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| | Visit Southeast Montana (Visit SEMT) |
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| RFP Number: 2024-01 | RFP Title: Professional Advertising & Marketing for Tourism Region | | |
| RFP Response Due Date and Time: April 29, 2024 4:30 p.m., Mountain Time | Number of Pages: 20 | Issue Date: March 27, 2024 | |

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| ISSUING AGENCY INFORMATION |
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| Brenda Maas, Director of Marketing brenda@southeastmontana.com Websites: www.southeastmontana.com and www.semtpartners.com | Visit Southeast Montana Phone: (406) 294-5270 |
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| INSTRUCTIONS TO OFFERORS |
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| Return Sealed Proposal to: <div style="text-align: center;"> MAILING ADDRESS: Visit Southeast Montana PO Box 31177 – 815 S. 27th St. Billings, MT 59101 </div> | Mark Face of Envelope/Package with: RFP Number: 2024-01 RFP Response Due Date: April 29, 2024 by 4:30 p.m. |
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Special Instructions: No FAXED OR EMAILED proposals will be considered.

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| OFFERORS MUST COMPLETE THE FOLLOWING |
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| Offeror Name/Address: | (Name/Title) |
| | (Signature) |
| | Print name and title and sign in ink. By submitting a response to this RFP, Offeror acknowledges it understands and will comply with the RFP specifications and requirements. |
| Type of Entity (e.g., corporation, LLC, etc.) | Offeror Phone Number: |
| Offeror E-mail Address: | Offeror Alternate E-mail Address: |

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| OFFERORS MUST RETURN THIS COVER SHEET WITH RFP RESPONSE |
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INSTRUCTIONS TO OFFERORS

It is the responsibility of each Offeror to:

Follow the format required in the RFP when preparing your response. Provide responses in a clear and concise manner.

Provide complete answers/descriptions. Read and answer **all** questions and requirements. Proposals are evaluated based **solely** on the information and materials provided in your written response.

Use any forms provided, e.g., cover page, budget form, certification forms, etc.

Submit your response on time. Note all the dates and times listed in the Schedule of Events and within the document. Late proposals are **will not be** accepted.

**The following items MUST be included in the response.
Failure to include ANY of these items may result in a nonresponsive determination.**

- Signed Cover Sheet**
- In addition to a detailed response to all requirements within Sections V-VI, if Offeror cannot meet a particular requirement, provide a detailed explanation next to that requirement.**

- _____ Section I, Summary
- _____ Section II, Schedule of Events
- _____ Section III, Proposal Preparation
- _____ Section IV, Background
- _____ Section V, Scope of Work
- _____ Section VI, Qualifications

SCHEDULE OF EVENTS

| <u>EVENT</u> | <u>DATE</u> |
|---|-----------------------|
| RFP Released..... | March 27, 2024 |
| Deadline for Receipt of Written Inquiries... .. | April 8, 2024 |
| Written Responses Posted | April 15, 2024 |
| RFP Proposals Due..... | April 29, 2024 |
| Evaluation Committee Meeting (via telecom) | May 7, 2024 |
| Finalist Presentations (if necessary)..... | May 21, 2024 |
| Intended Date for Contract Award..... | June 1, 2024 |
| Contract Commences (FY25)..... | July 1, 2024 |

NOTICE

From the issuance date of this RFP until a Contractor(s) is selected and the selection is announced, Offerors are not allowed to communicate with any Visit Southeast Montana staff or board member regarding this procurement, except at the direction of John Brewer, Executive Director of Visit Southeast Montana. Any unauthorized contact may disqualify the Offeror from further consideration.

Contracts Officer: John Brewer
Telephone Number: 406-869-3720
E-mail Address: john@billingschamber.com

SECTION I. SUMMARY

Visit Southeast Montana (hereafter referred to as Visit SEMT) is seeking the professional services of a qualified agency to work as a sole or lead agency in a collaborative partnership for advertising & promotion of the Visit Southeast Montana region as a travel destination to state, regional, national and international markets. The Visit Southeast Montana region consists of 13 counties and two tribal reservations: Big Horn, Carter, Custer, Dawson, Fallon, Golden Valley, Musselshell, Powder River, Prairie, Rosebud, Treasure, Wibaux and Yellowstone counties along with Crow and Northern Cheyenne reservations.

Visit SEMT is tasked with inspiring Montana residents (those outside of the Visit SEMT region) and out-of-state tourists to travel to the southeast region of Montana through domestic and/or international campaigns that seek to build awareness of this region as a worthy and inspiring tourism destination.

In order to achieve our directive, candidate agencies will submit proposals to be considered for all disciplines as a single full-service agency **or** as a lead contracted agency with subcontractors reporting to the lead contracted agency. Agencies submitting a proposal in the lead contractor/subcontractor model must clearly represent their capabilities as the lead agency and must identify in the proposal which Scope of Work (SOW) elements would be subcontracted under the lead agency.

