

REQUEST FOR QUALIFICATIONS

**WESTMARC (Western Maricopa Coalition)
MARKETING AND BRANDING STRATEGY**



July 17, 2024

TABLE OF CONTENTS

PUBLIC NOTICE.....	i
SCOPE OF SERVICES.....	2
QUALIFICATIONS REQUIREMENTS AND CONTENT.....	7
PROPOSER'S CHECKLIST	8
QUALIFICATIONS DELIVERY AND OPENING.....	8
QUALIFICATIONS EVALUATION AND SELECTION PROCESS	9
APPENDIX A – LABOR COST ALLOCATION BUDGET	8

PUBLIC NOTICE

REQUEST FOR QUALIFICATIONS

West Valley Marketing and Re-Branding Strategy

The Western Maricopa Coalition (WESTMARC) is requesting qualifications from experienced consultants to develop a regional marketing and re-branding strategy for the West Valley of Metro Phoenix. The purpose of this project is to review current external messaging, evaluate existing stakeholder perception and gather new information as needed to develop a targeted message platform and brand that reflect the West Valley's current and near-term strengths for business attraction, economic growth, and tourism. Through WESTMARC's work in convening and engaging business, education, government, and non-profit leaders to tackle regional issues, the organization has developed data driven message points and publications to change outdated perceptions of the region. These messages have been marketed strategically over the past 7 years (2017 – current) to local stakeholders including developers and commercial real estate brokers who work with clients nationally.

Recently, the organization completed a regional workforce development strategy using a stakeholder engagement process to include focus groups and meetings in the Phoenix metro region. While new information can be valuable, this process has provided a strong foundation for a re-branding strategy.

WESTMARC has evolved in the region since 2017 and is recognized as a credible and reputable organization, making it a perfect time for brand refresh.

Proposals should address the re-branding of the West Valley of Metro Phoenix and WESTMARC.

Detailed qualifications requirements may be obtained by contacting the WESTMARC Office at the address indicated below or downloaded from www.westmarc.org. For further information, please submit questions in writing by email to kjordan@WESTMARC.org no later than July 31, 2024.

Qualifications will be accepted until **August 9 2024 by 4:00 p.m.** MST (Mountain Standard Time) at the WESTMARC office, 6751 N. Sunset Blvd., Ste 210, Glendale AZ 85308.

SCOPE OF SERVICES

Introduction

This Request for Qualifications (RFQ) aims to receive credentials from qualified consultants, either one or many, depending on the expertise related to the task, for marketing, communications, and branding communities. The project aims to review current messaging, gather public perception information, and develop a messaging platform to reflect the West Valley's current strengths for business attraction and economic growth. Through a recent workforce development strategy, several key messages have been extracted and are being messaged through a recent workforce development strategy to begin changing outdated perceptions of the West Valley. Additional champions for message delivery must be identified and organized to share this new information with audiences locally and nationwide. The West Valley is defined as 15 unique communities in the Metro Phoenix area west of the I-17 in Maricopa County.

Background

Over the past 20 years, the West Valley of Metro Phoenix has grown to 1.8 million educated, talented, and wealthy residents. This population has also grown younger with an infusion of young families in the mid-2000s who today have young adult children. Before this economic growth, the West Valley region was predominately agricultural land. As in all communities, some areas were branded with low-income, poverty and crime which previously overshadowed many of the positive historical attributes in those communities. The West Valley also has three large retirement communities, shaping the region's image. For several decades, these demographics have defined the West Valley.

However, significant transportation investments in Maricopa County after 2004 opened strategic economic development corridors for West Valley communities. The completion of Loop 101 in the early 2000's made this corridor up to be a vital entertainment hub today. At the center of the West Valley's Loop 101 is the Westgate Entertainment District, home to many restaurants, Desert Diamond Arena, and State Farm Stadium (Arizona Cardinals). Both the arena and stadium not only host nationally televised sports events but has also put this region on a national and international stage by attracting big entertainment and musical acts such as Taylor Swift, Beyonce, Metallica, the Rolling Stones, Drake and more. New restaurant/entertainment concepts by names such as Tiger Woods and artist Ne-Yo have selected Westgate to open their locations in Arizona. The VAI Resort, the largest resort in Arizona, is currently under construction and expected to open in phases in late 2024 to 2025. The massive project is designed to be an experiential music venue.

