CENTRALINA COUNCIL OF GOVERNMENTS

Request for Proposals
Branding & Website Development
Services
Date of Issue: September 23, 2019

Submitted Written Questions

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

Direct all inquiries concerning this RFP to:
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704-348-2702, ehickok@centralina.org

RFP Section and Question	Response
1. *Section 2.2 – RFP Schedule: In the event we are selected to interview, what is the format for the interview? Is it a formal presentation? Will there be specific questions that CCOG would like us to answer?*	Finalists will have approximately 30 minutes to present information on their team, firm, methodology and scope response to a group of six Centralina Council of Governments (CCOG or Centralina COG) staff (the selection committee). That will be followed by 20 minutes of questions based on the information submitted in the RFP and the presentation. Interviews will be held at CCOG Offices on Friday, October 18 at 9 a.m., 10:30 a.m., 1 p.m. and 2:30 p.m.
2. *Section 2.5 – Proposal Preparation and Submittal: Does the 20-page limit include attachments B-E? Or are all attachments not counted towards the 20 pages?*	No, attachments will no count towards the proposal page limit.
3. *Section 2.5 – Proposal Preparation and Submittal: In terms of binding of the SOQ, can the document be stapled in the center and printed double sided (booklet layout)?*	Proposal format is your choice as long as it's within the page number requirement and contains all required content. Double sided and bound (or center staple for a booklet) is fine.
4. *Section 2.5 – Important Note: Should the PDF be provided on a jump drive vs. emailed?*	You can send the electronic copy of the proposal via email to Emily Hickok at ehickok@centralina.org to accompany the hard copies sent by mail or in-person delivery. A jump drive is also acceptable.
5. *Section 4.2 – Background Checks: Confirming background checks do not need to be provided by us with the proposal?*	No, you do not need to provide background checks with your proposal. CCOG will need this after the consultant is selected.
6. *Section 5.1 – Target Audience: Could you provide an example of or describe of how you work with government members?*	Due to the diversity of our work, we interact with local governments – their staff, managers and elected officials – in several different ways. For individuals, we offer training and leadership development opportunities, as well as peer group meetings (e.g. Regional Managers, Solid Waste Directors). At the municipal and county level, we offer grant assistance and technical/strategic support services (interim staffing, community engagement, assessments, recruitment, land use plans, GIS mapping, etc.) that is included as part of membership or is available through contracted services. A recent survey indicated that members are not aware of our full suite of services, so we developed a membership brochure to describe these benefits. Additionally, each member government appoints a delegate to our Board which helps to set priorities for our nine-county region. CCOG then advocates for these regional initiatives by building relationships with federal and state elected leaders and their staff. We also spearhead and coordinate regional projects like the Regional Transit Plan.
7. *Section 5.1 referencing all current department websites and logos and your stated goal of*	We have a strong desire to create a unified visual and narrative story about Centralina's role and impact in

	"creating a new brand including a refreshed logo..." and also mentioned in section 5.2- 'all the organizations housed under the CCOG roof' – Do you envision a new CCOG logo/brand as well as a strategy on rebranding or adjusting the CCOG departments' logos to look more connected to the over-arching CCOG brand? Do you have any other thoughts around this and how you would "integrate them into one brand family"? or can you provide an example of another COG that does this well?	the region. Many of our departments, affiliated organizations and even individual projects developed by CCOG have audiences/stakeholders who have a specific connection to that work, but often don't associate it with Centralina COG. We want to respect those connections while also working towards our goal of a unified brand and story. We will rely on the Consultant to help us sensitively navigate this process in a way that works for our organization. Our primary focus is the Centralina COG brand, but we want to explore through this process any recommendations on how existing logos for affiliated organizations could be adjusted.
8.	*Section 5.1 you mention competing with other COGs..." – Can you offer some examples of other COGs (national or local) that you think are doing a good job on their website and brand recognition that you would like to emulate?*	It has been difficult to find a council of government (COG) website that compares with our service offering that we admire and want to emulate. Many COGs focus heavily on government services and are very technical in nature. We want our website to appeal not only to our government members who are familiar with tech jargon, but also to residents who are not. A couple of sites that seem more user friendly and visionary in nature are www.DrCOG.org and www.AtlantaRegional.org (ARC). The ARC site is particularly appealing in that you can search for information two ways – type or topic. These examples, like all COG sites, are content heavy and figuring out the best way to design the navigation architecture will be key.
9.	*Section 5.1 – Background: Who else will make contractual decisions for this project and who will be on the selection committee for this project?*	The decision will be made through a deliberative process using the Evaluation Criteria listed in 6.0. The selection committee is comprised of the Marketing & Communications Manager and staff members from four departments (Government Affairs & Member Engagement, Regional Planning, Workforce Development and Community & Economic Development). The committee will make a recommendation to our Executive Director. The Executive Director has the authority to enter into contracts on behalf of CCOG, but the Marketing & Communications Manager will be the day to day project manager.
10.	*Section 5.1 – Background: We understand that other RFQs issued by CCOG have asked for elements of branding that is specific to plans. How does this branding effort tie into those ongoing branding elements?*	Once our new brand standards have been developed and approved, all new CCOG initiatives and projects, like the now-closed RFQ for a Regional Transit Plan, will need to align with those brand standards to reinforce the brand family.
11.	*Section 5.2 – Engagement Expectations and Project Management: How many directors will we meet with? Will they meet as a group or will we conduct individual sessions?*	In an effort to make the best use of resources and streamline this process, we will plan to meet as a group during a regularly scheduled meeting with department leadership. We cannot guarantee attendance so additional one-on-one meetings may