NOTE: Any subcontracted agency hired by the lead agency must have the capabilities and demonstrable experience to carry out the specific portion of the SOW being subcontracted and must first be approved by Visit SEMT.

The requirements of this RFP include ten (10) elements:

1. **Creative Advertising** – Agency will be responsible for identification and development of an overarching consumer brand campaign, including: brand and communications strategy; associated content strategies; consumer insights; creative asset development; and lead campaign performance measurement and analytics. If not applying as a full-service agency and applying in the contractor/subcontractor model, the lead agency will act as brand steward with all other subcontracted agency partners to ensure a cohesive and integrated marketing program. The lead agency will also hold the Visit SEMT contract as the agency of record.
2. **Media Planning and Buying** – Agency will be responsible for management of all paid media, including: planning strategy, channel optimization, media buying and will collaborate with all partners on campaign performance measurement, analytics and reporting.
3. **Publications** – Agency will be responsible for conceptualizing, creating and publishing niche marketing publications and collateral.
4. **Online, Digital and Social Expertise** – Agency will collaborate with Visit SEMT staff to develop and coordinate content for www.southeastmontana.com website and other online venues along with all owned media channels, i.e., Facebook, Instagram, Twitter, etc.

5. **Research** - Agency will be responsible for research activities as directed by Visit SEMT including: researching & compiling relevant industry research for marketing purposes, implementing and tracking specific research projects and presenting data to staff and BOD.
6. **Earned Media** – Agency will collaborate with Visit SEMT staff to utilize earned media strategies to further advance marketing initiatives across the travel and tourism industry.
7. **New Projects** – Agency will collaborate with Visit SEMT on new directives from the BOD in the dynamic tourism marketing environment.
8. **Costs and Record-Keeping** – The budget for Visit SEMT is generated from lodging tax revenue and thus agency protocols and accounting is a vital component.
9. **Qualifications** – Agency should be well-positioned to work with a Montana regional tourism Destination Marketing Organization (DMO) within the travel and tourism space.
10. **Written Proposal** – As an expert in the communication industry, agency will provide requested information in a clear and consistent manner while also determining what makes the agency the best choice for Visit SEMT.

SECTION II. SCHEDULE OF EVENTS

| <u>Event</u> | <u>Date</u> |
|--|--|
| 1. RFP Release | March 27, 2024 |
| 2. Deadline for Receipt of Written Inquiries | April 8, 2024 at 4:30 p.m. MST |
| 3. Written Responses Posted | April 15, 2024 |
| 4. Proposal Due Date | April 29, 2024 at 4:30 p.m. MST |
| 5. Evaluation Committee Meeting/Call | May 7, 2024 at 1:30 p.m. MST via telecom & Billings Chamber of Commerce, 815 S 27 th St |
| 6. Presentations by Finalists (if necessary) | May 21, 2024 at times TBD Billings Chamber of Commerce, 815 S 27 th St |
| 7. Intended Date for Contract Award | June 1, 2024 |
| 8. Contract Start Date | July 1, 2024 |

NOTE: Detailed information will be posted on www.semtpartners.com regarding Schedule.

Event 1: RFP Release—RFPs will be issued to: vendors who have requested to be on the vendor list; vendors who have performed similar projects for which we are aware; and, any other vendor who requests it. Additionally, a legal notice will be posted in the *Billings Gazette* and the RFP will be available for [download](#) from www.semtpartners.com or is available in person at the Billings Chamber of Commerce/Visit Southeast Montana office located at 815 S. 27th St. any week day from 8:30 a.m. to 5 p.m.

Event 2: Receipt of Written Inquiries—Offerors requiring clarification or interpretation of any section or sections contained in this RFP shall make a written request to Visit Southeast Montana by the deadline described in the Schedule of Events. All written correspondence must be addressed to:

Brenda Maas, Marketing Manager, Montana's Visit Southeast Montana
P. O. Box 31177, 815 S. 27th St.
Billings, MT 59107
Email: brenda@southeastmontana.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 may not be considered. Responses to written questions will be posted on www.semtpartners.com by the deadline described in the Schedule of Events. Any interpretation, correction or change to this RFP will be made by written Addendum. Interpretations, corrections or changes to this RFP made in any other manner will not be binding and Offerors shall not rely upon such interpretations, corrections, or changes. Visit Southeast Montana will issue any necessary Addenda and post them to the web site.