Opened in 2011 and completed in 2017, Loop 303 quickly became an attractive location for large household named companies in the logistics and manufacturing industry. Most recently, Taiwan Semiconductor Manufacturing Company (TSMC) started construction on a \$40 billion facility that is projected to employ close to 5,000 people, changing the landscape and demographics of the northwest valley. Congress recently added \$6.6 billion to the project allowing it to expand to three fabs (fabrication sites). Amkor, a semiconductor supplier recently announced plans to locate in Peoria, near the TSMC campus. These investments along Loop 303 are changing the region's employment trajectory to a more tech- focused workforce.

The southwest sub-region of the West Valley is also growing in terms of healthcare, retail/entertainment, and technology investments. KORE Power, a lithium battery cell manufacturer is investing in Buckeye, the fastest growing city in the nation (per Census 2020).

Post pandemic, Metro Phoenix has seen a large influx of new residents from California, Washington, Illinois, Colorado and other states with an average of 300 people moving here per day. The West Valley continues to attract California residents due to its proximity to their home state.

Once a community with affordable housing, the West Valley's cost of living and home prices are now almost comparable to other parts of Metro Phoenix. There is also more diversity in housing mix from apartments to starter homes to luxury homes. The West Valley is no longer "the other side of the tracks."

Yet, Phoenix natives, long-time residents and investors still have an outdated opinion of the region. Their voice and influence with newcomers are an area for opportunity in this effort.

West Valley Benefits:

1. 15 unique communities.

The region is equipped with a plethora of tourism opportunities to find quality outdoor recreation, entertainment, dining, retail experiences and more. A day trip in Wickenburg to experience the western culture, a staycation in Litchfield Park at one of the best historic resorts in America, or enjoy a concert, professional football game or spring training game, you're guaranteed to find what you're looking for in the West Valley.

2. Authenticity / authentic opportunity

You are greeted by authentic, genuine people when you come to the West Valley. As opposed to the feeling of being outcasted in one of the fastest growing communities in the nation, West Valley residents welcome you with open arms. Being part of the growth is encouraged.

3. GMFTZ / Foreign Direct Investment opportunities

Greater Maricopa Foreign Trade Zone was established in 2010 by the Federal Foreign Trade Zone Board to serve Western Maricopa County and designated GMFTZ as the Grantee of the Zone. This serves as an economic development tool and a benefit to businesses in the region. GMFTZ enhances economic development in the West Valley and like WESTMARC, has a mission to develop, grow and promote the region.

4. Tech Forward

The West Valley is a tech forward region. The recent and continuous news coverage about the semiconductor industry is proof of that. Since January 2020, 35 companies in the industry have announced plans to expand or relocate to Arizona, representing \$65 billion in investment.

5. [West Valley Pipeline](#). Regional Workforce Development Strategy

In 2018, WESTMARC created one of the first regional workforce development strategies in the country to address challenges which were at that time unique to the West Valley region. Post-pandemic, as new workforce challenges have arisen that are common across all regions of the country, WESTMARC is well positioned to address these challenges.

WESTMARC Assets:

1. Marketing Committee

The [Marketing Committee](#) is focused on promoting the West Valley with one united voice. Composed of the West Valley's top communication professionals and stakeholders, the priority of the Committee is to develop and execute messaging that promotes our fifteen communities through all available resources. The Committee works to inform members about West Valley's talented and diverse workforce, economic development, and the growing population of the West Valley.

2. Existing Media Relation Relationships – Existing Collateral Pieces

WESTMARC has several key media relationships, including CBRE, Phoenix Business Journal, Times Media Group and AZ Big Media. Through these established relationships, nearly 20 collateral pieces have been created and published on the website to serve as a resource to promote the region, including the AZ Big Media Supplement, Strategic Plan, and Quality Of Life Brochure.

