



The New York Wine & Grape Foundation

One Keuka Business Park, Suite 208
Penn Yan, New York 14527
(315) 924-3700
info@newyorkwines.org

Request for Proposals Domestic Marketing Consultant December 6th, 2023

Budget Update – January 5th, 2024:

NYWGF would like to amend the Domestic Marketing RFP budget to include activities related to our Sustainable Winegrowing program. NYWGF has recently been awarded a grant that will provide up to **\$35,000 in additional funds** to support the **promotion of wines made from sustainable grapes through September 2025**. The activities (deliverables) will include the following:

- Trade/Media tour(s) of key winegrowing regions
- Trade/Media seminars (in-person or virtual)
- Consumer seminars (in-person or virtual)
- Conceptualize and launch 'New York Sustainable Wine Week'

The successful bidder for the RFP will be expected to integrate these deliverables into their annual New York wines marketing activity workplan.

I. Background Information

The New York Wine & Grape Foundation (NYWGF) was created by the State of New York in 1985 as a private, non-profit organization. The enabling legislation established a financing mechanism for promotion and research, providing the industry with both short-term assistance and the potential for long-term viability.

NYWGF's programs are developed by a Board of Directors in consultation with other representatives from industry and state government. The activities carried out by NYWGF are designed to support all uses of New York-grown grapes from all regions of the state.

The mission of the NYWGF is to "promote the world-class image of New York grapes and wines from our diverse regions to responsibly benefit farmers, producers and consumers through innovative marketing, research, communication, and advocacy." The vision of the NYWGF is "to be the world's premier region for cool and cold climate viticulture."

Over the past three years, NYWGF has been reimagining its role in promoting New York State wines within the United States to increase its focus on Direct-to-Consumer marketing strategies and tactics, in addition to existing programming designed to engage trade and media audiences.

The increased focus on consumer marketing is a result of industry input, including feedback from regional marketing partners such as wine trails, tourism organizations, and other regional industry



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groups. It is NYWGF's intention to formalize a collaborative working relationship with these groups to create an Industry Advisory Committee. The committee will help a) provide timely and relevant feedback to help inform New York Wines brand marketing and, where possible, b) conceptualize and leverage key regional marketing activities that serve both their constituents and support NYWGF's mission and vision – with the management assistance of the successful bidder to this project.

II. Scope of Services

NYWGF is seeking proposals for a consultant partner to manage its marketing efforts targeting consumers, trade, and media in select U.S. markets to raise brand awareness and sales of New York Wines.

NYWGF's marketing program takes a two-pronged approach to promotion: 1) to consistently elevate and amplify the overall brand of New York wines and 2) to assist individual wineries participating in our program to achieve their individual brand and sales goals within key U.S. markets.

NYWGF's marketing program in the U.S. has primarily focused on New York, Pennsylvania, New Jersey, Connecticut, Washington D.C., and Florida.

NYWGF now seeks a consultant partner to develop a comprehensive strategy for the next phase of its marketing program evolution. This includes refining the process by which we develop our annual marketing plan and select activities.

The consultant is also expected to:

- 1) Increase overall awareness of the New York Wines brand as well as the brands of individual winery participants amongst consumers, trade, and media in select target U.S. markets.
- 2) Promote individual winery participants to help drive sales via retail, restaurant, and online channels in target U.S. markets.
- 3) Identify marketing opportunities for individual winery participants interested primarily in sales via their Tasting Room channel via promotion of increased wine tourism by consumers.
- 4) Work with NYWGF's collaborative of regional wine marketing organizations to execute a pre-determined number of priority marketing activities for key U.S. audiences.

The selected consultant partner will be contracted to engage with NYWGF on a one-year agreement for the period of **April 1, 2024 – March 31, 2025**. This agreement may be extended annually if efforts are successful. The consultant selected to manage the NYWGF's U.S. Marketing program would be expected to fulfill the following responsibilities:

- **Establish a Strategic Activity Selection Process:**
NYWGF would like to develop a strategic and transparent process by which we respond to the



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industry's changing promotional needs annually. This would include developing a documented process by which industry members and other promotional entities (i.e., publications, trade advertisers, educational organizations, etc.) can submit ideas to be vetted equally by key stakeholders through the lens of marketing experts, such as the successful bidder on this RFP. NYWGF would like assistance in establishing this process in 2024-2025 with full implementation in 2025-2026.

- **Provision of Trade Servicing & Public Relations:**

NYWGF seeks a consultant to provide strategic direction for both the generic New York Wines brand and individual winery brand promotions in the Domestic U.S. through the following means:

- Working with NYWGF staff leadership to identify most impactful messages and marketing tactics given desired goals for the *overall brand* of New York wines.
- Working with NYWGF staff leadership to identify the most impactful messages and marketing tactics given desired goals for *individual winery* participants.
- Keeping consumers, trade, and media in target U.S. markets up to date with all New York Wines news (brand developments, activities, promotions, key messaging) and identifying opportunities to incorporate NY wines key messaging.
- Identifying tactics to keep individual winery participants top of mind for target audiences. Tactics may include sending regular press releases, directing sample campaigns, directing pitches to your company's current roster of VIP trade, media, and consumer touchpoints, etc.

- **Engage Trade and Media Influencers:**

Identifying tactics to best connect with appropriate trade, media, and consumer influencers who are well positioned to help NYWGF accomplish its generic New York Wines brand goals as well as the brand goals of wineries participating in the Domestic Marketing program. Examples of tactics could include familiarization trips, online events and webinars, contests, special promotions, regional awareness campaigns, or other tactics that bring qualified buyers (trade & consumers), and media representatives to New York's wine regions to create lifelong supporters and ambassadors.

