

Questions from Potential Respondents

GENERAL INFO

Q: What is the ultimate goal of this partnership? Short-term, long-term?

A: The Global Identity Project wants to work with outside consultants to develop an identity and brand for Greater Philadelphia that not only catches the attention of people around the world, but also captures the true essence of our region. We imagine that the relationship between the Global Identity Project and any hired consultants would extend beyond the three phases outlined in the RFP to a long-term partnership in order to maintain a strong brand identity.

Q: We understand that this project is intended to improve the world's perception of Philadelphia. Some of the key objectives are to attract and retain talent, business, capital, students, and investment, to continue to grow tourism, meetings, and conventions business, and to help drive growth through the continued revival of the region. Within these greater objectives, are there any prioritizations?

A: The new shared brand identity must be applicable across all industries and stakeholder groups, so there is no prioritization amongst the audiences. It is possible that targeted efforts are phased in across different attraction priorities, but it is important that the brand identity work as a base for all.

Q: Are you open to partnering with third-party sponsors?

A: We would need more information about how the firm plans to engage sponsors in order to answer this question.

Q: What will the relationship with Brookings look like?

How much input would Brookings have on the brand positioning process?

How much input would the firm have with the completion of Brookings' research initiatives?

Can you expand upon how we would be working with the Brookings Institution Global Cities Initiative?

A: Brookings does not serve in any decision-making capacity with this project. Their team is here to guide our efforts and provide advice, but they will not dictate what we do or how we choose to apply our Global Identity work. The insights gathered by the hired consultant and the Global Identity Project team will inform work product developed for the Brookings Global Cities Initiative. It is likely that our work will be cited in future Brookings reports and other materials.

Q: What will the established roles be?

What is the size and structure of the Global Identity Advisory Board that will be managing the 'client side' of the project?

What role will the Advisory Group play in the decision making process?

Who are the specific different members that comprise the Advisory Group?

Can you share with us the organizations from the Philadelphia region that are involved with the Global Identity Project?

Are there any key organizations that the firm should expect to collaborate with?

Beyond bigger milestones, what is the desired day-to-day workflow for lower level approvals, status calls, etc.?

What is the review and decision-making process that we can expect in response to our findings, recommendations, and concepts? Who is the decision maker(s) and is there a hierarchy of decision making and presentations to levels of decision makers for approvals?

A: The smaller Global Identity Project Working Group — including representatives from the City of Philadelphia, PHLCVB, Campus Philly, Jones Lang LaSalle (JLL), Ben Franklin Technology Partners (BFTP) and Philadelphia Alliance for Capital and Technologies (PACT) — will be your day-to-day contacts on this project. This smaller group will sign off on all final products. Within the group, more specific roles will be assigned to ensure a quick approval process for low-level items.

The Global Identity Project Advisory Group consists of about 30 key stakeholders from the areas of economic development, higher education, tourism and various business sectors. The Advisory Group will review materials at key milestone and provide feedback, but will not be the ultimate decision-makers.

A larger Global Identity Alliance (90 members and growing) will serve mostly as ambassadors once a brand identity is developed. They represent important stakeholders throughout the region who will need to feel as though they have had buy-in in the process in order to adopt the ultimate brand and use it in their work.

You may be asked to make presentations to these various levels of groups, but the Working Group will be responsible for all decision making.

We will not be sharing names of specific individuals or organizations beyond the Global Identity Project Advisory Board or Alliance at this time.

Q: Do the current stakeholders know they will have to commit personnel to Phase 1?

A: All members of the Global Identity Project working group (and their organizations) are aware of the time commitment this project requires. Members of the Advisory Group and Alliance have also been informed of the level of commitment their involvement entails.

Q: Number of scheduled meetings of the Alliance during August - November this year? (wondering whether some of the Phase 1 work with the team can be integrated into these already scheduled meetings)

A: The next Global Alliance meeting has not been scheduled yet, but it likely would not take place until Dec '18. The smaller Advisory Group is scheduled to meet in September (no specific date at this time). The Working Group has been meeting regularly and will continue to meet frequently during this process.

Q: How do you currently work with your constituents for brand adoption? What assets do you provide and how do you provide them?

A: Right now, the Philadelphia market is fragmented when it comes to brand/asset adoption. The business, tourism and higher ed sectors share materials amongst their respective partners; but there has not historically been one brand that applies across sectors. The closest Philadelphia came to this was the Philadelphia Delivers campaign developed during the Amazon HQ2 bid process; www.philadelphidelivers.com. We consider this an interim tool as we work on our longer term brand identity.

