



Request for Proposals

Design and Creation of Centralina Economic Development District Web-based Communications and Marketing Platform

*Centralina Economic Development Commission project supported by a U.S. Commerce
EDA grant to provide new Web Platform inclusive of interactive access to the 2017-
2022 Prosperity for Greater Charlotte Comprehensive Economic Development Strategy
(CEDS) with Related Community Data and Economic Analyses of the nine county
Centralina Economic Development District Region*

RFP Submittal Deadline: 4:00 pm (EST) July 31st, 2018

Submit Proposals to:

**Centralina Economic Development Commission
9815 David Taylor Drive, Suite 100
North Carolina, NC 28262
mmanis@centralina.org**

ANNOUNCEMENT

The Centralina Economic Development Commission (CEDC) is initiating a Request for Proposal (RFP) process for a professional consultant (the “Consultant”) qualified to plan, execute, and deliver a new design for a web-based communications and marketing platform. This website will include interactive access to the 2017-2022 Prosperity for Greater Charlotte Comprehensive Economic Development Strategy (CEDS) with related community data and economic analyses of the nine county Centralina EDD Region. The engagement will also update the brand and mission statement of the Centralina Economic Development Commission in support of the new web portal asset.

The goal of the website design project is to offer a value-added web experience for all stakeholders that will also increase CEDC corporate visibility, value, and brand recognition. The final product should be a cutting-edge website to attract and support decision makers by delivering quality, up-to-date strategic data and benchmarking while providing excellent information delivery, interaction, and keeping visitors coming back for more.

The Consultant must have demonstrated experience in website project management and expertise with the best practices regarding successful website design, development, and deployment. A discovery process will be necessary to sharpen the corporate image and freshen the look of corporate communications of the Centralina Economic Development Commission. The Consultant also should have experienced knowledge of exemplary programs and nuances of local economic development best practice of information services delivery. The Consultant should have a strong and demonstrable background in developing successful 21st century economic development communication and branding programs and web platforms.

This engagement will be funded in part by a U.S. Commerce Economic Development Administration (EDA) Grant to support metropolitan and multi-jurisdictional planning efforts that integrate housing, land use, economic and workforce development, transportation, and infrastructure investments. Additional assessments, demographic and economic data analysis, and related influences corresponding to the additional Responses to this RFP must demonstrate:

- The respondents’ understanding of the plan of work, issues, and elements;
- The respondents’ understanding of the CEDC Communications and Marketing Re-Branding objectives;
- The respondents’ understanding of and qualifications to address and provide the requested plan and website implementation deliverables and;

PROPOSALS MUST BE RECEIVED BY: July 31th, 2018 by 4:00PM EDT.

RFP SCHEDULE - *This timetable is for the respondent's information. Project constraints may cause these dates to change.*

RFP Available:	July 10, 2018
Notice of Consultant's Intent due:	July 16, 2018
Pre-Submittal Teleconference:	July 17, 2018 - 2:00 PM EDT
Proposals due:	July 31, 2018
Consultant(s) selected for Interview:	August 03, 2018
Consultant(s) Interviewed:	August 8-15, 2018
Consultant Selected:	August 20, 2018
Contract Commencement:	August 27, 2018

Consultant Intent to participate in proposal process should be communicated by email by close of business on **Monday July 16th, 2018**. A **Pre-Submittal Teleconference will be held July 17th, 2018 at 2:00 PM EDT**. All questions or inquiries respondents wish to insure are answered should be transmitted in writing either via mail or email prior to that date.

CONTACT

Questions or requests for additional information regarding this "Design and Creation of Centralina Economic Development District Web-based Communications and Marketing Platform" RFP should be directed to:

Mike Manis
Centralina Economic Development Commission
9815 David Taylor Drive, Suite 100
Charlotte, NC 28262
Telephone: 704-348-2720
mmanis@centralina.org

PROPOSAL EVALUATION

Consultants responding to this RFP will be evaluated on the following basis:

- 30% Technical skills and staff/team expertise;
- 30% Proposed approach and plan of work, understanding of the issues and requested elements of project scope, including desired outcomes of developing and producing a Centralina EDD CEDS website;
- 30% Past record of performance, experience, and actual prior Strategic Economic Plan experience and Communications and Marketing consulting;
- 10% Proposed Budget.

