



DESTINATION MEDICAL CENTER

REQUEST FOR QUALIFICATIONS

MARKETING & ADVERTISING CONSULTANT
ISSUED AS OF OCTOBER 19, 2015

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DMC ECONOMIC DEVELOPMENT AGENCY MARKETING & ADVERTISING CONSULTANT

1.1 GENERAL INFORMATION

The Destination Medical Center Economic Development Agency (the “DMC EDA”), a private, non-profit corporation established by Mayo Clinic, pursuant to its contract with the Destination Medical Center Corporation (the “DMCC”), a public, non-profit corporation organized under the laws of the State of Minnesota, is requesting qualifications from qualified Marketing firms (“Subconsultant”) to provide comprehensive marketing and advertising services to assist the DMC EDA and DMCC in promoting the Destination Medical Center Project (“DMC”) in Rochester, Minnesota (the “Project”), as is further described in this Request for Qualifications (“RFQ”).

1.2 DESTINATION MEDICAL CENTER DESCRIPTION

The DMC initiative is one of the largest and most innovative economic development strategies ever undertaken in Minnesota. Its purpose is to secure Rochester’s and Minnesota’s status as a global medical destination now and in the future. It is anticipated that the DMC initiative will result in \$5.6 billion in private investments in building downtown Rochester, including investments by Mayo Clinic and other private investors, and \$585 million in public funding for public infrastructure and transportation projects.

The DMC is a major economic development initiative that will drive significant new job growth and tax base for future generations. The DMC will significantly increase and accelerate the demand for private development and public infrastructure in this market. DMC is estimated to grow the employment base in Rochester by 35,000 – 45,000 jobs, and to more than double the visitation from Mayo Clinic patients/companions, as well as business travelers, convention/event-goers and other visitors to the City, and particularly, to the downtown core.

In June 2013, the Governor of Minnesota signed the DMC law (Laws of Minnesota, Chapter 143, Article 10 (2013-2014 Regular Session)), which provides for \$585 million in State and local funding over a 20-year period to support public infrastructure projects supportive of the DMC mission. The legislation created two new entities to oversee the initiative, including:

- **The Destination Medical Center Corporation (the “DMCC”):** a public non-profit corporation, the purpose of which is to oversee the implementation of DMC strategies. The DMCC’s board is structured to provide the primary stakeholders representation in key decisions related to planning and strategic investments of the public DMC funds.
- **The Non-Profit Economic Development Agency (the “DMC EDA”):** a private non-profit corporation established by Mayo Clinic, the primary purpose of which is to provide services to the DMCC, and to develop, plan and implement DMC strategies and market the DMC. The services of the DMC EDA are specifically enumerated in the law and by contract with the DMCC.

In addition to the two entities created under the law, the City of Rochester (“City”), Olmsted County (“County”) and the State of Minnesota are actively involved in the Project. As provided under the DMC law, the City provides a significant contribution of public funds, assists the DMCC with its financial administration, and disburses authorized funding by the State and the County.

1.3 SCOPE OF WORK

The primary goal of the DMC initiative is to attract substantial private investment that will complement Mayo Clinic's and other private investment in Rochester over the next 20 years to realize the DMC mission – reinventing Rochester making it a destination for bio-med-tech innovation and health/wellness, and firmly establishing it as America's City for Health, anchored by Mayo Clinic.

Realizing the DMC Initiative will require a comprehensive marketing and advertising strategy. The goal at the foundation of the strategy is to **increase awareness of the DMC initiative and the strategic and economic benefits of developing relationships with Mayo Clinic and with other stakeholders** and, more specifically, to:

- **attract the talent needed to support Mayo Clinic’s growth objectives,**
- **attract new private investment, and**
- **contribute to increased visitation in Rochester consistent with the strategic framework of the DMC.**

In this first, critical implementation phase of the DMC (2nd through 4th quarters of 2015), when much work still needs to be undertaken to more fully set the various DMC strategic implementation plans in motion, the DMC EDA recognizes the need to develop, promote and manage awareness of the DMC initiative to the audiences that will be critical to its success through an effective marketing and advertising plan.

The DMC EDA currently contemplates engaging one or more Subconsultants for marketing/advertising for a total term of 14 months (Nov. 2015 – Dec. 2016). This term will be broken out into two phases, with the first phase (“Phase I”) beginning in November. Phase I will focus on creating the long-term, strategic plan and beginning implementation. The next phase (“Phase II”) is anticipated to commence in the first quarter of 2016 and will be focused on full implementation of the strategic plan. Firms may submit qualifications for Phase I only, or Phases I and II combined. Phase II contracts may be executed at a later date, or simultaneously with Phase I.