Event 4: Proposal Due Date

- a.) Offerors must submit an original (for public record) and six copies (for total of 7) of the written proposal by the deadlines described in the Schedule of Events to: Brenda Maas, Montana's Visit Southeast Montana, 815 South 27th St. Billings, MT 59101. Fax or email submissions **will not** be accepted.
- b.) Regardless of cause, late proposals will not be accepted and will automatically be disqualified from further consideration. It shall be the Offeror's sole risk to assure delivery to Visit Southeast Montana at the designated address by the designated time. Late proposals will not be opened and may be returned to the Offeror at the expense of the Offeror or destroyed if requested.

Event 5: Evaluation Committee Conference Call

- a.) Proposals will be evaluated by each Evaluation Committee member at their leisure with the results read, discussed and documented during the Evaluation Committee Conference Call on the time and date described in the Schedule of Events.
- b.) Conference Call/Telecom details will be provided on www.semtpartners.com and also sent to each agency that submits an RFP.
- c.) The Evaluation Committee will separate proposals into "responsive" and "non-responsive" proposals. Non-responsive proposals will be eliminated from further consideration.
- d.) 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 B. The committee will then select no more than (3) finalists they feel are appropriate to continue to Stage Two, which could consist of an oral presentation/interview and a possible on-site visit.
- e.) The evaluation committee reserves the right to waive the Stage Two portion of the evaluation. In that instance, Visit Southeast Montana may proceed immediately to final negotiations before awarding a contract.
- f.) The finalists will be asked to prepare and present (for 20 minutes, maximum) based on pre-determined questions, which will be shared with finalists.

Event 6: Presentations by Finalists (optional)

- g.) For each finalist, total points for written responses, as scored by the Evaluation Committee, and total points for the oral presentation, interview and possible site visit will be combined into one total. The contract will be awarded to the finalist with the highest combined total.

- h.) Although proposals may be accepted and a contract awarded without discussion, Visit Southeast Montana may initiate discussions with one or more Offerors should clarification or negotiation be necessary.
- i.) After receipt of all proposals and prior to the determination of the award, respondents may be required to make an oral presentation and product demonstration to clarify their response or to further define their offer. Oral presentations and product demonstrations, if requested, shall be at the Offeror's expense.
- j.) The "Best and Final Offer" is an option available to Visit Southeast Montana under the RFP process which permits Visit Southeast Montana to request a "best and final offer" from one or more Offerors. Offerors may be contacted asking that 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 7: Intended Date for Contract Award— Award will be made to the proposal offered by a responsive and responsible Offeror which is determined to best meet the evaluation criteria and is therefore the one most advantageous to Visit Southeast Montana.

Contract Provisions and Terms

- a.) This RFP and any addenda, the Offeror's response including any amendments, any best and final offers, any clarification question responses, and any negotiations shall be included in any resulting contract. Appendix A contains the contract terms and conditions which will form the basis of any contract between Visit Southeast Montana and the successful Offeror. The contract language contained in Appendix A does not define the total extent of the contract language that may be negotiated. In the event of a dispute as to the duties and responsibilities of the parties under this contract, the contract, along with any attachments prepared by Visit Southeast Montana, will govern.
- b.) Offerors should notify Visit Southeast Montana of any terms within the sample contract that either preclude them from responding to the RFP or add unnecessary cost. This notification must be made by the deadline for receipt of written inquiries.

SECTION III. PROPOSAL PREPARATION

- 3.1 All information received in response to this RFP will be available for public inspection at the Visit Southeast Montana office, with written request.
- 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, an Offeror must meet the intent of all mandatory requirements. Compliance with the intent of all requirements will be determined by Visit Southeast Montana. 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.", their subsections, and all appendices must be submitted by each Offeror in order to be considered for selection. Offerors must organize proposals into sections following the format of this RFP. If no exception, explanation or clarification is required in the Offeror's response to a specific subsection, the Offeror shall indicate so in the point-by-point response with the following:

"(Offeror's Name)", understands and will comply.

Points may be subtracted for non-compliance with these specified proposal format requests. Visit Southeast Montana 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. An Offeror 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 Southeast Montana 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 of one another 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

The Montana Legislature created a tourism-dedicated four percent accommodations tax in 1987. In 2010 the Montana Department of Commerce awarded the Visit SEMT contract to the Billings Chamber of Commerce. The Chamber partners with the Visit SEMT Board of Directors to provide services, including staff.

Visit Southeast Montana funds its travel and tourism marketing programs solely from accommodations or “bed” tax, with no dollars from the State’s general fund. The existence of this funding, and the valuable promotional efforts it has allowed, are essential to maintaining and increasing tourism growth into the future.

ABOUT VISIT SOUTHEAST MONTANA Visit SEMT markets the southeast region of Montana by inspiring visitation to the area, thereby maximizing the economic impact of tourism, encouraging private sector investment and ensuring that Montana is a great place to live, work and play today and for future generations.