		be necessary. Engagement with department leadership will be essential in the process; however, we also expect that the Consultant will incorporate input from our entire staff based on their approach to the project. We have four department directors in addition to our Executive Director who oversees the Government Affairs & Member Engagement division.
12.	*Section 5.2 – Is travel outside of Charlotte involved? (e.g. meeting with CCOG representatives in outlying counties)*	No. The Consultant will be able to meet with CCOG representatives during our scheduled Board meetings, which are held at our office in Charlotte.
13.	*Section 5.5 – Logo and Tagline: With CCOG being the parent brand, is your goal for audiences to think of the parent brand as the primary place to go for information regarding the sub-brands (i.e. Centralina AAA)?*	Our goal is to create unified visual and narrative story about CCOG's role and impact in the region, which by its nature, includes all of our departments' work, as well as our affiliated organizations. Given how specialized some of the audiences are for our departments and affiliated organizations, it is important that their websites and brands are accessible to those audiences. However, we do need create a stronger umbrella to connect the work (and ultimately its impact) back to our regional mission and the Centralina COG identity. We will look to the Consultant to advise on how to best create those links in a way that works for our organization. The goal is for audiences to understand that these brands are related and that sub-brands like Centralina Area Agency on Aging is part of Centralina COG.
14.	*Section 5.6 – Website Development: Regarding the redesign the Centralinas.org website - how much of the content from centralinaedd.org, 4communitydevelopment.org, and 4cleanfuels.com will you want to fold into the new site?*	We want to shift our approach from a project archive website to a proactive communications tool. To do this, we will need to scrub existing content and are open to recommendations on how to best achieve this given our limited resources and capacity. We do have a cross-departmental website committee that will assist with project implementation and content scrubbing.
15.	*Section 5.6 – Will centralina.org/centralinaaging/ also be part of the new site?*	Please see Answer #13. The Centralina Area Agency on Aging (CAAA) website was recently updated and is not part of the scope of this project; however, we want to explore how to best connect to the information on the CAAA site through the Centralina website redesign.
16.	*Section 5.6 – Confirming that centralinaworks.com/ and connectourfuture.org will not be part of this scope of work?*	Please see Answer #15 – the same approach applies to the Centralina Workforce Development Board. ConnectOurFuture.org was a project site that has now been completed. We (CCOG with advice from Consultant) need to establish a methodology for addressing independent project sites that have closed, but still have relevant information for our organization.
17.	*Section 5.6 – Is there any functionality requirements outside what your current site offers, plus the interactive map?*	All website requirements are listed in Section 5.6 of the RFP; however, we may identify new functionality requirements during the discovery process.

