



***Request for Proposal
for Professional Full-Service
Marketing Agency of Record***

Helena Tourism Business Improvement District
Request for Proposal
Marketing Agency of Record
May 13, 2019

To All Prospective Bidders:

Introduction:

Visit Helena, the brand comprised of the Helena Tourism Business Improvement District (TBID) in Helena, Montana is seeking the qualified services of a marketing agency to provide marketing recommendations, creative development, project management and media placement for marketing initiatives to favorably position our community in the minds of travel consumers and to encourage potential visitors to consider our area as a desirable destination for their travel plans.

Visit Helena is looking for a collaborative partner, not only an agency to note on record, in the development, implementation, and evaluation of a comprehensive marketing program to promote the tourism region as a travel destination to state, regional, national and international markets. Collaboration and ingenuity are crucial and key in the partnership that will help grow visitation and evolve Helena as a tourism destination.

About Visit Helena:

The TBID is funded by assessed businesses (lodging partners) that have an interest in promoting tourism to Helena. The TBID has been in place since 2009. The TBID operates under the direction of the TBID Board of Directors and reports to the City of Helena. Visit Helena's priority is to market the community as a premier travel destination to the regional, national and international markets across several segments including leisure travel, meetings recruitment, and sports and events promotion to increase overnight stays.

The Visit Helena team oversees the production of a variety of marketing activities for the brands Visit Helena and Bike Helena, including on and offline advertising, visitor publications and maps, cooperative programs with the Montana Office of Tourism and Business Development, social media, development and management of digital offerings, tradeshow, events, expansion of tourism segments including but not limited to regional, national and international leisure, meeting recruitment and sports events-all designed to promote Helena, Montana to visitors. In addition, Visit Helena's staff works with tourism partners and stakeholders.

For more details visit:

www.helenamt.com

www.bikehelena.com

Helena TBID Organizational Mission

To promote and preserve Helena as a unique destination in order to increase occupancy for lodging facilities thereby creating vibrant growth in the local economy.

Helena TBID Organizational Vision

The Helena TBID is the premier partner and leading advocate for Helena's quintessential experiences and profound opportunities.

About Helena, Montana:

Helena, Montana, is Montana's Capital City and is nestled against the Rocky Mountains. Helena was built by gold mining and has a rich gold rush history and exploring Last Chance Gulch brings the history to life. Montana's capital city strikes a unique balance between having a rich history and being a lively arts and culture town.

Helena, Montana, is much more than just the state capital; it is a vibrant community bordering some of the best recreation opportunities in Montana. Helena is located between Yellowstone National Park and Glacier National Park.

Designated a ride center by the International Mountain Biking Association, Helena has over 75 miles of trails that originate in the Downtown area, offering visitors a world-class mountain biking or hiking experience.

Surrounded by pristine mountain scenery, numerous rivers and lakes, clean fresh air, and an abundance of wildlife, Helena is a unique travel destination.

Montana's Brand Pillars perfectly match with Helena and what it offers visitors.

More spectacular unspoiled nature than anywhere else in the lower 48.

Its location, nestled against the Rocky Mountains and opening into a lush valley, highlights the spectacular unspoiled nature that can be found just outside the city limits. Helena is surrounded by pristine mountains, rivers, and lakes. With over 80 miles of trails on Helena's South Hills, nearby public land, and

Gates of the Mountains, visitors can escape into an outdoors that is still very much like it was when Lewis and Clark first set eyes on it.

Vibrant and charming small towns that serve as gateways to natural wonders.

Named one of the Best Small Arts Towns, Helena has all the amenities of a big city but with a small-town feel. In addition to its rich history and culture, visitors will find biking and hiking trails, blue-ribbon fishing, and water recreation opportunities just outside city limits.

Breathtaking experiences by day, relaxing hospitality at night.

Whether it is the panoramic views from atop MacDonald Pass or watching a resident artist create their next piece at Archie Bray, Helena offers visitors unique and breathtaking experiences that can't be found elsewhere. Stroll along the walking mall to explore the many local shops. Or relax and enjoy some Helena flavor at a local restaurant, brewery, or distillery. At night, visitors can choose from a variety of hotels offering hometown Montana hospitality.