Working Relationship

As a marketing entity, Visit SEMT is a service-intensive client, governed by a volunteer Board of Directors and operated under the management of an Executive Director. Additionally, Visit SEMT seeks a partner who will supplement SEMT’s staff of a Marketing Director, plus Content and Social Media Specialist.

The successful Offeror will therefore be expected to understand the inner workings and needs of such a client and have the ability to provide a high level of quality account service no matter what timelines or deadlines are imposed. Visit SEMT intends to have a close working relationship with the successful Offeror.

The successful Offeror will be required to:

- (1) provide budget estimates for final approval prior to commencement of work on all approved projects and/or campaigns undertaken on behalf of Visit SEMT.
- (2) provide Visit SEMT an opportunity for input and to review all draft materials relevant to a project and/or campaign.
- (3) Keep Visit SEMT informed as to the status and progress of all approved project phases through completion: conceptualization, creative, production, implementation, tracking and final completion report. These reports shall include relevant year-to-date accounting and bookkeeping information that tracks budget spending.

The Visit Southeast Montana corporate office is located in Billings. **It is not a prerequisite that the contracting lead agency be located in Billings. However, the contracting lead agency should have a deep understanding of Montana, specifically the Visit SEMT region, its unique communities and their assets. In addition, an assigned account representative(s)**

needs to be available at reasonable business (MST) hours via telephone, email and/or telecom. Visit SEMT holds five Board of Directors meetings per calendar year throughout the 13-county region and attends TAC (Tourism Advisory Council) meetings three times per year in addition the Governor’s Conference on Tourism. Visit SEMT requires key agency personnel to attend these meetings as deemed necessary, at no extra cost to Visit SEMT. At this time, the TAC offers remote attendance options while the Visit SEMT Board of Directors typically does not.

ABOUT TOURISM IN MONTANA Tourism is one of Montana’s leading industries and primary revenue drivers. In 2022, Montana hosted 12.5 million nonresident visitors who spent more than \$5.8 billion in the state. There are many compelling reasons for tourists to vacation in Montana, including national parks and monuments, unspoiled scenery, wildlife watching, hiking, hunting, fishing, historical sites and scenic driving.

Tourism in Montana is an industry of small businesses from a variety of sectors, including lodging accommodations, restaurants and bars, outfitters and guides, ski areas and private attractions, museums and cultural facilities, farmers and ranchers, gas stations and convenience store owners, and retail shops. The industry also counts various state and federal agencies as critical partners.

Additional information regarding Montana’s Visitors and its tourism industry can be found on the [Institute for Tourism & Recreation Research](#), [Travel MT](#) and [Brand MT/Montana Department of Commerce’s Marketing](#) websites.

Visit SEMT markets the region in adherence with the State branding pillars:

1. Montana has more spectacular, unspoiled nature than anywhere else in the lower 48 states.
2. Montana’s vibrant and charming small towns serve as gateways to natural wonders.
3. Montana offers breathtaking experiences by day; relaxing hospitality at night.

Additionally, Visit SEMT identifies these key elements as regional pillars:

1. Outdoor Recreation
2. Historic Significance
3. Western Authenticity
4. Crow and Northern Cheyenne Culture
5. Dinosaur Adventures

The mission of Montana’s Visit Southeast Montana is to increase visitors to Southeast Montana by increasing awareness of our region, showcasing our cultural heritage, developing memorable experiences and educating our residents about the economic benefits of tourism.

The vision of Visit Southeast Montana is to become the trusted source for free-spirited travelers to achieve their legendary life experiences.

To learn more about Visit Southeast Montana’s current marketing plan, visit [semtpartners.com](#).

SECTION V. SCOPE OF WORK

The successful Offeror shall be expected to complete the Scope of Work below. **Under each segment below, explain how you, the Offeror, would fulfill the requirement as the best agency to represent Visit Southeast Montana.**

5.1 Advertising and Creative. Offeror will be expected to work closely with the Visit Southeast Montana team to deliver integrated marketing communications on behalf of Visit SEMT. The Offeror will:

- Contribute to developing a strategic consumer marketing plan annually that includes 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 measurements for each campaign element described below and will be reviewed and updated annually. The plan may be modified periodically, as required, by Visit Southeast Montana and the successful Offeror.
- Conceptualize big, singular ideas that engage the audience with Visit SEMT and/or Montana brand.
- Develop brand positioning strategy, plan and execute integrated and measurable marketing programs that build awareness, intent and travel to the Southeast Montana region.
- Strategize, create, produce, procure and prepare advertising and branded content for distribution on domestic and international online and offline channels.
- Research, produce, and/or procure, and manage assets and content for tourism development and marketing purposes, including, but not limited to, artwork, illustrations, photography, video, music, maps, voice-over, copy, literature, brand identity pieces, etc. Negotiate rates and use for rights-managed and owned assets along with portal, which is shared with Visit SEMT team.
- Be knowledgeable and have experience in the following forms of advertising:
 - Full-color magazine and/or newspaper advertising production.
 - Direct mail production.
 - Promotional brochure production.
 - Broadcast advertising production.
 - Forms of digital or online advertising, including banner ads, as well as other forms of online advertising but especially cost per mille, pay-per-click and affiliate.
 - E-marketing production.
 - Outdoor advertising.
 - “Packaging” of any and all combinations of the above.
- Have knowledge and experience in developing, enhancing and integrating a brand. The agency of record could be charged with rebranding the region, updating the existing brand or staying the course with the current branding elements. **Please explain your experience in the following branding aspects (and include samples):**
 - An outline of brand development process.
 - Distinctive Brand Pillars upon which the brand is built.
 - The markets targeted by the brand.
 - Development of logos and taglines.
 - A style guide created by the agency for the brand.