PROJECT CONTEXT GREATER CHARLOTTE REGION BACKGROUND

Centralina Council of Governments (CCOG) is a State of North Carolina regional organization representing a nine-county area that includes Anson, Cabarrus, Gaston, Lincoln, Iredell, Mecklenburg, Rowan, Stanly, and Union. CCOG is the second largest of 16 regional councils in the State of North Carolina and works with local governments, state, and federal agencies to meet the region's needs on a wide range of governance issues, including, local and regional land use, environmental and transportation planning and administration, aging and workforce services, and economic and program development.

The CEDC was formed to serve as the local U.S. Commerce EDA designated Economic Development District (EDD) for the nine-county region to maintain eligibility for grants from the EDA and other federal and state sources. The CEDC also has the responsibility as the local EDD to create, manage and implement the regional Comprehensive Economic Development Strategy (CEDS) initiated in 2004, renewed in 2007, 2012, and most recently 2017 in the series of required five-year updates.

Home to over 2.43 million people, Greater Charlotte MSA is among the nation's fastest-growing mid-sized metropolitan regions composed of closely interrelated sub-regions that act together as a single globally competitive unit. Strategic growth is advanced within a multitude of exemplary organizations that exist on the individual county Economic Development Corporation level. These entities participate as a region within the overarching "Charlotte USA", Charlotte Regional Partnership. The private sector business, public, state and municipal support has advanced the Charlotte brand and industry recruitment success on a national and international scale. The City of Charlotte Chamber of Commerce and the Chambers of the surrounding counties, cities and towns have played major roles in the success of the region's economic health as well as the national recognition of the attractive high-ranking quality of life.

ROLE OF CENTRALINA REGIONAL CEDS UPDATE WITHIN THE PROJECT

The CEDC EDD nine-county geographic area is identical to the Centralina Council of Governments' North Carolina Region "F" service boundary. The CEDS analyzed the EDD's current economy and proposed short and long-term strategies to support the retention and expansion of existing businesses, attract new business investment and create jobs, and grow employment across all sectors, supporting a diversified, expanding and sustainable economy.

The Centralina CEDS was incorporated into the North Carolina consolidated economic planning initiative, NC TOMORROW, a NC Department of Commerce sponsored program to develop a uniform statewide economic development collaborative plan. Under this program, all 16 North Carolina Councils of Governments prepare their local CEDS plans that are inclusive of four overarching strategic goals to allow a uniform process and structure for a statewide framework of the plans that will consolidate alignment of all 16 NC COG CEDS under a combined set of EDA, HUD and National Association of Development Organizations (NADO) priorities and principles.

The Centralina Economic Development commission and Centralina Council of Governments has developed a robust repository of economic, transportation, workforce, and community data that local leaders need to understand to make informed economic development decisions. The general public is more actively involved in local economic development issues than ever before and with new elected leadership continuing to change in 2 to 4-year term cycles, a modern and current platform for continuously updated and relevant strategic information consumption is mandated.

Given this significant turnover in regional leadership, and growing expectation among policymakers for information to be concise, visual, actionable, and useful, there is a growing need to translate existing data and information into a new type of integrated communication platform that will meet today's needs. At the same time, there exists an opportunity to innovate the integration of collaborative data (economic, workforce, community) and plans to help identify new project opportunities and gaps that link to the CEDS and thus can be addressed and advanced as they evolve in real time. This would make the CEDS a much more powerful and valuable tool for regional use in approaching future economic realities.

Through this project, the CEDC will develop a web-portal that will leverage this existing real-time data, and that once deployed, will be able to be managed and maintained by the CCOG and the CEDC. This work will enable the CCOG and the Centralina EDD to add significant value to regional partners and augment the capacity to carry out CEDS goals.

