

Solicitation for **Visit NC Marketing Communications Services July 2023 - June 2028**

Legal Name of Company/Organization or Individual:

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**THIS PAGE IS TO BE FILLED OUT AND RETURNED WITH YOUR PROPOSAL.  
FAILURE TO DO SO MAY SUBJECT YOUR PROPOSAL TO REJECTION.**

ATTENTION:

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## Economic Development Partnership of North Carolina, Inc.

### REQUEST FOR PROPOSALS RFP: Marketing Communications Services

**TITLE:** **Marketing Communications Services for Visit NC,  
a unit of the Economic Development Partnership  
of North Carolina, Inc.**

**ISSUE DATE:** December 15, 2022

Proposals will be received until the **deadline of 5 PM Eastern Time, January 25, 2023**, for furnishing the services described herein.

#### **SEND ALL PROPOSALS DIRECTLY VIA EMAIL TO BOTH OF THE ADDRESSES BELOW:**

Scott Peacock, Director of Tourism Marketing, Economic Development Partnership of North Carolina:  
[scott.peacock@VisitNC.com](mailto:scott.peacock@VisitNC.com), AND

Chris Cavanaugh, President, Magellan Strategy Group:  
[ccavanaugh@magellanstrategy.com](mailto:ccavanaugh@magellanstrategy.com)

Direct all inquiries concerning this RFP by email to Visit NC's review consultant, Chris Cavanaugh of Magellan Strategy Group, at [ccavanaugh@magellanstrategy.com](mailto:ccavanaugh@magellanstrategy.com) **with the following in the SUBJECT line: Visit NC Marketing Communications Services RFP 2023.**

**NOTE: Questions concerning the specifications in this Request for Proposals will be received until close of business Friday, December 23, 2022.**

No telephone or in-person conversations with Visit NC and Magellan Strategy Group staff, related to this RFP, shall be allowed between December 15, 2022, and the awarding of this contract. All inquiries, questions, or comments must be submitted by email.

Proposals will be sealed and publicly opened on January 26, 2023 at 9:00 AM at the offices of Visit NC, located at 150 Fayetteville Street, Suite 1200, Raleigh, NC. Methods of evaluation shall be as described in this RFP.

A summary of all questions and answers will be posted at <https://partners.VisitNC.com/request-for-proposals> as an addendum, located under the RFP being modified.

**It is the proposer's responsibility to assure that all addenda have been reviewed and, if need be, returned.**

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## **Section 1**

### **INTRODUCTION**

Visit North Carolina, part of the Economic Development Partnership of North Carolina, hereinafter referred to as "Visit NC," is seeking qualified and competent marketing, communications, public relations, and advertising firms, hereinafter referred to as "Proposer" or "Contractor" pursuant to EDPNC's contract with the NC Department of Commerce. As a private entity, EDPNC is not subject to state purchasing and contract requirements in Article 143 of the NC General Statutes or regulations thereunder.

Visit NC is focused upon the following:

### **Mission**

To unify and lead the state in positioning North Carolina as a preferred destination for travelers and film production and in maximizing economic vitality statewide.

### **Objectives**

1. Increase awareness of North Carolina as an inspiring, desirable visitor destination.
2. Drive and grow traveler interest in North Carolina destinations for more frequent, higher spending, longer trips.

### **Measures of Success**

- Arrival Lift – as measured by Arrivalist
- Advertising ROI – as measured by SMARInsights
- Number of users to the Visit NC.com family of websites
- Total number of co-op marketing partners from Tier 1 and Tier 2 counties (see county map here: <https://edpnc.com/incentives/county-development-tier-designations/>)
- Partner satisfaction ratings – as determined by annual industry survey
- Other metrics as determined by Visit NC

### **Strategies**

1. Engage with travelers on an emotional, authentic level to connect with their motivations and aspirations.
2. Showcase North Carolina's unique and diverse stories, places, and experiences through the deeper connections found within them.
3. Collaborate with industry partners to maximize the impact of marketing investments for attracting primarily out-of-state visitors while leveraging in-state media partnerships.
4. Use insights from research and analytics as the foundation for decision making and program optimizations.
5. Prioritize opportunities based on alignment with target audiences and measures of success.

A key component of Visit NC's marketing strategy is its contract with full-service marketing, communications, public relations, and advertising firms engaged to work as collaborative partners in the development, implementation, and evaluation of a comprehensive marketing program to promote the State of North Carolina as a premier travel destination and film production location to regional, national, and international markets as appropriate.

### **EDPNC Diversity Statement**

At the EDPNC, our most valuable resource is our people. We are committed to building a team that draws strength from a diversity of backgrounds, perspectives, and life experiences. We value everyone's individual talents and contributions to our collective accomplishments. By setting our standards high, we aspire to success, while creating positive results for our stakeholders and advancing our state's economic well-being.

Additional background information, including economic impact data, partner co-op programs, and market research, is available at: <https://partners.VisitNC.com/>.

## **Section 2**

### **SCOPE OF WORK**

**The contractors shall be expected to complete one or more components of the Scope of Work described below and in Section 6.** The contractor may complete a proposal for all or some of the components in the scope of work and/or may subcontract parts of the scope of work as long as the contractor remains responsible for the delivery of the subcontractor work product.