About this Request for Proposal:

The purpose of this request is to seek and retain a qualified full-service Marketing Agency to assist in providing professional marketing services to the organization, effective promotion of Helena as a premiere Montana destination for individuals and groups, and continued development of the Visit Helena brand. The results of these efforts will benefit Helena's assessed lodging businesses, bring exposure to Helena as a viable destination for individuals and groups, plus help cultivate and grow events and competitions within our service area.

The Helena TBID budget operate as a July 1st through June 30th fiscal year. The budget for this contract could scale \$125,000 annually, however the team and board of directors reserve the right to adjust this amount based on the content of proposals and related factors.

Visit Helena is looking for a partner, not only an agency to note on record. Collaboration and ingenuity are crucial and key in the partnership that will help grow visitation and evolve Helena as a tourism destination.

The successful proposer will enter into a contract for services with Visit Helena. The duration of the initial contract between Visit Helena and the partner is expected to begin on the date outlined in this document upon approval by all parties involved (approximately July 2019). Visit Helena reserves the right to renew its agreement prior to the end of each contract term, provided funding is available for

subsequent budgets. Any proposed renewals will also be assessed according to program direction, funding, success of partnership, consistency of price and scope of work.

The RFP is to be filled out by those capable of meeting minimum requirements and a scope of work that supports Visit Helena and a mission to generate room nights for lodging facilities in the city of Helena by effectively marketing the region as a preferred travel destination.

All responses will be carefully reviewed and evaluated by a committee based on the criteria noted in the attached document.

SECTION I- ADDITIONAL SUMMARY

Visit Helena seeks the professional services of a marketing/creative service agency to provide a comprehensive marketing program to promote Helena, Montana as a travel destination to state, regional, national and international markets.

SECTION II-SCHEDULE OF EVENTS

Event	Date
RFP Release	May 13, 2019
Deadline for Receipt of Written Inquiries	May 20, 2019
Written Proposal Distributed	May 27, 2019
Proposal Due Date	June 11, 2019
Evaluation Committee Meeting	Week of June 10, 2019
Finalists Presentations (if necessary)	June 19, 2019
Intended Date for Contract Award	June 30, 2019
Contract Commences	July 1, 2019

******The Helena Tourism Business Improvement District reserves the right to lengthen or shorten the above schedule. ******

Event 1: RFP Release

RFPs will be released to vendors who have performed similar projects for which we are aware; any other vendor which requests it. Additionally, a legal notice will be posted in the Helena IR and the RFP will be available for download from www.helenamt.com/applications or is available in person at the Visit Helena office located at 105 Reeder's Alley any weekday between 8:30 a.m. to 4:30 p.m.

Event 2: Receipt of Written Notice

Proposers requiring clarification of interpretation of any section contained in this RFP shall make a written request to Visit Helena's Executive Director by the deadline in the Schedule of Events. All written correspondence must be addressed to:

Andrea Opitz
Executive Director
105 Reeder's Alley, Helena, MT 59601
Email: aopitz@helenamt.com

Event 3: Written Responses Distributed

An official written answer will be provided to all questions received by the deadline described in the Schedule of Events. Written questions received after the deadline will not be considered. Responses to written questions will be posted to www.helenamt.com/applications by the deadline described in the Schedule of Events.

Event 4: Proposal Due Date

Proposers must submit five (5) copies of the written proposal by the deadline described in the schedule of Events to: Andrea Opitz, Visit Helena, 105 Reeder's Alley, Helena, MT 59601; or aopitz@helenamt.com. Proposals received after this time will not be accepted for consideration.

Event 5: Evaluation

All responsive proposals will be evaluated based on stated evaluation criteria, accepted industry standards, and a comparative analysis of all other qualified responses. Proposals will be evaluated on the date described in the schedule of events by a committee of representatives from Visit Helena and TBID Board of Directors.

The evaluation committee will separate proposals into "responsive" and "non-responsive" proposals. Non-responsive proposals will be eliminated from further consideration.

The evaluation committee will evaluate the remaining proposals in a two-stage process. Stage one will consist of a scored process based on the submitted proposals as shown in Appendix A. The committee may then select a number of finalists they deem appropriate to continue to stage two, which consists of a final presentation.

The evaluation committee reserves the right to waive the stage two portion of the evaluation. In that instance, the committee may proceed immediately to final negotiations before awarding a contract.

