



Request for Proposals

Craft Beverage, Wine, and Ecotourism Marketing Campaign

PROPOSAL ISSUE DATE:	April 14, 2023
QUESTIONS DUE BY:	May 1, 2023
PROPOSAL DUE DATE:	May 15, 2023
TIME:	3:30 p.m.

All proposals should be submitted to:

Crystal A. Erhard, Administrative and Financial Assistant

214 Central Avenue, Suite 124
Dunkirk, New York 14048

Email: erhardc@chggov.com
Telephone No.: (716) 363-3708

Technical questions should be submitted to:

Jason Toczydlowski, Director of Marketing and Communications

Email: toczydli@chggov.com
Telephone No.: (716) 661-8302

STATEMENT OF WORK

Objective

This RFP is for a Craft Beverage, Wine, and Ecotourism branding and marketing campaign for Chautauqua County, NY.

Background Information and Purpose

Chautauqua County is the western-most county in New York State. The County is rich in natural assets, including five (5) lakes, more than 20,000 acres of State and County forest lands, more than 400 miles of groomed and marked snowmobile trails, the most miles of single track groomed fat bike trails in New York State, and hundreds of miles of hiking, biking, and equestrian trails, just to name a few. It is also home to the renowned Chautauqua Institution, Robert H. Jackson Center, Roger Tory Peterson Institute, and the National Comedy Center. Chautauqua County possesses very strong manufacturing, agriculture, and tourism sectors, with the tourism sector showing the greatest expansion year-after-year.

Unique to the county is cultural tourism, which the visitor's essential motivation is to learn, discover, and consume the tangible and intangible attractions/products, which has more than a 150 year history. In the late 1800's, people came to the hotels, cottages, and religious encampments dotting the shores of Chautauqua Lake, Findley Lake, and Cassadaga Lake. Chautauqua Institution and Lily Dale have retained historic architecture and their missions' to continue to offer summer programming based on artistic, intellectual, and spiritual growth.

Globally, the agritourism market size continues to expand and our county is well positioned. The pastoral landscape can be found within the rolling hills between dense forests, but a significant amount can be enjoyed along the 50 miles of Lake Erie shoreline. There are hands-on farm experiences, vineyard tours, educational foraging programs, farm to table dining, and farm bed and breakfasts.

The microclimate along the lake and the rich soil create an ideal terroir or growing conditions for fruit trees and grapes. Since the 1800's, table grapes have been grown in the region. Welch's first headquarters was located in the County in Westfield, NY. In 2013, the Grape Discovery Center was opened as the official Visitor's Center for the Lake Erie Concord Grape Belt, which has been designated a New York State Heritage Area. Within the last decade, farmers and brewers are growing more and more hops. There are twenty (20) wineries that make up the Lake Erie Wine Country, a member based organization that promotes the wineries and wine related events. Thirteen (13) of them are located in Pennsylvania and nine (9) of them are located in Chautauqua County, New York.

A few of the wineries have added breweries and distilleries. In 2015, one winery, Mazza Chautauqua Cellars created Five & 20 Spirits & Brewery and became New York State's first combination winery, brewery & distillery, and dubbed "The Westfield Wonder". There are five (5) breweries that have a presence in Chautauqua County. The rural setting that continues to see an increase in tourism fosters a market for farm breweries, some of which have outdoor stages to host live music.

Most notably, [Southern Tier Brewing](#) was birthed in Lakewood, New York and has now risen to be a nationally recognized craft brewery that distributes nationwide and in thirteen (13) countries. In

2015, [Southern Tier Distillery](#) was born. They are known for their vodka, whiskey, and gin, which is sold in bottles and canned cocktails. The brewery has public facing retail establishments in Buffalo, New York, Pittsburgh, Pennsylvania, and Charlotte, North Carolina.

There is an extraordinary opportunity to tell more people about this story and promote the county as a destination to enjoy wine and craft beverages. The abundance of existing cultural tourism, and the increasing ecotourism sets us apart from other wine and beer trail destinations.

Objective

CCPEG is soliciting proposals from qualified marketing professionals to create a robust marketing strategy and campaign to promote the craft beverage and wine industries within Chautauqua County, New York while highlighting the ecotourism opportunities. The campaign will build on the successes and existence of cultural tourism and agritourist.

