

Southwest Montana
Response to questions regarding the RFP
April 11, 2017
RFP Due: April 27, 2017

Questions

Whether companies from Outside USA can apply for this? (like, from India or Canada) [Any can apply as long as they meet the criteria](#)

Whether we need to come over there for meetings? [Yes](#)

Can we perform the tasks (related to RFP) outside US? (like, from India or Canada) [Some tasks yes, others no, offerer must be present for a variety of meetings and available during our business hours as needed](#)

Can we submit the proposals via email? [No](#)

Can you share who is on the scoring committee?

[Mike Mergenthaler – Helena CVB](#)
[Maria Pochervina – Butte CVB](#)
[Julie Shelton – Fairmont Hot Springs](#)
[Becky Henne – Baymont Inn and Suites](#)
[George Everett – Main St. Butte](#)
[Alternate: Pamela Kimmey – Madison River Foundation](#)

Who else submitted questions?

[Seven Outsource – no location given](#)
[The Wendt Agency – Great Falls, MT](#)
[Rebel River Creative – Billings, MT](#)
[Banik – Great Falls, MT](#)
[Partners Creative – Missoula, MT](#)

Cover Page: states “SEALED PROPOSALS will be accepted until: 12:00 PM, Monday, April 29, 2017.” We note that April 29 is a Saturday. **Page 7, “Schedule of Events,”** states “Proposal Due Date...must be received by 12:00 noon, April 27, 2017.” April 27 is Thursday.

- Please confirm the correct proposal due date and time.
[Proposal is due by Thursday, April 27, 2017 12:00 Noon](#)

Page 7, SCHEDULE OF EVENTS, states that oral interviews / site visits will take place “The week of May 18, 2017.” We note that May 18 is a Thursday.

- Please confirm if this means oral interviews will take place the week beginning Monday, May 15 or the week beginning Monday, May 22; or if it means something different. [Week of May 22nd](#)
- If interviews will take place the week of May 15, please identify the anticipated day(s) of the week when interviews will take place. [Takes place week of May 22](#)

Page 12, Section 1.6, states “respondents may be required to make an oral presentation and product demonstration to clarify their response or to further define their offer.” **Page 22, Section 5.2**, refers to an “oral interview.” While Section 5.2 provides broad guidance on how the oral interview is scored, it is not clear from either section whether you anticipate a prepared presentation based on the content of the proposal, or an interview-type conversation with no formal presentation

- Please clarify whether you desire a formal presentation for the oral interview; and, if so, the desired length. [15 minutes for the formal presentation with an additional 15 minutes for questions from the scoring committee.](#)
- If you require a formal presentation, how far in advance will we know the specific questions, etc. that we are required to answer? [We will let you know within two days after the final written evaluations. We will send out a question in advance to all finalists and encourage them to answer it showcasing the talents and skills of their agency.](#)
- Under the criteria, it states “creativity — and feasibility”. Please define what you mean by feasibility. [Feasibility refers to what makes sense and is doable. For instance Southwest Montana would do well with a national television ad campaign but it wouldn’t be doable or feasible with our budget.](#)

Page 17, Section 2.2, states “The budget for this portion of the plan is estimated between \$185,000 - \$200,000.”

- Does this budget include your budget for services not included under this contract, specifically website development and maintenance, social media, and video acquisition? [No](#) If so, which portion of the stated budget applies to the services requested under this RFP?
- Does this budget include the annual travel guide (including printing)? [Yes](#)
- Given that the \$185,000 - \$200,000 budget is discussed in a separate bullet point from the discussion of the strategic consumer marketing plan (also under Section 2.2), are we to understand that there is an additional budget for the strategic consumer marketing plan? Or is that included in the stated budget? [Included in this budget](#)
- Given that the \$185,000 - \$200,000 budget is discussed in a separate bullet point, is the development of “an annual program in which potential marketing and advertising partners are identified and strategies specified for generating new partnership funds...” additional budget? Or is that included in the stated budget? [In the stated budget](#)

Page 17, Section 2.2, states “The successful offeror must work closely with website designer / social media agency chosen by Southwest Montana to ensure that advertising and website designs complement each other.”