For each finalist, total points for written responses as scored by the evaluation committee, and total points for the final presentation will be combined into one total. The contract will be awarded to the finalist with the highest combined total. Visit Helena may initiate discussions with one or more proposers should clarification or negotiation be necessary.

The "Best and Final Offer" is an option available to Visit Helena under the RFP process which permits Visit Helena to request a "best and final offer" from one or more proposers. Proposers may be

contacted asking they submit their best and final offer, which must include the discussed and/or negotiated changes. The “Best and Final Offer” for this RFP may be based on price/cost alone.

Event 6: Intended Date for Contract Award

Award will be made to the proposal offered by a responsive and responsible proposer, which is determined to best meet the evaluation criteria and is therefore the one most advantageous to Visit Helena.

Contract Provisions and Terms

This RFP and any related documents, the proposer’s response including any amendments, any best and final offers, any clarification question responses, and any negotiations can be included in any resulting contract.

SECTION III- PROPOSAL PREPARATION

- 3.1 - All information received in response to this RFP will be available for public inspection.
- 3.2 - This RFP contains the instructions governing the proposals to be submitted and a description of the mandatory requirements. To be eligible for consideration, a proposer must meet the intent of all mandatory requirements. Compliance with the intent of all requirements will be determined by the committee. Responses that do not meet the full intent of all requirements listed in this RFP may be subject to point reductions during the evaluation process or may be deemed non-responsive.
- 3.3 - A point-by-point response to “SECTION V” and “SECTION VI,” and their subsections, must be submitted by each proposer in order to be considered for selection. Proposers must organize proposals into sections following the format of this RFP. If no exception, explanation, or clarification is required in the proposer’s response to a specific subsection, the proposer shall indicate so in the point-by-point response with the following:

“(Proposer’s Name) understands and will comply.”

Points may be subtracted for non-compliance with these specified proposal format requests. Visit Helena may also choose to not evaluate, may deem non-responsive, and/or may disqualify from further consideration any proposals that do not follow this RFP format, are difficult to understand, are difficult to read, or are missing any requested information. A proposer responding to a question with a response similar to, “Refer to our literature...” or “Please see www.....com” may be deemed non-responsive or receive point deductions.

All materials related to a response must be submitted to Visit Helena in the RFP response and not just referenced. Any references in an answer to another location in the RFP materials shall have specific page numbers and sections stated in the reference. Each question is scored independently, and the scoring is based solely on the information provided in the response to the specific question. (The evaluation committee is not required to search through literature to find a response.)

SECTION IV- BACKGROUND & REQUIREMENTS

The Montana Legislature created a dedicated four percent accommodations tax in 1987. Montana funds its travel and tourism marketing programs solely from this source, with no dollars from the State’s

general fund. The existence of this funding, and the valuable promotional efforts allows, are essential to maintaining and increasing tourism growth into the future. Tourism is currently Montana's fastest-growing and second-largest industry.

Additionally, the City of Helena approved the Helena TBID, allowing hotels to assess a \$2.00 fee per occupied room per night. These funds are collected bi-annually and managed by Visit Helena with the oversight of the Tourism Business Improvement District Board of Directors.

It is not a prerequisite that the contracting lead agency be located in Helena, Montana. However, the contracting lead agency is required to have an assigned account representative(s) available at reasonable business hours via telephone and email.

Additional information regarding Montana's Visitors and its tourism industry can be found on the Institute for Tourism & Recreation Research's website at <http://www.itrr.umt.edu> and via the recently-released Montana Brand study from the Montana office of Tourism and Business Development (MOTBD) located at <http://www.marketmt.com/Programs/Marketing/Research>.

SECTION V- SCOPE OF WORK

Scope of Work – General: For each of the following project areas, the proposer could prove capability; describing strategies to be used and quality controls. The proposer should demonstrate knowledge and understanding of brand in a global marketplace, and the shifting dynamics of how consumers receive and use information today.

Advertising Campaign Development: Demonstrate how your agency develops a holistic approach to client brand advertising, integrating interactive, including social, into the overall strategy. Include how your media planning has changed due to the evolution of marketing. Exemplify how your agency evolves based on the way consumers receive and use their information today.

