



Centralina Council of Governments

CENTRALINA COUNCIL OF GOVERNMENTS

**Request for Proposals
Branding & Website Development
Services**

Date of Issue: September 23, 2019

**Submission Deadline:
Friday, October 11, 2019
at 17:00 EDT**

Direct all inquiries concerning this RFP to:
Emily Hickok, Marketing & Communications Manager,
704-348-2702, ehickok@centralina.org

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1.0 PURPOSE AND BACKGROUND

The purpose of the Request for Proposals (RFP) is to solicit proposals for website development and branding services for the Centralina Council of Governments (“CCOG” or “Centralina”). CCOG recently celebrated its 50th anniversary and, under the leadership of a new executive director, completed a strategic review in the last six months. Through intensive internal and external engagement, CCOG refreshed its mission, created core values and set strategic priorities that will guide the organization for the next three years. As part of the strategic review, CCOG also identified the need to strengthen internal operations and external engagement based on the following goals:

1. Strengthen our communications with stakeholders to promote CCOG, our work and impact across the region;
2. Effectively market CCOG services and resources; and
3. Develop a brand identity that unifies the numerous affiliated programs, boards and commissions that are a part of the Centralina family.

In support of these goals, the CCOG Executive Board approved a workplan for fiscal year 2020 that included resources to support consultant services. Through this RFP we are seeking a creative, highly skilled and collaborative consultant (or consultant team) with an impressive record of success to uncover CCOG’s brand identity and formulate a compelling brand strategy that positions us for increased success. This project has two main components (1) create a new brand including a refreshed logo, design standards, and collateral materials and (2) develop a new CCOG website based on those standards as outlined in detail throughout this RFP document.

Mission Statement

Centralina Council of Governments leads regional collaboration and sparks local action to expand opportunity and improve quality of life. We do this through creative problem solving, innovative service delivery and support to our local governments.

Who We Are

Centralina Council of Governments (CCOG) is the state-designated lead regional organization serving the Centralina region, one of the nation’s fastest growing metropolitan areas. Our region includes Anson, Cabarrus, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly and Union counties. We have a voluntary membership comprised of 60 counties and municipalities and are governed by a Board of Delegates.

Since 1968, we have served as a platform for regional dialogue and developed action plans to support the sustained growth and development of the greater Charlotte area. We serve as an umbrella for the Area Agency on Aging, Centralina Workforce Development Board, Centralina Economic Development District and our Regional Planning Department.



We are one of 16 regional councils in North Carolina established by the General Assembly to meet the region’s needs on a wide range of governance issues. Regional councils exist in some fashion across the country although naming conventions can differ. In North Carolina, each council is also designated by a letter – we are known as Region F. More information available at www.ncregions.org/.

What We Do

Centralina realizes its mission in three distinctive ways. First, we are a platform for regional collaboration and creative problem solving around the big issues facing the greater Charlotte region as outlined in our strategic priorities. Second, we serve individuals across the region by providing direct services in two critical areas: workforce development and senior services. Finally, we serve as a helping hand to our local member governments by providing technical support, training and advocacy at the state and federal levels. Our vision is to be among the best regional councils in the nation. We believe we will do that by focusing on our mission, demonstrating our values in our work and by seeking to understand and serve our member communities’ needs.

Our Core Values

The Centralina team is wholeheartedly dedicated to serving our communities and making a meaningful difference in our region. To do this we LEAD in the way we ACT with each other and our customers:

Listen and speak with care
Embrace boldness and flexibility
Accelerate collaboration
Deliver expertise with respect

Act with integrity and empathy
Commit to our communities
Take care of ourselves and each other

Our Regional Priorities for the Next Three Years

- **Growth:** Manage cross-jurisdictional collaboration for coordinated regional growth
- **Mobility:** Expand regional mobility choices and connections
- **Health:** Improve the health and resilience of individuals, communities and our region
- **Economic development:** Facilitate business and infrastructure investments in our local communities and regional economy
- **Talent:** Provide talent strategies and solutions for a qualified and competitive workforce
- **Innovation:** Support and champion our local governments
- **Operations:** Enhance CCOG operations, infrastructure and partnerships

Proposals shall be submitted in accordance with the terms and conditions of this RFP and any addenda issued hereto.

2.0 GENERAL INFORMATION

2.1 REQUEST FOR PROPOSALS (RFP) DOCUMENT

The RFP is comprised of the base RFP document, any attachments, and any addenda released before contract award. All attachments and addenda released for this RFP in advance of any contract award are incorporated herein by reference.

