

PHILADELPHIA ZOO

Due: Monday,
July 10, 2023 EOD

RFP

Branding
Re-boot and
Guidelines Toolkit





PHILADELPHIA ZOO

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PHILADELPHIA ZOO
 MESSAGE FROM
PROJECT LEADERS

Amy Shearer CHIEF MARKETING AND EXPERIENCE OFFICER
 Suzanne Gaadt CREATIVE DIRECTOR



Dear creative firms:

Thank you for your interest in submitting an RFP for our Philadelphia Zoo Branding Re-boot. Please review the following information and send any questions to Suzanne Gaadt at gaadt.suzanne@phillyzoo.org.

In order to be considered, please submit your Proposal no later than EOD on **10 July 2023**. We will talk with top candidates before acceptance. Please plan on a minimum of two on-site meetings and facilitated workshops for engagement by Zoo stakeholders and employees at the commencement of the project.

Philadelphia Zoo is looking to re-boot its brand to create more connected and consistent message execution—both internally and externally—with our vision and mission, as well as to create the most appealing value proposition to potential visitors and customers. Our refined and clear identity must represent our well-earned and highly-respected standing as a world-class destination and global conservation organization loved by guests, donors, the community and stakeholders. At the same time, we must never forget we are a fun and joyful destination for families and people of all ages to connect with one another and the natural world.

At the project's outset, we will also require a working document to include a schedule with an outline of deliverables, concept reviews, budget check-ins, a list of items to be provided by the Zoo, deadlines for approvals, and recommendations for a phased plan of conversion of assets, with a focus on those required by a launch date.

We believe that brand training for all employees, as well as an identity handbook, toolkit and communication plan for internal and external stakeholders are vital to the successful implementation of the brand.

AMY SHEARER, SUZANNE GAADT



PHILADELPHIA ZOO AT A GLANCE

PHILADELPHIA ZOO, first zoo in America, opened its historic gates in 1874. Since that time, the Zoo has become a leading family destination in the Philadelphia region. As one of the country's foremost conservation organizations, and home to more than 1700 endangered animals from around the world, the Zoo is always working to reach new heights. We have been offering enriching animal experiences, award-winning education and conservation programs, exceptional guest services, and extraordinary scientific accomplishments, to make this historically significant destination one of the most renowned zoos in the world.

The Zoo works to create experiences that have a positive impact on its guests beyond their Zoo visit, inspiring them to learn and lead change. We work to create encounters that connect animals and people, like no other in the world, in order to reshape how guests view their role in protecting the natural world. As such, **we are seeking a branding partner** who will help us reboot/refresh our brand positioning, piggy-backing on foundational work that has been established over the past decade.

By connecting people with wildlife, Philadelphia Zoo creates joyful discovery and inspires action for animals and habitats.



BUILDING UPON OUR WORK

In a perfect world, a brand emerges from a blank page, unencumbered by past history, existing inventories of signage, collateral, digital assets and merchandise. As Philadelphia Zoo exists very much in the real world, our branding and marketing challenge has been staged and evolutionary over the past decade, with 2016 marking a notable moment with the launch of a multi-year campaign, **The Zoo Changes You**. In each of the previous years, we raised the level of engagement between the Zoo and its visitors through the introduction of programs and emotionally-resonant messaging while harmonizing communication channels and unifying design tonality. Throughout this period, we were able to test and explore a range of messages to gain insight into the relationship between the Zoo and its community.

The first insight that formed the nucleus of our recent campaign was this: **Animals make us human**. By reminding visitors how rich and varied life on earth really is, and our place within it, the Zoo helps to restore a sense of wonder and appreciation that is often lost in our everyday lives. So a visit to Philadelphia Zoo is an experience that will change the way you see, enjoy and appreciate the world. By taking guests out of their scheduled, screen-focused routine, the Zoo shifts perspectives so you walk away with a refreshed appreciation for the planet's life and for one another. In other words, **The Zoo Changes You**. Since being named the **top national marketing campaign by American Zoos and**

Aquariums (AZA) in 2017, the Zoo has continued to build upon the original intention of **The Zoo Changes You** with the evolution/refresh of the public-facing message.

SUMMARY OF THE ZOO EXPERIENCE

For more than 160 years, Philadelphia Zoo has served as one of the region's most important destinations for children and families. It is a place where many have built lasting memories together and are inspired to make their own positive impact on our world. Throughout its history, the Zoo has remained the region's **largest living classroom**, offering a place for tens of thousands of school children, some who may never be able to visit animals in the wild worldwide, to recognize their perspective on the world and their role within it.

For more than 1 million annual onsite visitors, the Zoo is the only place to see magnificent African lions, majestic Western lowland gorillas, elusive Snow leopards, and playful Humboldt penguins and more, in real life, not on a phone or movie screen. While exploring the 42-acre campus, visitors enjoy award-winning exhibits like Zoo360®, Big Cat Falls, PECO Primate Reserve, McNeil Avian Center and KidZooU.

Welcoming guests of all backgrounds, the Zoo is proud to create joyful discovery and inspire action for wildlife and habitats. In addition to being a place of wonder for guests of all ages, **Philadelphia Zoo provides exceptional care for animals**, inspires millions to make positive changes for animals, and participates in a variety of successful worldwide conservation efforts to help save species and wild places.

As a premiere conservation organization, the Zoo works in cooperation with other accredited zoos in North America and worldwide via the Species Survival Plan® (SSP), an effort to manage and breed endangered and other animal species to ensure healthy, self-sustaining genetically-diverse animal populations. These breeding programs serve as safety nets for species that are threatened with extinction in the wild.