3. [ERC \(Economic Recovery Corp\) Fellowship](#)

WESTMARC is excited to officially be part of the first cohort of Economic Recovery Corps (ERC) fellows and host communities. Launched in 2023 through a \$30 million cooperative agreement between the International Economic Development Council (IEDC) and the U.S. Department of Commerce's Economic Development Administration, ERC is designed to build capacity in some of the hardest-hit and most economically distressed areas across the United States while cultivating the next generation of economic development leaders. This opportunity allows for WESTMARC and the region to further brand as Tech Forward.

The consultant will provide relevant strategies for marketing and branding the West Valley region for business attraction. This includes developing messaging to reflect and highlight the region's:

- Rising household income overall, with strong pockets of wealth.
- Social and financial investments in challenged areas to increase education attainment, job opportunities and upskilling job training.
- This region serves as a major transportation hub and access point via Loop 101, Interstate 10, Loop 303 and Loop 202.
- The widening of our major streets including Northern Parkway, the bridge from Peoria to Sun City, future El Mirage 303 to the north exit to Surprise, have made crosstown transportation incredibly easy, fast and accessible.
- Transportation investments to include freeway, rail, etc. has opened this region to international trade with Mexico and Asia through California ports of entry.
- Quality of life amenities to include national sports teams include NFL, NHL, NASCAR, and 9 spring training baseball teams, all in addition to golf courses and lifestyle amenities.
- Growing entertainment amenities and active arts and culture community.
- Healthy living with outdoor recreation and active lifestyle amenities.
- Changing demographics to include younger age populations, and families.
- Rising education attainment through strengthened K-12 public schools, and increasing charter and private school options, some of which are considered the best in the state of Arizona.
- Over 25 post-secondary education institutions offer programs in our targeted industries.
- Diverse housing opportunities from workforce housing to executive level. Increasing smart housing to serve millennial residents.
- The West Valley is a very open, neighborly community with involved residents who support non-profits through volunteerism and active engagement.
- The West Valley is a minority majority community with 56% of its population being minorities. This is very attractive to many companies with diversity embedded in their corporate cultures.
- The region's system of government is extremely cohesive and cooperative which makes for sustainable unification of the communities. It's very easy to get consensus on major projects, and the lines of communication are very open and congenial.

Workforce highlights:

- 38% of all Healthcare workers in Maricopa County live in the West Valley; 21% of healthcare jobs exist here today
- 34% of advanced business services (finance, insurance, technology) workers in Maricopa County live in the West Valley; 11% of advanced business jobs exist here today.
 - 70% of advanced business services workers travel east for employment.
- 28% of manufacturing workers in Maricopa County live in the West Valley; 18% of manufacturing jobs exist here today.
- The West Valley does have foreign trade zones.

PROPOSED TASKS

The Proposer is encouraged to be creative in developing a community-oriented approach to achieve the goals for this project. The Proposer is urged to be as specific as possible when describing the activities that will be performed to support each task. The Proposer is also urged to make maximum use of matrices, tables, and drawings in working papers produced for the project to ensure conciseness and clarity and to minimize the amount of text required. In preparing qualifications for consideration by WESTMARC, the Proposer may suggest additional tasks as warranted. The Proposer is not limited to the specific tasks listed below. These tasks may be accomplished by one or more consultants or agency, depending on the expertise needed to accomplish the task.

Task 1. Review and Assess Current Work

The Proposer will review the current messages, communications plan, and delivery methods to date. This includes work conducted by the Marketing Sub-Committee, Economic Development Committee, West Valley Pipeline 2.0 focus groups and prior consultant work on regional branding.

Task 2. Stakeholder Engagement

The Proposer will convene stakeholders through interviews, focus groups, and working group meetings as needed. Stakeholders may include economic development representatives from communities west of the I-17 and leaders from the business, education, non-profit and government sectors. Additional regional partners such as the Greater Phoenix Economic Council, Arizona Commerce Authority, Arizona Office of Tourism, as well as the input from the commercial brokerage community. Local chambers of commerce should also be included for small business input.