2.2 RFP SCHEDULE

The table below shows the intended schedule for this RFP. The Contract Lead will make every effort to adhere to this schedule.

Action	Responsibility	Date and Time
Issue RFP	CCOG	Monday, September 23, 2019
Submit Written Questions	Respondents	Monday, September 30, 2019 at 18:00 EDT
Provide Responses to Questions on CCOG Website at https://centralina.org/website-development-and-branding-rfp/	CCOG	Wednesday, October 2, 2019
Submit Proposals	Respondents	Friday, October 11, 2019 at 17:00 EDT
Finalists Notified	CCOG	Wednesday, October 16, 2019
Finalists Interviews (Virtual if not a local company)	CCOG	Friday, October 18, 2019
Selection and Contract Award	CCOG	Monday, October 21, 2019

2.3 RFP QUESTIONS

Upon review of the RFP documents, Respondents may have questions to clarify or interpret the RFP in order to submit the best proposal possible. To accommodate the proposal questions process, Respondents shall submit any such questions by the above due date.

Written questions shall be emailed to ehickok@centralina.org by the date and time specified above. Respondents will enter “Website Development + Branding Proposal Questions” as the subject for the email. Questions submittals must include a reference to the applicable RFP section.

Questions received prior to the submission deadline date, CCOG’s response and any additional terms deemed necessary by CCOG will be posted in the form of an addendum on CCOG’s website at <https://centralina.org/website-development-and-branding-rfp/> and shall become an Addendum to this RFP. No information, instruction or advice provided orally or informally by any CCOG personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Respondents shall be entitled to rely *only* on written material contained in an Addendum to this RFP.

CCOG shall not be bound by informal explanations, instructions or information given at any time by anyone on behalf of CCOG during the competitive process or after award. CCOG is bound only by information provided in this RFP and in formal Addenda issued through IPS.

2.4 INSTRUCTIONS

CCOG encourages all potential respondents to read the full RFP document, including all attachments, prior to preparing a response. In addition, Respondents shall note the following:

- COST FOR PROPOSAL PREPARATION: Any costs incurred by Respondent in preparing, submitting proposals or participating in finalist interviews are the Respondent’s sole responsibility; CCOG will not reimburse any Respondent for any costs incurred prior to award.
- CONFIDENTIAL INFORMATION: To the extent permitted by applicable statutes and rules, CCOG will maintain confidential trade secrets that the Respondent does not wish disclosed. As a condition to confidential treatment, each page containing trade secret information shall be identified in boldface at the top and bottom as “CONFIDENTIAL” by the Respondent, with specific trade secret information enclosed in boxes or similar indication. Cost information shall not be deemed confidential under any circumstances. Regardless of what a Respondent may label as a trade secret, the determination whether it is or is not entitled to protection will be determined in accordance with G.S. 132-1.2. Any material labeled as confidential constitutes a representation by the Respondent that it has made a reasonable effort in good faith to determine that such material is, in fact, a trade secret under G.S. 132-1.2. Respondents are urged and cautioned to limit the marking of information as a trade secret or as confidential so far as is possible.

2.5 PROPOSAL PREPARATION & SUBMITTAL

Respondents shall note the following requirements for Proposal format and submittal instructions:

- FORMAT: Respondents shall deliver one (1) **signed, original** proposal, five (5) copies response and one (1) digital format such as Adobe Acrobat PDF. Proposals are limited to 20 pages maximum, with an additional two (2) pages maximum for the cover letter, one (1) page for the Attachment A response page and five (5) pages maximum for any appendix.
- ORGANIZATION: All Proposals shall be arranged in the following order. See Section 4 RFP and Proposal Requirements for the full details and expectations for content requirements.

PROPOSAL (meeting all requirements of this RFP and responding to the scope of work outlined in Section 5.0) including:

- a. Tab 1: Response to Project Goals and Scope
- b. Tab 2: Firm Experience and Qualifications

- c. Tab 3: Key Personnel Experience
- d. Tab 4: Proposed Schedule

ATTACHMENT A: Pricing Proposal

Completed version of ATTACHMENT B: References

Completed version of ATTACHMENT C: Location of Workers Utilized by Respondent

Completed and signed version of ATTACHMENT D: Certification of Financial Condition

ATTACHMENT E: Copies of Certificate(s) of Insurance

- **SUBMITTAL INSTRUCTIONS:** Proposals, subject to the conditions made a part hereof and the receipt requirements described below, shall be received at the address indicated in the table below, for furnishing and delivering those items as described herein. Refer to Section 4.1 PROPOSAL CONTENTS for details on required content of submitted proposals.