5.2 Media Planning and Buying. Offeror will be expected to annually develop and recommend media objectives, strategies and tactics in support of the overall marketing goals and objectives, including:

- Plan, negotiate and purchase media placements and program integrations on channels and publishers including, but not limited to, print, digital (including

display, search engine marketing, mobile, video, social media), broadcast, out-of-home, event, sponsorship, point-of-purchase, cooperative marketing, direct marketing and emerging technology vehicles.

- Monitor and direct placements to ensure optimum performance and full completion of all media schedules, negotiating make-goods and bonus units as appropriate.
- Provide performance reports and analysis of medial placements throughout and at the completion of each campaign. The contractor shall retain and submit upon request proof of publication, performance and other such affidavits for all media placements.
- Develop cooperative marketing program for industry partner participation, including but not limited to VisitMT/Travel MT and regional partners both within and outside the state.
- Monitor industry and priority media markets and report media insights, opportunities of importance and/or impacting client and competitors.
- **Share Offeror's experience in media planning and buying comparable to those outlined above.**

5.3 Travel Guide. Visit Southeast Montana publishes an annual travel guide in magazine format and the Offeror will be instrumental in this all-encompassing project. The travel guide is produced without using Visit SEMT's state marketing funds. The AOR is expected to produce the guide to meet consumer needs as well as generate non-lodging tax revenue for Visit SEMT through the sale of advertising or sponsorships. Successful Offeror will design, layout, strategize content and obtain print bids. **Offeror will provide samples of similar publications completed by the Offeror and explain how Offeror will:**

- Incorporate Visit Southeast Montana's brand standards throughout, with special emphasis on the brand pillars of Western Adventure, Indian Nations, Dinosaur Adventure, Outdoor Recreation and Historic Adventure.
- Be responsible for all design work such as layout, photo selection and arrangement, calendar of events design, cover design and coordination with the standards of the Visit Southeast Montana and VisitMT/Travel MT brand.
- Collaborate with Visit SEMT on concept and copy – Visit SEMT typically provides copy.
- Obtain print bids from no fewer than three printers for any project over \$1,999.
- Function as Visit SEMT's authority on publishing and printing while working with Visit SEMT staff while ensuring product meets Montana TAC rules and regulations.
- **Please provide a detailed bid to produce the following** (This bid is not binding and is simply to give Visit Southeast Montana a comprehensive estimate of total costs):
 - i. 64 pages + cover, full color gloss.
 - ii. 8"x10.5" full bleed.
 - iii. Fold-out front cover measuring 14.25"x10.5".
 - iv. Do not include costs for obtaining photos.

- v. Offeror's fees for coordination, layout and design OR Offeror's suggested alternative project.
- The publication should be similar in dimension, paper weight/gloss, and overall quality to the Visit Southeast Montana 2023 Regional Travel Guide. Visit Southeast Montana will send a copy upon request or view digital copy [here](#).
- **If selected as Visit SEMT's AOR, how would you approach generating net revenue for Visit SEMT through the travel guide project? Currently Visit SEMT's AOR provides an annual \$10,000, through the sale of ads, guaranteed after all expenses.**

5.4 Research and Evaluation. The Offeror will help Visit Southeast Montana compile research on industry trends, analyzing how to best use the information in future marketing efforts. Additionally, **describe how Offeror will compile and evaluate completed projects and also:**

- Monitor, track and provide points-of-view on social, economic, political, environmental, media, consumer and travel industry data and trends that could impact Visit SEMT and identify opportunities to grow market share.
- Conduct research to shape and target marketing efforts, upon request.
- Track and evaluate performance of all marketing and advertising activities, giving an over-arching perspective on a regular basis.
- Provide staff with data analysis, as requested.
- Produce reports, summaries, dashboards and other tools for industry and regional key performance indicators (KPIs).