STRATEGIC PLANNING (all contractors must agree to the following)

1. Develop marketing strategies for domestic marketing campaigns and use in international marketing campaigns through Visit NC's contracted representatives.
2. Provide comprehensive budgets and individual campaign estimates for approval in advance of execution by the firm.
3. Provide budget management, reporting, strategy, and monitoring.
4. Develop a 3- to 5-year strategic marketing plan for Visit NC.
5. Develop an annual Marketing Plan with objectives and tactics focused on determined KPIs; identification of target markets; specific strategies that include measurable objectives for each target market; tactics to achieve these objectives, and the integration of all programmatic activities in the marketing plan.
6. Work closely with Visit NC staff and any other agencies and firms contracted by Visit NC and align advertising and other communications strategies developed by the firm closely with their initiatives.

### RESEARCH, ANALYTICS, AND REPORTING

7. At the direction of Visit NC and working with Visit NC's marketing and research staff, and in conjunction with the strategic and marketing plans, monitor the effectiveness of Visit NC's marketing, communications, and advertising efforts.
8. Conduct required research programs on behalf of Visit NC in coordination with Visit NC's research staff.
9. Working with Visit NC's research staff, conduct additional research as needed to set strategic direction, predict trends, seek out new and emerging markets and demographics and monitor the industry's performance and trends for all marketing and media programs.
10. Oversee existing analytical programs including but not limited to Arrivalist, Adara, Google Analytics 360, Salesforce, and similar partner companies.

### CREATIVE

11. Develop creative copy concept, graphic design, and layout from first drafts to completed product as needed for all broadcast or printed materials, advertisements, promotions, Internet, and public relations materials.
12. Produce or assist in development and producing print, broadcast, and electronic marketing materials as needed
13. Prepare all mechanical art or acquire all necessary artwork, photography, and other creative assets that are required for the production of advertisements, marketing, and public relations materials.
14. Produce all other collateral materials in support of Visit NC's campaigns. (The program of work does **NOT** include the development of the state's annual printed visitor guide.)

### MEDIA PLANNING

15. Select media and media placement based on primary and secondary research, past tracking inquiries, fulfillment, follow-through on visitors' actions, return on investment studies, and measure advertising and creative effectiveness in expanding awareness, interest, and visitation.

16. At the direction of Visit NC, and in conjunction with the strategic marketing plans, analyze and recommend specific marketing media (both paid and unpaid across print, digital, broadcast, out of home, sponsorships, and social media), placed upon the approval of Visit NC.
17. Monitor placement to ensure accuracy and completion of all paid and unpaid media schedules.
18. Provide traffic management as needed for all media as part of any campaigns.

#### PUBLIC RELATIONS

20. Develop, execute, and track public relations programs in coordination with Visit NC staff.
21. Establish plans and designate staffing for advisories and crisis communications.
22. Set and create a media PR relations strategy based on target audience / media, target markets, media missions, media materials, monitoring, press visits / FAM tours, and asset management.

#### INDUSTRY RELATIONS

23. Provide support for partner state agency / initiative requests: Commerce, Natural and Cultural Resources / State Parks, Travel Guide, etc.
24. Provide support and video/ presentation development for the annual Visit NC Tourism Conference.
25. Provide support, attendance, and presentation assistance for ongoing partner meetings.
26. Develop and produce the Visit NC Annual Report and Strategic Plan documents.

#### PARTNER & CO-OP PROGRAMS

27. Develop an annual value-added co-op program in which potential marketing and advertising partners are identified and strategies specified for generating partnership funds (typically with a goal of more than 100 individual businesses/partners participating at a typical combined investment level of more than \$1 million) for leveraging Visit NC funds to extend North Carolina's marketing reach and frequency. The contractor shall have primary responsibility for generating, collecting, implementing, and reporting all advertising sales and partnership funds. More information about the current program can be found here: <https://partners.VisitNC.com/partner-programs>.

#### BRAND FAMILY MANAGEMENT

28. Manage Visit NC's Retire brand family
29. Manage Visit NC's Film brand family
30. Manage Visit NC's Sports Travel brand family
31. Assist in managing Visit NC's International brand family

#### WEBSITES

32. Lead Visit NC in the development and enhancement of technology-based strategies and programs, including the [www.VisitNC.com](http://www.VisitNC.com) destination website and the associated family of sites including [filmnc.com](http://filmnc.com), [retirenc.com](http://retirenc.com), [sportsnc.com](http://sportsnc.com), [project543.com](http://project543.com), and [partners.VisitNC.com](http://partners.VisitNC.com), and product databases. Manage and provide quality assurance and maximize user experience.
33. Determine appropriate and cost-effective methods for hosting the website and other online media, web promotion, keyword search optimization, and site design to enhance search engine placement.
34. Recommend and execute strategies and tactics for effective use of integrated social media (organic and paid), mobile technologies, and other leading-edge technology for reaching the target audiences.
35. Manage the e-mail database of potential visitors for the distribution of ongoing electronic newsletters.