MAILING ADDRESS FOR DELIVERY OF PROPOSAL VIA U.S. POSTAL SERVICE	OFFICE ADDRESS FOR DELIVERY BY ANY OTHER MEANS, SPECIAL DELIVERY, OVERNIGHT DELIVERY OR BY ANY OTHER CARRIER
Attn: Emily Hickok Centralina Council of Governments 9815 David Taylor Drive, Suite 100 Charlotte, NC 28262	Attn: Emily Hickok Centralina Council of Governments 9815 David Taylor Drive, Suite 100 Charlotte, NC 28262

- **IMPORTANT NOTE:** It is the responsibility of the Respondent to have the proposal physically in this Office by the specified time and date listed above, regardless of the method of delivery. **This is an absolute requirement.** The time of delivery will be marked on each proposal when received and any proposal received after the proposal submission deadline will not be accepted or evaluated. Attempts to submit a Proposal via facsimile (FAX) machine, telephone or electronic means, including but not limited to email, in response to this RFP will **not** be accepted.
- **ADDENDA:** Critical updated information may be included in Addenda to this RFP. It is important that all Respondents proposing on this RFP periodically check CCOG's website at <https://centralina.org/website-development-and-branding-rfp/> for any Addenda that may be issued prior to the proposal deadline date. All Respondents shall be deemed to have read and understood all information in this RFP and all Addenda thereto.
- **WITHDRAWAL OF PROPOSAL:** A proposal may be withdrawn only in writing and only by the office issuing the RFP prior to the time for the opening of proposals identified on the cover page of this RFP (or such later date included in an Addendum to the RFP). A withdrawal request shall be on Respondent's letterhead and signed by an official of the Respondent authorized to make such request. Any withdrawal request made after the opening of proposals shall be allowed only for good cause shown and in the sole discretion of CCOG.

2.6 DEFINITIONS, ACRONYMS AND ABBREVIATIONS

- **CCOG:** Centralina Council of Governments.
- **CENTRALINA:** Centralina Council of Governments.
- **CONTRACT:** A contract generally intended to cover all normal requirements for the scope of services for a specified period of time based on an agreed upon price.
- **CONTRACT LEAD:** Representative of CCOG who corresponds with potential Respondents in order to identify and contract with that Respondent providing the greatest benefit to CCOG and who will administer the contract for CCOG.

- **RFP:** Request for Proposals.
- **PROPOSAL:** A submission in response to this RFP by a responsible Respondent.
- **QUALIFIED PROPOSAL:** A proposal submitted by a responsible Respondent that is responsive to the requirements of the RFP as outlined in this document.
- **RESPONDENT:** Supplier, proposer, company, firm, corporation, partnership, individual or other entity submitting a response to this RFP.

2.7 NOTICE TO RESPONDENTS REGARDING TERMS AND CONDITIONS

It shall be the Respondent's responsibility to read the Instructions, CCOG's terms and conditions, all relevant exhibits and attachments, and any other components made a part of this RFP and comply with all requirements and specifications herein. Respondents also are responsible for obtaining and complying with all Addenda and other changes that may be issued in connection with this RFP. A copy of CCOG's standard contract with terms and conditions may be found at <https://centralina.org/website-development-and-branding-rfp/>.

If Respondents have questions, issues or exceptions regarding any term, condition, instruction or other component within this RFP, those shall be submitted as questions in accordance with the instructions in Section 2.3 Proposal Questions. If CCOG determines that any changes will be made as a result of the questions asked, then such decisions will be communicated in the form of an RFP addendum. CCOG may also elect to leave open the possibility for later negotiation and amendment of specific provisions of the Contract that have been addressed during the question and answer period. Other than through this process, CCOG rejects and will not be required to evaluate or consider any additional or modified terms and conditions or Instructions to Respondents submitted with Respondent's proposal document. This applies to any language appearing in or attached to the document as part of the Respondent's proposal that purports to vary any terms and conditions or Respondents' instructions herein or to render the proposal non-binding or subject to further negotiation. **By execution and delivery of a proposal in response to this Request for Proposals, Respondent agrees that any additional or modified terms and conditions, including Instructions to Respondents, whether submitted purposely or inadvertently, or any purported condition to the offer shall have no force or effect, and will be disregarded. Noncompliance with, or any attempt to alter or delete, this paragraph shall constitute sufficient grounds to reject Respondent's proposal as nonresponsive.**

If a Respondent desires modification of the terms and conditions of this solicitation, it is urged and cautioned to inquire during the question period, in accordance with the instructions in Section 2.3, about whether specific language proposed as a modification is acceptable to or will be considered by CCOG. Identification of objections or exceptions to CCOG's terms and conditions in the proposal itself shall not be allowed and shall be disregarded or the proposal rejected. By executing and submitting its proposal in response to this RFP, the Respondent understands and agrees that CCOG may exercise its discretion not to consider any and all proposed modifications a Respondent may request and may accept the Respondent's proposal under the terms and conditions in this RFP.

