



## **Resort Communities Retrofit Program: Strategic Marketing Services RFP**

### **OVERVIEW AND GOALS:**

The Resort Communities Retrofit Program (“the Program”) is issuing this Request for Proposals for Strategic Marketing Services, to solicit responses from firms with expertise in strategic marketing with a specific focus on clean and efficient energy, policy, and business and residential market development.

The Program is interested in procuring the services of a marketing professional to undertake specific tasks at the direction of the Partnership Counties in the area of strategic branding, marketing and promotion in order to effectively create and advance the goals of the Program.

### **ELIGIBLE APPLICANTS:**

Applicants must demonstrate applicable skills (including experience within at least of the partner counties) in strategic marketing, branding, advertising and new media marketing related to energy efficiency and relevant technologies, economic development incentives, financing tools, and general issues of community sustainability. Applicants must present detailed descriptions of team members, their responsibilities and qualifications, and the applicant firm’s overall competence in strategic marketing consulting projects.

### **APPLICATION DEADLINE:**

Applications are due to Adam Palmer by no later than Thursday, September 30<sup>th</sup> at 5:00pm.

### **TERM OF CONTRACT:**

A final contract is subject to successful negotiation of a final budget and scope of services. It is anticipated that the contract will commence on or about January 1<sup>st</sup>, 2011 for a period of 3 years, terminating December 31<sup>st</sup>, 2013. The contract will be reviewed during its course and may be extended at the sole discretion of RCRP for an additional term.

**CONTACT INFORMATION:**

Adam Palmer  
Eagle County Community Development  
PO Box 179  
500 Broadway  
Eagle, CO 81631-0179  
(970) 328-8734  
adam.palmer@eaglecounty.us

Please submit all questions to [adam.palmer@eaglecounty.us](mailto:adam.palmer@eaglecounty.us). “RCRP Strategic Marketing Services” must appear in the email subject line.

**PROJECT BACKGROUND AND SCOPE OF WORK:**

In November 2009, Eagle, Pitkin, and Gunnison counties (the “Partnership Counties”), home to the rural resorts Vail/Beaver Creek, Aspen/Snowmass, and Crested Butte, received voter approval to develop a tri-county, PACE-style program, called the Energy Smart Program (“ESP”). Working from the PACE framework, Partnership Counties’ have created a comprehensive Resort Communities Retrofit Program designed to fundamentally and permanently transform the demand for weatherization and energy retrofits and foster permanent job growth and energy conservation, while serving as a nationwide model for other resort-communities.

Rural resorts have a unique demographic: a high cost-of-living area populated by relatively low- to mid-income transient and full-time residents, combined with second homeowners partially occupying a significant portion of available housing stock. Income disparity between locals and second homeowners creates particular challenges for local governments in setting and achieving energy retrofit goals, reducing greenhouse gas emissions, and supporting green-collar jobs. Second homeowners, for their part, are an especially hard-to-reach demographic whose homes use significant amounts of energy. The program’s goal is to effectively target three components of its demographic for energy efficiency upgrades: low-to mid-income single family homeowners, second homeowners, and multi-unit housing complexes.

The Program addresses these challenges by increasing access to 1) information, 2) finance, and 3) skilled workers and services. These barriers have prevented a self-sustaining retrofit market from forming in the Partnership Counties despite historic demand for green retrofits and high levels of general community awareness of the need to improve energy efficiency. Partnership County homeowners need reliable and consistent information, a suite of financial options that cover high upfront costs, and

access to a well trained workforce in order to catalyze the local retrofit market and to sustain this transformation.

The Partnership Counties have received Department of Energy funding in the amount of \$4.9M as part of the Energy Efficiency Conservation Block Grant competitive solicitation. The stated goal for the Program is to achieve a minimum 20% energy savings in at least 10% of the total housing stock. For the tri-county region this equates to roughly 4300 homes over the three-year grant period.

The Program is interested in procuring the services of a marketing consultant to undertake specific tasks at the direction of the Partnership Counties in order to effectively create and advance the goals of the Program. Key to the Program's success are the following innovations:

- Standardized marketing, financing, and monitoring tools at the regional level, designed to achieve a greater impact, reduce costs, and facilitate quicker analysis and programmatic adjustments;
- Customized and non-traditional marketing according to customer and demographic type;
- Energy Resource Centers, providing step-by-step retrofitting guidance to homeowners; Quick-fix kits, to allow homeowners to make immediate and highly cost-effective weatherization improvements.