#### VISIT NC CALL CENTER

36. Manage and provide quality assurance and software assistance for in-bound telemarketing services at the 1-800-Visit NC call center and any related training, scripting, reporting, and data transfers.
37. Participate as appropriate with coordination of inquiry response materials, training of inquiry operators, and assist with call center database management.

#### DIGITAL ASSETS AND SOCIAL MEDIA

38. Manage and oversee Visit NC's consumer-facing newsletters and email database.
39. Manage and oversee Visit NC's sweepstakes management.
40. Manage and oversee Visit NC's social media voice and strategy.

#### INTELLECTUAL PROPERTY MANAGEMENT AND BRAND ASSETS

41. Handle all intellectual property issues arising out of the work to be performed under or in connection with the contract(s). This shall include securing permission to use copyrighted or trademarked material or other protected visuals, words, names, music or sounds that will be included in the promotional materials. This also includes researching and registering any necessary copyright or trademark for materials developed under the contract(s). All intellectual property rights shall be vested in the Economic Development Partnership of North Carolina.

#### OUTDOOR NC INITIATIVE

42. Develop marketing strategies to manage Visit NC's Outdoor NC destination stewardship and sustainable tourism initiative with the goal of awareness and adoption of the initiative's core principles. More information about the initiative can be found here: <https://www.VisitNC.com/outdoornc>.
43. Develop partner/industry facing marketing materials with the goal of use in amplifying initiatives key messages to their visitors and followers/customers.
44. Provide comprehensive budgets and individual campaign estimates for approval in advance of execution by the firm.
45. Provide budget management, reporting, strategy, and monitoring.
46. Develop an annual Marketing Plan with objectives and tactics focused on determined KPIs; identification of target markets; specific strategies that include measurable objectives for each target market; tactics to achieve these objectives, and the integration of all programmatic activities in the marketing plan.
47. Work closely with Visit NC staff and any other agencies and firms contracted by Visit NC and align advertising and other communications strategies developed by the firm closely with this initiative.
48. Develop creative copy concept, graphic design, and layout from first drafts to completed product as needed for all broadcast or printed materials, advertisements, promotions, digital, and public relations materials for the initiative.

#### OTHER

49. Demonstrate support and assistance above and beyond the scope of work for day-to-day issues, crises, and varied tourism and tourism office-related requests.
50. For the purpose of responding to this RFP there will be times when assistance is needed beyond the scope of work and anticipated plans. Please elaborate on the firm's willingness and capacity to assist the Visit NC team on endeavors not currently identified and a brief statement on what you believe differentiates you from the field of expected respondents in helping Visit NC meet those unplanned future endeavors.

### **Section 3**

#### **PROPOSALS**

A. This RFP is not an offer. This RFP is an expression of current intention and seeks responses from companies who wish to be considered for selection to receive an offer from Visit NC/EDPNC to provide the goods and services agreed between the parties. Visit NC/EDPNC seeks the very best companies to provide the goods and services necessary to fulfill our goals, and the intentions expressed herein may change during the course of this RFP. Should your response be selected to receive an offer to contract it is expected that you will agree to a contract containing any terms and conditions referenced herein, your RFP responses and to other reasonable commercial terms for similar engagements. Proposers are urged to submit a proposal for establishing and performing the services described herein. All proposals must be submitted strictly in accordance with the requirements for the Request for Proposal. Failure to furnish any required information with your proposal is grounds for rejection, at the option of the EDPNC. The successful proposer will enter into a contractual agreement with Visit NC/EDPNC to provide the agreed services.

B. Each proposer shall demonstrate in its proposal that the firm and its management and employees are experienced and competent and that it has the background, training, and experience to perform the services required by this contract.

C. All proposals must be received not later than the date and time specified on the cover of this RFP.

D. Upon completion of the technical and cost evaluations, the firms whose proposals have been deemed most acceptable will be invited to make an oral presentation. The evaluators reserve the right to request discussion with any or all proposers for the purpose of clarification or to amplify the materials presented in any part of the proposal. Upon completion of the oral presentations, final evaluations will be made and the evaluation team will make a recommendation for award. It is recommended that proposals do not include speculative creative nor should confidential or trade secret information be submitted.

E. Proposals will be evaluated according to completeness, content, experience with similar projects, the ability of the proposer and its staff, and cost. Award of a contract to a proposer does not mean that the other proposals lacked merit, but that, all factors considered, the selected proposal was most advantageous to the EDPNC. Cost will not be the primary deciding factor for the award. The award will be made to the most qualified total written proposal package, plus the oral presentation, for the most advantageous use of EDPNC funding for Visit NC.

F. Proposers are cautioned that this is a request for offers, not a request to contract, and the EDPNC reserves the unqualified right to reject any and all offers when such rejection is deemed to be in the best interest of the EDPNC and Visit NC.

G. Visit NC will review all acceptable proposals and will invite the highest rated proposers for an oral presentation. Qualified proposers will be notified of the confirmed date and time but may wish to hold dates during the week of **February 13, 2023**, in case of a request to make an oral presentation.