3.0 METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS

3.1 METHOD OF AWARD

All Qualified Proposals submitted by the due date and time will be evaluated. CCOG will select award or awards based on the evaluation criteria outlined in Section 6: Evaluation Criteria. While the intent of this RFP is to award a Contract to single Respondent for all line items, CCOG reserves the right to make separate awards to different Respondents for one or more line items, to not award one or more line items or to cancel this RFP in its entirety without awarding a contract, if it is considered to be most advantageous to CCOG to do so. CCOG reserves the right to waive any minor informality or technicality in proposals received.

3.2 CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION

During the evaluation period—from the date proposals are submitted through the date the contract is awarded—each Respondent submitting a proposal (including its representatives, sub-contractors and/or suppliers) is prohibited from

having any communications with any person inside or outside the using agency, issuing agency, other government agency office, or body (including the purchaser named above, department secretary, agency head), or private entity, if the communication refers to the content of Respondent's proposal or qualifications, the contents of another Respondent's proposal, another Respondent's qualifications or ability to perform the contract, and/or the transmittal of any other communication of information that could be reasonably considered to have the effect of directly or indirectly influencing the evaluation of proposals and/or the award of the contract. A Respondent not in compliance with this provision shall be disqualified from contract award, unless it is determined in CCOG's discretion that the communication was harmless, that it was made without intent to influence and that the best interest of CCOG would not be served by the disqualification. A Respondent's proposal may be disqualified if its sub-contractor and supplier engage in any of the foregoing communications during the time that the procurement is active (i.e., the issuance date of the procurement to the date of contract award). Only those discussions, communications or transmittals of information authorized or initiated by the issuing agency for this RFP or general inquiries directed to the purchaser regarding requirements of the RFP (prior to proposal submission) or the status of the contract award (after submission) are excepted from this provision.

3.3 PROPOSAL EVALUATION PROCESS

CCOG shall review all Proposals to this RFP to confirm that they meet the specifications and requirements of the RFP. Only those deemed as Qualified Proposals will be sent for evaluation by the selection committee.

- a) Proposals are requested for the scope of services as specified. CCOG reserves the right to reject any proposal on the basis of fit, form and function as well as cost. All information furnished on this proposal may be used as a factor in determining the award of this contract.
- b) CCOG will review and assess Qualified Proposals according to the evaluation criteria listed in Section 6: Evaluation Criteria.
- c) CCOG will rank all Qualified Proposals and select a finalist group of Respondents that will take part in a short interview with CCOG leadership, including the Executive Director. At this time, CCOG may request additional formal responses or submissions from any or all Finalists for the purpose of clarification or to amplify the materials presented in any part of the proposal. Finalists are cautioned, however, that CCOG is not required to request clarification, and often does not. Therefore, all proposals should be complete and reflect the most favorable terms available from the Respondent. Prices proposal cannot be altered or modified as part of a clarification.
- d) Upon completion of the evaluation process, CCOG will make award(s) based on the evaluation and notify Respondents via email of the award(s). Award of a Contract to one Respondent does not mean that the other proposals lacked merit, but that, all factors considered, the selected proposal was deemed most advantageous and represented the best value to CCOG. All Respondents will be notified regarding the status of their Qualified Proposal by the date of the proposed contract award in the schedule above.

3.4 INTERPRETATION OF TERMS AND PHRASES

This Request for Proposals serves two functions: (1) to advise potential Respondents of the parameters of the solution being sought by the agency; and (2) to provide (together with other specified documents) the terms of the Contract resulting from this procurement. As such, all terms in the Request for Proposals shall be enforceable as contract terms in accordance with the General Contract Terms and Conditions. The use of phrases such as "shall," "must," and "requirements" are intended to create enforceable contract conditions. In determining whether proposals should be evaluated or rejected, the Department will take into consideration the degree to which Respondents have proposed or failed to propose solutions that will satisfy the Department's needs as described in the Request for Proposals. Except as specifically stated in the Request for Proposals, no one requirement shall automatically disqualify a Respondent from consideration. However, failure to comply with any single requirement may result in CCOG exercising its discretion to reject a proposal in its entirety.