Project Description - Craft Beverage, Wine, and Ecotourism Marketing Campaign

In May of 2023, the Chautauqua County Partnership for Economic Growth (CCPEG) is seeking to enter into a Contract with a marketing firm to establish a campaign to promote the craft beverage and wine industry while highlighting ecotourism opportunities in Chautauqua County. CCPEG is an initiative of the County of Chautauqua Industrial Development Agency (CCIDA) under the Chautauqua Regional Economic Development Corporation (CREDC). CCIDA is the primary economic development agency in the county. The Chautauqua County Visitors Bureau (CCVB) is the main tourism promoter of the county. The majority of the campaign content will be housed within and directing consumers to the CCVB website or campaign website. Working with industry partners such as the Chautauqua County Visitors Bureau, Lake Erie Wine Country, the Grape Discovery Center and others, CCPEG will encourage additional marketing partnerships, synergies, and connections among wine and craft beverage destinations throughout the county. With a growing wine and craft beverage scene, and the possibility of creating a tourism transportation shuttle with tourism destination routes, excursions, and tours, an opportunity exists to bolster this segment of the tourism/hospitality sector. Depending on interest and available resources, a branding and marketing campaign, potentially developed in partnership with Lake Erie Wine Country, will be developed and implemented to promote producers of craft beers and spirits, as well as connections with other tourism destinations and accommodations.

Organizational Descriptions (CCPEG, CCIDA, CREDC, and CCVB)

CCPEG

The **Chautauqua County Partnership for Economic Growth (CCPEG)** brings together public and private leaders to focus on countywide and regional economic development initiatives. It serves as the catalyst and broker of resources for advancing economic prosperity efforts and is the central coordinating entity for the formation, retention, development, and attraction of quality jobs and advancements to quality of life in Chautauqua County. CCPEG fulfills its mission through the following strategic initiatives:

- Providing proactive leadership on issues that affect business growth, challenges to job creation and the long-term competitiveness of our economy;

- Developing vibrant places with enriching experiences for citizens and visitors alike with dynamic communities in which to live;
- Synthesizing workforce, entrepreneurial and small business development with business development objectives;
- Facilitating entrepreneurial growth and the retention and expansion of primary employers and key industries; driving development, marketing, and attraction of targeted businesses to our greater community. Link to current website: chqpartnership.org

CCIDA

The **County of Chautauqua Industrial Development Agency (CCIDA)** is an economic development organization authorized and empowered by the State of New York to make Chautauqua County a better place to work, live, and visit. It facilitates development by attracting new businesses, while promoting the retention and expansion of existing businesses. Assistance in the forms of incentives – tax abatements, low interest loans, and bond financing – enhances the opportunities for job creation and retention by our businesses.

Business Attraction: Attract businesses, visitors and new residents by maintaining a skilled workforce, developing infrastructure, and creating a dynamic environment in which to work, live, and visit.

Business Retention: Proactive outreach (reach out) to identify potential business retention and expansion opportunities, and continue support after closing.

Capacity: We will build capacity through staff development/education, educational outreach to the business community, continued membership of local, regional, and national economic development organizations, and maintain appropriate staffing levels to deliver quality services. Link to current website: ccida.com

CREDC

The **Chautauqua Region Economic Development Corporation (CREDC)** is the managing entity of the Partnership for Economic Growth. CREDC, a subsidiary of the County of Chautauqua Industrial Development Agency, serves as an umbrella organization and tool for the advancement of several strategic projects and initiatives including tourism, real estate, transportation, community development, and workforce development, which includes the CCPEG. Here is the link to information about CREDC on the CHQPartnership.org website. CREDC does not currently have a dedicated website.

CCVB

Chautauqua County Visitors Bureau is the official tourism promotion agency for Chautauqua County, NY. CCVB conducts a year-round program of promotion and marketing intended to create destination awareness about experiences available in the Chautauqua County area, and to draw potential visitors including active trip-planners to information resources about area amenities. The Visitors Bureau runs digital, social media, and print advertising in the western New York state, northern Ohio, western Pennsylvania and other visitor markets. CCVB also maintains an informative website TourChautauqua.com, produces a 96-page travel guide and map, and operates two

information centers. Additionally, the Visitors Bureau has a program dedicated to marketing to and assisting group function planners, which often includes recreational events and tournaments.