The selected consultant will be responsible for marketing these innovations to potential participants in the Partnership Counties. Specific tasks include but are not limited to:

- Identify target audiences, and develop an innovative and distinct brand strategy for the Program that will enhance its impact in the community and contribute to overall project success. The Program's brand should have the same look and message across all three counties; however, it should be structured to allow for variations in each county as needed.
- Target outreach to homeowners, realtors, contractors, and related building industry professionals. Identify
- Conduct research and development with various audiences to help develop a marketing campaign for the Program that will highlight the region's energy efficiency solutions and opportunities.
- Create marketing and promotional materials that strengthen the Program's brand.
- Track marketing initiatives and present measured outcomes of various initiatives to the Partnership Counties.
- Identify and explore new opportunities that could drive participants to RCRP including social media marketing.
- Work with the Energy Resource Centers to manage advertising strategic plan and budget in each Partnership County.

- Apply brand to existing RCRP supporting materials.
- Manage the production of printed and electronic materials.

#### **QUALIFICATIONS:**

Applicants to the solicitation must provide proof of the following qualifications:

- Documented experience in strategic marketing, branding and advertising related to clean energy and/or business development;
- Documented experience in developing marketing campaigns for high profile government agencies and/or organizations in the clean energy industry;
- Familiarity with state legislative and public policy initiatives related to clean energy locally, statewide, and nationally.

#### **PROPOSAL REQUIREMENTS:**

Applications are due to Eagle County no later than Thursday, September 30th at 5:00 p.m. The submission must be in electronic form, including a scanned signature page, submitted via email to [adam.palmer@eaglecounty.us](mailto:adam.palmer@eaglecounty.us). “RCRP Strategic Marketing Services” must appear in the email subject line. Electronic proposals only will be accepted; hard copy submittals will not be accepted.

#### Information Required:

**Executive Summary:** Respondents should provide a summary of their organization, their qualifications and their proposed approach for working with the Program.

**Statement of Qualifications:** All responses must include a statement of qualifications, relevant experience and description of the Respondent firm or individual and its/their history. The response should specifically indicate the firm’s current and historical expertise in providing the Consulting Services identified in the RFP, as well as experience in Eagle, Gunnison, Pitkin Counties and/or similar Colorado mountain communities.

**Staff Qualifications:** All responses must include resumes of each individual who will be providing Consulting Services under any work order, as well as written descriptions of the individuals’ experience with the specified eligibility criteria. The Partnership Counties reserve the right to investigate and review the background of any or all personnel assigned to work under agreement for services and, based on such investigations, to reject the use of any persons within the Partnership’s discretion.

**References:** All responses must include references from at least three clients of the firm, and preferably clients who have utilized the firm on matters related to the Consulting Services. The references must include a contact person, a full address, and a phone number. In addition to the foregoing, all responses must include a listing of public and

private clients for whom the firm has provided services similar to those set forth in this RFP, with a description of the services provided.

**Rate sheet submission:** Please include detailed information on rates of all team members working on this project.

**Detailed Budget:** Please include separately proposed budgets for staffing, marketing collateral, and media placement for the program broken out for each of the 3 years of the program and totaled accordingly.

Length: Respondents to the RFP should limit their submissions to no more than 8 pages, single-spaced, no smaller than 10 point font, excluding illustrative materials or relevant attachments explaining the applicant's ability and experience to complete the scope of work and required information described above. Concise, complete applications are encouraged, overly voluminous information or materials are discouraged and may count against an applicant as part of the review criteria.

Evaluation Criteria:

1. Approach to Project  
The Applicant shall prepare a statement as to how the firm tends to handle:
  - Project Overview
  - Project Schedule
  - Personnel assignments, including qualifications and experience of those personnel
  - Time Estimates of personnel assigned to the Project
  - Other Pertinent Facts
  - Clear, concise, well-organized application
2. Experience/List of Similar Work  
The Applicant shall submit examples of work with other governmental agencies and work of similar type and size. Also demonstrated relevant experience working in Eagle, Pitkin, Gunnison Counties and/or in similar Colorado mountain communities.
3. Availability  
The Applicant shall affirmatively state that all necessary staff is available to complete the Project within the time indicated.
4. Cost and Pricing
5. References

**Additional:**

The County reserves the right to extend, cancel or amend this RFP; amendments will be published on the County's website ([www.eaglecounty.us](http://www.eaglecounty.us)). Statements received after September 30<sup>th</sup>, 2010 will be marked "late" and considered at the sole discretion of the

RCRP Review Team. Respondents are advised that Eagle County, and/or its partners relevant to this project, shall not be liable at any time for any costs associated with or related to the project incurred by any applicant during any phase of this RFP or subsequent amendment or cancellation.