4.0 PROPOSAL REQUIREMENTS

This Section lists the requirements related to this RFP and Proposals submitted in response to this RFP. By submitting a Proposal, the Respondent agrees to meet all stated requirements in this Section as well as any other

specifications, requirements and terms and conditions stated in this RFP. If a Respondent is unclear about a requirement or specification or believes a change to a requirement would allow for CCOG to receive a better proposal, the Respondent is urged and cautioned to submit these items in the form of a question during the question and answer period in accordance with Section 2.3.

4.1 PROPOSAL CONTENTS

Respondents' proposal shall include the required elements outlined below, including populating all attachments of this RFP that require information and include an authorized signature where requested. Additional details required for each Proposal section are included below.

Tab 1: Response to Project Goals and Scope

Respondents should address their approach to meeting the Proposal goals and producing the requested deliverables outlined in 5.0. Respondents are encouraged to provide suggestions to this scope that would improve the end product.

Tab 2: Firm Information and Qualifications

If multiple firms are responding as a team, this information shall be listed for each company.

2.1 Organization Information

- a. Firm name, address, phone and website. Also include primary contact name, title and contact information.
- b. Specify the history of the firm and the state in which the firm was organized or incorporated, number of full-time employees and type of ownership.
- c. Specify the office location(s) (City, State) from which key individuals on this team will operate.
- d. CCOG invites and encourages participation by businesses owned by minorities, women, disabled, disabled business enterprises and small businesses. Describe how your firm or team responds to this statement.

2.2 Firm Qualifications

Please describe recent experience relevant to this project. Include the location and description of the project(s), key staff that worked on the project(s) and how you measured the results or effectiveness of the project.

- a. Experience with creating and launching a new brand, including design standards
- b. Experience in developing websites
- c. Experience working with non-profits, local governments or brand families

Tab 3: Key Personnel Experience

Identify key individuals to be assigned, their education, credentials and projected hourly rates. Experience summaries of these key individuals shall be provided, with emphasis on previous experience on similar projects.

Tab 4: Proposed Schedule

The initial Contract term shall extend through the end of fiscal year 2020, or June 30, 2020, but may be extended up to 180 days in 90-day-or-less increments. Respondents shall propose a general project schedule as part of the Proposal to demonstrate the preferred timeline for completing the scope of services and deliverables required. The Respondent's attention is directed to the need for the timely performance of services provided for under this contract.

Attachment A: Pricing Proposal

Price shall constitute the total cost to CCOG to perform all services requested, including all materials, supplies and travel. Note that CCOG is unable to accept unlimited reimbursable expenses. Any proposed reimbursable expenses must be capped in the price proposal. Respondents are asked to complete Attachment A which serves as a cover sheet for the price proposal; the format of the price proposal included in Attachment A is at the discretion Respondent but must reference the specific tasks and deliverables outlined in Section 5.

Attachment B: References

Respondents shall provide at least three (3) references on which your company has provided services of substantially the same size and scope to those solicited herein. Respondents shall provide the required reference information on Attachment B. CCOG may contact these users to determine the services provided are substantially similar to those proposal herein and Respondent's performance has been satisfactory. Such information will be considered in the evaluation of the proposal.

Attachment C: Location of Workers Utilized by Respondent

Attachment D: Certification of Financial Condition

Each Respondent shall certify it is financially stable by completing the scope of work outlined in this RFP. CCOG is requiring this certification to minimize potential performance issues from contracting with a Respondent that is financially unstable. From the date of the Certification to the expiration of the Contract, the Respondent shall notify CCOG within thirty (30) days of any occurrence or condition that materially alters the truth of any statement made in this Certification.

Attachment E: Certificate of Insurance

Respondents should attach proof of insurance for the type of work solicited in this RFP, including, but not limited to Workers Compensation and Commercial General Liability coverage.

4.2 RFP REQUIREMENTS

Respondents shall note the following requirements of Respondents to this RFP and fully review the standard CCOG contract for services provided in Attachment E.

- IRAN DIVESTMENT ACT: As provided in G.S. 147-86.59, any person identified as engaging in investment activities in Iran, determined by appearing on the Final Divestment List created by the State Treasurer pursuant to G.S. 147-86.58, is ineligible to contract with CCOG.
- BACKGROUND CHECKS: Respondent and its personnel are required to provide or undergo background checks at Respondent's expense prior to beginning work with CCOG. The Respondent must also conduct a criminal check annually on employees providing services to CCOG under this Contract. Any individual convicted of a criminal offense, other than a misdemeanor, may not be allowed to work on the scope of services referenced in this RFP.