Lake Erie Wine Country

The Lake Erie Wine Country is a member based organization that encompasses 53 miles of unique wineries and gorgeous vineyard vistas nestled along the shoreline of Lake Erie. They are a group of twenty (20) wineries, each one providing great wine, wineries are all different, each has its own atmosphere and unique ability to make you feel at home. You can visit the wineries page to see what each winery has to offer. Visit the current website at <https://www.grapediscoverycenter.com>.

Grape Discovery Center

The Grape Discovery Center is the official Visitor's Center for the Lake Erie Concord Grape Belt, designated a New York State Heritage Area in 2006. Developed by the Concord Grape Belt Heritage Association, it seeks to be an experiential destination that supports and promotes the grape industry through sharing stories and engaging, educating, and informing the public about all things grape. Visit the current website at <https://www.lakeeriewinecountry.com>

Positive Attributes of Current Tourism, Craft Beverage, and Wine Industries Marketing:

- CCVB promotes the craft beverage, wine, and ecotourism industry in the county within their current capacity on their website, annual visitor's guide book, on social media (Facebook, Instagram, and YouTube), and paid digital ads.
- Lake Erie Wine Country promotes the wine industry members in Chautauqua County, New York, and North East, Pennsylvania within their current capacity on their website, printed brochures, and on social media (Facebook, Instagram, and YouTube); and
- Southern Tier Brewery is a nationally recognized craft brewery and now craft distillery and was started and still exists in the county with locations in public facing retail establishments in Buffalo, New York, Pittsburg, Pennsylvania, and Charlotte, North Carolina.

Ideal Future Improvements, at a Minimum:

- Dedicated website or child site for craft beverages and wine;
- Hyper focused marketing tools about local craft beer, breweries, and establishments that celebrate, have events/activities, and serve local craft beer;
- Increase communication channels and collaboration between craft beverage and wine industries;
- A possible craft beverage trail with guide book, passport, club/punch card program;
- Encourage a local craft beverage and wine makers to brand a beverage based on the county's attributes such as the outdoor recreation and cultural institutions.

Scope of Work and Deliverables, at a Minimum:

Task 1 – The project will entail developing a Craft Beverage, Wine, and Ecotourism Marketing Campaign strategy/campaign based on current assets and those who can consult with the campaign process; this should include:

- Interview/meet with client’s staff, management, organized small group of Craft Beverage and Wine Industry Professionals, County’s outspoken outdoor recreation and cultural attraction advocates/professionals, and main partners;
 - Collect a list of other effective Craft Beverage, Wine, and Ecotourism Marketing campaigns to study best practices; and
 - Evaluate if the client’s team is missing opportunities of strength, and acknowledge areas of weakness (what Chautauqua County can’t compete with/change and what it can possibly improve/strengthen).
- **Deliverable 1** – Present a report of the initial data collected from the interviews/meetings with client’s team; the report will include a Chautauqua County asset inventory and strengths the team will lean on through the campaign; it will include known weaknesses that can’t be changed and others that can be strengthened given the organizations’ and partners’ assets and capabilities;

Task 2 – Create and present campaign concepts/story boards to the client to review allowing a minimum of two rounds of edits.

- **Deliverable 2** – Campaign concepts/story boards will be presented to the client with time allowed for, at minimum, two rounds of edits.

Task 3 – Based on agreed objectives, the campaign marketing strategy will be developed and include suggestions and instructions on how to apply the brand campaign to various media.

- Based on organizations’ goals, work, and branding, provide guidance on how each organization involved in the project play a role in the effort and campaign; and
 - Apply the brand campaign to various media.
- **Deliverable 3** – Presentation of the completed Craft Beverage, Wine, and Ecotourism Marketing Campaign strategy/campaign to client and stakeholders.
- Includes, but not limited, to a timeline, goals and objectives, brand inventory, brand exploratory, brand outline/brand style guide, budget to implement marketing plan, an audience and market definition including segmentation, market positioning and key messages, competitive analysis, strengths, weaknesses, opportunities, threats, (SWOT) analysis, tactical strategy, internal and external roles to launch campaign, success metrics to monitor and evaluate, content marketing strategy, and a general three (3) year marketing plan.