Q: What are the out of town meeting requirements for the consulting team in regards to the Brookings Global Identity work, as mentioned in the RFP?

A: We do not anticipate that the consultant(s) will be required to travel outside of Philadelphia for the Brookings Global Identity work. Communications with Brookings will largely take place via phone, email and webinars. Any required sessions in D.C. will be the responsibility of the working group.

Q: Are there domestic and international cities that the Philadelphia Global Identity Project Team considers aspirational?

A: Glasgow and Oslo have been the best examples we've seen so far of the type and scale of brand identity we are looking to develop. We also enjoy elements of the work done in Tel Aviv and Lyon.

Questions from Potential Respondents

BACKGROUND/RESEARCH

Q: Would Brookings be involved in the primary and secondary research analysis? Should we account for using third-party vendors for research, or is this something Brookings will be handling?

Can we have any more detailed information on the research content that Brookings has? (This will inform the research design that we recommend)

What methodology and framework does Brookings have set up to service the provider chosen in this RFP?

A great deal of the first phase of the project involves research, but based upon what I know and what the RFP indicates, there are several parallel research initiatives taking place and there is also some completed research as well. We wouldn't want our recommendations to duplicate any that exists or is in process (and ideally would love to have access to what is currently available). Can you offer any insights or clarifications?

Can you provide more details about the data and information that will be provided by Brookings, as mentioned in the RFP?

A: Brookings has already provided the full extent of Philadelphia-specific research they will be sharing during this process. This includes a Global Perception Analysis, which is based on international indices rankings, media scans, and social media analysis. There will be additional opportunities through Brookings to learn from subject matter experts who have done Global Identity work in other countries, but there will not be Philadelphia-specific insights shared there. If the firm does not have a research team in house, they may need to account for third-party vendors to supplement research based on the recommendations made as part of the firm's proposal. Partner organizations, such as PHLCVB, Visit Philadelphia, and JLL also have agreed to provide access to some social media analyses and media scans and data.

Q: What are the gaps left to fill in?

A: There is a need for domestic research (outside of the immediate Philadelphia region), as well as some supplemental international research — namely primary research such as interviews with international stakeholders.

Q: In what countries and regions has Philadelphia perception research already been conducted?

A: Brookings initial Perception Analysis compared us to peer cities such as Milan, Amsterdam, Hong Kong, Osaka, Frankfurt, Suzhou, Hamburg, Rotterdam, Manchester, Tel Aviv, Lyon, Glasgow, Auckland. An older study includes perception analysis from various countries, mostly in Europe, and can be shared.

Q: The RFP mentions that Brookings has provided a suggested methodology and frameworks for perception analysis and research that might be utilized. Can you provide additional information about this suggested methodology that we will need to follow as part of Phase 1 to help us qualify price and our approach? For example, will there be predefined list of attributes or brand drivers that we need to include?

A: Nothing is required by Brookings, but they have provided a number of tools and recommendations.

Key elements of the framework include: 1) Organizing stakeholders (DONE) 2) Diagnostics and Identity Development 3) Implementation Structure 4) Program Interventions - New Activities/Projects

Tools provided include: Narrative Matrix that links Global Identity to application by local stakeholders, Sample Media Scans, Sample Social Media Analyses, and Sample Indices Rankings

Q: Besides the Brookings report, can you tell us what other studies on the brand identity or perceptions of Philadelphia exist either commissioned by the City or one of the other key stakeholders? Has an inventory of those studies been done by the City with the stakeholders?

A: There are not many recent studies to our knowledge, but we have stumbled on several products or processes that may prove helpful. We can share these with the selected consultant(s).

Q: Is there any indication from Brookings how they are working with other cities at this point?

A: There are only four cities — including Philadelphia — involved in the Global Identity Project. Brookings is in contact with Core Team regularly, including by email and phone. They have set up a number team-specific phone calls, as well as joint calls and webinars for all four cities to share the progress, ask questions and gain additional insight.

Q: Can we have access to the Brookings finding that you are referring to in the RFP asap to become familiar with the assumptions while preparing our proposal?

May we access (pre-proposal) both the stakeholder meeting/focus group summaries as well as the Brookings suggested perception analysis methodology and frameworks? These will be helpful in ensuring that recommended primary research closes gaps but is not wasteful or repetitive.

A: We will need to confirm with Brookings that we are able to share the initial Perception Analysis. If they agree, you will receive it by COB on 6/14.

Q: Please describe the positioning idea behind the “Philadelphia Delivers” tagline

A: The Philadelphia Delivers tagline was developed specifically for the Amazon proposal and has been used in the interim to showcase the many assets Philadelphia has to offer for businesses and people interested in locating to our region.