J. NOTE: Proposers will disclose the current business relationships they have with other tourism accounts, including, but not limited to, convention and visitors bureaus, destination marketing organizations, hotels, attractions, and other tourism-related entities. Conflicts of interest with any of these entities will be determined by Visit NC on a case-by-case basis. The existence of such relationships (either ongoing or project-based) does not necessarily create a conflict of interest. However, the proposer will be expected to immediately disclose any travel industry-related entities with which it has a relationship, or is participating in a review for such business, both now and for the duration of this contract. Visit NC prefers that the firm selected to develop and execute destination brand creative not represent a competing state tourism campaign for the duration of this contract.

K. Proposers will not be compensated for any costs related to their responses, or any other costs incurred by participating in this process.



L. Any comments made verbally or in written form to Visit NC or the review panel outside the content of the submitted response or the oral presentation will not be considered as part of the response or as a demonstration of the proposer's status or qualifications.

M. The proposer must disclose and explain any pending or threatened litigation and, if such exists, whether it will hinder the proposer's ability to perform to the client's expectations.

N. Visit NC will consider firms located outside of North Carolina for all components of the scope of work described in this RFP. However, firms interested in the creative/ media/ brand identity component described below must have at least one account service team member located in North Carolina in order to facilitate in-person meetings, establish relationships with industry representatives from across the state, and develop first-hand knowledge of the destination.

## **Section 4**

### **PROPOSAL CONTENT**

Please provide the response to the RFP in a user-friendly format. There is a 50-page limit to the response to the RFP, exclusive of cover pages or table of contents. Relevant creative examples hosted online will not count against this page limit.

The proposal shall contain the following information:

- Executive Summary
- Corporate Background and Experience
- List of Current Clients and Length of Service
- Financial Statement
- Project Staffing and Organization
- Scope of Work to be Provided and Technical Approach
- Cost
- Execution Page

#### Executive Summary

The executive summary will consist of the proposal cover letter highlighting the contents of this proposal.

#### Corporate Background and Experience

This section will include background information on the organization and should give details of experience with similar assignments. This should detail whether the work of a similar nature was performed by the firm as agency of record; as a project; and/or by the firm's personnel while employed with other firms. A list of references (including contact persons, telephone numbers and e-mail addresses) for whom similar work has been performed must be included.

#### List of Current Clients and Length of Service

The proposal should include a list of current clients for whom the firm is providing services; the nature of the relationship (project-based or agency of record); and the length of the relationship with each.

#### Biographical Profiles of Key Staff on This Account

Please include brief biographical information for senior personnel who will work on the account.

#### Financial Statement

The proposer shall provide the following financial information:

- Recent audited or reviewed financial statements prepared by an independent certified public accountant (CPA) that shall include, at a minimum, a balance sheet, income statement (i.e., profit/loss statement) and cash flow statement and, if the audited or reviewed financial statements were prepared more than six (6) months prior to the issuance of this RFP, the proposer shall submit its most recent

internal financial statements (balance sheet, income statement and cash flow statement or budget with entries reflecting revenues and expenditures from the date of the audited or reviewed financial statements to the end of the most recent financial reporting period (i.e., the quarter or month preceding the issuance date of this RFP));

OR

- Recent compiled financial statements prepared by an independent CPA that shall include, at a minimum, a balance sheet, income statement (i.e., profit/loss statement) and cash flow statement and, if the compiled financial statements were prepared more than three (3) months prior to the issuance of this RFP, the proposer shall submit its most recent internal financial statements (balance sheet, income statement, and cash flow statement or budget with entries reflecting revenues and expenditures to date), and other evidence of financial stability such as most recently filed income tax return, evidence of a line of credit/loans/other type of financing with statement of amount in use/outstanding balance (e.g., a complete copy commitment letter, loan agreement, billing statement reflecting the line of credit or statement from lender acknowledging the commitment to fund the proposer's stated financing), performance bond, personal guaranty with copies of personal income tax filing and statement of net worth or such other evidence that is accurate, reliable, and trustworthy regarding the proposer's financial stability.

"Recent" shall be defined as financial statements that were prepared within the 12 months preceding the issuance date of this RFP.

Consolidated financial statements of the proposer's parent or related corporation/business entity shall not be considered, unless: (1) the proposer's actual financial performance for the designated period is separately identified in and/or attached to the consolidated statements; (2) the parent or related corporation/business entity provides the EDPNC with a document wherein the parent or related corporation/business entity will be financially responsible for the proposer's performance of the contract and the consolidated statement demonstrates the parent or related corporation's/business entity's financial ability to perform the contract, financial stability and/or such other financial considerations identified in the evaluation criteria; and/or (3) proposer provides its own internally prepared financial statements and such other evidence of its own financial stability identified above.

The proposer's failure to provide any of the above-referenced financial statements or failure to submit all the requested financial statements may result in the rejection of the proposer's proposal and rejection is more likely to occur if other proposers provide financial documentation in compliance with the foregoing provisions. Proposers are also encouraged to explain any negative financial information in financial statements and are encouraged to provide documentation supporting those explanations.

All financial information, statements and/or documents provided in response to this proposal requirement should be clearly marked CONFIDENTIAL and shall be kept confidential by EDPNC and Visit NC.