18.	*Section 5.6 – On the website's interactive map, is there a current data set you'd like to integrate, or how small of an area do you wish to share data on? Do you see this more as a marketing tool to convey success or attractiveness of an area or more of a research tool?*	We would like the interactive map to be a way to convey our impact on the region and show where we're working. We already have a economic data portal (https://www.centralinaedd.org/interactive-data/) that uses Tableau and we also have access to Esri (GIS mapping software). We would like guidance on this issue, but initial thoughts are to interface with existing software like Tableau or Esri and also to use the map as a storytelling tool (our impact / footprint in each of the nine counties).
19.	*Section 5.6 – Aside from ease of use, what is your primary goal for the website, or what do you want users to accomplish on your website? (e.g. get information, take action like making a call).*	In general, we have two main audience groups that our website must serve. Our goal for members (local government and the CCOG Board) is for them to quickly and easily access information on what we do, our impact and how to connect with us for support. Our goal related to non-members (such as residents, beneficiaries of our service delivery programs, businesses, institutional partners and other levels of government) is for our website to become a known resource for information on our region related to our mission of improving quality of life / expanding opportunities and our regional priorities like mobility. The second goal will prove more challenging as most people have never heard of a council of government or regional council; however, we can start the awareness process with improved search rankings. Additional information on our goals can be found in Section 5.6 of the RFP.
20.	*Section 5.6 – How will you measure the success of the new website?*	The following are some of the ways we will measure success: - Analytics (total visits, new users, conversion rates, time on page, etc.) - Improved security and compliance - Refreshed look with easy navigation of content and events - Improved user experience (faster load times, mobile friendly, etc.) - Ease of use for updating content - New password protected members section - Better integration with department websites - Improved search rankings
21.	*Section 5.6 – What has been problematic with updating your website?*	There have been two main problems. One, we don't have a dedicated IT staff person or webmaster on staff. Updates are handled by various staff members that have mixed knowledge of Wordpress, HTML and graphic design. The Marketing and Communications Manager will serve as the webmaster for the new website, but departments will be responsible for page updates. Second, our Wordpress software is out of date and will not allow us to make the changes we

		need. Our website is about a decade old and we've been advised that running an update could cause the site to break since that has happened before (new software may not support the current design). Without a dedicated IT person, this would be very problematic should it occur. We have also continued to add pages and subpages without removing or organizing content so there is too much information for users to navigate and for staff to maintain.
22.	*Section 5.6 – Events: Will the online calendar need to sync to a google calendar? How many categories of events will you have?*	We have not yet thought through the exact number of event categories that we will need. Our goal is to make searching for events as user friendly as possible. We may need the ability to search by type (department) and topic (project / initiative such as transportation or grants). We have five departments but have not defined the number of "topic" categories.
23.	*Section 5.6 – Email Marketing: Please clarify what you mean by "linking our newsletter content to our website".*	Given our limited resources, we are searching for ways to repurpose existing content, like newsletter articles, for our website. We are seeking guidance on how to best reuse copy and are open to changing email marketing systems if presented with an option that has considerable advantages (example: if we can automate the newsletter process by setting them up to auto-populate with content from our website). Our current email marketing tool is Constant Contact and is not integrated with our website.
24.	*Section 5.6 – Can you please guide us the name of email marketing tool that is integrated with existing site? Would you need help with designing an e-newsletter tool?*	
25.	*Section 5.6 – Imagery, Embedded Videos, Icons & Infographics: About how many icons and infographics do you anticipate?*	It is too early in the process to say how many icons and infographics we may need. We do not yet have a clear vision for the website and look forward to collaborating with the consultant on this issue.
26.	*Section 5.6 you mention that a copywriter may be required – Do you have an internal expert that can consult with the copywriter, have you previously used a copywriter or staff member(s) to write content that can advise? How much new content do you anticipate needing and what kind? (ie: higher-level content vs technical content?) Would this content writing need to be provided by consultant and included in the proposed fees?*	We do not have a dedicated copywriter, but we do have many internal experts that can consult or help write new copy. Content will need to work for all our audience groups and will therefore not be technical in nature. The Consultant will advise us on the best way to organize and present our information. CCOG staff will work on updates and/or drafting new copy based on those recommendations. We will not know how much content assistance we will need until we get further into the process, but at a minimum we would like the Consultant's eye on main landing pages, including parent / department pages. Please estimate the amount of copywriting assistance that might be needed and include that amount in the RFP. We also have an internal team that will assist with the site's implementation and copywriting. Please see Answer #49 for additional information.
27.	*Section 5.6 – On the Members Section, how secure does the portal need to be? Do you need*	We do not plan to share sensitive personal or financial information on our website or in this