Questions from Potential Respondents

PROCESS

Q: How many agencies are included in this RFP process? Can you share the agencies participating?

What made you include our firm in your agency selection process?

A: The RFP was posted publicly and received media coverage in the Philadelphia Business Journal, so we do not have a full list of everyone who has seen and plans to respond to the RFP. We have received numerous inquiries and anticipate a large pool of responses.

Q: Who are the key decision makers in selecting an agency? Is it a committee base, one individual, etc.?

How many decision makers will contribute to the selection process?

A: The smaller Global Identity Project Working Group — including representatives from the City of Philadelphia, PHLCVB, Campus Philly, Jones Lang LaSalle (JLL), Ben Franklin Technology Partners (BFTP) and Philadelphia Alliance for Capital and Technologies (PACT) — will select the consultant(s).

Q: How many different rounds will there be?

A: We intend to have three rounds in the selection process for Phase 1 — Initial proposal review, First round interviews with 5-8 firms, Final interviews with Top 2 firms.

Q: Are the key decision makers and final decision makers for creative identified? Are they part of the Philadelphia Global Identity Advisory Group, or are they separate?

A: The Global Identity Project Working Group will need to sign off on all final products. Within the group, more specific roles will be assigned to ensure a quick approval process for low-level items.

Q: What are the criteria being used to select a partner?

A: We will look at a number of factors including relevant experience, creativity, expressed understanding of Philadelphia's unique attributes, team diversity, and others.

Q: Are you open to a phone call or in-person meeting for us to walk you and your team through the proposal?

A: We will not have additional contact with respondents during the initial proposal review.

Q: Are you looking for bidding agencies to provide speculative creative?

A: Speculative creative is not required for the initial RFP response, but if you have specific thoughts already you can include them.

Q: Are there any mandatories that we should be aware of?

A: All responses must be PDF files, 20 pages or less, and submitted by 5 p.m. on June 18. The RFP contains specific questions that should be addressed (page 4).

Q: Will you be rewarding the agency with all 3 phases of the scope, or will you be pushing out a separate RFP to multiple agencies for Phases 2 and 3?

If we plan to submit for all three phases, is a proposal for all phases required now, or just for Phase I? (Under "Scope of Work" it is specified that "a complete proposal for all phases is requested," but in the third paragraph of "Required Deliverables" it is specified that "the provider for Phases II and III of the proposed project will be finalized with a separate RFP once Phase I is completed")

Would you like the firm to provide Fee/OOP cost for all 3 phases? Providing budget for Phases 2 and 3 would be difficult knowing that they are dependent on the completion of Phase 1.

Are we to respond to Phases 2 and 3 in this proposal, or when the future RFP is provided? If you need a response to them now, what information are you looking for?

Can you clarify whether or not this first phase requires a plan of action and budget for Phases 2 and 3?

A: We will issue a separate RFP for Phases 2 & 3 based on the result of Phase 1 and availability of funding.

If you plan to submit for all three phases, it would be requested — but not required — for the initial proposal to include information for all three phases. We understand that the information for Phases 2 & 3 would be preliminary and not as detailed as your plans for Phase 1.

Q: Is it acceptable to provide an alternative approach/process to the project that may differ somewhat from the Phase 1 process/ scope in the RFP but will still meet the goals of Phase 1 if we feel our approach will provide a more productive result and process?

A: Yes.

Q: The RFP states the proposal should be 20 pages. Must the 20 pages include project experience cases, or can these be an appendix to 20 pages of our approach, team process, and schedule?

A: Work samples should be included in the 20 pages. The only exception is if there are work samples that need to be viewed online and will require the review team to visit the website — those can be included as links in the PDF (you do not need to do screen shots of each page).

Q: Is there a shortlist presentation/ interview date(s) determined so we can block those in our calendar to ensure availability of our team if we are considered?

A: First round interviews will take place on Monday, July 16.

Q: What is driving the June 18th RFP deadline with questions being answered on 6/13?

A: The RFP has been posted since May 31. In order to get the consultant on board by August (which is required to meet Brookings anticipated workplan), we had to move forward on a tight timeline.

Questions from Potential Respondents

SCOPE

Q: How many other cities in the U.S. are you looking to compare Philadelphia with in the perception analysis?

A: We do not have a set number in mind and will work with the consultant(s) to determine this. Also, it may be more important to focus on a number of individuals from a sampling of cities than to prioritize a certain number of cities.

Q: What audiences do you want the perception analysis to be conducted with? General population? Business decision makers? Tourists? All of the above?