#### Project Staffing and Organization

This section must include the proposed staffing, deployment, and organization of personnel to be assigned to this account. The proposer shall provide information as to the qualifications and experience of all executive, managerial, legal, and professional personnel to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person as follows:

A. Contract or Account Manager. Identify one (1) individual who will manage the contract work and be the primary contact for the client. Document overall experience in tourism marketing and demonstrate a minimum of five (5) years of service in this area. Attach a current resume/biography. Provide detail on the Account Manager's experience, education, affiliations, memberships, awards, and recognitions received for similar services. Describe this individual's work ethic and philosophy. Define the percent of the Account Manager's time devoted exclusively to managing Visit NC's account.

B. Account Team. Identify by name, title, and roles and responsibilities each proposed account team

member on Visit NC's account. Include relevant experience, including that which may be outside of your firm. Identify individual experience in destination, travel, trade and/or international tourism marketing, sports, marketing and/or business development. Identify specifically what percentage of the firm's total effort will be provided by various team members and the percentage of their time that will be devoted to the account.

C. Identify who would work on Visit NC marketing strategies and plans and how much time would be spent on the Visit NC account.

D. Identify who would take prime responsibility for, and have final authority over, the Visit NC account. How much time would this individual devote to issues pertinent to Visit NC? List all other account assignments this person would carry.

E. Submit an organizational chart, showing the hierarchy of key personnel to be working on this account and project(s). Show the relationship between contract manager, account team, and key personnel of the proposer's organization and all other parties (subcontractors) to the proposal.

F. Identify any other firms, outside personnel not employed directly by the proposer, or partnerships that will be used to meet the obligations of the relationship. The lead firm should also state the reasons why the outside resource will be part of the account team; whether the lead firm has any prior experience working with that external resource; and how the resource will be integrated into the service of the account.

The Vendor must detail the manner in which it intends to utilize resources or workers located outside of the United States, and the EDPNC will evaluate the additional risks, costs, and other factors associated with such utilization to make the award for this proposal as deemed by the awarding authority to be in the best interest of the EDPNC and Visit NC.

For any proposed or actual utilization or contract performance outside of the United States, the proposer's proposal must include:

- The location of work performed under a state contract by the vendor, any subcontractors, employees, or other persons performing the contract.
- The corporate structure and location of corporate employees and activities of the vendors, its affiliates, or any subcontractors.

The EDPNC may initiate proceedings to debar a vendor from participation in the proposal process and from contract award as authorized by North Carolina law, if it is determined that the vendor has refused to disclose or has falsified any information provided herein.

G. Detail any personnel changes you would be required to make if you were to be awarded this proposal, including the number of new employees you would have to hire and for what positions. Visit NC understands that the selected firm may need to hire new or additional staff to support the account. If this will be required, please state the date by which you intend to be fully staffed to support the account.

H. Describe your firm's business and marketing philosophies. Describe your firm's work environment and internal culture. Please summarize any hybrid or remote work policies your firm has adopted.

#### Qualifications & Experience

I. A brief statement of how long the proposer has been performing the type of services required by this RFP.

J. List any relevant professional memberships.

K. Identify the location of the firm's offices. Identify any known members of the account team who will be working permanently in locations outside of the firm's offices.

Scope of Work to be Provided and Technical Approach

This section must include, in narrative, outline, and/or graph form, the proposer’s approach to accomplishing the tasks outlined in the scope, technical information and requirements section of this RFP. A description of each task and deliverable must be included. Include a discussion of any primary marketing research you would propose upon being awarded this account, and how you would utilize such research to benefit the client. Also include a broad, strategic vision for growing North Carolina’s market share and its subsequent impact on the state’s economy.

Cost

The EDPNC and Visit NC are open to a variety of compensation arrangements. However, cost proposals must be clearly defined and articulated in detail. “Open-ended” cost proposals are strongly discouraged.

The cost proposal must be in keeping with the expected budget for all requested services. The total budget for all services described within this RFP is not-to-exceed \$14,000,000 annually for the next two fiscal years beginning July 1, 2023. Annual funding for Visit NC is determined by the North Carolina legislature and could fluctuate as adjusted annually in the State’s budget process. The firm’s compensation will be a component of the annual budget for each component in the scope of work as detailed below:

<u>Total Budget Not to Exceed</u>	<u>\$14,000,000</u>
Media	\$ 8,600,000
Creative	\$ 3,000,000
Website Development	\$ 800,000
Social Media	\$ 600,000
Public Relations	\$ 400,000
Film NC	\$ 330,000
Outdoor NC	\$ 270,000

At a minimum, cost proposals should detail all of the following components as applicable to the scope of work to be provided, including as appropriate:

- Proposed media planning and placement fee structure, based upon net media costs to the agency.
- Expected costs for in-house creative development (exclusive of out-of-house creative production costs, which will be billed at cost to Visit NC)
- Monthly account service fees, inclusive of normal expected operational fees (such as copying, telephone, postage, packaging, and express shipping) and travel required for normal account service. Operational and travel expenses outside of the normal anticipated plan of work will be approved in advance by Visit NC and receipts provided for verification.
- Any other significant professional services to be billed as monthly fees.
- An hourly rate sheet for in-house services and contracted services to be provided by subcontractors as part of this proposal.
- Total estimated annual compensation proposed by the proposer.