Community perspectives should also be included and may be obtained through existing city resident survey results/input. The Proposer will leverage the expertise of the stakeholders and use their feedback to identify priorities and message platforms for the project.

Task 3. Marketing and Branding Strategy Development

1. The Proposer will develop a branding strategy for the West Valley. The strategy should describe promotional activities and organize them into initiatives designed to accomplish goals. The action plan will recommend responsibilities, resources/technologies, and priorities for implementation. The CONSULTANT will develop estimated operating costs for applicable message delivery platforms.
2. The Proposer will develop concepts for refreshing WESTMARC's brand. This process should include internal stakeholders who are defined as WESTMARC members. Focus groups and surveys should be included as tools to gather information. Current tag line, branded look, logo, etc. should be evaluated.

Task 4. Message Delivery Platforms

The Proposer will evaluate and recommend current message delivery **audiences** and platforms for message delivery. This should include but not limited to the following platforms:

- social media
- blogs
- print and digital media
- relationships with local and national media
- media buys
- website elements and design

- podcasts and other interactive mediums

Task 5: Measurement, Evaluation and Reporting Tools

The Proposer will identify industry accepted performance measures to ensure promotional funding is invested appropriately and with the ability to measure reach and results.

Deliverable Products:

Required products of this project are listed below. An administrative draft of each deliverable will be submitted in electronic form and, when requested, hard copy format, to the WESTMARC project manager for review. Comments from the WESTMARC project manager will be incorporated into the deliverable by the Proposer, before it is distributed for external review. Comments received during the external review process will be incorporated into the final drafts.

1. Rebranding for WESTMARC and the West Valley based on where we are today and where the region and organization are going in the future. Including:
New logo
New tagline(s)
Website redesign
Branding guidelines
2. Evaluation of existing Marketing and Communications Plan and recommendations for improvements including strategy for increased engagement, message delivery, standardized templates, appropriate communication mediums.
3. Stakeholder Engagement Report. This will include attendance, agendas and minutes notes from meetings held with stakeholders, as well as findings from the meetings.
4. Stakeholder Engagement SWOT Report. This will include a summary of the facts and perceptions on the strengths, weaknesses, opportunities, and threats in the West Valley.
5. Project Coordination. This includes bi-monthly calls between the WESTMARC team and the Proposer to provide an update on progress made and to identify midcourse adjustments.

QUALIFICATIONS REQUIREMENTS AND CONTENT

Qualifications Content

It is required that the qualifications include the following items in the same order as they are listed below. Brief and concise submittals are encouraged. The total number of pages must not exceed 20 pages, entirely on letter size (8.5 x 11 inches), excluding the resumes, the cover letter, table of contents, tabs, appendices, and forms. Blank pages are not included in the total page count. The outside packaging of the submittal must be clearly marked with the Project Title, the RFQ Due Date, and the Proposer's name.

1. **Identification.** A cover letter or equivalent which includes:
 - a. The title of this solicitation.
 - b. Proposer's name and business address.
 - c. The name, title, mailing address, and telephone number and email address of the principal contact.
2. **Table of Contents.**
3. **Organization and Approach.** A brief statement describing the Proposer's organization and outlining its approach to completing the work required by this solicitation. This statement shall briefly illustrate the Proposer's overall understanding of the project.
4. **Work Plan.** A concise explanation of how the Proposer will carry out the objectives of the project. In the work plan, the Proposer shall describe each project task and proposed approach to the task as clearly and thoroughly as possible.
5. **Preliminary Schedule.** A project schedule in bar-chart format will indicate all work plan tasks and their durations. The schedule shall clearly identify project deliverable dates.
6. **Staffing Plan.** The plan shall include the following in table format:
 - a. A project organization chart, identifying the project manager.
 - b. Names of key project team members and/or Sub consultants. Only those personnel who will be working directly on the project should be cited.
 - c. The role and responsibility of each team member.
 - d. Percent effort (time) of each team member for the contract period.
 - e. The role and level of WESTMARC technical staff support, if any.
7. **Résumés.** Include résumés for major staff members assigned to the project. These résumés should focus on their experience in this type of project.
8. **Budget.** A completed labor cost allocation budget to include travel, meeting organization and other associated costs **not to exceed \$75,000.**
9. **Recent Examples.** Proposer's recent experience in performing work similar to that anticipated herein. This description shall include the following:

- a. Date of the project.
- b. Name and address of client organization.
- c. Name and telephone number of the individual in the client organization that had management responsibility for the project.
- d. Brief description of the project.
- e. Proposer team members involved and their roles.

