

# Strategic Marketing Plan Fort Worden Lifelong Learning Center Request for Proposal

## Introduction

The Fort Worden Public Development Authority (FWPDA) is requesting proposals from qualified consultants or consulting firms (“Consultant”) with expertise in the development of a Strategic Marketing Plan for Fort Worden State Park in Port Townsend, Wash. The overall goal of the marketing plan is to increase the number of overnight guests using the wide variety of Fort Worden’s accommodations and conference options, particularly in the shoulder seasons, and within the context of the Fort’s evolution towards a center of lifelong learning. The FWPDA Board of Directors is focused on an effective Strategic Marketing Plan with this RFP. Follow-up implementation work – graphic design, website design, social media and other digital platforms, collateral materials, marketing and print advertising campaigns – will be awarded separately (and the Consultant is invited to also seek this work). Note that the Fort Worden staff will include a fulltime marketing and sales professional tasked with carrying out the recommendations of the Consultant.

## Fort Worden Background

Fort Worden is a 434-acre park in Port Townsend, Wash. on the northeast coast of the Olympic Peninsula, two hours from Seattle via auto and ferry. It was an Army fort at the turn of the 19<sup>th</sup> century, when most of the 70-plus now historic buildings were built. It is centered around a grassy parade ground in what is now called the Campus area. The Campus consists of 90 acres, with the rest devoted to upland and beachfront campgrounds, a wooded hill laced with trails and old bunkers, broad beaches on the Salish Sea, and a large lagoon. After the military base was decommissioned, it served as a juvenile detention center and then, in 1973, became a state park and conference center with a special focus on arts education through Centrum. It has become Washington’s iconic state park and is listed on the National Register of Historic Places.

Today Fort Worden it is a comprehensive multiple use facility. The Campus contains a variety of accommodations in historic buildings both large and small. This ranges from historic military housing (1, 2 and 3 bedroom units), to larger semi-private Officer Row housing options (4, 5, 6 and 11 bedroom units) to former military barracks that provide dozens of single room-dormitories (with shared bathrooms) or more open barracks (bunk-style) accommodations for large groups. The accommodations include 392 rentable units, or 456 beds. Food services include a state-of-the art dining hall with many room variations and a large commercial kitchen that can serve up to 500 people. Guest services include a laundromat, maintenance and janitorial services and grounds keeping. Many buildings are leased to 15 tenants (Partners), most of whom are

nonprofits that provide classes, workshops and performances in a variety of arts, education and trades. The Campus also houses a variety of meeting rooms, classrooms and performance halls, including a chapel used for weddings and meetings, a 300-seat theatre and a 1,200-seat performance hall. The Campus offers more than 56,000 square feet of meeting room facilities.

## **State Park – FWPDA Partnership**

At the end of a seven-year planning process, the Washington State Parks and Recreation Commission signed, in November 2013, a Master Lease for the Campus portion of Fort Worden with the FWPDA. The FWPDA is an entrepreneurial municipal entity created by the City of Port Townsend with the express purpose of bringing entrepreneurial marketing and management to Fort Worden. The FWPDA assumes full management duties for the Campus on May 1, 2014. A FWPDA General Hospitality Manager and his/her staff will work alongside the State Parks Manager and staff to operate the park, with State Parks responsible for the campgrounds and maintenance, and the FWPDA responsible for individual and conference visitor services in the Campus. The FWPDA is responsible for handling reservations and registration services for both the Campus and the campgrounds. The goal of the partnership is to sustain the traditional state park while allowing the FWPDA to maximize Fort Worden's potential as a visitor destination. Governance of this partnership, along with milestones and expectations, are detailed in a 50-year master lease. One of the milestones required before the FWPDA takes over day-to-day operations is the development of a Strategic Marketing Plan. More importantly, the FWPDA intends to use this plan to guide an ambitious renewal of Fort Worden's regional and national branding and marketing.

## **Budget**

The total amount under this RFP will not exceed Fifty Thousand Dollars (\$50,000) for three (3) months. The FWPDA seeks a completed plan no later than April 30, 2014

## **Scope of Work**

The FWPDA seeks expert assistance in creating a Strategic Marketing Plan. This plan would utilize recent research establishing the most probable geographic and demographic markets of greatest benefit to Fort Worden State Park, and in particular the 2012 Fort Worden Public Development Authority Business Plan, prepared by PROS Consulting and available upon request. The Consultant may also provide other existing market research. We do not want to duplicate previous work.

This plan would take into account short-term and long-term branding and marketing goals of the FWPDA. The short-term goal (2014-2015) is to increase the level of group, small conference and independent and leisure travelers to Fort Worden in the shoulder season months beginning immediately. The long-term goal of the FWPDA is to build up Partner educational programs to increase the number of individuals and groups connected to arts and educational programs offered at Fort Worden. However,

conferences and individual visitors will always be an important element to the Fort's future growth.