	resource links to remain private if it is sensitive information or can a link be shared?	section. We envision the member section having online service request forms, training content (like webinar archive) and our grants listings. Consultant may advise us on the security level given this information.
28.	*Section 5.6 – In the RFP you have mentioned that the new website will have a member section. Will this section be free or paid? If you can provide us more details about the registration process it will be helpful.*	See Answer #27. This section will be free for our members to use and payment will not be collected on the website. We are looking for the consultant to advise us on the registration process. Multiple people from each member government account may need access to this section.
29.	*Section 5.6 – The existing CMS used for existing https://centralina.org/ website is WordPress. Would like to stay with that or do you prefer moving to more secure CMS systems such as Drupal?*	We are open to changing to platforms but will need additional cost/benefit information before making that decision. We also need to better understand the implications of changing given that we have one Marketing and Communications Manager and a committee of representatives from each department with varying skills sets.
30.	*Section 5.6 – For video upload, do you prefer to host the video on website or use 3rd party service & add embedded code on the website?*	We currently don't have much web-ready footage but hope to slowly start developing and incorporating videos into our new site. For example, we've started work on a three-minute overview video that we hope to add. As for the format, we need more information before making a decision on hosting vs. embedding.
31.	*Section 5.6 – Using CCOG Job Posting (https://centralina.org/what-is-ccog/job-postings/) section, can a user only see the list of Job openings or he/she would be allowed to apply using the same portal?*	No – our website only needs the ability to post available job opportunities. Applicants will not have the option to apply online via our website.
32.	*Section 5.6 – To enhance website search are you interested in implementing Apache Solr or Elastic search?*	We do want to improve our search rankings but need more information before we can determine if these might be a good fit for CCOG. One of the deciding factors might be how much support this will need from our staff (initial set up and long term) given our limited resources.
33.	*Section 5.6 – We assume that the current CMS admin roles are webmaster and content editor, is there anything else apart from this that we need to be aware of?*	We have a lean operation and as stated in Answer #21, we also do not have a dedicated IT staff person. Our Marketing & Communications Manager assumed the role of webmaster and staff in various departments help to edit content. Since most of our employees update content on the website only as a secondary responsibility, it can't be overly complicated or difficult to support.
34.	*Section 5.6 – What is the current database server? We need this information to understand the effort we need to put in for data migration.*	We have five in-house database servers and our current website is hosted by GoDaddy. We have an IT consultant that can provide more detailed information at a later point.
35.	*Section 5.6 – Can you please provide us the list of 3rd party tools/API linked to existing website?*	We are not aware of any API third party tools on our existing website, but our IT consultant can provide more detailed information at a later point.
36.	*Section 5.7 – Capabilities Brochure: How many*	We have not yet determined the format or length but

pages do you anticipate the capabilities brochure to be? Ex: trifold, 12-page booklet	planning for a 12-page booklet is a good assumption.
37. *Section 5.7 – Biz Cards: How many names?*	We are looking for a template that we can populate ourselves and do not need the consultant to create business cards for each employee. We hire frequently and need something that we (or a printer) can update each time we hire new staff.
38. *Section 5.7 – Staff bio sheets: How many?*	Like the business cards, we are looking for a template that we can populate ourselves since we have new hires coming on board frequently. Initial thoughts would be to give each department its own look so we would have five versions in total.
39. *Section 5.7 – Sales sheets for each department: How many?*	We need a total of five department sales sheet templates with the ability to update them inhouse since our service offering changes frequently. The consultant will design the initial version and then give us the working files for future updates.
40. *Section 5.7 – For the sales sheets for each department – do you need us to populate out/design each sales sheet?*	
41. *Section 5.9 – Implementation strategy: Who are the audiences that CCOG wants to reach? If part of your strategy is to reach new audiences, then we'll want [to] implement that into the PR strategy.*	To start, we want to grow the brand (general awareness of CCOG and our service offering) and demonstrate the organization's impact in the region, particularly to our members and stakeholders. After we've established a level of general awareness, we can target nonmember "subgroups" – audiences that align more specifically with our departments and projects.
42. *Section 5.9 – What are your expectations regarding the press strategy? Do you want a local focus (9 county area for PR outreach) or do you want outreach beyond that?*	Our primary focus for the initial press strategy is our nine-county region. Ultimately all our materials and messaging should be portable to audiences in Raleigh and Washington, DC because we have active state and federal advocacy programs.
43. *Timeline – Do you have a desired date for the website launch and the full brand launch?*	Our priority is to develop the logo/tagline and brand standards. Collateral materials and the website will follow. We would like to make substantial progress on our logo concepts and develop a general plan for the brand standards guide by the end of the calendar year (2019) in order to facilitate engagement with the CCOG Board. Possible engagement dates with our Board in 2020 include the CCOG Executive Board meeting on the 2nd Wednesday of January and the full Board of Delegates meeting on the 2nd Wednesday of February. We hope to launch the website no later than the end of our fiscal year (June 30, 2020).
44-47. *Budget* – *What is your budget?* – *The scope achievable on your brand and website projects will depend somewhat on your budget. Can you offer any guidelines around this?* – *Do you have a specific budget you need to stay within?* – *What is the maximum budget for this project?*	We are a government organization with limited flexible funds for this fiscal year. Our Executive Board approved a workplan for fiscal year 2020 that included resources to support consultant services for website design and branding. To make the most of these resources and in an effort not to limit the pool of possible consultants, we have chosen not to give a budget figure at this time. Once a consultant is selected, we will disclose the budget and negotiate