5.5 Digital/Online and Social Media Expertise. Offeror must be knowledgeable in all realms of digital, online and social media communication tools. Visit SEMT's site, *southeastmontana.com*, is independent of VisitMT/Travel MT's site; however, the business listings are populated from *VisitMT.com* with design, content and operations being the sole work of Visit SEMT and its AOR. Visit SEMT's social and content manager currently oversees social channels and online content. **Describe how Offeror would:**

- Lead, actualize and execute website design, re-design, user testing, technology audits, competitive audits, coding, development, automated personalized marketing, content apps and integrate marketing campaigns/programs.
- Research market target audience/users and development strategies to reach them and fulfill their needs and expectations of a travel destination website.
- Comply with all privacy and internet data collection regulations and laws.
- Employ emerging optimization strategies and techniques.
- Identify and counsel as to how Visit SEMT can maximize emerging technologies (I.E.: AI or AR) and trends in web marketing, design and development, along with those in mobile platforms such as tablets, smartphones and wearable, in terms of naïve and web apps to support and advance our marketing efforts.
- Integrate overall consumer marketing program into social media campaigns.

- Identify and counsel as to how Visit SEMT can maximize emerging technology and trends in the social space (I.E. social influencers).
- Work with Visit SEMT to design and produce a cost-effective and inspirational app version of the travel guide, if requested, or other apps to inspire, orientate and facilitate travel to the Visit SEMT region.
- Envision and execute, upon request, high-impact social media events and campaigns
- Provide technical support.

5.6 Earned Media Offeror should be well-versed in earned media and public relations as it relates to the travel and tourism industry. Visit SEMT staff is the lead on earned media and requests assistance from the AOR. **How would the Offeror:**

- Collaborate with Visit SEMT staff to generate earned media releases, pitches and media trips.
- Recommend and advise Visit SEMT staff on media relations, generate leads or one-on-one meetings with traditional and emerging earned media sources and contacts, especially as it relates to target markets, to meet marketing goals.
- Use media tracking service (i.e. Meltwater, Cision) to connect Visit SEMT staff and story ideas and also track and report earned media.
- Serve as potential back-up earned media resources on behalf of Visit SEMT upon request.

5.7 Potential (TBD) new projects, programs and partnerships, as approved by the BOD Visit SEMT, as an organization, is growing and needs an AOR to grow alongside it. **How is Offeror prepared to handle:**

- Tourism Stewardship and/or Ambassador Plan plus Community Outreach
- Responsible Recreation Messaging
- Tourism Destination (Product) Development
- Live Chat and/or Text to Website
- Other initiatives as they develop

5.8 Cost and Record-keeping **The total budget (including media purchases) for this contract is estimated to be between \$300,000 - 500,000 per year. The budget is based on annual projected accommodations revenue (bed tax) collections and does fluctuate.** Visit SEMT conducts business on an individual project basis (Examples: warm season media campaign, annual website work) and recordkeeping must reflect this. **Please provide a rate card in addition to detailing costs by hour.** An Offeror may enter “No Cost” in the unit price column to indicate that the item is being offered at “No Cost.” Noting that Visit SEMT believes that tracking hours and preparing invoices falls under “the cost of doing business,” please:

- Note all services provided by the Offeror, including hourly rates. Be sure to add those services not listed below.
 - Account Management

- Copywriting/Editing
- Creative Conception
- Design/Layout
- Print Supervision/Quality Control
- Mechanical Art Direction
- Online Advertising Design/Programming
- Public Relations/Earned Media
- Accounting
- Budget Research and Estimates
- Media Research/Buying (Commissionable and Non-commissionable)
- Travel (outside of required meetings as outlined previously)
- Other Charges Not Noted Above
- Specify record keeping techniques for:
 - Time spent on project
 - Resources spent on project
 - Additional costs incurred and why (I.E. photo rights)
 - Budget including year-to-date statements
 - Internal control system that protects the integrity of the accounting system

SECTION VI. QUALIFICATIONS

Visit Southeast Montana may make such investigations as deemed necessary to determine the ability of the Offeror to supply the products and perform the services specified. Visit SEMT reserves the right to reject any proposal if the evidence submitted by, or investigation of, the Offeror fails to satisfy Visit Southeast Montana that Offeror is properly qualified to carry out the obligations of the contract. This right includes Visit Southeast Montana's ability to reject the proposal based on negative references. In determining the capabilities of an Offeror to perform the services specified herein, the following informational requirements must be met by the Offeror and will be weighed by Visit Southeast Montana. (Note: Each item must be thoroughly addressed. Taking exception to any requirements listed in this Section may disqualify the proposal.)