5.0 SCOPE OF WORK & SPECIFICATIONS

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.

5.1 Background

CCOG is searching for a creative, highly skilled and collaborative consultant (or consultant team) with an impressive record of success to uncover our brand identity and formulate a compelling brand strategy that positions us for increased success. This project has two main components (1) create a new brand including a refreshed logo with design standards and (2) develop a new website based on those standards.

It is the intention of CCOG to reach an agreement with an agency that would have the capability of undertaking both pieces in house, although consultants may partner together to bid as a team. Weight will be given to firms that have had experience working with governments or multiple brands.

Target Audience

CCOG has a wide and varied audience. Below is a sample of some of our target groups:

- Our 60 local government members, comprised of counties, cities, towns and villages of varying size
- Other local government entities in the nine-county Centralina region
- Local government staff including municipal planners, economic development directors, transportation officials, etc.

- Partner organizations and stakeholders
- Residents seeking evidence-based health programs or career information
- News media

Department Websites and Logos

- **Regional Planning** – housed under the CCOG website, no logo
- **Centralina Area Agency on Aging** – www.centralinaaging.org, website may get folded into the new CCOG at a later point
- **Community & Economic Development** – www.centralinaedd.org, old website www.4communitydevelopment.org will be folded into the economic development section of the new CCOG website
- **Centralina Workforce Development Board** – www.centralinaworks.com
- **Government Affairs & Member Engagement** – will be housed under the new CCOG website, no logo



Other Centralina Brands

Some projects and programs also have their own websites and logos. Some examples include:



Note: Centralina Clean Fuels Coalition's website www.4cleanfuels.com will also get folded into our new website. This program is housed in the Planning Department. All existing content may not migrate over – it will need to be pared down.

Challenges We Face

- **Lack of Awareness** – includes residents but especially our members (a recent survey indicated that members are not aware of all the services we offer)
- **Wide Service Offering** – we offer an array of services that can overwhelm or confuse our audience
- **Broad Target Audience** – our main audience is our local government members, but our secondary audience stems from our departments who serve residents, planning departments, businesses etc.
- **Members Needs Difference** – we aim to balance the needs of our member communities, which range in size from large cities like Charlotte to small towns. We also try to balance our work on a regional level with what we do at the local level. This should be apparent in our new website – regional and local impact.
- **Rotating Board Members** – many of our delegates are elected officials which rotate frequently. We need to do a better job of educating new board members and reaching other local government staff
- **Multiple Brands** – most of our departments have their own website, social media platforms and logos. We need to find a way to integrate them into one brand family.
- **No Brand Standards** – we need a style guide so that all external-facing materials look similar
- **Value Proposition** – we need to do a better job of telling our story and demonstrating the value of membership
- **Competition** – we sometimes compete for the same business with other COGs, private planning organizations, UNC School of Government (for government education) and municipalities that elect to do work in house

5.2 Engagement Expectations and Project Management

Once selected, the consultant will have an initial in-person meeting with the Executive Director and the Marketing & Communications Manager. The consultant will also need to meet with the department directors to get a better understanding of the organizations housed under the CCOG roof. The consultant may also be asked to present at a Board of Directors meeting and a staff meeting to get feedback on brand concepts. The Marketing & Communications Manager, Emily Hickok, is the project manager and will be your main point of contact throughout this process.

5.3 Assessment

Consultant will conduct a brand review of all CCOG communication outlets and visual identity, including affiliated organizations, to identify opportunities, challenges, and alignment with new mission, values and priorities. Findings shall be presented to the CCOG project team and influence the approach to the remaining tasks and deliverables.

5.4 Style Guide

CCOG does not have a set color palette, fonts or other brand standards items. CCOG also needs a way to distinguish each department in our collateral materials while creating consistency within the CCOG brand.

The style guide shall include, but is not limited to, the following components:

- **Color Palette** – primary and secondary color palettes in PMS, RGB and CMYK with usage guidelines
- **Typography** – primary and secondary typeface with Microsoft-standard alternatives and usage guidelines
- **Department Identity** – brand architecture should unify departments and programs, creating a comprehensive brand that is easily recognized
- **Iconography** – for CCOG, our departments, programs and regional priorities
- **Brand Voice**
- **Logo Usage Guidelines** – including graphic positioning and how the CCOG logo treatment on department materials

5.5 Logo and Tagline

The selected consultant will complete an assessment of our current logo and colors. Based on that assessment, CCOG and the consultant will work together to create a new logo with iconography. We also want to use a collaborative process to develop a new tag line.