A: While we will look for the consultant(s) to help inform this, we will want a cross-section of a variety of stakeholder groups, including tourists, businesses, startups, investors, professionals, etc.

Q: Can you provide clarity around what you mean by community engagement? Do you mean you want to engage the general population in the research, or do you mean you want to engage community leaders? If you mean you want to engage community leaders, is this the advisory board?

Your phase I requirements stipulate that a “communication engagement strategy” be developed. Is it the responsibility of the consultant to implement this strategy as well or will that be done by your team internally?

When you refer to the community engagement strategy in Phase I, can you provide additional details about your expectation for the level of community engagement? Does this refer to just our initial community input gathering approach, or a broader strategy for initial input and post-brand identity development refinement?

What are the specific expectations for Community engagement strategy for brand development? Is this a strategy or is it actual engagement with the community? Are there specific requirements determined for engagement or are you looking for our team to recommend best practice for this RFP scope?

Please explain in more detail your expectations for the ‘community engagement strategy for brand development’.

A: We have learned from the Brookings process that it is important to involve members of your community in developing a brand identity. In Glasgow, this occurred with a short online form requesting three ideas. Community engagement could take many different forms and involve an array of stakeholders. The Advisory Board is inherently involved in the process but is only one layer of what is needed in terms of community engagement. We definitely expect the consultant to be involved in implementing the stakeholder engagement strategy, but the Working Group and Advisory Board will be involved as well.

Q: Will the selected provider have access to various governmental/organizational databases that will be helpful to recruiting stakeholders for research participation?

A: We will provide access to databases when possible, though the level of access at each organization will be at their discretion.

Q: From a global perspective, how should we think about countries/regions/audiences that are of greatest priority for the City?

Phase I includes a “Perception analysis of Philadelphia domestically, including comparison to other cities/regions”. Will the comparative cities/regions be selected by both the provider and the Brookings Global Cities Initiative or is solely the responsibility of one or the other? Or have they already been selected?

A: It is probably best to start with existing partners, such as trade relationships and countries that are likely to want to establish a business location, invest in or relocate to Philadelphia. The first place to start would be locations that are sources of attraction for Philadelphia. We can provide insight on these partners once we engage a consultant(s). Domestically, we will want to focus on cities who tend to be natural competitors for business and talent. We have many cities identified already for this, but welcome the insight and advice of the consultant(s).

Q: In terms of ‘support of fundraising’ efforts as enumerated in the Phase I work scope, is that referring to the creation of assets for use in development efforts? Such as, potentially, microsite/pitch deck/collateral, etc.?

For Phase I, can you clarify the type of fundraising support requested for the sustained brand identity campaign? For example, is this creating fundraising marketing material or developing a strategy for how the campaign could conduct fundraising based on historic models?

Can you elaborate on the types of support of fundraising for sustained brand identity campaign that will be required as part of the Phase I deliverables?

Please clarify what is meant by “Support of fundraising for sustained Brand Identity campaign”. What is our responsibility and deliverable in this scope of work?

Where are you in the fundraising funnel? Is that a key task of agency involvement?

A: At this point, the only money raised is \$50,000 towards the first phase. It is our hope that the consultant(s) can be a partner in raising additional funds, by assisting with strategy and attending meetings as needed. Your role will be to help sell the vision of the new brand identity in potential pitch meetings. We believe that this project will receive a lot of interest and that investment will accompany such interest, but some potential investors may require a bit more convincing. We also have some ideas and prospects which we will discuss with the selected consultant(s).

Q: Is the Phase I budget ceiling inclusive of all expenses such as research respondent incentives and other production-level items?

A: The proposed budget ceiling is contemplated for the listing of deliverables in the RFP for Phase 1. Ultimately, after reviewing proposals, the Project Team and selected consultant(s) will agree on the Phase 1 scope together.

Q: Beyond content excellence and the palpable spirit of cooperation, are there any additional/new levers associated with this initiative that will promote organizational buy-in and compliance?

A: Need clarification to answer this question.

Q: For Phase I preliminary brand identity options and brand asset recommendations, are you expecting one presentation with our recommendation, or multiple rounds of refinement before moving into Phase II?

Please clarify the difference between the Development and presentation of multiple, preliminary brand identity options in Phase 1 and Ideation and presentation of multiple brand and visual system options.

Your phase I requirements also stipulate that there be "Development and presentation of multiple, preliminary brand identity options". Is this an error (i.e. is this supposed to be part of phase 2?) We have never seen such a small budget from any city or community for a project with the breadth of scope of requirements you have outlined in Phase 1.