This plan would assess current branding recommendations from the FWPDA Marketing Committee (a subgroup of the FWPDA Board of Directors), including this theme or branding slogan for the enterprise:

*“Explore. Discover. Engage.”*  
*“The Campus at Fort Worden in Port Townsend”*

This plan would assess the suitability of this website domain name, already owned by the FWPDA:

*www.fortworden.org*

This plan would assess the suitability of using, as a centerpiece of branding, the terminology:

*“The Campus at Fort Worden”*  
or  
*“The Fort Worden State Park Conference Center”*  
or  
*“The Center at Fort Worden”*

This plan would assess business prospects, and make strategic marketing recommendations, to satisfy the FWPDA's mission to attract new business from the following audiences:

- Small and medium-sized conferences, workshops, seminars of all types: corporate, government, non-profit, educational institution, etc.
- Independent travelers
- Leisure travelers
- SMERF (small group gatherings)
- Campers and RVers
- Individuals and groups drawn by the programmatic learning and engagement opportunities provided by the Partner organizations
- General marketing of Fort Worden as a regional and national visitor destination.

This plan would emphasize the effective use of various digital marketing tools, platforms and messaging central to travel decisions by the above audiences. In addition, this plan would emphasize the most effective use of print materials, advertising and public relations outreach. It would study and make recommendations related to the following media and platforms:

- Social media
- Website and mobile (the FWPDA will also separately award a website design contract)
- E-newsletter
- SEO
- Other forms of digital marketing
- Printed collateral materials
- Advertising
- Public relations outreach

This plan would include an assessment of visual materials (photographs, graphics) of the greatest utility to Fort Worden, and provide recommendations on design templates for printed or digital outreach.

This plan would include implementation strategies, including the most appropriate outreach platforms and media, timing and baseline budgets to achieve the most impact for the least cost. This plan should also complement marketing provided by local tourism partners such as the City of Port Townsend and the Olympic Peninsula Tourism Commission.

## **Additional Tasks**

The Consultant will:

1. Review existing marketing materials.
2. Identify, review and analyze competing destinations and how Fort Worden can present its unique positioning in the context of these competitors.
3. Make recommendations on how Fort Worden and Port Townsend's marketing efforts can be more effectively coordinated.
4. Make recommendations on how to integrate the Fort Worden marketing plan with existing Partner organizations' marketing, especially website marketing.
5. Make recommendations on how to connect Fort Worden and its unique opportunities to regional and national event planners who might, in the future, locate conferences or conventions at Fort Worden.

## **Deliverables**

The successful Consultant will present to the FWPDA Board of Directors, within three months of the award of the contract, the following deliverables:

1. A Strategic Marketing Plan that:
  - Summarizes existing relevant research.
  - Makes recommendations on the most effective branding for Fort Worden, in the context of its unique offerings, its location, its competition, and its targeted customers bases.

- Assesses current branding direction, slogans, taglines and makes recommendations.
- Makes recommendations on the best and most cost-effective marketing outreach to the identified customer bases, both for short-term goals of maximizing use by conferences, small groups and independent travelers during the shoulder seasons of 2014-2015, and for long-term goals of maximizing use by programmatic customers associated with Partner organizations' learning opportunities in the years beyond toward the vision of a lifelong learning center.
- Makes recommendations on how Fort Worden can successfully distinguish itself and market its unique strengths in light of facilities that compete for the same kind of audiences.
- Makes recommendations on the best use of digital and print marketing tools to realize the best return on investment. This will include recommendations on website capability and design, SEO components, and integration with other digital media.
  - Microsites
  - Blogs
  - Portals
  - Online advertising
  - Email newsletters
  - Mobile applications
  - Multi-media sources

Each digital strategy should be accompanied by a method of measuring its successful implementation and reach, such as:

- social media engagement
  - web analytics
  - search engine rankings
  - click-through rates
  - conversions
  - ROI
- Makes recommendations on key design elements of print and digital material, although the contract will not specifically call for completed logos or graphics. (That will be part of a later bid that the selected consultant may also bid on.)

2. Create a compelling visual narrative and portfolio of imagery (FWPDA Marketing Committee will secure approvals for use of any images or materials).

3. Outline an action plan, including proper use of targeted media, with a preliminary budget, that could be launched in the early summer of 2014 to provide maximum exposure of Fort Worden to its intended audiences, especially with a short-term focus on groups, small conferences and individual travelers, and that includes the most effective direct outreach to regional and national event planners. This outline should be presented in such a form that Fort Worden's staff and marketing committee can use it as an action plan to conduct a marketing and advertising campaign.

## **Application Process**

- This is an open and competitive process.
- The project budget should include fees for each task, deliverable, with an overall project amount.
- If the pricing excludes certain fees or charges, a detailed list must be provided explaining excluded fees.
- If work to be performed by your company will involve hiring subcontractors, you must clearly state this in your proposal. Subcontractors must be identified and the work they will perform must be defined. The PDA will not refuse a proposal based on the use of subcontractors, but we retain the right to refuse the subcontractors you have selected.

## **Required Components of Your Proposal**

To be considered, please submit both an electronic copy and five (5) hard copy proposals to Dave Robison (see contact info below).