5.6 Website Development

The CCOG website is out of date, problematic to update, has functionality issues and can be confusing to visitors due to the amount of content and current navigation architecture. We want a clean, modern website that makes it easy for all our stakeholders to find information, promotes our upcoming events, is easily modified by non-technical users and clearly explains who we are and what we do. We currently use Wordpress but are open to other content management systems.

CCOG has a lot of content and plans to reuse some of it, provided it's still useful after the rebranding process. Other content will need to be rewritten or added, which may require the use of a copywriter. The consultant will advise on this process and our internal website team will take the lead on scrubbing and reorganizing content. After the team has reworked the copy, the consultant will review content so that it reads well for the web, is optimized, has a consistent brand voice and works for our different audience groups.

The navigation structure will need to be reworked to make it easier to use. We are open to categorizing information in whatever way makes sense to the site visitor and are looking for guidance on this issue. Currently, visitors much search by department but it would be helpful to also be able to search by type (possibly persona or service/program type that cuts across our departments e.g. grants or technical assistance). We have some photographs and video but may need professional assistance to obtain more original imagery as part of this process and budget.

Goals

- Present information and our services in an easy-to-understand way without industry jargon
- Position CCOG as a thought leader and expert in our field

- Allow our diverse audience to quickly and easily find the information they are looking for, including events
- Improve awareness and engagement
- Seamlessly integrate with our stand-alone department websites
- Improve performance, security and compliance

Functionality Requirements

- **Content Management System (CMS)** – all areas (webpages, images, forms, etc.) should be easy to update
- **Responsive Design** – ability to seamlessly adjust to fit desktops, laptops, tablets and smartphones
- **Search Engine Optimization** – the CMS must include the ability to make alterations (title tags, meta descriptions, alt tags and headers) and be built to be easily crawled by search engines
- **Social Media Integration** – the ability for web content to be shared via social media networks; these platforms should also link to the website to allow for easy “follows”
- **Contact Forms**
- **News** – a built-in news platform enabled to create, edit and publish news articles to the site
- **Events** – a robust, easy to update calendar module with the ability to search by category
- **Email Marketing** – we want to explore the idea of linking our newsletter content to our website to cut down on duplicative tasks and integration with our email marketing system for automatic enrollments
- **Imagery, Embedded Videos, Icons & Infographics** – include more visual elements to break up content and data
- **Technical requirements** – the site must be built using HTML/CSS (no Flash) and compliant with Mac and PC, as well as the latest versions of Microsoft Edge, Mozilla Firefox, Chrome and Safari
- **Website Analytics** – analytics tracking must be integrated on the site to allow for website visitor tracking
- **Resource Library** – a searchable section for visitors to find items such as previous newsletter articles, grant information, white papers, etc.
- **Interactive Map** – we want to explore the idea of creating an interactive map of the region where visitors can see our activity in that area or get economic development data for their county (linking with software like GIS, Tableau or Esri)
- **Members Section** – password protected area where members can search a training library, watch videos, etc.

5.7 Capabilities Brochure

Consultant will design a capabilities brochure utilizing text developed for the website and following the final style guide that will showcase the CCOG mission, values, and regional priorities. The brochure would function as either a stand-alone printed piece or be paired with other collateral templates noted below in 5.7.

5.8 Collateral Templates

Consultant will design several template items that CCOG can populate and customize. This include but are not limited to:

- Letterhead
- Business cards
- Presentation folder
- PowerPoint presentation (title slide and footers for body slides)
- E-newsletter header and footer
- Email signature (with the ability to add additional logos to promote conferences and programs)
- Events one-page flyer (in Word and Publisher)
- Sales sheets for each department (in Publisher)
- Staff bio sheets (in Publisher)

5.9 Implementation Strategy

Consultant will consult on a roll out plan to launch the new CCOG brand and website to various audiences, including social media and press strategy.

6.0 EVALUATION CRITERIA

CCOG will utilize the following evaluation criteria in its execution of the valuation process outlined in Section 3.3.

CCOG intends to select up to four (4) Finalists from the pool of qualified Respondents for in-person interviews at CCOG offices (virtual if not a local company) to be held on the date listed in 2.2 RFP Schedule. The successful consultant will be hired by CCOG based on the totality of the information provided in the RFP response and in the interviews, as well as other information that may be gathered independently from other sources.