- Work with NYWGF staff leadership *and* NYWGF Industry Advisory Committee to identify most valuable tactics given desired goals for generic New York Wines brand and individual wineries.
- Select and invite key influential trade and media to visit New York's wine regions.
- Coordinate all events, from concept to execution, including arranging trade for invited guests, and liaise with NYWGF as needed to develop agenda/schedule.



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- **Leverage Educational Tools:**

Identifying educational tools (both current and those that have yet to be developed) that will best connect with appropriate consumers, trade, and media influencers who are well positioned to help NYWGF accomplish its generic brand recognition and specific winery marketing goals. Examples of tactics could include partnerships with WSET, GuildSomm, or other recognized leaders in wine education, to deliver quality consistent information to wine enthusiasts, trade, and media leaders.

- Work with NYWGF staff leadership and Industry Advisory Committee to identify most valuable tactics given desired goals.
 - Organize and execute New York wine seminars/tastings that increase awareness for New York wine regions and varietals amongst trade, media, and wine enthusiast consumers in key markets.
- **Other:** While the activities listed under Scope of Services are expected, the consultant should feel free to propose activities related to the overall strategy recommended for New York wine.

In the planning and execution of these initiatives, the consultant shall maintain close communication with NYWGF and report monthly in writing on the progress and impact of activities. In addition, the consultant shall manage all financial aspects of the program in accordance with NYWGF's contracting guidelines. The NYWGF receives grant funding, primarily from the regional and state entities for its U.S. Marketing Program. There are regulations within these grants on eligible and ineligible use of funds, and other limitations. NYWGF would work with the selected consultant to ensure an understanding of program regulations.

III. Resources

NYWGF is pleased to provide the following resources to educate future partners as to the brand and key messaging assets already in place to support this project. Also provided are links to examples of past activity plan outlines and successful partnerships in advertising and education:

Brand Assets

- [Boldly, NY | New York Wines | New York Sustainable Winegrowing Marketing Assets](#)
- [New York Wines Brand Training](#)
- [New York Wines – Regional Videos](#)
- [New York Wine Reference Guide Courses](#)



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Sample Activities

- [Newsletter Update for Domestic Marketing Participants](#)
- [Wine Folly New York Region Guide](#)
- [Seven Fifty New York Region Landing Page](#) & Promotion
- Examples of Regional Partner Events ([Finger Lakes Wine Month](#) | [Long Island 50th Anniversary](#))

IV. Project Budget

The New York Wine & Grape Foundation's preliminary 2024-2025 budget for the Domestic U.S. marketing program, inclusive of activities and consultant fees, is **\$175,000**. Consultants should provide NYWGF with a budget breakdown for their recommended Domestic U.S. marketing strategy within the current budget constraints, including the appropriate activities denoted within the Scope of Services. Please note that your proposed consultant fees should fully account for all work required to execute all proposed activities.

V. Evaluation of Proposal

There is no required format for the proposal, however proposals should be limited to **ten pages** and should include at a minimum:

- Company information including prior experience in the wine/alcoholic beverage sector or with food/hospitality or other comparable projects, experience with any regional, state, or federal grant programs, as well as staff capabilities/backgrounds.
- Proposed scope of work including event format/timing and consultant roles/responsibilities.
- Staffing for the NYWGF account, and any expected subconsultants, including capabilities and staffing in the various markets that make up this suggested scope.
- Estimated budget for activities including breakdown of all associated fees and expenses.

The NYWGF will independently review and evaluate each proposal and selection will be made based on the following criteria:

- Ability to meet or exceed requirements as set out in the scope of services.
- Adequacy and availability of professional level staffing.
- Credentials and related experience.
- Level of service and activity given the budget parameters provided.



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VI. Authority

The selected agency will work with the prior approval of NYWGF for all program activities. All expenditures must fall within the program budget and must be pre-approved by NYWGF.

VII. Discrimination Clause

The NYWGF is an equal opportunity employer and does not discriminate based on race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, or marital/familial status. The NYWGF complies with all provisions of the U.S. government’s Executive Order 11246 dated September 24, 1965, and the rules, regulations, and relevant orders of the Secretary of Labor.

VIII. Instructions for Submitting Proposals

Proposals should be submitted electronically to:
Valerie Venezia-Ros, Director of Programs and Marketing
Email: rfp@nywgf.org
Phone: (518) 229-3765

Questions regarding this RFP should be directed to: valerieross@nywgf.org by December 22nd, 2023.

All proposals are due by 5:00 PM EST on January 19th, 2024.

NYWGF reserves the right not to award a contract if in the opinion of the evaluators, no suitable proposal is received. NYWGF is not liable for any costs associated with any company’s response to this RFP.

The successful bidder will be required to consent to a cancellation clause by the New York Wine & Grape Foundation, in its sole discretion, at any time prior to April 1, 2024, in the event that regional and state funding allocations are not provided at the levels expected by NYWGF.

IX. RFP Time – Subject to Change (Updated January 5th, 2024)

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|-------------------------------------|------------------------------|
| RFP Open | December 6, 2023 |
| Questions Due to NYWGF | December 22, 2023 |
| Q&A Document Provided | January 5, 2024 |
| Proposals Due | January 19, 2024 |
| Interviews Conducted | Week of February 5, 2024 |
| Successful Partner Announced | February 21, 2024 |
| Onboarding & Prep | February 21 – March 31, 2024 |
| Activity Schedule Launch (FY 24-25) | April 1 – March 31, 2025 |



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