The recent Prosperity for Greater Charlotte CEDS 5-year update encompassed goal objectives for creation of a data-oriented portal web tool to link information to usability and communication dissemination of the plan itself. Successful design and implementation of this proposed EDA grant project will create a 21st century local CEDS repository of strategies, data and other economic resources that are understandable; accessible; and actionable for all stakeholders and population of the region at large.

SCOPE OF WORK

The following Scope of Work components have been prepared as a guide to help the interested respondent understand the expected product from this work engagement. Respondents are encouraged to provide suggestions to this scope that would improve the end product.

The final rebranded website will integrate data content and area analysis from the new Centralina CEDS, but the consultant must develop additional counties reports with regional workforce, education, housing, transportation, and targeted industries data. The metrics will enable board members, the public, and appointed and elected officials to effectively and efficiently find and evaluate information to inform future policy options supporting a more sustainable and resilient Greater Charlotte Region.

The Centralina CEDS was last updated in September 2017. A comprehensive **economic development strategic plan (CEDS) plays a role** to maximize development activity efficiency that will attract and produce jobs and enhance the Greater Charlotte region’s global competitiveness. Access to existing CEDS documents is available on-line at www.prosperityforgreatercharlotte.org. Promoting growth of target clusters while cross-linking competitive competencies is critical to the latest models for overall economic growth on a national and globally competitive stage. Community competencies include workforce skills, infrastructure, and innovations that intersect multiple target sectors as well as attractive quality of life and natural resources that enable the region to thrive.

The final scope of services to be provided by the selected Consultant will be developed in partnership with the CEDC Board and partners. The scope may include the following elements:

1) Development of a Comprehensive Web Communication Platform

- i. Visually Rebrand Web and Communications Materials
- ii. Identify and Orient Outreach Channels
- iii. Reorganize Information
 - a. Map and understand what information
 - b. Research and Residual Plans Asset
- iv. CEDS Plan Interactive Web Presentation
- v. Data Dashboards of following four Core Goal areas and Performance Metrics
 - a. Infrastructure (includes Housing)
 - b. Quality of Life
 - c. Business & Innovation
 - d. Workforce
- vi. Connections to external research, practices and funding
- vii. Communicating the value
 - a. Creating the value-add through the platform

2) Creation of a Web-Based Outreach and Marketing Support Plan

Develop a web portal program that services the economic development stakeholder community recognizing today’s reality that dependencies require cross sector collaboration and the Charlotte region is a complex system with various subsystems. Because the “process” is as important as the “finished product”, stakeholder engagement is essential to success. To reach the goal of delivering an asset to support a globally competitive, locally vibrant and resilient Charlotte region of communities, the following steps should be included as part of the product creation:

- i. **Stakeholder Interviews:** Interview key stakeholders, including council\commission members, civic\chamber leaders, economic developers and key public officials to

- understand the various priorities, projects, issues and resources that are crucial to monitoring the economic growth of the region.
- ii. **Program development:** Outline and present the 4 primary CEDS economic development goals as the foundational framework which also allows future additions based on new industry trends, new programs, additional partner organizations or additional funding opportunities.
 - iii. **Metrics:** Determine what metrics should be used to measure the effectiveness of the Economic Development Strategy's implementation. Identify specific data points and data sources.

3) Website Functionality Requirements

- i. Content Management System (CMS) -- The website must be built on a content management system that allows for all areas of the site (webpages, images, blogs, forms, etc.) to be easily updated.
- ii. Responsive Design -- The website must be responsive, so that it seamlessly adjusts to fit desktops, laptops, tablets and smartphones.
- iii. Search Engine Optimization (SEO) -- The CMS must include the ability to alter title tags, meta descriptions, alt tags, and headers. The site must be built to be easily crawled by search engines.
- iv. Social media Integration -- The site should include the ability for web content to be shared to social media networks. The organization's social media networks must be linked to the website to allow for easy "follows."
- v. Contact Forms -- The website must include contact forms. When a visitor fills out the form, the message must be sent to the correct staff member.
- vi. News -- The website must include a robust, built-in news platform enabled to create, edit and publish news articles and/or blogs to the website.
- vii. Email Marketing -- The website company must provide email marketing capabilities that are seamless with the website and can integrate with current email marketing software. The website company must provide one email template that is consistent with website design.
- viii. Website Analytics -- Analytics tracking must be integrated on the site to allow for website visitor tracking, page tracking, etc. Technical requirements -- The website must be built using HTML and CSS. No use of Flash. The website must be compliant with Mac and PC, as well as with the latest two versions of Microsoft Edge, Mozilla Firefox, Chrome and Safari.

