

Request for Proposal

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Release Date: 2/8/2021

Response Due: 3/5/2021

PROJECT DETAILS

The Northeast Dairy Business Innovation Center (NE-DBIC) hosted by the Vermont Agency of Agriculture, Food and Markets (VAAF), seeks a contractor to study consumer perceptions of brand identities to better understand strategies businesses can use to sell their products to specific consumer segments or market channels. The contractor will then create a sophisticated cataloging of the distinct ways that consumers receive brand value from case studies of successful dairy processors across categories, from conventional fluid milk to farmstead cheese. This cataloged data will inform the contractor's development of a marketing toolkit and set of best practice recommendations for dairy processing businesses in the Northeast (New England, New York, Pennsylvania, Delaware, and New Jersey).

Agency/Department

Name: Vermont Agency of Agriculture, Food, and Markets

Contact: Laura Ginsburg, Agriculture Development Division Section Chief

Address: 116 State Street

Contact Phone: (802) 522-2252

Montpelier, VT 05620

Contact E-mail: laura.ginsburg@vermont.gov

Proposals must be submitted as a single PDF document via email to the contact above.

TIMELINE

Release Date: 2/8/2021

Responses Due: 3/5/2021

Pre-Qualification Deadline: 3/3/21 (see note in Submission Requirements section)

Contract Start Date*: 4/15/2021

Contract End Date*: 3/31/2022

**To be finalized after proposals are received and negotiated*

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BUDGET

Maximum budget for project: \$85,000

PROJECT BACKGROUND

Dairy is an integral part of our everyday life. It is present in food service and packaged goods, whether as a standalone product such as milk, cheese, and yogurt or as a critical input for iconic products such as pizza, pasta, or cheeseburgers. In the Northeast, many dairy processors are small in scale and rely on sales to metropolitan markets to sustain their business. The consumer base across this region encompasses incredible diversity and brands have the opportunity to market themselves to specific audiences, such as young, millennial families who are seeking values-driven products at reasonable prices or high-end consumers seeking luxury products from small-batch producers. Concurrently, the dairy sector is impacted by the same trends and preferences as the food sector at large, which can result in smaller companies falling behind as marketing strategies or consumer demands shift.

In Vermont, for example, dairy farms have shaped the landscape and way of life for nearly 150 years. Vermont’s dairy farms produce about two thirds of all milk in New England, with the bulk of it being processed by one of 151 plants into fluid milk, cheese, butter, ice cream, or yogurt and then sent to consumers across the Northeast and the nation. Further, Vermont dairy businesses are key drivers in attracting over 13.5 million visitors to Vermont every year where they can interact with the farms and creameries who produce the dairy products they consume at home.

Nationwide, consumers are increasingly showing appreciation for locally produced high-quality food. Source-identified products that deliver transparency, food safety, and a positive community impact are replacing traditional consumer preferences, such as shelf-life stability, quantity, and cost. Northeast dairy producers and value-added processors often carry many of the qualities that consumers are looking for—values such as authenticity, cleanliness, purity, ethics, trust, and quality—but businesses can struggle to convey this to the consumer. This poses the question: what is a successful dairy brand and what qualities define it? While it may be challenging to describe the exact nuance of what makes each specific brand successful, testimonials, anecdotal evidence, and brand recognition can help set the base for understanding how a brand sells itself.

In Vermont, for example, businesses who use the word “Vermont” or another common reference for the state like “Green Mountain” can find traction with consumers because of the implicit connection of Vermont with quality. There are many different brands, however, that come from the state and then use other techniques to draw in consumers. The branding look and feel covers the spectrum from fun and quirky (Ben and Jerry’s, Lazy

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Lady Farm) to refined and sophisticated (Jasper Hill Farm, Vermont Creamery). Understanding brand identities, the strategies utilized, and the resulting consumer base are key elements of successfully selling products.

STATEMENT OF WORK

The NE-DBIC seeks a contractor with experience in strengthening brand recognition, product messaging, and brand utilization. The contracted firm will work directly with NE-DBIC staff to develop a sophisticated cataloging of the distinct ways that consumers receive brands from dairy producers across dairy product categories. The contractor will develop at least 12 case studies of Northeast dairy processors that highlight how businesses have successfully penetrated different market channels using brand identities to leverage their products. These should be addressed *in concert* with specific business models, business decisions, and business skills, to develop a marketing toolkit and set of best practice recommendations for processors.