- When will the contract with the website designer / social media agency expire / come up for periodic RFP? [next year](#)
- When the website designer / social media agency contract expires, do you anticipate continuing to separate that contract from your advertising and marketing services contract; or do you anticipate issuing a new RFP to combine all marketing services under a single contract? [As of now It will be a separate contract](#)

Page 17, Section 2.3, states “It is expected that key personnel be available for meetings as needed at their own expense, and available at all times via telephone and email.”

- Please explain the types of meetings that you expect to be conducted at the offeror’s own expense. Does this include meetings about jobs in progress, budgeting, or other day-to-day communications? [This includes Southwest Montana Meetings, Tourism Advisory Council Meetings \(3\), Governor’s Conference on Tourism and Business Development; our Southwest Montana meetings \(approximately 6 in different areas around the region\) always include jobs in progress and budgeting; regular communications via call, email, and tele-conference calls will be as needed and will usually come out of the budget. Some situations may be different.](#)

Page 18, Section 3.2.2.3, states “Describe your agency’s work environment and internal culture.”

- Please provide and explain the criteria on which work environment and internal culture will be scored. [This refers to how your team works together. The scoring for this is all lumped together.](#)

Page 18, Section 3.2.3 states “a maximum of four samples of marketing campaigns.”

- Please provide and explain the criteria on which these will be scored. [This is an overall view and lumped together in the scoring.](#)
- Please explain how points will be divided among the sample campaigns given that offerors can submit anywhere from one to four campaigns. Will there be a collective review of all the campaigns from one offeror rather than individual scoring of each campaign? [This will be a collective view.](#)

Page 19, Section 3.2.4, states, “Information is desired as to client reporting methods, in-house production capabilities (listing related equipment), and possible use of subcontractors.”

- Please define what you mean by “in-house production capabilities”. [What can you produce in-house rather than sourcing out to a third party.](#)
- Please explain more specifically the types of in-house production equipment you wish to be listed, and the degree of detail. Are you requesting information on number and types of

- computers, printers, editing bays, etc? Anything that helps us understand what all you can do in-house that pertains to our needs. Don't need to include computers.
- Does this list of equipment include the software we utilize to make? No but you can include that information.
- perform the in-house production capabilities? What can you produce in-house rather than contract out?
- On what criteria will in-house production equipment be scored? This is an overall assessment and will be scored this way.

Page 19, Section 4.0, states "The anticipated annual budget for Southwest Montana in Fiscal Year 2017-2018 is approximately \$400,000."

- Please explain the specific portion of this budget that will be applied to the work under this RFP. The budget changes every year and we are in the process of doing that now. Last year 47% of the budget was applied to the sections in the RFP not including approximately \$35,000 kicked in toward the travel guide from sales. We have added some projects so the actual costs are greater than the 47%.
 - Consumer Leisure Print - 24% which doesn't include the additional \$32,000 sales revenue for the travel guide.
 - Consumer Leisure Online - 18% (we have added a Trip Advisor project not included in this)
 - Publicity - 5%
 - Marketing Plan doesn't register as a % but we had budgeted \$1000 toward this line item.

The estimated total budget for Southwest Montana has presently been updated to \$430,000 from the state.

Page 21, Section 5.0.3, states "If the first and second top scoring proposals are within 5 percent scoring of each other and the third top scoring proposal is within 10 percent of the top scoring proposal, all three top scoring offerors will proceed to Stage Two, which will consist of an oral interview and a possible on-site visit."

- To confirm the math — the first two top scoring proposals have to be within 50 points or less to move onto Stage Two? The third top scoring proposal would need to be within 100 points of the lead scorer? Correct? Yes
- If the third top scoring proposal is *not* within 10 percent of the top scoring proposal but the top two scoring proposals are within 5 percent of one another, will only the top two scoring offerors proceed to Stage Two? The evaluation committee reserves the right to adjust these percentages as they deem appropriate if need be.
- By "on-site visit," do you mean a visit to the offeror's site, or Southwest Montana's? When will this take place, and will it be in lieu of, or in addition to the oral interview? The offerer's place and in addition to if the evaluation committee chooses. The visit will have to be scheduled.