The Scope of Work would be carried out in phases, as follows:

Phase 1

- ❖ Discovery process and overview of the Centralina Economic Development Commission and its partnerships with Charlotte Regional Partnership and Regional County EDCs; sharpen the message
- ❖ Interview stakeholders; board members, local city and town municipal jurisdictions and counties, county economic development and chamber orgs, and workforce boards to determine web users desired capabilities of the www.prosperityforgreatercharlotte.com site.

- ❖ Rebrand website content including positioning, personality, promise, differentiation, and value proposition; motto or tag line development
- ❖ Create the framework and architecture for the website redesign
www.prosperityforgreatercharlotte.com

Phase 2

- ❖ Website content and page development
- ❖ Create Web-Based Outreach and Marketing Support Plan

Phase 3

- ❖ Beta testing of website

Phase 4

- ❖ Launch of website

DELIVERABLES:

Task A: Centralina EDD\CEDS Web Update: The project deliverable will be an updated website and communications platform for the Centralina Economic Development Commission and the Prosperity for Greater Charlotte CEDS. Included is interactive CEDS web experience with specific data dashboards for coverage of the EDD Region and the individual nine NC counties of the District. The website shall be dynamic, rich in data and communicate the most up-to-date information and regional benchmarks in graphic form and also serve as multi-point portal for all CEDC activities.

Task B: Web-based Economic Strategy Outreach and Marketing Plan: Alignment and incorporation of all findings and work products into an interactive web portal information asset that serves as a CEDS based implementation resource for regional economic strategic plans and initiatives. Provide a concise and focus-driven tag line and mission statement for the CEDC.

CONTENTS OF RESPONSE

By submitting a response, respondents represent that they have thoroughly examined and become familiar with the scope of work outlined in this RFP and are capable of performing the work to achieve the objectives. The submittal must demonstrate that the respondent has sufficient and appropriate resources to complete the project. Consultants must designate the project lead and report where his/her primary office is located. Any proposed sub consultants must be identified.

Respondents are asked to organize their responses in accordance with the following format:

1. **Cover letter.** Provide a letter of introduction with a brief description of your firm, indicating the primary office location for the performance of this project, the type of firm, areas of

specialization, and the project lead. Include company name, address, contact name, title, phone number, fax number, email and website address. Identify all sub-consultants that will be involved.

2. **Project Approach.** Provide an outline description of how you would approach the scope of services and a timeline that would include completion of Task A and Task B by no later than March 30th, 2019.
3. **Key Personnel.** Please also include the names, qualifications and experience of personnel to be assigned to the project during the specified project timeline and indicate what role these individuals will play in the project.
4. **Response Page.** See ATTACHMENT A and include with completed submittal.
5. **References.** For the prime consultant and all sub-consultants, provide reference information and brief project descriptions for at least three (3) current clients. Reference projects should have been completed within the last three (3) years and *similar* in nature to those described in this RFP. Please include the following information:
 - 1) Name of client
 - 2) Name and title of client's primary contact.
 - 3) Telephone number, fax number, email address, and mailing address of the client's primary contact.
 - 4) A brief description of the types of services provided, the overall scope of the project, duration of the project and the current status of the project.
6. **Budget.** Show total costs for services specified including labor and direct costs, associated travel costs, materials and any other requirements (each enumerated separately) as may be required to furnish the work. Provide a summary of cost and percentage of total project effort by proposed task. The base project assignment is targeted for completion for the sum of \$75,000 or less, all-inclusive. All additional assignments or additions to scope will be specifically contracted and based on initial engagement rates of base contract agreement. Consultants may provide a budget they propose would accomplish the scope that exceeds the target but acknowledge the costs proposed are considered in the evaluation criteria of the RFP.
7. **Submittal Date.** Responses must be sealed and be received **no later than 4 PM EDT, July 31, 2018. Any responses received after this date and time will not be considered.** Responses should be delivered to the Centralina Economic Development Commission, 9815 David Taylor Drive, Charlotte, NC 28262.
8. **Number of Copies and Length of Proposal.** All submissions should be clearly marked "*Centralina EDD Web Platform.*" Please include **five (5) copies of your proposal along with your original. Your submittal is limited to 20 pages maximum, with an additional 2 pages maximum for the cover letter, 1 page for the Attachment A response page, and 5 pages**