PROPOSER'S CHECKLIST

Before submitting a qualification, please make sure all required information as specified in "Qualifications Requirement" have been included.

1. Email submission of all application materials to kjordan@WESTMARC.org. Email submission will not exceed 20 pages, including resumes.
2. Description of Proposer's organization and approach to work required by the solicitation.
3. Work plan including preliminary schedule, staffing plan, résumés, and similar experience.
4. Labor cost allocation budget.
5. Qualifications submitted no later than 4:00 p.m. MST on August 9, 2024.

QUALIFICATIONS DELIVERY AND OPENING

1. Electronic submission of qualifications must be submitted **by August 9, 4:00 p.m.** Mountain Standard Time (MST), to the following address:

Kimberly Jordan – kjordan@westmarc.org

Timely receipt of qualifications shall be determined by the date and time the qualifications is received at the above address. No late submissions shall be accepted after the time indicated. . All material submitted in response to this solicitation becomes the property of WESTMARC and shall not be returned.

QUALIFICATIONS EVALUATION AND SELECTION PROCESS

1. **Evaluation Criteria.** All QUALIFICATIONS will be evaluated by a group consisting of WESTMARC staff and stakeholders. Evaluation criteria include the following, listed in rank of importance:
 - Demonstrated understanding of the project through a well-defined work plan consistent with program objectives.
 - Clarity of qualifications, realistic approach, technical soundness, and enhancements to elements outlined in this RFQ.
 - Experience and knowledge of personnel in providing similar services. Only those personnel assigned to work directly on each area should be cited.
 - Proven track record in creating marketing/re-branding plans and programs. Proposer should clearly identify the principal people who worked on past projects and the amount of time they devoted to the work effort.
 - Availability of key personnel throughout the project effort.
 - Budget with breakdown of costs per task. **Budget not to exceed \$75,000.**
 - Ability and commitment to deliver required products and services, meet all deadlines for submitting associated work products, and ensure quality control.
 - Recognition of work priorities and flexibility to deal with change and contingencies.
2. WESTMARC may conduct discussions with Proposers who submit qualifications determined likely to be selected for the award.
3. WESTMARC reserves the right to:
 - a. Cancel this solicitation.
 - b. Reject any and all qualifications and re-advertise.
 - c. Select the qualifications(s) that will, in its judgment, best meet WESTMARC 's needs, despite any differences in estimated project costs between the proposer and all others.
 - d. Negotiate a contract that covers selected parts of a qualifications, or a contract that will be interrupted for a period, or canceled, for lack of funds.
4. Contact with WESTMARC or WESTMARC Member Agency Employees. All firms interested in this RFQ (including the firm's employees, representatives, agents, lobbyists, attorneys, and sub consultants) will refrain, under penalty of disqualification, from direct or indirect contact for the purpose of influencing the selection or creating bias in the selection process with any person who may play a part in the selection process. This policy is intended to create a level playing field for all potential firms, and to protect the integrity of the selection process. All questions on this selection process should be addressed to the authorized representative at WESTMARC.
5. **Selection and Award.** Selection and award of contract to successful proposer shall be made by the WESTMARC CEO.

6. Timeline:

- **Proposals due by 4:00pm August 9, 2024**
- Proposals distributed to review committee by 5:00pm August 9
- Committee review completed by August 16, 2024
- Proposer interviews scheduled between August 19-August 21, 2024
- Selection to be made by August 23, 2024
- **Contract target date: September 1, 2024**