- **References.** Offeror shall provide a minimum of three references that are using services of the type proposed in this RFP. At a minimum, the Offeror shall provide the company or agency name, the location where the services were provided, contact person(s), customer telephone number, contact name and email address, and a complete description of the service type and dates the services were provided. Visit Southeast Montana reserves the right to use any information or additional references deemed necessary to establish the ability of the Offeror to perform the conditions of the contract. Negative references may be grounds for proposal disqualification.
- **Destination Marketing and Regional Knowledge.** Offeror shall thoroughly explain their company's experience in marketing a destination to leisure visitors. In-depth knowledge of the Visit Southeast region is desirable. The ability and willingness to learn about the region is required.

- **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 details on the Account Manager’s experience, education, affiliations, memberships, awards and recognitions received for similar services.
- **Account Team.** Identify by name, title and role each proposed team member on the Visit Southeast Montana account. Include relevant experience, including that which may be outside of your agency and/or outside the advertising field. Identify individual experience in destination, travel, group and/or international tourism marketing.
- **Product Samples.** The Offeror shall provide a maximum of (5) samples of items that are pertinent to this proposal. Include an explanation of what the project was designed to accomplish, budget information and measurable outcomes. For the samples provided, identify the personnel responsible for the publishing project components.
- **Emerging Technology.** Tell us how you recommend using emerging technologies to further the work and impact of Visit Southeast Montana’s marketing plan.
- **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.

SECTION VII. APPENDICES

7.1 Appendix A. Sample Contract

7.2 Appendix B. Evaluation Criteria and Phase I Scoring Grid

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APPENDIX A: SAMPLE CONTRACT

APPENDIX A Sample Contract

(INSERT PROJECT TITLE)

(insert date)

1. PARTIES

THIS CONTRACT, is entered into by and between Visit Southeast Montana (Visit SEMT) whose address and phone number are P. O. Box 31177, 815 South 27th St., Billings, MT 59107, 406-294-5270 and (insert name of contractor), (hereinafter referred to as the "Contractor"), whose nine digit Federal ID Number, address and phone number are (insert federal id number), (insert address) and (insert phone number).

THE PARTIES AGREE AS FOLLOWS:

2. EFFECTIVE DATE, DURATION, AND RENEWAL

(a) This contract shall take effect on (insert date). The contract shall terminate on (insert date), unless terminated earlier in accordance with the terms of this contract.

(b) This contract may, upon mutual agreement between the parties and according to the terms of the existing contract, be extended in one-year intervals, or any interval that is advantageous to Custer Country, for a period not to exceed six additional years. This extension is dependent upon legislative appropriations and in no case may this contract run longer than a seven-year period.

3. PRICE ADJUSTMENTS

Contractor and Visit Southeast Montana agree price adjustments may be made at the time of contract renewal under the following conditions: Price increases may be permitted at the time of contract renewal through a process of negotiation with the Contractor and Visit Southeast Montana.

4. SERVICES AND/OR SUPPLIES

Contractor agrees to provide to Visit Southeast Montana the following (insert supplies, services, etc.).

5. CONSIDERATION/PAYMENT

(a) In consideration for the (insert supplies or services) to be provided, Visit Southeast Montana shall pay according to the following schedule: (insert pay schedule).

(b) Visit Southeast Montana may withhold payments to the Contractor if the Contractor has not performed in accordance with this contract. Such withholding cannot be greater than the additional costs to Visit Southeast Montana caused by the lack of performance.

6. ACCESS AND RETENTION OF RECORDS

(a) The Contractor agrees to provide Visit Southeast Montana, the Legislative Auditor or

their authorized agents access to any records necessary to determine contract compliance.
(b) The Contractor agrees to create and retain records supporting the **(insert services rendered or supplies provided)** for a period of three years after either the completion date of this contract or the conclusion of any claim, litigation or exception relating to this contract taken by Visit Southeast Montana or a third party.

7. ASSIGNMENT, TRANSFER AND SUBCONTRACTING

The Contractor shall not assign, transfer or subcontract any portion of this contract without the express written consent of Visit Southeast Montana.

8. HOLD HARMLESS/INDEMNIFICATION

The Contractor agrees to protect, defend, and save Visit Southeast Montana, its elected and appointed officials, agents, and employees, while acting within the scope of their duties as such, harmless from and against all claims, demands, causes of action of any kind or character, including the cost of defense thereof, arising in favor of the Contractor's employees or third parties on account of bodily or personal injuries, death, or damage to property arising out of services performed or omissions of services or in any way resulting from the acts or omissions of the Contractor and/or its agents, employees, representatives, assigns, subcontractors, except the sole negligence of Visit Southeast Montana, under this agreement

9. COMPLIANCE WITH THE WORKERS' COMPENSATION ACT

Contractors are required to comply with the provisions of the Montana Workers' Compensation Act while performing work for Visit Southeast Montana in accordance with sections 39-71-120, 39-71-401, and 39-71-405, MCA. Proof of compliance must be in the form of workers' compensation insurance, an independent contractor exemption, or documentation of corporate officer status. Neither the contractor nor its employees are employees of Visit Southeast Montana. This insurance/exemption must be valid for the entire contract period.