Execution Page

The Execution Page must be signed and included in your response.

**Section 5**

**PAST WORK SUBMISSIONS**

Items to be submitted for evaluation in technical and cost approach:

Past Work

The work performed by your firm related to past initiatives will be considered in the evaluation. Therefore, the firm should present any of, but not limited to, the following information which demonstrates your firm's ability to develop and implement destination marketing. The client may be a destination or any other product or

service. The components of the program must be detailed and specific. However, for each, the firm should identify the personnel responsible for the service being referenced and should cross-reference that service with how the person is proposed for the state agency campaign. The work cited should demonstrate the following:

- A. Budget Maximization: The firm should provide examples of how they maximized the budget with which they were working and how it was accomplished.
- B. Results-Oriented Success: The firm should document previous successes for other clients and should describe in detail how such successes were measured.
- C. Creative Ability: The firm should demonstrate its creative capabilities by describing and detailing what it considers to be its two (2) best initiatives or campaigns.
- D. Samples: The firm is strongly encouraged to submit samples outlining any or all of the current/past work described above in order to demonstrate the style, creativity, and overall past performance of the personnel proposed by the firm who worked on those initiatives. In addition, any such samples submitted shall be at the proposer's expense by the proposer's organization. Any samples provided may remain confidential at the option of the proposer. Samples should be marked or otherwise indicated as such. Only members of the review panel will have access to this information.

## **Section 6**

### **WRITTEN RESPONSES FOR PROPOSAL**

***Proposers may propose on one or more of the following components:***

#### **Component One: Creative/ Media/ Brand Identity**

The technical proposal shall include the following:

Illustration of the agency's past work on at least two (2) campaigns--Please provide a description of two marketing campaigns executed for a client or clients, in the last five years. For each campaign include:

- The goals and objectives of the campaign.
- The research and methodology utilized to develop the campaign
- Creative concept including advertising, marketing, branding, and or other related efforts
- Media strategy, including any online initiatives
- The results of the campaign and how it was measured.
- The budget for the campaign (if available)

For the above, please provide at least two and not more than four samples of exceptionally effective advertisements and other marketing communication (print, brochures, television spots, radio creative, out-of-home media, web, digital, social media, etc.)

#### **Component Two: Public Relations**

Please provide a description of at least two public relations strategies executed for a client or clients in the last five years. For each include:

1. The goals and objectives of each strategy.
2. The research methodology that went into the development of each strategy.
3. The results of strategy and how impact was measured.
4. The budget for the campaigns (if available).

#### **Component Three: Trade Industry Relations/ Marketing (Film NC)**

Please provide a description of at least two business-to-business strategies executed for a client or clients in the last five years. For each include:

1. The goals and objectives of each strategy.
2. The research methodology that went into the development of each strategy.

3. The results of strategy and how impact was measured.
4. The budget for the campaigns (if available).

### **Component Three: Social Media**

Please provide a description of at least two social media campaigns developed for a client or clients in the last five years. For each include:

1. The goals and objectives of the social media campaigns.
2. Any research and the methodology that went into the development of the social media campaigns.
3. Any demonstrations of the tracking metrics used to measure effectiveness and identify areas of ongoing improvement.
4. The results generated by the social media campaigns.
5. The budget for the social media campaigns (if available).

### **Component Four: Website Development**

Please provide a description of at least two websites developed for a client or clients in the last five years. For each include:

1. The goals and objectives of the websites.
2. Any research and the methodology that went into the development of the websites.
3. Any demonstrations of search engine optimization used in the website development; mobile executions of the websites; and the tracking mechanisms used to measure effectiveness and identify areas of ongoing improvement.
4. The results generated by the websites.
5. The budget for the websites' development (if available).

### **Component Five: Consumer Marketing and Industry Engagement (Outdoor NC Initiative)**

Please provide a description of at least one sustainable tourism or education/awareness-based consumer marketing and industry engagement strategy executed for a client or clients in the last five years. For each include:

1. The goals and objectives of each strategy.
2. The research methodology that went into the development of each strategy.
3. The results of strategy and how impact was measured.
4. The budget for the campaigns (if available).

### **Component Six: Marketing Co-Op Program**

Please provide a description of at least one advertising/marketing co-op or sales strategy executed for a client or clients in the last five years. For each include:

1. The goals and objectives of each strategy.
2. The research methodology that went into the development of each strategy.
3. The sales strategy
4. The project management strategy
5. The results of strategy and how impact was measured.
6. The budget for the campaigns (if available).

**Cost Component: See minimum requirements listed above and below.**

## **Section 7**

### **ORAL PRESENTATIONS**

Oral presentations by selected proposers will be subjectively evaluated.

If the proposer is selected for an oral presentation, the proposer will be expected to develop and present based on Visit NC's marketing goals.

**The oral presentation will take place at Visit NC's offices, located at 150 Fayetteville Street, Suite 1200, Raleigh, N.C., scheduled for February 16-17, 2023. You will be notified of your specific presentation date and time. You will have one and one-half hours (90 minutes) for the presentation and one-half hour (30 minutes) for questions from the evaluation committee.**

Key members of the proposed account team should make the oral presentation, or at the very least, be active participants in the presentation.