Task 4 – Art, photos, videos, copy, and all creative content will be conceptualized and created in collaboration with the client within the total campaign budget. Create the key digital and print collateral needed for campaign. Work with the clients’ web development team to develop content, and strategize implantation of the campaign materials to proper websites.

- Creative and unique content;
- Utilization and taking an inventory of existing content;
- Identifying objectives and detailing a plan that utilizes the creative content will be determined by the hired firm and the client;
- Present creative work to client and allow two rounds of edits;
- Determine collateral needed which may include but are not limited to brochures, flyers, rack cards, point of sale materials and posters to digital content such as content for existing apps, e-books, videos, newsletters, e-magazines, white papers, blog posts;
- Design collaterals utilizing campaign content; and
- Present all collateral to client and allow two rounds of edits.

➤ **Deliverable 4** – Presentation(s) of all creative content will be conducted with the allowance of two rounds of feedback. Deliver all creative content produced and conceptualized for the campaign to the client.

- The campaign strategy and marketing plan will have identified objectives and include a detailed plan on how to effectively utilize the creative content;
- Present creative content with hard examples of how it will be used in campaign collaterals; and
- Present collaterals needed for the campaign allowing two rounds of edits.

Task 5 – Develop a detailed plan with a timeline of how the campaign will be implemented. Provide implementation work, assistance, and consultation for a six to eight month period or agreed upon timeframe. Develop educational materials about campaign for all partners such as breweries, craft distilleries, wineries, tasting bars, and ecotourism and agritourism attractions. Develop a plan to encourage and cultivate public and partner content creation.

- Strategically perform media buys/place ads;
- Create campaign templates for social media posts;
- Create and post social media and blogs;
- Draft newsletters, and press releases;
- Utilize existing content;
- Present the campaign to all partners; and
- Coordinate and produce a public campaign kick-off event including local media.

➤ **Deliverable 5** – Deliver detailed plan with a timeline of how the campaign will be implemented. Deliver and present educational materials about campaign for all partners such as breweries, craft distilleries, wineries, tasting bars, and ecotourism and agritourism attractions. Market and produce a public campaign kick-off event(s).

Project Timeline & Budget

CCPEG envisions that this project should be able to be completed within a twelve (12) to fourteen (14) month timeframe. This includes the discovery phase up to the final month of implementation work, assistance, and consultation.

The project budget is not to exceed \$150,000 and is inclusive of all tasks including strategy, implementation, and media buys.

The Scopes of Work for the project is by no means “locked in.” Assuming the consultant understands where we are and where we’re trying to go, we welcome other methodologies that we may not have included in the Scopes of Work that can lead us to fulfilling our objectives.

GENERAL TERMS AND CONDITIONS

SECTION 1: INSTRUCTIONS

- 1.1. RFP - The services that are required herein are not subject to formal competitive bidding under Section 103 of New York State General Municipal Law. CREDC Purchasing Policy rules in this case require selection of a contractor through a Request for Proposal process.
- 1.2. CREDC encourages all qualified applicants, including Minority-Owned Business Enterprises, Women-Owned Business Enterprises, Small Business Enterprises and Disadvantaged Business Enterprises, to partake in the solicitation of these and all other services. The successful proposer must be an Equal Opportunity Employer.
- 1.3. CREDC is exempt from all Federal and State taxes.
- 1.4. Insurance shall be in place prior to execution of the agreement and shall be up to date and maintained for the contract term. It is preferred that you attach samples or original certificates of insurance along with your proposal.
 - Within (5) five days receipt of the notice of award the proposer shall supply up-to-date certificates of insurance. Certificates may be e-mailed to the following email address: erhardc@chqgov.com.
 - Failure to do so may be cause for CREDC to declare a proposal non-responsive, with the result that the award may go to the next highest scoring proposal.
- 1.5. The successful proposer must obtain CREDC approval prior to utilizing a subcontractor in order to perform the requirements of this RFP.
- 1.6. The Minority and Women-owned Business Enterprise overall participant contract goal is 30%, which includes 15% Minority Business Enterprise Participation and 15% Women’s Business Enterprise Participation.