Would you consider moving all design concepts into phase 2 to allow more resources for Research recommendations and Brand narratives and message (also tagline)?

A: We recognize that preliminary brand identity options can be interpreted in many ways. Recognizing the time and resources needed to complete this work, we are willing to be flexible on what "brand identity options" are delivered at the end of Phase 1. We anticipate this work will be very preliminary in nature with more refinement in Phase 2. Ideally, we are looking to have solid positioning and key messages by the end of Phase 1 that can be built on during Phase 2. We are also looking to see what process and sequencing Respondants provide to make a final decision.

Q: Can you define in more detail, the scope of work of the "identity cohort assignments" mentioned in "Scope of Work" under Phase I? What type of assistance may be required with the completion of Brookings Global Cities Initiative Identity Cohort assignments?

What are the additional cohort assignments for Brookings stated on page 3?

Phase I calls for the provider to offer "assistance with the completion of Brookings Global Cities Initiative Identity Cohort" Are there specific tasks in place that the provider should expect to be responsible for to meet this deliverable?

Please clarify what is meant by "Assistance with the completion of Brookings Global Cities Initiative Identity Cohort assignments"

It is mentioned that we would be assisting with completion of Brookings cohort assignments. Can you expand on what these assignments are?

A: The Brookings Institution assigns homework, such as completing a workplan for the process, developing an community engagement process, developing a matrix within a framework provided by Brookings, etc. The Working Group will play a lead role in completing these assignments, but will want the guidance and contribution of the consultant(s).

Q: The Brookings Global Cities Initiative will include "Surveys of a broad base of global business leaders, visitors and expats"? Will Brookings be administering the surveys or will they look to the provider to administer them? If Brookings is administering the survey(s), what specific audiences will they survey and will the provider have access to all of the raw data?

A: Brookings will not conduct surveys. We will need the support of the consultant(s) and the Working Group will also play a role in this. Surveys may be an online form, one-on-one, focus groups, etc.

Q: Can travel and out of pocket expenses be treated separately from the overall \$50,000 budget, or must those expenses be incorporated into the \$50,000?

A: We anticipate most work in Phase 1, particularly the research, will be completed remotely. For firms outside of the immediate Philadelphia region, we are willing to provide limited travel funds. We would need to see your proposed travel budget in your RFP response.

Q: Can you define primary and secondary research?

What do you mean by "significant primary and secondary research?" What is the minimum in terms of outreach (# of countries) would you consider acceptable by the Philadelphia Global Identity Project Team?

Can you provide more clarity around the scope of primary research?

A: We will need to gather information from individuals, experts, etc. as well as through research of social and print media, rankings, etc. Internationally, Brookings has provided a robust amount of secondary data. We also have some research from earlier dated studies.

For the primary research, the Working Group will be flexible in terms of the scope and number of interviews based on consultant recommendations.

Q: What are the criteria/KPIs you will be using to measure success?

A: We will work with the consultant to determine success metrics. Broadly speaking, we want to identify an identity that resonates and speaks to Philadelphia's current momentum and its future. It needs to be far-reaching. We will also want to see robust adoption of the brand.

Questions from Potential Respondents

NEXT PHASES

Q: For Phase II, are you referring to the visitphilly.com website?

A: No. This would be a new website that cuts across industries.

Q: In Phase II, will you need the website redesigned, reorganized and redeveloped? What platform are you currently running on?

Are you planning on using the existing framework of the beta site for the website that you want to launch in Phase 2 with a new design? Or are you looking at the sitemap, UX and UI of the beta site and reworking that?

Can you define in more detail, the scope of work of the website mentioned in "Scope of Work" Under Phase II? For example, do you expect it would be more similar to a small 3-4 page informational website or a larger 10-15 page fully-interactive website?

A: The Global Identity Project is not just about a website. The idea is to develop a narrative and message and then brand identity.

A new website will be important an important tool for expressing that brand identity. This would be an entirely new website, requiring full development. Wordpress is the preferred platform for backend content management. The website that will be the strongest base for future work is www.philadelphiadelivers.com.

Q: Who will own, manage and sustain the brand and messaging at the conclusion of Phase 3?

A: The City of Philadelphia will be the lead agency to manage brand continuity after Phase 3, with support from the organizations who are part of the Global Identity Advisory Group.

Q: Will an agency that passes over participating in Phase One, be given "unfavorable" status for participating in the subsequent phases? Phase One really is research intensive with the research laying the foundation for the core verbal and visual brand development

A: No. The projects was intentionally divided up so that we could choose the best option for each phase. It is entirely plausible that the consultant for the first phase be awarded for the second and third.