- Objective 1 – Brand case studies and assessment of consumer perceptions
 - Complete at least 12 brand case studies spanning the range of popular dairy products produced in the Northeast, including fluid milk, specialty cheese, yogurt, and frozen products. Brands selected for case studies must successfully sell regionally or beyond and represent businesses in multiple states. Case studies shall include the following elements:
 - brand characteristics that appeal to the consumer base who purchase the product
 - how specific branding/marketing efforts may work in conjunction with business models and types of dairy products (i.e., farmstead cheese from a Certified B-Corporation business)
 - if and how branding efforts focused on a geographic location from states in the Northeast benefit the brands studied
 - key elements of each brand that make it successful
 - Overview of consumer perceptions regarding how brands convey specific messages and ways that brand strategy can be utilized to develop a consumer base
- Objective 2 – Marketing Toolkit for Dairy Processors
 - The toolkit shall address the following key topics and focus areas:
 - importance of investing in brand identity and strategy
 - how a dairy processor can understand their consumer base, while staying amenable to change as consumer preferences shift, in order to increase sales or better align with consumer expectations
 - recognize when it may be appropriate and how to capitalize on the inherent qualities a geographic location may carry

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- key strategies and best practices regarding brand look and feel that meet consumer expectations of the product, price point, and consumer sector targeted
 - common mistakes in brand development when starting a business or re-branding
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- Objective 3 – Final report and presentation of findings
 - Develop a complete report of the case studies and toolkit, which includes an executive summary of key ideas, an overview of consumer perception of brands, and primary best practices that may contribute to brand success
 - Offer at least one webinar to stakeholders to discuss the case studies, toolkit, and key findings

TARGET AUDIENCE

The report will be provided to NE-DBIC and VAAFM as well as cow, goat, and sheep dairy industry stakeholders. NE-DBIC will disseminate the report online and conduct presentations to industry partners. The report will be available online for free download. The presentations will occur in partnership with the Northeast Dairy Business Innovation Center and industry partners to strengthen industry engagement, improve strategic planning, and support business development and financial success to grow this sector of agriculture.

PERFORMANCE MEASURES & DELIVERABLES

- The Contractor will conduct a planning meeting with Agency and Dairy Business Innovation Center Staff by **April 30, 2021**.
- Contractor will draft the report and toolkit for review and feedback from the VAAFM, incorporating two rounds of edits if needed.
- Contractor will incorporate edits and provide the finalized report and toolkit suitable for public dissemination.
- Contractor will have a final package due by **March 31, 2022**.
- Contractor will host at least one live online webinar, open to interested stakeholders, to discuss and share research findings prior to contract end date. Webinar will be recorded to support future viewing.

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SUBMISSION REQUIREMENTS

Please include the following with your response to this bid:

1. **Project approach, background, and experience:** Please provide a history of your firm, a list of current and/or notable clients, a description of your firm's experience with market assessment, notable examples of successful outcomes, and what makes your firm the right fit for this project.
2. **Resumes of project team leader and other team members.**
3. **Proposed work plan, proposed activities, associated deliverables, reporting measures, and timeline**
4. **Project budget:** Please submit a budget, not to exceed \$85,000 that is both realistic and reasonable to complete the scope of services. Budget must tie specific activities to deliverables, with clear cost associated with each component of the proposal. Proposal shall include an hourly rate for services and any related expenses to be billed. Proposals should include all relevant costs to complete the work as detailed in PERFORMANCE & DELIVERABLES, should note any travel requirements, and all proposals should include necessary costs to meet requirements of Attachment C. Proposals must also submit a budget that adheres to USDA AMS Terms and Conditions [Section 8.0 Allowable Costs](#).
5. **3 samples of similar research projects (links to download are appropriate)**
6. **Certificate of Insurance** which meets the criteria as outlined in [Attachment C](#)
7. A **W9** signed within the last 6 months
8. Proof of a complete and successful registration at [sam.gov](#) with no exclusions. (Note: this process will take about a week)
9. **DUNS number**

Note: All bidders on this project must be a Prequalified Marketing Vendor in the Market Research service category in order to submit an eligible proposal and to be considered for this work. Bidders who need to become prequalified for marketing contracts must submit an application to the Chief Marketing Officer by the prequalification deadline indicated in this RFP. Refer to the Prequalified Marketing Vendor Application for requirements. Information regarding pre-qualification can be found at [cmo.vermont.gov](#). Questions regarding the pre-qualification process should be directed to the CMO's office