maximum for any appendix. Please also **submit one digital copy of the proposal** labeled as such, using a digital format such as Adobe Acrobat PDF (this can be emailed to mmanis@centralina.org.)

RESPONSE DEADLINE

Any response to this Request for Proposals (“Response”) must be submitted in writing. Sealed proposal and required copies are acceptable until **4 PM EDT, July 31, 2018**. One requested electronic copy as a PDF file may be emailed. Responses received after this time and date will not be considered.

Please address the Response to:

Mike Manis, President & COO
Centralina economic Development Commission
9815 David Taylor Drive, Suite 100
Charlotte, North Carolina 28262
mmanis@centralina.org

TERMS AND CONDITIONS

Freedom of Information

Respondents are advised that any and all materials submitted in response to this RFP shall become the sole property of the Centralina Economic Development Commission and the Centralina Council of Governments and shall be subject to the provisions of North Carolina General Statutes, Chapter 132 (Freedom of Information).

Incurred Costs

This request for proposals does not commit the Centralina Economic Development Commission to award a contract or to pay any costs incurred in the preparation of a response to this request. The Centralina Economic Development Commission will not be liable in any way for any costs incurred by respondents in replying to this RFP.

Right to Cancel

The Centralina Economic Development Commission reserves the right to cancel this RFP at any time and to decide not to consider any or all of the respondents submitting information in response to this request.

Severability

If any terms or provisions of this Request for Proposal shall be found to be illegal or unenforceable, then such term or provision shall be deemed stricken and the remaining portions of this document shall remain in full force and effect.

Collusion

By responding, the firm implicitly states that his/her proposal has not been made in connection with any other competing firm submitting a separate response to this RFP; is in all respects fair; and has been submitted without collusion or fraud.

Oral Presentation/Interview

Respondents who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to the Centralina Economic Development Commission. This provides an opportunity for the respondent to clarify or elaborate on the proposal. These are fact-finding and explanation sessions only and do not include negotiation. The Centralina Economic Development Commission will schedule the time and location of these presentations. Oral presentations are an option of the Centralina Economic Development Commission and may or may not be conducted.

Affirmative Action

The Centralina Economic Development Commission is an equal opportunity employer and requires an affirmative action policy from all contractors and vendors as a condition of doing business, as per Federal Order 11246. By signing the Response Page for this RFP, all respondents agree to this condition of doing business.

Assigning/Transferring of Agreement

Any successful firm is prohibited from assigning, transferring, conveying, subletting or otherwise disposing of the resulting agreement or its rights, title, or interest therein or its power to execute such an agreement to any other person, company or corporation without prior consent and approval in writing from the Centralina Economic Development Commission.

ATTACHMENT A

RESPONSE PAGE

Design and Creation of Centralina Economic Development District Web-based Communications and Marketing Platform

REQUEST FOR PROPOSAL

DATE ADVERTISED: July 10, 2018

DATE/TIME DUE: July 31, 2018 by 4:00 PM EDT

NAME OF PROPOSAL

**Design and Creation of Centralina Economic Development District
Web-based Communications and Marketing Platform**

Type or Print Name of Individual

Signature of Individual

Title

Date

E-mail Address/website

Doing Business as (Trade Name)

Street Address

City, State, Zip Code

Telephone Number/Fax Number

Tax Identification Number