SECTION 2: SUBMISSION OF PROPOSALS:

Sealed proposals containing 3 physical copies of the proposal, and one electronic copy on a flash drive or sent via email, shall be submitted to the Chautauqua Region Economic Development Corporation, to the attention of: **Crystal A. Erhard, Administrative and Financial Assistant** at 214 Central Avenue, Suite 124, Dunkirk, New York, 14048 by **May 15, 2023 at 3:30 p.m.** A copy of the proposal can be emailed to erhardc@chqgov.com

Any proposals, or unsolicited amendments to proposals, received after the due date and time specified on the cover page may not be considered in the review process. No faxed documents will be accepted. CREDC takes no responsibility for any third party error in the delivery of the applications (e.g., U.S. Post Office, Federal Express, UPS, courier, etc.).

PDF document will be requested by e-mail after all proposals have been opened.

- 2.1 No proposal will be considered which is not accompanied by pricing information for services to be rendered, and all proposals shall be signed by an authorized individual.
- 2.2 Confidential, trade secret or proprietary materials as defined by the laws of the State of New York must be clearly marked and identified as such upon submission. Proposers intending to seek an exemption from disclosure of these materials under the Freedom of Information Law (NYS Public Officers Law, Sections 84-90) must request the exemption in writing, at the time of the submission of the materials, setting forth the reason for the claimed exemption. In addition, the proposer must mark each page of its submission on which there appears any material claimed to be protected as confidential or proprietary with the following legend, in boldface, capital letters at the top of each page: “THE PROPOSER BELIEVES THAT THIS INFORMATION IS PROTECTED FROM DISCLOSURE UNDER THE NEW YORK STATE FREEDOM OF INFORMATION LAW”. Acceptance of the claimed materials does not constitute a determination on the exemption request, which determination will be made in accordance with statutory procedures.

SECTION 3: MODIFICATIONS OR WITHDRAWAL OF PROPOSAL:

- 3.1 Questions about or requests for clarification of a technical item for this RFP must be submitted in writing to **Jason Toczydlowski, Director of Marketing and Communications at Toczydlj@chqgov.com**. Questions must be submitted prior to the date on the front of this solicitation. CREDC responses will be submitted to all parties in the form of an Addendum to the original RFP, receipt of which must be acknowledged with each proposal submission.
- 3.2 **Other than the contact person identified in the proposal, or their designee, prospective proposers shall not approach CREDC employees or associated**

organizations during the period of this RFP process about any matters related to this RFP or any proposals submitted pursuant thereto.

- 3.3 A proposal that is in the possession of CREDC may be altered by a sealed letter bearing the signature or name of the authorized person, provided it is received PRIOR to the date and time of the proposal due date. Fax, email, telephone or verbal alterations will not be accepted. A proposal that is in the possession of CREDC may be withdrawn by the proposer up to the time of the proposal due date. Failure of the successful proposer to furnish the service awarded, as a result of this Request for Proposal, may eliminate the proposer from the active vendors list for a period of time as determined by the Manager.

SECTION 4: EVALUATION CRITERIA:

- 4.1 CREDC reserves the right to seek any clarifications needed to determine the most qualified submittal and/or require correction of arithmetic or other apparent errors for the purpose of assuring a full and complete understanding of a proposer's proposal and/or to determine compliance with the requirements of the solicitation.
- 4.2 **Alternatives/Value-Added Considerations:** The Proposer may include items not specified in this RFP in their proposal in which the vendor feels can be pertinent to or an added benefit to the services requested. All such alternatives must be listed separately from the proposal and the cost thereof must be separated and itemized.
- 4.3 A contract may be awarded to the proposer whose proposal achieves the highest evaluation score by the evaluation committee and not solely on the basis of price.
- 4.4 Unless otherwise specified in the solicitation, every offer is firm and not revocable for a period of sixty (60) days from the due date of the proposals.
- 4.5 Evaluation will be performed to determine the proposers understanding of work to be performed, technical approach, potential for completing the work as specified herein, cost reasonableness, the probable cost to CREDC, and ranking with competing proposers.