Page 21, Section 5.0.4, states “the evaluation committee reserves the right to waive the Stage Two portion of the evaluation if one proposal has a score that is 6 percent higher than the next scoring offeror.”

- Using 5 percent for section 5.0.3. and 6 percent for section 5.0.4 is a difference of 10 points (50 vs. 60). What happens to offerors that fall within this range?
 - If you are eliminating offerors over 5 percent (and assuming .5 increments), shouldn’t this read “the evaluation committee reserves the right to waive the Stage Two portion of the evaluation if one proposal has a score that is 5.05 percent higher than the next scoring offeror.”? (This percentage would be even less if you are scoring in smaller increments than .5). **Yes, we could say this yet the evaluating committee has the right to adjust these percentages as they deem appropriate at the time.**

Page 22, the scoring criteria grid, below does not match the RFP on page 19.

	Section of RFP	Point Value
Company Qualifications - Experience related to contract needs, project manager and principle staff, company philosophy/ environment.	3.2.1 – 3.2.2	150
Marketing Campaigns - Creativity, message effectiveness, measurable results, overall campaign.	3.2.3	250
Customizing the Plan – Overall campaign matched with Southwest Montana and Montana Office of Tourism Strategic Plan, Cooperative partnerships, resources used/ applicability, understanding of what is required and needed to provide the utmost service to this contract.	3.2.4	200
Method of Providing Services – Scope of work assessment, reporting methods, in-house capabilities, research integration/ experience.	3.2.5	150
Cost for Services – Offeror cost for billable services, non-billable services, commission rate for media and print.	4.1 – 4.3	200
Written Proposal – Offeror’s written response to this RFP will be evaluated in its entirety in terms of completeness, responsiveness, clarity, quality of writing and overall layout		50
Total Possible Points		1000

Customizing the Plan — this is not listed in the body of the RFP and it is not section 3.2.4.

Method of Providing Services is listed on page 19 as section 3.2.4.

Additional Information about our company is listed on page 19 as 3.2.5 (and is not listed above in the scoring matrix).

- Please revise the scoring matrix and page 19 to clarify
 - Customizing the Plan — what is the criteria for this section? What are we expected to produce and what is the # of points available?

Customizing the Plan – written response: 200 points

3.2.4 Customizing the Plan – Written Response. The offeror should prepare a written response that delineates the process the offeror would employ to develop the campaign presented below. The written response should include and address the following:

- Outline the process and techniques employed to develop a campaign designed to promote Southwest Montana as a travel destination by extending travel marketing dollars through public-public partnerships and/or public-private partnerships and/or sponsorships.
- Provide an overview of your approach to strategic planning for this campaign. The written response should include marketing and communications objectives, identification of potential partners, and a description of your proposed campaign along with an outline of the marketing elements to be employed.
- The tracking system used to evaluate results should be described.
- Identify the general advertising vehicles and mediums the campaign would use for maximum impact and effective use of resources. Identify value-added opportunities. Indicate how funding is allocated.
- Please add any additional information about your company that has not been directly covered in the RFP, but is relevant to your ability to service this account.
- Method of Providing Services — is this section 3.2.4 as indicated on page 19 and what are the # of points available? This should be put as 3.2.5 and not the 3.2.4 on page 19. The original copy for 3.2.5 on page 19 is actually the last part of 3.2.4 as stated in the answer to the question above. The points for Method of Providing Services is 150 points.
- Additional Information — is this section actually scored? And if so, what is the criteria for scoring and how many points are available? This is the last bullet in the section 3.2.4 above and it is open ended for the offerer to give additional information that they feel pertinent to their ability to service the account. The is lumped in as part of the 200 points for the Customizing the Plan