CCOG staff will evaluate individual submittals in context of the Respondent's overall capabilities, experience and the information provided in each response. Any Respondent determined to be technically unqualified, or whose submittal is deemed unresponsive, will not be considered. Consultants responding to this RFP will be evaluated on the following basis:

- | | |
|-----|-------------------------------------|
| 40% | Response to Project Goals and Scope |
| 20% | Firm Information and Qualifications |
| 10% | Key Personnel Experience |
| 10% | Schedule |
| 10% | Fee Proposal |
| 10% | Adherence to Proposal Format |

Attachments to this RFP begin on the next page.

ATTACHMENT A: PRICING PROPOSAL

In addition to completing this cover sheet, Respondents shall provide a detailed price proposal based on their approach to delivering the scope of services in this RFP. Note that CCOG is unable to accept unlimited reimbursable expenses. Any proposed reimbursable expenses must be capped in the price proposal.

Total price for all services and deliverables	
Total reimbursable expenses cap	
Total price proposal	

Please attach a full price proposal that references the specific tasks and deliverables outlined in Section 5. The format of the price proposal is at the discretion of the respondent.

Respondent: _____

ATTACHMENT B: REFERENCES

Respondent **must** provide a minimum of three (3) references for whom you have performed similar services as described herein. Include the name of the firm, a contact person, length of time Respondent provided services, address, e-mail address and telephone number: **Note:** E-mail addresses must be valid. Failure to provide a valid email may subject the Respondent's proposal to rejection.

1) Firm/Company Name: _____ Service Dates: _____

Contact Name: _____

Address: _____

Phone number: _____ Email address: _____

Scope of work: _____

2) Firm/Company Name: _____ Service Dates: _____

Contact Name: _____

Address: _____

Phone number: _____ Email address: _____

Scope of work: _____

3) Firm/Company Name: _____ Service Dates: _____

Contact Name: _____

Address: _____

Phone number: _____ Email address: _____

Scope of work: _____

Respondent: _____

ATTACHMENT C: LOCATION OF WORKERS UTILIZED BY VENDOR

In accordance with NC General Statute 143-59.4, the Respondent shall detail the location(s) at which performance will occur, as well as the manner in which it intends to utilize resources or workers outside of the United States in the performance of this Contract. CCOG will evaluate the additional risks, costs, and other factors associated with such utilization prior to making an award. Please complete items a, b, and c below.

a) Will any work under this Contract be performed outside the United States? YES NO

If the Respondent answered "YES" above, Respondent shall complete items 1 and 2 below:

1. List the location(s) outside the United States where work under this Contract will be performed by the Respondent, any sub-Contractors, employees, or other persons performing work under the Contract:

2. Describe the corporate structure and location of corporate employees and activities of the Respondent, its affiliates or any other sub-Contractors that will perform work outside the U.S.:

b) The Respondent agrees to provide notice, in writing to CCOG, of the relocation of the Respondent, employees of the Respondent, sub-Contractors of the Respondent, or other persons performing services under the Contract outside of the United States. YES NO

NOTE: All Respondent or sub-Contractor personnel providing call or contact center services to CCOG of North Carolina under the Contract **shall** disclose to inbound callers the location from which the call or contact center services are being provided.

c) Identify all U.S. locations at which performance will occur:

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Respondent: _____

ATTACHMENT D: CERTIFICATION OF FINANCIAL CONDITION

Name of Respondent: _____

The undersigned hereby certifies that: [check all applicable boxes]

- The Respondent is in sound financial condition and, if applicable, has received an unqualified audit opinion for the latest audit of its financial statements.

Date of latest audit: _____

- The Respondent has no outstanding liabilities, including tax and judgment liens, to the Internal Revenue Service or any other government entity.
- The Respondent is current in all amounts due for payments of federal and state taxes and required employment-related contributions and withholdings.
- The Respondent is not the subject of any current litigation or findings of noncompliance under federal or state law.
- The Respondent has not been the subject of any past or current litigation, findings in any past litigation, or findings of noncompliance under federal or state law that may impact in any way its ability to fulfill the requirements of this Contract.
- He or she is authorized to make the foregoing statements on behalf of the Respondent.

Note: This shall constitute a continuing certification and Respondent shall notify the Contract Lead within 15 days of any material change to any of the representations made herein.

If any one or more of the foregoing boxes is NOT checked, Respondent shall explain the reason in the space below:

Signature

Date

Printed Name

Title

[This Certification must be signed by an individual authorized to speak for the Respondent]

Respondent: _____

ATTACHMENT E: CERTIFICATION OF INSURANCE

Respondents should attach proof of insurance for the type of work solicited in this RFP, including, but not limited to Workers Compensation and Commercial General Liability coverage.

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