

**Request for Proposals**  
**COMPREHENSIVE COMMUNITY BRANDING & MARKETING STRATEGY**

City of Charlevoix  
Charlevoix Downtown Development Authority  
Charlevoix, Michigan

**Introduction**

Charlevoix Main Street seeks proposals to develop a comprehensive community brand and marketing strategy. The branding and marketing initiative should incorporate existing economic development and tourism activities. Charlevoix Main Street's recently appointed Branding Committee will provide oversight for this project. The committee has identified two primary objectives for this campaign: development and implementation of a strong community brand; and presenting the Charlevoix area as a desirable location for businesses and individuals. The Branding Committee represents a cooperative effort between Charlevoix Main Street, City of Charlevoix, Charlevoix Convention & Visitors Bureau, and Charlevoix Chamber of Commerce. The Charlevoix Main Street Branding Committee will give final approval for all work performed.

The City of Charlevoix is located approximately 50 miles northeast of Traverse City on US Highway 31 and is one of the premiere resort communities on the great lakes. It is situated on Lake Michigan, Round Lake, the Pine River Channel, and Lake Charlevoix.

**Background**

Since Charlevoix's acceptance in the Michigan Main Street program, numerous community stakeholders and the interests they represent have been developing a unified vision for community growth. As the branding committee began exploring the branding vision for the community, members concluded extensive research would be required to create a brand that defines the Charlevoix community and demonstrates the unique qualities to make it an attractive place in which to live, visit and do business. This process requires specific expertise from a firm or individual specializing in community branding.

The primary objectives of the branding initiative include, but are not limited to:

- a. Consistency - The brand should convey a common message and image to audiences both within and outside of the Charlevoix community.
- b. Community Identity/Pride - Identify and promote what makes the Charlevoix community appealing to residents, investors, businesses, retailers, and visitors.
- c. Community and Economic Development Promotion - Promote a healthy economy; attract private investment; attract new residents and young professionals; retain businesses and creative talent. Present a defined message to promote Charlevoix locally, statewide, nationally, and internationally as a desirable place to live, work, play, and do business, as well as the right location for development, redevelopment and investment, the perfect combination for a business-friendly community.
- d. Flexibility - The brand must be flexible and adaptable in order to meet the needs of a variety of partners, including agencies within the Charlevoix community, as well as groups and businesses with their own specific marketing initiatives, while maintaining consistency with the overall brand. It must also be flexible enough to evolve in order to adapt to any changes in the market.
- e. Endorsement - The brand must be authentic and resonate with citizens, businesses and community groups within the Charlevoix Community and throughout the region in order to gain the broadest possible support for the initiative. It must be relevant, but also reflect the desire to continue to grow and progress as a community.

**Scope of Work**

- Overall, the respondent should address the following:
- Conduct research with key community segments to determine existing attitudes, local and statewide perceptions, opportunities and challenges to enhancing the community image.
- Why are businesses, residents, visitors choosing us/not choosing us? How do we address this issue?

- Recommend specific necessary elements to convey the message, i.e. visual elements, printed collateral, print advertising, web elements, media placement, public relations, events, etc.
- Develop strategies to position the messaging statements based on qualitative research and analysis of quantitative data.
- Help ensure message is appropriately tailored and woven throughout the cooperative partners' web and social media presence.
- Define how the core message is shared with existing partner initiatives and expandable to the broader region partners and assets.

The respondent will lead all aspects of the Charlevoix Community branding initiative, including the following:

1. Advice to the Branding Committee – This team will be composed of representatives from Charlevoix Main Street, City of Charlevoix, Charlevoix Convention & Visitors Bureau, and Charlevoix Chamber of Commerce and community leaders.
2. Facilitator during the research process and/or testing of the new brand - The Charlevoix community has been very involved and engaged and we would require community and stakeholder meetings and support. The respondent will be expected to employ creative means of public involvement to ensure all segments of the community are aware of and engaged in the project.
3. Research – Research will be the basis for the development of a brand concept, creative elements, and the overall brand initiative. The respondent will create and implement a brand research plan, which may include qualitative and quantitative research to identify the following:
  - a. List of key stakeholders, groups, or influential individuals, as well as a cross-section of citizens, commuting workforce and business owners in the Charlevoix Community and those outside of the city having a vested interest in the branding initiative and need to be involved in the process.
  - b. List the key elements and features of the Charlevoix Community.
  - c. Analysis of current efforts and existing creative elements such as logos, tag lines, and designs.
  - d. Analysis of competitor marketing strategies.
  - e. Measures that will be used to determine if the branding effort is successful. Include timeline to assess effectiveness of implemented branding and marketing strategy.
4. Strategic Plan – The respondent will develop strategic objectives to implement manage and promote the brand to include, but not limited to the following:
  - a. Promote use of the brand among community partners, groups, and businesses while maintaining brand integrity.
  - b. Maintain consistency of brand image and message while providing suitable flexibility for the target audiences of the participating agencies.
  - c. Recommend ways to articulate the brand, define markets and promotional opportunities, and advise on strategies to promote brand awareness.
5. Creative Development of Brand – The respondent will develop creative elements which include design concepts, logos, messages, taglines, and other features to support the overall brand initiative. A minimum of three distinct creative options must be presented, based on the results of the research. Primary and secondary branding deliverables for the community, based on research and assessments. All deliverables will be provided to the community at the end of the branding process. Deliverables must include but are not limited to:

## **Design Activities**

### Primary

1. Community and program messages and tagline  
Based on the specific needs, the contractor will develop messages and taglines that help support the new logos and collateral materials.
2. A brand standards guide and full package of branding files  
The branding style should be comprehensive and include step-by-step instructions on the proper use of the branding materials. Branding files should be named clearly and organized. The brand standards guide should also include the taglines and written descriptions of how to talk about and use the new brand as a whole.