- **Page 22, the scoring criteria grid**, explains “Customizing the Plan” as follows: “overall campaign matched with Southwest Montana and Montana Office of Tourism Strategic Plan, Cooperative partnerships, resources used/applicability, understanding of what is required and needed to provide the utmost service to this contract.” However, nowhere in the RFP do you request discussion of an overall campaign.
- Please explain under which section of the RFP you would like to see discussion of an overall campaign. [Please see the information just above for 3.2.4.](#)
- Please explain in detail what you request regarding an overall campaign as part of the RFP. Do you request specific tactics, budget allocation, creative, etc? [Please see the detailed information just above for 3.2.4.](#)

Page 22, the scoring criteria grid, states that “Cost for Services” has a point value of 200.

- Please explain in detail the formula / method you will use for scoring cost, and how that will be scaled? Please provide an example scenario. [We will look at the costs and the lower costs will receive a higher score. The costs are expected to be per hour.](#)
COST PROPOSAL FORMULA
- [The lowest overall cost proposal automatically receives the maximum allotted points \(200\). All other proposals will receive an incremental 10% decrease of the total points available based on the lowest to highest cost.](#) Example: Total possible points for lowest cost proposal are 200. Offeror A (lowest cost proposal) would receive 200 points. Offeror B (2nd lowest cost proposal) would receive 180 points (200 x 90%=180 pts). Offeror C (3rd lowest cost proposal) would receive 160 points (200 x 80%=160 pts), etc.
- [Note:](#) Any proposal that Southwest Montana believes to be so unjustifiably low that it would diminish the ability of the agency to complete the scope of work with the quality and responsiveness deemed appropriate by Southwest Montana, will be immediately disqualified from consideration.
- Will you score each of the hourly rates listed in section 4.1 separately (e.g., one score for Account Management, a different score for Copywriting/Editing) and then add those scores up? *If so*, please explain in detail the method / weighting you will use for that process and provide an example scenario *If not*, will you be calculating a blended rate for the purposes of scoring? And again, please provide an example scenario. [This will be done on a cumulative basis.](#)

[Offerer Cost for Billable services: 80 points](#)

[Non-billable Services: 60 points](#)

[Commission Rate 60 points](#)

- Please explain in detail how nonbillable services (requested under section 4.2) will be scored.

This will depend on the responses. What we deem best and such will get the maximum points. All other proposals will receive an incremental 10% decrease of the total points available based on the lowest to highest cost. The committee may adjust this as needed based on responses. Offeror A (lowest commission rate) would receive 60 points. Offeror B (2nd lowest cost proposal) would receive 54 points (60 x 90%=54 pts,). Offeror C (3rd lowest cost proposal) would receive 48 points (60 x 80%=48 pts), etc.

- Please explain in detail the formula / method you will use for scoring media placement commission (requested under section 4.3) and provide an example scenario. All media, outside production costs, subcontractors' costs, or out-of-pocket expenses incurred will be invoiced at net cost. Commission rates are allowable up to 15% for media placement. **The lowest overall commission rate proposal automatically receives the maximum allotted points (60). All other proposals will receive an incremental 10% decrease of the total points available based on the lowest to highest cost.** Offeror A (lowest commission rate) would receive 60 points. Offeror B (2nd lowest cost proposal) would receive 54 points (60 x 90%=54 pts,). Offeror C (3rd lowest cost proposal) would receive 48 points (60 x 80%=48 pts) , etc.

General Questions:

- Southwest Montana has contracted the same agency for this work for the past seven years. Please describe your views of the quality of that agency's work, the quality of the relationship with that agency, and any improvements in either work or relationship that you would like to see under the new contract. Please note that State of Montana regulations require a new RFP for agency work every seven years. Once awarded, that contract can be renewed annually based on performance. Our expectations and criteria for the agency are outlined in this RFP. Once the contract is awarded we can sit down and discuss these elements prior to signing the contract.
- Please identify by name, title and organization the individuals who will be on the official scoring committee for this RFP. [Answered previously](#)
- Please identify by name and location the agencies that submitted questions related to this RFP. [Answered previously](#)