Media Planning & Buying: Provide us with your process in deciding where, when, and how to purchase media. What tools or analytics do you use? What are the determining elements that make your purchasing decisions? Optimization strategy? Co-op Strategy? Give us an overview of your philosophy as it relates to planning and buying media domestically and internationally.

Promotional and Strategic Partnerships: Where do strategic partnerships or alliances fit into your overall approach? How have you used strategic partnerships to extend a client's budget and exposure?

Social Media: Demonstrate how you would integrate social media into a brand strategy. Visit Helena manages most social profiles internally but is interested in how best to promote and manage the Helena, Montana's Trailhead and Visit Helena brand(s) efficiently, effectively and successfully. At a minimum, we would look to the winning proposer to provide the overarching social strategy and guidance on implementation.

Influencer Program: Exhibit how you would partner with Visit Helena staff to create an effective influencer program for the destination. What is your past experience with influencers and how would you incorporate that into the Visit Helena marketing plan?

Research & Analytics: Provide an overview of how you determine success. What are the analytic tools or services you utilize, and the type of information will you be reporting back to Visit Helena as it relates to meeting our objectives? Please define how your analytics can be converted into insights, and how the insights will help guide us in making decisions on how we market in the future. How can we best communicate to our stakeholders (Helena' area hoteliers) the ROI on marketing investments to ensure future support?

Travel and Administration: The proposer should estimate travel to two Helena TBID Board meetings per year, monthly meetings with the Visit Helena team (can be done virtually), consistent email exchanges, communication and postage/shipping expenses expected to incur during contract period, and any additional reserve funds to be held for marketing contingencies.

Scope of Work

The successful proposer shall be expected to complete the Scope of Work below, quoting a price and providing detailed recommendation on how they will fulfill each item and subsection. Visit Helena will determine which specific elements to move forward with based on price and usefulness of each item. Proposer may provide one proposal covering every item:

5.1 – Marketing/Advertising Agency. Proposer will be expected to assist Visit Helena in developing a strategic consumer marketing plan annually that includes the following: identification of target markets; specific strategies that include measurable objectives for each target market; and tactics to achieve these objectives. Awareness and integration of components from the statewide Montana Tourism & Recreation Strategic Plan is expected. In addition, the plan shall address strategies, objectives, tactics, and measurement for each major campaign element described below and will be reviewed and updated annually. The plan may be modified periodically, as required, by Visit Helena and the successful proposer.

5.1.1 - At the direction of Visit Helena and in conjunction with Visit Helena's Annual Marketing Plan, proposer will analyze and recommend specific marketing mediums and assist Visit Helena in developing and producing identified marketing deliverables including creative concept, design, media buying, media placement, digital advertising, and multi-media opportunities. Upon Visit Helena's approval of all materials, proposer will place these marketing materials in media approved by Visit Helena. Visit Helena reserves the right to place certain media on its own behalf and enter into partnership marketing opportunities with outside companies which may bypass the contracted agency buying the media in certain circumstances. Proposer should be knowledgeable and have experience in the following forms of advertising development:

5.1.1.1 – Digital Marketing.

5.1.1.2 – Web banner design, as well as other forms of online advertising including video ads, expanding ads, and interactive ads.

5.1.1.3 - Promotional video production.

5.1.2 - Proposer must have knowledge in supporting and promoting a brand. The agency of record may be charged with rebranding the destination, updating the existing brand, or staying the course with the current branding elements. Please explain your experience in the following aspects:

5.1.2.1 - An outline of brand development process.

5.1.2.2 - Distinctive Brand Pillars upon which the brand is built.

5.1.2.3 - The markets targeted by the brand.

5.1.2.4 - Development of logos and taglines.

5.1.3 - Proposer should seek out and (with assistance from Visit Helena) develop cooperative/partnership opportunities with other regional tourism-related organizations.

5.1.4-Proposer will be knowledgeable and have experience in helping design, develop, and produce print collateral if necessary. Prior to any project development, agency will seek bids and must retain bids.

5.2 - - Social Media Development. Proposer will be expected to guide Visit Helena in building and maintaining a Social Media presence. Proposer must be knowledgeable in all Social Media platforms including, but not limited to Facebook, YouTube, Instagram, etc.