		cost with the understanding that if we propose a reduction in cost that we may have to limit or alter some of the services presented in the original proposal. The project cost will count towards 10% in the evaluation criteria.
48.	*Logos – There are a few departments that list no logo. Will they all need brand identity included in the package (e.g. Government Affairs & Member Engagement)?*	Moving forward we want to avoid creating new logos for departments, projects or other initiatives unless there is a significant reason to do. However, we are looking for creative solutions to highlight each department within the final Centralina brand/logo, like assigning a color to each department for collateral materials.
49.	*General – What marketing capabilities and bandwidth does your current marketing team have? For example, could they regularly write and publish blog posts if that were a part of the implementation plan?*	CCOG does not have the resources to support a marketing team. Historically, marketing has been fragmented and handled by each department independently. In July 2018, CCOG hired its first full-time marketing employee who splits her time between marketing CCOG and department events / programs. We are working on creating a cohesive system and may have more capacity in the future, but currently we are focused on utilizing existing marketing channels (newsletter, social media and our website). Blog writing, beyond our monthly newsletter, is not a priority at this time. Our Marketing & Communications Manager does oversee two committees comprised of staff from each department – communications team and website team. These groups will assist with the website implementation/scrubbing and content creation.
50.	*General – What would an ideal or fantasy outcome of this project look like to your stakeholders and audiences?*	Three main goals. First, brand recognition – that we are the experts in our fields and are passionate about moving our region forward by improving the quality of life and expanding opportunity for all. Our second goal is for our visual identity to match the level of expertise and cutting-edge solutions that we offer. We need something inspiring and modern that conveys who we are / what we do. And finally, we would like Centralina's website to be one of the first places people go to find out information about our region and how we serve it.
51.	*General – Most clients have phased out Publisher – would you consider Power Point as an alternative for Microsoft compatible editable flyers, or Adobe InDesign?*	The goal of creating collateral templates is to empower staff to develop their own marketing pieces (following brand standards) since we do not have the resources to support a marketing team. Most of our staff use Publisher, but PowerPoint might be a suitable alternative if it offers the same functionality. CCOG only has a couple of employees that are familiar with and have a license for Adobe InDesign so that would not be a good solution for the events template(s) that many of our staff will utilize, but InDesign may work for other templates like the

	department sales sheets that will need updating less frequently.
52. *CCOG Standard Terms & Conditions, Article VII – A: Can you define "free from defect?" Our standard of care is defined as "in accordance with the normal degree of care and skill of other reputable Engineers providing similar services on similar projects of like size and nature at the same time and in the same locale as this project."*	CCOG will discuss definitions and proposed alterations to our Standard Terms and Conditions following the contract award and upon the advice of Counsel.
53. *CCOG Standard Terms & Conditions, Article VII – B: We would like to adjust this section to read "Consultant shall indemnify and hold harmless CCOG and its respective affiliates from and against all claims, cost, liabilities, judgments, expenses or damages owed to third parties (including amounts paid in settlement and reasonable attorneys' fees) (collectively, "Losses") arising out of or in connection with (i) Consultant's breach (or alleged breach) of any covenants, or representations made herein, (ii) third party materials, or (iii) any **negligent** act or omission of Consultant which results in (a) any bodily injury, sickness, disease or death; (b) any injury or destruction to tangible or intangible property (including computer programs and data) or any loss of use resulting therefrom; or any violation of any statute, ordinance, or regulation."*	