### Secondary

3. Four event logos  
Development of four downtown event logos that are unique but look like part of the larger brand set forth in the program and committee logos. The committee may request logos for associated organizations in lieu of event logos.
4. A collection of photographs of the downtown  
Photos for marketing purposes to be taken by the Contractor while in the community for the community and stakeholder meetings.
5. Branding collateral materials  
Collateral materials include:
  - a. Letterhead and business card template
  - b. Social media icons (twitter, fb, cover photo)
  - c. Newsletter template (both digital and printed)
  - d. Pole banner template
  - e. Business directory and event Tri-fold brochure template
6. The selected logo design will be delivered with a style manual and guidelines for use and the capacity for utilization in the following:
  - a. Print and electronic advertising
  - b. All elements of website/s, social media, and other interactive platforms
  - c. Media placement
  - d. Public Relations
  - e. Events
  - f. Templates
7. Implementation Plan – The respondent will develop an Action Plan for implementation of the brand in sufficient detail to enable Charlevoix Main Street and the Branding Committee to understand the approach and work plan. An Action Plan should include, but not be limited to the following:
  - a. Estimated costs/budget associated with the implementation process.
  - b. Proposed timelines for development of creative elements.
  - c. Recommended positioning of logo and brand guidelines.
  - d. Implementation plans for brand identity applications and brand identity maintenance plan.
8. Evaluation Plan - The respondent will develop a plan for ongoing evaluation of the brand's effectiveness and report results of the branding initiatives to Charlevoix Main Street, key stakeholders, and the public.

### **Desired Qualifications & Requirements**

The respondent should specialize in project management, research, marketing, and creative design as it relates to development of a community brand. To be eligible to be awarded this project, the respondent must demonstrate significant experience with branding initiatives.

Charlevoix Main Street desires to issue a single contract to a qualified respondent to lead the project. Proposals based on a consortium approach in which more than one firm provides support or services within a consulting team are acceptable. List the key personnel and their individual responsibilities for this project. Include the extent of each person's participation and their related experience. Indicate the approximate percentage of the total work to be performed by each project team member.

### *Insurance and Business Licensing*

The respondent must furnish, within 10 calendar days from the notice to proceed, a Certificate of Insurance from respondent's carrier. Failure to provide certificate shall result in disqualification of proposal. The respondent shall maintain insurance coverage for its employees and actions throughout the duration of the contract.

### *Relevant Experience*

The proposal should address the respondent's overall capacity to lead the branding process. Resumes of the individuals who will perform the work outlined in this proposal, including their capabilities and experience conducting similar work should be included.

### *Industry Knowledge*

The proposal should provide in detail the respondent's experience in marketing for economic development, relocation and tourism, in addition to a brief synopsis explaining the respondent's philosophy on Destination Branding.

### **Specific Proposal Preparation Instructions**

The respondent should address in detail, their ability to gather and effectively utilize research to assist the branding process. The proposal should include a list of any tasks that will be subcontracted and a list of the subcontracting firms. The ideal candidate will be able to either perform these tasks in-house or operate as the lead contractor and subcontract the individual work items and create a final, comprehensive product. Charlevoix Main Street reserves the right to approve or reject any sub-contractor of the lead contracting firm's team.

**Proposed Action Plan, Time Frame and Expectations:** The proposal should include an Action Plan, along with applicable timeline. Please keep in mind Charlevoix Main Street general expectations as outlined above. Charlevoix Main Street desires the work to begin immediately and for the project to conclude on or before March 1, 2017.

**Client References:** Each party should provide three professional references for similar work which has been performed by your firm including the names, addresses, titles and telephone numbers of the person most familiar with the work. Project profile of other brands the agency has developed are highly recommended.

**Budget:** The maximum budget for this project, Inclusive of all fees and costs (whether service fees or reimbursable expenses), is \$25,000.

### **Submission & Other Details**

This RFP does not obligate Charlevoix Main Street to pay any costs incurred in the preparation of the response to this Request for Proposal or to award a contract for services. Charlevoix Main Street reserves the right to accept or reject any and all proposals received, to negotiate with any qualified source(s), or cancel, in part or entirely, this RFP, deemed in the best interest of the Charlevoix Main Street. All work performed on behalf of Charlevoix Main Street becomes the property of Charlevoix Main Street including, but not limited to, hard copies, CD's, DVD's, databases, research, etc. All final reports prepared under the contract shall be the property of Charlevoix Main Street and may not be used or reproduced in any form without the explicit written permission of Charlevoix Main Street.

In addition to responding to all requirements above, the respondents shall include a not-to-exceed fee for all services required by this RFP. Five copies of the proposal shall be included for the Branding Committee's review. Once the proposals are received and opened, the Branding Committee may request some or all of the respondents to provide additional information or invite them for interviews with the Committee or the Downtown Development Authority/Main Street Board.

### **Proposals are due and will be opened on September 21, 2016 at 10am EDT.**

Proposals shall be delivered in a sealed package clearly labeled "Branding RFP" and shall be addressed to:

Joyce M. Golding, City Clerk  
City of Charlevoix  
210 State Street  
Charlevoix, MI 49720

Emailed, faxed, or other electronically submitted proposals and those delivered after the deadline will NOT be accepted.

Any questions regarding this request for proposal should be directed to Mark Heydlauff, City Manager who may be contacted by emailing [markh@cityofcharlevoix.org](mailto:markh@cityofcharlevoix.org) or calling 231-547-3270.