The Subconsultant will need to work collaboratively with the DMC EDA (and the Public Relations/Communications Subconsultants), DMCC Board of Directors, the City, the County, and Mayo Clinic in the development of comprehensive marketing and advertising strategies consistent with the final approved 2016 DMC EDA operating budget and the DMC Development Plan (see <http://dmc.mn/press-materials/>, **Section 12.0 of Volume 2**).

Specific **Phase I tasks** will include:

- Create a **long-term strategic marketing and implementation plan** for Phase II based upon proven standards and tools, innovative social media components and relationship building, which will complement the DMC EDA's public relations/communications strategy and consistent with the DMC Development Plan. This plan will support the overall DMC mission and objectives, including, but not limited to, raising awareness and generating quality leads among targeted decision makers/ influencers; identifying **target markets** (specific business segments and investors) and **positioning strategies for growth**.
- Create specific **short-term strategies** to maintain momentum and continue to build local, State and national support for the DMC initiative, driving interests and ultimately attracting private investment.
- Coordinate and **collaborate with Mayo Clinic and all State / local partners and other groups marketing Rochester** to ensure unified and consistent messaging to establish a regional economy consistent with the business development strategies and local marketing groups.

Specific **Phase II tasks** may include, but are not limited to, the following:

- **Implement the long-term strategic marketing plan** for Phase II.
- Further **evolve the bio/med/tech brand** for DMC in cooperation with Mayo Clinic, which will inform decisions related to identifying target companies and investors and complement the DMC business development strategies.
- Identify and **build a network of national and international business segments and potential investors** to attract the broadest level of business investment opportunities in the City and provide diversity within the downtown "Development District."
- **Develop marketing and advertising materials** (print/digital/other collateral) that consistently include clear key messages and standardized communication plans established for target audiences and stakeholder groups, and adjust materials based upon performance metrics.
- Develop a **print/digital campaign strategy and budget** focused on target market development, workforce development and emphasizing entrepreneurship and innovation consistent with the business development strategies.
- Directly coordinate **placement of print and digital advertising**.

- Develop **sponsorship and promotional strategies** that will raise awareness of the DMC Initiative and promote successes of the business development strategy.

The DMC EDA reserves the right to determine, in its sole and absolute discretion, whether any aspect of the Qualifications satisfactorily meets the criteria established in this RFQ for Phase I or Phase II, the right to seek clarification from any firm, the right to reject any or all submittal with or without cause, and the right to cancel and/or amend, in part or entirely, the RFQ.

The RFQ does not commit the DMC EDA or the DMCC either to award a contract or to pay for any costs incurred in the preparation of Qualifications. Submission of a Qualifications as provided herein shall neither obligate nor entitle a prospective Subconsultant to enter into any agreement with the DMC EDA or the DMCC for Phase I or Phase II.

It is understood that any Qualifications received and evaluated by the DMC EDA can be used as a basis for direct negotiation of the cost and terms of a contract between the DMC EDA and the firm submitting such Qualifications.

1.4 SELECTION PROCESS SCHEDULE

A tentative schedule for the selection process is outlined below. This schedule is preliminary in nature and may be adjusted at the DMC EDA’s sole discretion.

RFQ PROCESS / TIMELINE	
RFQ Issued	Oct. 19
Qualifications Accepted	Nov. 13 or until qualified firm is identified
Selection of Subconsultant	Nov. 2015

1.5 QUALIFICATION REQUIREMENTS

Each Subconsultant must demonstrate knowledge and experience in the area(s) for which the services are proposed. The specific criteria the firm or entity must possess to be considered by the DMC EDA in the selection of the Subconsultant include, but are not limited to:

1. Experience of the proposed Project personnel;
2. Time availability and commitment of the proposed Project personnel to the Project;
3. Accessibility of Subconsultant’s office and staff to the Project site;
4. The effectiveness of the proposed marketing and advertising strategy in meeting DMC economic development objectives and the creativity of the proposed content/tactics;
5. Experience of the firm or entity in similar project(s);
6. Commitment to diversity;
7. References for the personnel and firm;
8. Competitiveness of Qualifications; and
9. Acceptance of Consulting Services Agreement and its attached Scope of Work.

Preferred experience includes recent involvement with one or more projects of similar or greater scope and complexity and direct experience (within the past five years) for marketing/advertising of large-scale economic development initiatives. Preference will be given to large urban redevelopment projects and tourism that incorporate a range of uses, including bio-medical research facilities, hospitality, residential, commercial office, retail, entertainment and cultural venues.