The proposal should include:

- Overview of your approach to producing the marketing strategy, including a detailed summary of the work to be completed
- List of deliverables you agree to provide
- Time frame for completing each task
- Budget broken down by each task identified
- Anticipated costs of project management
- Consultant qualifications (see below)
- Any terms or conditions you require
- Additional information you feel is important for us to consider in evaluating your proposal

## **Consultant / Agency Qualifications**

The proposal shall contain sufficient detail to convey knowledge, skill, experience, and ability to satisfy our expectations. The following must be provided:

- All contact information
- A summary of the firm's or individual's history, experience, and capabilities, with an emphasis on experience your firm has in marketing of hospitality services, including accommodations, conferences and programs
- Firm's experience in branding or refreshing brands of existing businesses
- Resume(s) of key personnel working directly on the marketing plan

- Proposal will identify a team leader who will manage all services under the resulting contract. The FWPDA will not accept any substitutions of the team leader or other key personnel without written approval of the FWPDA. The team leader must be present at the selection interview.
- List of clients and relevant projects you have completed, including contact information for at least three client references.
- Please note: All submittals to the FWPDA are subject to the State's Open Record Act and may become available to interested individuals. Please do not include any proprietary information in your proposal.

### **Selection Criteria Includes:**

- Overall approach and response to RFP
- Demonstrated understanding of the project
- Applicable experience— performance on past projects
- Qualifications and track record of success in producing marketing strategies
- Experience in hospitality marketing and branding
- Personnel and technical expertise
- Project innovations: ideas or suggestions to improve the quality/schedule of the project
- Project proximity
- Detail of services to be provided
- Overall value based on price, experience, and deliverables
- References

### **Cost**

- The FWPDA has allocated \$50,000 towards the Strategic Marketing Plan. Cost may be considered in the selection criteria above.
- The firm's proposed fee should include the expected total amount as well as hourly rates or other components of the total fee.
- Any additional fees, expenses and reimbursement requirements should be identified.

### **Selection Process**

- Review of RFPs submitted by the deadline
- FWPDA Marketing Committee review and identification of up to three firms for interviews
- Telephone or in-person interviews of short list by subcommittee
- Reference checks by subcommittee and recommendation to board
- FWPDA Board review and approval



## **Basis for Award of Contract**

The FWPDA intends to award a contract resulting from this RFP to the responsible consultant whose proposal represents the best experience, qualifications and value. A single firm or multiple firms with different yet complimentary competencies or a single individual or multiple individuals can be considered to provide all or any combination of the desired services. The FWPDA holds the right to reject any and all proposals if it is deemed in the best interest of the project.

## **FWPDA Provided Items**

In order to make the best use of available resources, the consultant will review background information on the Fort's and City of Port Townsend's existing tourism market data. Some of this information is available for review via the FWPDA website at: [www.fwpda.org](http://www.fwpda.org). and will include at a minimum:

- Marketing Committee work products:
- Competitive Meeting and Group Demand Analysis, HVS Consulting Study, May 2013
- Fort Worden Visitor Guide
- Fort Worden collateral materials—brochures, maps and advertising
- City of Port Townsend marketing materials
- Olympic Peninsula Tourism Committee Strategic Plan
- FWPDA Business and Management Plan, Oct. 2012 (see marketing plan at end of document)
- [www.enjoypt.com](http://www.enjoypt.com)
- <https://www.facebook.com/enjoypt>

## **Project Schedule and Site Tour**

The selected consultant will begin work no later than February 3, 2014. The project will kick-off with a two-day site tour of Fort Worden State Park exploring the Fort's accommodation and meeting facilities, tenant buildings, amenities and natural areas. The Consultant will meet with the Marketing Committee, Fort Worden Partner organizations, city tourism marketing directors and other stakeholders. The final Strategic Marketing Plan shall be completed by April 30, 2014.

## **Ownership of Proposals**

All documents, including proposals, submitted become the property of the FWPDA and are open to public disclosure requests. Any information considered to be trade secrets, privileged or confidential should not be revealed in the proposal. Any cost incurred by respondents in preparing or submitting a Request for Proposal (RFP) for this project shall be the respondents' sole responsibility.



## **Deadline to Submit a Proposal**

The deadline to submit your proposal is by Friday, **January 17, 2014**. We must receive your proposal by this date. No exceptions. Proposals received after 5:00PM PST on **January 17, 2014** will not be considered.

## **Submission Information**

### **A. Questions?**

If you have questions, please direct them via email to Dave Robison, Executive Director, at [drobison@fwpda.org](mailto:drobison@fwpda.org). Please do not contact any FWPDA board members or Marketing Committee members.

Those who wish to automatically receive any addenda or a notice of cancellation should provide contact information by emailing Dave Robison, at [drobison@fwpda.org](mailto:drobison@fwpda.org). Those who do not provide contact information are solely responsible for monitoring the FWPDA's website for any addenda to the RFP or a notice of cancellation.

### **B. Electronic Submission**

Please submit your electronic proposal to email to Dave Robison at [drobison@fwpda.org](mailto:drobison@fwpda.org)

### **C. Hard Copy Submission**

Please submit five (5) hard copy proposals to:

Dave Robison

Executive Director

Fort Worden PDA

250 Madison Street, Suite 2

Port Townsend, WA 98368