Nothing may be left behind by the firm other than those items specifically requested as part of this RFP.

Presenters will be provided with detailed information about standard audio/visual equipment and the room setup.

The proposer should address the following points during the presentation:

- A. Introduction of your personnel, their backgrounds, and their proposed roles on the Visit NC account. This should also include identification of any subcontractors or other resources to be used on the account.
- B. A demonstration of your beliefs--how would you define the ideal client relationship. This section should include a look at the personality and culture of the firm, and what it's like to work with you. The firm is welcome to use any medium for communicating this to the audience.
- C. Provide an overview of your firm's expertise in the marketing, communication, and interactive services you offer, and those of the subcontractors or other resources used to meet the needs of the client.
- D. The firm's specific strategic approach to helping Visit NC grow visitation to the state. The presentation should demonstrate how the firm will specifically approach the scope of work to increase awareness of North Carolina as a travel destination; extend travel marketing dollars throughout the state through expanded partnerships; and measure the effectiveness of the program. (**Speculative creative and media plans are not included as part of the presentation, however.**) The focus of this approach must be on driving out-of-state visitation only, with a primary focus upon domestic markets.
- E. A presentation of specific previous experience that helped stimulate growth for clients of the firm, including a case study with results generated by the firm's work. The content should cover the firm's strategic and tactical approaches used to generate the results.

Please distribute a summary of your oral presentation to members of the review panel at the conclusion of your oral presentation. The summary of your oral presentation will become part of your proposal and ultimately part of any resulting contract. Your presentation, the summary, and any multimedia used in the presentation may be delivered to the panel members via flash drives or other electronic media.

## **Section 8**

### **CONTRACT TERMS AND CONDITIONS**

#### Contract Terms

The expected term of this contract will be for the period July 1, 2023, through June 30, 2028. Vendor performance will be reviewed annually by the Contract Administrator. Termination for non-performance will be

permitted upon 15 days written by either party and Visit NC/EDPNC may terminate for any reason upon 60-days written notice and immediately in the event Visit NC/EDPNC's contract with the Department of Commerce is terminated or materially altered. The contract is conditioned upon N.C. Gen. Stat. § 143C-6-8 and other terms deemed necessary or proper by Visit NC/EDPNC in their sole discretion.

#### Account Administrator

Visit NC/EDPNC shall designate one person as the Account Administrator for this contract. This person will be responsible for the following duties:

A. The Account Administrator and liaison for the contract will be named after the award. The Account Administrator will approve the work schedule. Any documents that may be generated as a result of this contract will be submitted to the Account Administrator for approval.

B. Determination as to whether the Contractor is satisfactorily performing the services delineated in the contract shall be at the discretion of the Account Administrator. In the event performance is unsatisfactory, the Account Administrator shall be responsible for initiating notifications to the Contractor as outlined in the contract. Any desired change in the contract must be approved by the Department's Purchasing Officer.

## **Section 9**

### **COMPENSATION PROPOSAL**

All compensation proposals shall be signed as follows:

- As an individual, sign with full name and business address.
- As a partnership, partners shall sign with full names and business address
- As a corporation, an officer of the corporation shall sign with full name and title and shall include the name and address of the corporation.

Visit NC is open to a variety of compensation arrangements. However, compensation proposals must be clearly defined and articulated in detail. "Open-ended" compensation proposals are strongly discouraged.

The compensation proposal must be in keeping with the expected budget and anticipated plan of work for all services provided to Visit NC. Compensation must be a component of the annual budget previously described within this RFP.

At a minimum, cost proposals should detail all of the following components as applicable to the scope of work to be provided, including as appropriate:

- Proposed media planning and placement fee structure, based upon net media costs to the agency.
- Expected costs for in-house creative development (exclusive of out-of-house creative production costs, which will be billed at cost to Visit NC)
- Monthly account service fees, inclusive of normal expected operational fees (such as copying, telephone, postage, packaging, and express shipping) and travel required for normal account service. Operational and travel expenses outside of the normal anticipated plan of work will be approved in advance by Visit NC and receipts provided for verification.
- Any other significant professional services to be billed as monthly fees.
- An hourly rate sheet for in-house services and contracted services to be provided by subcontractors as part of this proposal.
- Total estimated annual compensation proposed by the proposer.



## **Section 10**

### **AWARD CRITERIA**

Proposals will be initially evaluated by an internal review panel on the basis of the following criteria for each scope of work component proposed:

- Technical Proposal and Cost Proposal (Total 75 Points)
  - Corporate Background and Experience, Financial Statement, Project Organization, Written Response (20 Points)
  - Scope of Work and Technical Approach (20 points)
  - Past Work (30 points)
    - Budget Maximization (10 points)
    - Results-Oriented Success (10 points)
    - Creative Ability and Samples (10 points)
  - Cost Proposal (5 points)
- Oral Presentation (25 points)

***Total evaluation equals 100 points.***

**Section 11**

**EXECUTION OF PROPOSAL**

By submitting this proposal, the potential contractor certifies the following:

- This proposal is signed by an authorized representative of the firm.
- It can obtain insurance certificates as required within 10 calendar days after notice of award.
- The cost and availability of all equipment, materials, and supplies associated with performing the services described herein have been determined and included in the proposed cost.
- All labor costs, direct and indirect, have been determined and included in the proposed cost.
- The proposer is aware of prevailing conditions associated with performing these services (*if applicable*).
- The proposer can and will provide the specified performance bond or alternate performance guarantee (*if applicable*).
- The potential contractor has read and understands the conditions set forth in this RFP and agrees to them with no exceptions.