1.6 SUBMITTAL REQUIREMENTS

Qualifications must include the following material and information:

- Section 1: Cover letter (Limit to 2 Pages);
- Section 2: Brief summary of the firm's qualifications and experience;
- Section 3: Organizational chart of the personnel to be assigned to the Project and a matrix of time commitment and availability of these personnel;
- Section 4: Resumes of personnel assigned by the Consultant to the Project, including:
 - i. Relevant experience
 - ii. Summary of current workload for each individual;
- Section 5: Three (3) references for the firm or entity, all for projects executed in last five (5) years. All three (3) projects should have been led by the senior staff person proposed to lead this Project. At least two (2) should include senior staff members that are proposed for this Project team;
- Section 6: Description(s) of any other subconsultants, contractors, service providers or advisors to be proposed to be employed by the Subconsultant;
- Section 7: A brief (bullet) description of the work and deliverables and/or materials to be completed and/or reviewed for the Project. The schedule should follow the general schedule for completion of work included in this RFQ. The Subconsultant should also provide its comments to the schedule with this submittal;
- Section 8: A proposed fee schedule (in the form attached in Exhibit A) for an anticipated term of 4-5 months (Nov. 2015 – Quarter 1 of 2016);
- Section 9: A commitment to diversity evidenced by such factors as the actual diversity among its existing or proposed team members or the existence of an affirmative action plan addressing the diversity issues;
- Section 10: Insurance Certificates (see Exhibit B); and
- Section 11: Written description of current litigation involving the Subconsultant.

The Qualifications must be provided in an 8.5" x 11" format and correspond to the list of submittal requirements outlined above. Subconsultants must provide all of the information required in each of the above referenced sections. Failure to do so may cause that Subconsultant to be disqualified from consideration by the DMC EDA.

Firms should submit an electronic or hard copy of the written Qualifications to DMC EDA at the address below no later than 4:00 p.m. CDT on November 13, 2015. The electronic form of the document may be emailed or sent on a disk accompanying the Qualifications. The address to which Qualifications should be sent is:

DMC Economic Development Agency
Attention: Lisa Clarke, Executive Director
195 S Broadway, Suite 12
Rochester, MN 55902

All questions should be directed via email to the following address: codypogalz@dmceda.org
The DMC EDA may conduct oral interviews with selected firms after review of each firm's Qualifications. The DMC EDA reserves the right to short-list firms for interviews or to interview all firms submitting Qualifications.

If selected, the Subconsultant agrees to negotiate the Consulting Services Agreement and Scope of Work in good faith with the DMC EDA. Selection of a Subconsultant shall not be considered a commitment by the DMC EDA until such time as the Consulting Services Agreement is executed by both the DMC EDA and selected Subconsultant. The DMC EDA is not responsible for any costs incurred by a Subconsultant in connection with the review, negotiation and/or execution of the Consulting Services Agreement.

The DMC EDA reserves the right to approve or reject any and all personnel employed by the Subconsultant assigned to the Project and any additional subconsultants proposed for the Project. The DMC EDA will receive and review all Qualifications in its discretion and according to the process that it develops, and the DMC EDA reserves the right to accept or reject any and all portions of Qualifications submitted in response to this RFQ. Furthermore, the DMC EDA reserves the right to reject any and all Qualifications or to waive informalities in any Qualifications or to accept any Qualifications in its sole and absolute discretion. It is intended that award of this Qualifications will be made to the Subconsultant who is responsive, competitive, and qualified to perform the work as determined in the sole and absolute discretion of the DMC EDA.

1.7 OTHER GENERAL PROVISIONS

1. Confidentiality – Information supplied by the Subconsultant to the DMC EDA is subject to the Minnesota Government Data Practices Act, Minnesota Statutes, Sections 13.01, et seq. Such information shall become public unless it falls within one of the exceptions in the Act, such as security information, trade secret information, or labor relations' information pursuant to Minnesota Statutes, Section 13.37. If the Subconsultant believes any non-public information will be supplied in response to the RFQ, the Subconsultant shall take reasonable steps to identify and provide reasonable justification to the DMC EDA regarding which data, if any, falls within the Minnesota Government Data Practices Act exceptions. However, the Subconsultant agrees as a condition of submitting Qualifications that the DMC EDA will not be held liable or accountable for any loss or damage which may result from a breach of confidentiality as may be related to the responses submitted.