10. INTELLECTUAL PROPERTY

(a) All patent and other legal rights in or to inventions arising out of activities funded in whole or in part by this contract must be available to Visit Southeast Montana for royalty-free and nonexclusive licensing. The Contractor shall notify Visit Southeast Montana in writing of any invention conceived or reduced to practice in the course of performance of this contract.

(b) Visit Southeast Montana shall have a royalty-free, nonexclusive, and irrevocable right to reproduce, publish or otherwise use and authorize others to use, copyrightable property created under this contract.

(c) Any and all work performed for Visit Southeast Montana will be the sole property of Visit Southeast Montana. This includes the final product, as well as any mockups or design work and all other work leading up to the final product.

11. COMPLIANCE WITH LAWS

The Contractor must, in performance of work under this contract, fully comply with all applicable federal, state, or local laws, rules and regulations, including the Montana Human Rights Act, the Civil Rights Act of 1964, the Age Discrimination Act of 1975, the Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973. Any subletting or subcontracting by the Contractor subjects subcontractors to the same provision. In accordance with section 49-3-207, MCA, the Contractor agrees that the hiring of persons to perform the contract will be made on the basis of merit and qualifications and there will be no discrimination based upon race, color, religion, creed, political ideas, sex,

age, marital status, physical or mental disability, or national origin by the persons performing the contract.

12. CONTRACT TERMINATION

(a) Visit Southeast Montana, by written notice to the Contractor, may terminate this contract in whole or in part at any time the Contractor fails to perform this contract.

(b) Visit Southeast Montana, at its sole discretion, may terminate or reduce the scope of this contract if available funding is reduced for any reason. (See Mont. Code Ann. § 18-4-313(3).)

13. LIAISON AND SERVICE OF NOTICES

All project management and coordination on behalf of Visit Southeast Montana shall be through a single point of contact designated as Visit Southeast Montana liaison. Contractor shall designate a liaison who will provide the single point of contact for management and coordination of Contractor's work. All work performed pursuant to this contract shall be coordinated between Visit Southeast Montana's liaison and the Contractor's liaison.

14. MEETINGS

The Contractor is required to meet with Visit Southeast Montana's personnel, or designated representatives, to resolve technical or contractual problems that may occur during the term of the contract, at no additional cost to Visit Southeast Montana. Meetings will occur as the need arises and will be coordinated by Visit Southeast Montana. The Contractor will be given a minimum of three full working-days notice of meeting date, time and location. Face-to-face meetings are desired. However, at the Contractor's option and expense, a conference call meeting may be substituted. Consistent failure to participate in problem resolution meetings, two consecutive missed or rescheduled meetings, or to make a good faith effort to resolve problems, may result in termination of the contract.

15. CHOICE OF LAW AND VENUE

This contract is governed by the laws of Montana. The parties agree that any litigation concerning this proposal or subsequent contract must be brought in the First Judicial District in and for the County of Cascade, State of Montana and each party shall pay its own costs and attorney fees. (See Mont. Code Ann. § 18-1-401.)

16. SCOPE, AMENDMENT AND INTERPRETATION

These documents contain the entire agreement of the parties. Any enlargement, alteration or modification requires a written amendment signed by both parties.

17. EXECUTION

The parties through their authorized agents have executed this contract on the dates set out below.

VISIT SOUTHEAST MONTANA

CONTRACTOR'S NAME

ADDRESS
CITY, STATE, ZIP
FEDERAL ID #

BY: _____
(Name/Title)

BY: _____
(Name/Title)

BY: _____
(Signature)

BY: _____
(Signature)

DATE: _____

DATE: _____

APPENDIX B: Stage I Scoring Grid

| Offeror | Advertising & Creative | Media Planning & Buying | Travel Guide | Research & Evaluation | Earned Media | Digital/ Online & Social Media Expertise | New Projects | Cost & Recording Keeping | Agency Profile & Experience | Written Presentation | TOTAL POINTS |
|----------|------------------------|-------------------------|--------------|-----------------------|--------------|--|--------------|--------------------------|-----------------------------|----------------------|---------------------|
| | 25 POINTS | 25 POINTS | 25 POINTS | 15 POINTS | 15 POINTS | 25 POINTS | 10 POINTS | 20 POINTS | 20 POINTS | 20 POINTS | 200 POINTS POSSIBLE |
| Offeror: | | | | | | | | | | | |
| Offeror: | | | | | | | | | | | |
| Offeror: | | | | | | | | | | | |
| Offeror: | | | | | | | | | | | |
| Offeror: | | | | | | | | | | | |

NOTE: In the event of a tie, the Visit SEMT Evaluation Committee will break the tie through discussion and consensus.