PROPOSER: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY, STATE, ZIP: \_\_\_\_\_

TELEPHONE NUMBER: \_\_\_\_\_ FAX (if applicable): \_\_\_\_\_

E-MAIL: \_\_\_\_\_

Principal Place of Business If Different from Above:

\_\_\_\_\_

Will any of the work under this contract be performed outside the United States?  Yes  No  
(If yes, describe in technical proposal.)

**N.C.G.S. § 133-32 and Executive Order 24** prohibit the offer to, or acceptance by, any EDPNC Employee of any gift from anyone with a contract with the State, or from any person seeking to do business with the State. By execution of any response in this procurement, you attest, for your entire organization and its employees or agents, that you are not aware that any such gift has been offered, accepted, or promised by any employees of your organization.

BY: \_\_\_\_\_ TITLE: \_\_\_\_\_ DATE: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Printed name)

\*\*\*\*\*

ACCEPTANCE OF PROPOSAL

**(Using Firm Name)**

BY: \_\_\_\_\_ TITLE: \_\_\_\_\_ DATE: \_\_\_\_\_

**THIS PAGE MUST BE SIGNED AND INCLUDED IN YOUR PROPOSAL.**  
Unsigned proposals will not be considered.

## **Section 12**

### **LIMITATIONS**

1. This request for proposal is not an offer.
2. As a recipient of this RFP, You (a.k.a. "Your"), as an independent consultant, firm, company, partnership, or network of individuals or firms have been invited to participate in Visit NC's search and You agree to be bound by any terms and conditions related to Visit NC's secrecy and proprietary rights, or if a separately executed Secrecy and Proprietary Rights and/or Non-Disclosure Agreement between You and Visit NC exists, by the terms of that document.
3. Following the due date for submission of this RFP, and prior to establishing a contract, the RFP response shall be considered binding on the proposer until such time as Visit NC selects and negotiates contract terms with the winning proposer, but in no event beyond 5:00 PM Eastern Time on June 30, 2023.
4. Hold Harmless – In submitting a proposal(s), You understand that Visit NC will determine in its sole discretion, which proposal(s), if any, is/are accepted. You waive any right to claim damages of any nature whatsoever based on the selection process, final selection, and any communications associated with this RFP process and agree to accept the decisions of the EDPNC and Visit NC as final.
5. Proprietary Document – You agree that all information communicated by Visit NC shall be received for the sole and exclusive purpose of enabling You to submit a response to this RFP. The information contained in this RFP and the RFP itself, is proprietary in nature and shall not, under any circumstances, be disclosed, in whole or in part, to any third parties without the prior written approval of Visit NC.
6. Proprietary Rights – By responding to this RFP, you acknowledge that Visit NC will have the right to use, for Visit NC's own business needs, any ideas or concepts You present in Your RFP response, without compensation to Your firm (Visit NC shall not construe this to be a license to reproduce copyrighted and/or trademarked materials).
7. The issuance of this document and the receipt of the information in response to this document shall not in any way cause Visit NC to incur any liability or obligation to You, financial or otherwise. Visit NC assumes no obligation to reimburse or in any way compensate You for expenses incurred in connection with Your response to this document.
8. All proposals received shall become the property of Visit NC and will not be returned to You.
9. Visit NC may seek to procure only part of the services proposed by You or other suppliers in this process. Visit NC may reject any or all proposals. Visit NC shall have no obligation to award a contract for work, goods, and/or services as a result of this solicitation. Visit NC may make an award to other than the lowest proposer. Visit NC may change the Scope of Services, Technical Specifications, Evaluation Criteria, Contract Terms and Conditions, and any other factor involved in this RFP at its sole discretion in an attempt to develop the best marketing and advertising for the visitor industry in North Carolina.
10. Visit NC reserves the right to change the schedule of events, revoke the RFP, or discontinue the process at any time as deemed necessary.
11. Visit NC is committed to diversity and inclusion of our workforce, customers, consumers, and suppliers. To that end we encourage diverse suppliers, contractors, and sub-suppliers to submit proposals on opportunities to provide our Visit NC with high quality goods and services at a reasonable price. Selection of a contractor shall be made without regard to race, sex, gender, sexual orientation, religion, age, national origin, disability, military status or any other characteristic protected under applicable law.
12. As a private entity, EDPNC is not subject to State purchasing and contract requirements in Article 143 of the NC General Statutes or regulations thereunder.
13. By reason of EDPNC's status as contractor to the NC Department of Commerce, by law EDPNC is subject to the Public Records Law, Chapter 132 of the NC General Statutes. Proposals submitted are subject to that statute.
14. Any other business partner, sub-contractor, or vendor with whom you work to respond to this RFP must agree to these conditions.
15. If you do not agree to the above conditions, please do not respond to this RFP.