The DMC EDA will not consider any cost information and references submitted by the Subconsultant to be non-public, confidential or trade secret material. Simply stating that the document is confidential or making a blanket claim of confidentiality without proper supporting justification is also not a valid reason to declare the document confidential.

2. Equal Opportunity Statement – Subconsultant agrees to comply with the provisions of all applicable federal, state, and local laws and regulations pertaining to civil rights and nondiscrimination.

3. Non-Discrimination – Subconsultant will not discriminate against any employee or applicant for employment because of race, color, creed, religion, ancestry, sex, national origin, affection preference, disability, age, marital status, status with regard to public assistance, or status as a disabled veteran or veteran of the Vietnam era. Such prohibition against discrimination shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment, layoff or termination, rates of pay or other forms of compensation, and selection for training.

REQUEST FOR QUALIFICATIONS – APPENDICES

BASE FORM OF CONSULTING SERVICES AGREEMENT, SUBCONSULTANT SCOPE OF WORK, FEE PROPOSAL & INSURANCE REQUIREMENTS

The following provides an outline of the requirements for the base form of agreement, scope of work and insurance requirements for the Project:

Base Form of Agreement

The Subconsultant agrees to use the DMC EDA’s base form of agreement (the “Consulting Services Agreement”), which shall be provided to the Subconsultant as part of the request for information and/or outline of requirements for the interview, if the Subconsultant is short-listed for the Project. The Subconsultant shall be required to submit comments to the Consulting Services Agreement in writing to the DMC EDA at the time of the Subconsultant’s interview. The DMC EDA reserves the right to accept or reject comments in its sole and absolute discretion.

Scope of Work

Included in this RFQ is a scope of work (“Scope of Work”) for Phase I and as currently anticipated for Phase II. This Scope of Work in its entirety is preliminary in nature and subject to change in accordance with the terms and conditions of the RFQ. The final scope of work shall be attached as an Exhibit to any Consulting Services Agreement.

Fee Proposal

Attached hereto as **Exhibit A** is the form for the Subconsultant’s Fee Proposal for Phase I. DMC EDA is not asking for proposed fee for Phase II at this time.

Insurance Requirements

Attached hereto as **Exhibit B** is a preliminary outline of the types and limits of insurance to be maintained by the Subconsultant. The Subconsultant is required to provide its existing Insurance Certificates as part of the response to the RFQ.

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FEE PROPOSAL (Phase I and Optional Phase II)

The following fee proposal is to be submitted by the Subconsultant for the **Phase I** Scope of Work contemplated in this RFQ. This fee proposal represents a total cost estimate for the Subconsultants fees, third party expenses and an estimate of reimbursable expenses for an anticipated Phase I contract term of 4-5 months (Nov. 2015 – Quarter 1 2016), and is not to exceed \$50,000. If the Subconsultant intends to work with more than one third party, please list the fees for each third party separately.

	SUBCONSULTANT PHASE I FEES, EXPENSES
Phase I Long-term Strategic Marketing Implementation Plan	\$ 0.00
Other Phase I Strategic Marketing and Advertising Services	\$ 0.00
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Total Phase I Proposed Fees	\$ 0.00
Estimated Reimbursable Expenses	\$ 0.00
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Total Phase I Proposal	\$ 0.00

Billing Rates / Arrangements

Provide the DMC EDA with hourly billing rates for staff positions by level that will be involved in executing the Scope of Work, and indicate any special considerations for billing to assist the DMC EDA in managing its budget. (i.e. monthly retainer, capped contract fees, etc.).

Phase II Budget

DMC EDA anticipates a total marketing budget in 2016 of up to \$750,000, inclusive of consultant and subconsultant fees, collateral materials, design and printing, advertising, and other tactics associated with the outcome of **Phase I**.

REQUEST FOR QUALIFICATIONS – EXHIBIT B

INSURANCE REQUIREMENTS

Insurance Certificates:

The insurance limits that will be required of the Subconsultant are outlined below. The Subconsultant should provide copies of its current policies as part of the submittal for the RFQ. The DMC EDA will formulate questions related to insurance (if any) as part of the interview process with shortlisted candidates.

Insurance Coverages:

Commercial General Liability

General Aggregate \$2,000,000

Products/ Completed Operations Aggregate \$2,000,000

Each Occurrence \$2,000,000

Automobile Liability

Combined Single Limit \$1,000,000

Worker's Compensation

Statutory

Employer's Liability

Each Accident \$1,000,000

Disease - Policy Limit \$1,000,000

Disease - Each Employee \$1,000,000

Professional Liability

Each Occurrence \$2,000,000