SECTION 5: PROPOSAL FORMAT AND SUBMITTALS:

- 5.1 CREDC requests that the following format be followed when submitting your proposal:
- ✓ The title page: RFP Subject, name of proposer, address, telephone, email address, contact person and table of contents.
 - ✓ Qualifications: List of qualifications and experience to carry out the requested services. Qualification to do business in NYS, number of years in business and length of experience. Limit this to two (2) pages maximum.
 - ✓ References: Include at least two references from supervisors of previous projects. Provide a list of municipal clients whom you have had past projects with that are of similar size and quality.
 - ✓ Plan Implementation: This is the scope of services in terms of the proposer's plan to carry

out the requested services. Limit of a total of 6 pages maximum.

- ✓ Cost Proposal Section: This shall include *all costs* associated with the proposer's plan to carry out the requested services as specified. Any cost proposal forms furnished by CREDC must be included in this section. Alternatives must be separated and itemized.
- ✓ Mandatory Documents: Please use the Response Checklist when submitting your proposal.
- ✓ Page Limit: The combined technical approach, qualifications, experience, and references sections of the proposal is limited to 20 pages.

SECTION 6: PREPARATION OF PROPOSAL

- 6.1 In case of error in the extension of prices in the proposal, unit prices will govern, where applicable.
- 6.2 Proposers are expected to examine special provisions, the scope of work, schedules and instructions included in this Request. Failure to do so will be at the proposer's risk
- 6.3 CREDC will not reimburse proposers for any costs associated with the preparation and submission of any proposal, or for any travel and/or per diem costs that are incurred.

SECTION 7: PROPOSER QUALIFICATIONS:

- 7.1 CREDC shall have the right to take such steps as it deems necessary to determine the ability of the proposer to perform obligations under the contract, and the proposer shall furnish to CREDC all such information and data for this purpose as may be requested.

SECTION 8: AWARD AND CONTRACT INFORMATION:

- 8.1 The proposer agrees that should their firm be awarded a contract, proposer will not discriminate against any person who performs work hereunder because of age, race, color, sex, creed, sexual orientation, national origin, or disability.
- 8.2 The proposer expressly warrants to CREDC that it has the ability and expertise to perform its responsibilities hereunder and in so doing shall use the highest standards of professional workmanship.
- 8.3 CREDC reserves the right to reject any or all proposals, to waive any informality or technical defect in the proposals, or to award the contract in whole or in part, if deemed to be in the best interest of CREDC to do so. Explanations of CREDC decisions shall not be required except as otherwise provided by law.
- 8.4 The successful proposer will be required to enter into and sign an Agreement or an Agreement of Services (Contract) with CREDC with reasonable adjustments acceptable to CREDC. This RFP and the response of the successful proposer may become a part of the Contract and will be in effect for the duration of the contract. The Contract language will control over any conflicting language contained within this RFP.
- 8.5 The successful proposer will not commence any work, which could be billed, until a valid Contract has been executed by both the proposer and CREDC.

- 8.6** After the initial down payment is made to the vendor, the billing will align with each phase or task of the project. CREDC will withhold 15% of the payment until the vendor presents the deliverable and CREDC approves the quality of the work.

SECTION 9: CONTRACT TERM

- 9.1 Contract Term:** CREDC intends to enter into a twelve (12) to fourteen (14) month Contract with the awarded Consultant. The Contract shall begin on or about June 5, 2023 and end on June 5, 2024 or August 5, 2024.

PROPOSAL FEE FORM

Craft Beverage, Wine, and Ecotourism Marketing Campaign

Due Date: May 15, 2023

The undersigned proposer is to provide a lump sum fee for the provision of Craft Beverage, Wine, and Ecotourism Marketing Campaign as described in this RFP.

Cost \$ _____

Provide fully-burdened hourly rates with fee for emergent additional work that may be required.

Submitted by:

Proposer's Co. Name:	
Address:	
Phone No.:	
Fax No.:	
E-mail:	