained in G.S. 66-152 (2), Respondent may clearly mark the particular record, or portion of the record, that meets the definition of trade secret as TRADE SECRET or CONFIDENTIAL TRADE SECRET. In the event the County receives a public records request for records Respondent designates as 'trade secret' the County will notify Respondent and give Respondent the opportunity to, within one week of such notice to confirm in writing that the specific record, or portion of record, that Respondent designated as TRADE SECRET meets the requirements of G.S 132-1.2 and G.S. 66-152, and the reasons therefore. The County will require that Respondent indemnify the County in the event a challenge is brought for the withholding of a record based on Respondent having designated it a trade secret.

- J. The Public Records law In providing a submittal, Respondent agrees that County may reveal any trade secret materials contained in such submittal to all MC staff, Board of Commissioners, TDA members, and other stakeholders actively involved in the selection process and to any outside consultant or other third parties who are hired by MC, or the TDA to assist in the selection process.