5.2.1 - Proposer should have the ability to personalize the Visit Helena Facebook Page with custom applications if necessary.

5.2.2 - Proposer will develop a social media strategy as appropriate for campaigns and assist in its implementation. The strategy should be designed as to allow Visit Helena staff to implement long term maintenance of the social media outlets independently.

5.3- Website Modifications and Updates. Proposer may be expected to assist Visit Helena in maintaining its web presence at its current address of www.helenamt.com as well as Bike Helena www.bikehelena.com .This includes having the ability to make changes or additions to the current website or redesign the website entirely. Developer must have the ability to integrate cutting edge technologies into the Visit Helena website in order to create a product which is up to date.

SECTION VI- QUALIFICATIONS

6.1 - Visit Helena may make such investigations as deemed necessary to determine the ability of the proposer to supply the products and perform the services specified.

6.2 - Visit Helena reserves the right to reject any proposal if the evidence submitted by, or investigation of, the proposer fails to satisfy Visit Helena that proposer is properly qualified to carry out the obligations of the contract. This right includes Visit Helena' ability to reject the proposal based on negative references.

6.3 - In determining the capabilities of a proposer to perform the services specified herein, the following informational requirements must be met by the proposer and will be weighed by Visit Helena.

6.3.1 - References. Proposer shall provide a minimum of one reference which has used services of the type proposed in this RFP. Visit Helena reserves the right to use any information or additional references deemed necessary to establish the ability of the proposer to perform the conditions of the contract. Negative references may be grounds for proposal disqualification.

6.3.2 - Company Profile and Experience. Proposer shall specify how long the individual/company submitting the proposal has been providing professional services similar to those requested in this RFP.

6.3.3 - Destination Marketing and Regional Knowledge. Proposer shall explain their company's experience in marketing and regional knowledge.

6.3.4 - Account Manager. Identify one individual who will manage the contract work. Document overall experience in providing services as described in the SCOPE OF WORK. Provide detail on the Account Manager's experience (i.e. education, affiliations, memberships, awards, and recognitions received for similar services.)

6.3.5 - Account Team. Identify proposed team member(s) on the Visit Helena account and include relevant experience.

6.3.6 - Product Samples. The proposer shall provide a sample of items which are pertinent to this proposal. Provide an explanation of what the project was designed to accomplish, budget information, and measurable outcomes.

6.3.7 -Your Turn. Use this component to share any additional information about your company that has not been directly covered in the RFP but is relevant to your ability to service this account.

Terms and conditions

The Helena TBID intends to establish a business relationship for an initial period of one (1) year for the fiscal year of July 1, 2019 to June 30, 2020. Visit Helena and the contracting agency may, upon mutual agreement and according to terms of the initial contract, extend the contract in one (1) year intervals. This extension is dependent upon and may be terminated in the event that the TBID assessment is interrupted.

This RFP does not represent an offer or any kind of a commitment by the Helena Tourism Business Improvement District to any respondent nor does it represent an agreement to pay for costs incurred in the preparation of a response to this RFP. Respondents are responsible for all costs of any kind, including any travel, involved in the preparation of their respective proposals.

The RFP and the selected response to the RFP may become a part of the final agreement between the Helena TBID and the firm selected to provide services as a result of this solicitation.

The Helena TBID shall own all materials submitted in response to this RFP.

It should be understood that any work the successful proposer performs for Visit Helena will be the sole property of Visit Helena.

**APPENDIX A
EVALUATION CRITERIA AND SCORE SHEET**

	Point Value
Company Qualifications - Experience related to contract needs, project manager and principle staff, company philosophy/ environment.	150
Marketing Campaigns - Creativity, message effectiveness, measurable results, overall campaign.	250
Customizing the Plan – Overall campaign matched with Visit Helena and Montana Office of Tourism Strategic Plan, Cooperative partnerships, resources used/ applicability, understanding of what is required and needed to provide the utmost service to this contract.	200
Method of Providing Services – Scope of work assessment, reporting methods, in-house capabilities, research integration/ experience.	150
Cost for Services – Offeror cost for billable services, non-billable services, commission rate for media and print.	200
Written Proposal – Offeror’s written response to this RFP will be evaluated in its entirety in terms of completeness, responsiveness, clarity, quality of writing and overall layout	50
Total Possible Points	1000