Known for continued scientific innovation, the **Zoo continues to be a zoo of firsts**; from having the first orangutan and chimpanzee born in the U.S. in the 1920's, to the creation and implementation of Zoo360®, the Zoo is an industry leader, setting standards for animal care and guest experiences.

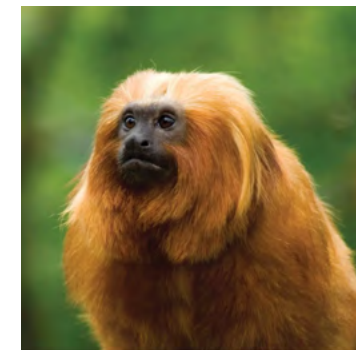
ZOO360®

Animals are on the move like never before with Zoo360®, **a first-in-the-world system of see-through trails passing through treetops, crossing over pathways and connecting habitats**, providing animals like amazing big cats, majestic primates and marvelous meerkats opportunities to travel and explore.

Another first for Philadelphia Zoo and the world, Zoo360® offers exciting and enriching experiences for animals and visitors alike, taking the Zoo experience to a whole new level. This pioneering exhibit benefits animals by offering more opportunities for long-distance travel, greater environmental variety, and an increased ability to determine their own experiences, enhancing the visitor experience by creating a more dynamic engagement. Now as you move around the Zoo, the Zoo moves around you.

Zoo360® showcases the Zoo's commitment to excellence in animal care and inspiring guests to conservation action. Although the idea of using bridges and pathways has been explored at other zoos and animal sanctuaries, Zoo360® is unique in the combination of its length and the opportunity for a wide variety of species to use it. **Zoo360® was such a revolutionary concept that it is now implemented in more than 60 zoos across the globe.**

Philadelphia Zoo is a special place for people and wildlife in the heart of Fairmount Park in west Philadelphia. We also lead and support critical conservation projects in the field by encouraging and leveraging the power of thousands of visitors while continuing to be innovators in animal well-being and serving as an "ark" for endangered species.



PHILADELPHIA ZOO PROJECT GOALS

The following will serve as guiding principles during the decision process. Responses should indicate ways in which the Zoo will have gained a stronger understanding of its opportunities and will provide a road map to a phased execution approach.

GUIDING PRINCIPLES



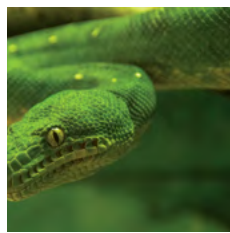
• Provide a deep understanding of the competitive marketplace and the Zoo's current position within in.



• Develop a brand architecture to emotionally and cerebrally connect with a range of diverse, multi-generational audiences that engage with the Zoo for different reasons: ticket buyers, donors, members, elected officials, school teachers/ children.



• Reinvigorate the idea that Philadelphia Zoo is *innovative* and *forward-looking* while still holding the hearts of millions that have loved the Zoo the way it is over many, many decades.



• Share the reason the Zoo exists: **to save animals from extinction.** We connect people with wildlife so that...as the only animal left on the planet that can change the trajectory of wildlife destruction... people can take action and make a difference.

• Identify ways to streamline use of existing assets and new ways in which the Zoo can communicate its messaging on campus and externally.

• Ensure that the final product communicates that **Philadelphia Zoo** is by far the most preferred (leader) Zoo in the region. Lean on the institution's deep connection to all of the communities that are the fabric of the Philadelphia region. Set the Zoo with its identity in the city of Philadelphia.

• Develop a brand hierarchy that includes the establishment of at least one complementary secondary or sub-brand to serve as specific representation of the Zoo's global conservation program (and possibly other programs).

The Zoo Changes You

Every Zoo visit is an opportunity for guests to connect with wildlife and habitats and be inspired to conservation action in their own backyard and around the world.



Philly Zoo's award-winning Albert M. Greenfield UNLESS Contest has empowered thousands of K-12 students to take action for wildlife. This year-long, project-based contest encourages students to create real solutions to environmental issues in their lives.



SCOPE OF SERVICES

THE SUCCESSFUL PARTNER

will respond completely to all vendor submission requirements outlined in this RFP. All responses will be treated as proprietary information and will be used solely for the purposes described herein. If potential partners require their responses to be returned, The Zoo will do so at the potential partner's expense.

- 1. Conduct a discovery phase**
 - Interview key internal and external stakeholders (identified in conjunction with the Zoo team)
 - Connect with members (active and lapsed) as well as past ticket buyers for input and insights (surveys/focus groups TBD)
 - Incorporate Zoo data and KPIs into analysis
- 2. Execute a market scan and competitor analysis**
 - Determine key competitor set in Philadelphia DMA and track performance against the Zoo (with Zoo staff)
- 3. Audit: Review current Zoo assets for message and brand consistency and opportunity**
 - Include onsite and external
- 4. Define customer personas—update current segmentation**
- 5. Develop a brand hierarchy with designs and messaging to connect with diverse segments across multiple channels**
 - Create a vibrant new graphic identity (multi-channel)
 - Develop a variation of message to reach each segment
- 6. Create brand style guidelines and toolkit**
 - Develop color palette/schemes
 - Standardize font treatments
 - Create and supply logo files in various formats for diverse platforms
 - Develop design templates
- 7. Present ideas and ways in which the brand can come to life onsite and externally**
 - Assist in creating ways in which to incorporate new branding into all communications and marketing activities
 - Assist in developing timeline and ideas for a successful launch and phased rollout



PHILADELPHIA ZOO PROPOSAL CONTENT REQUIREMENTS

PROPOSALS MUST CONTAIN THE FOLLOWING:

Executive Summary - include a cover letter describing the firm, including a primary contact person, address, phone number, and email. Please include a qualification statement.

Team Description - provide relevant information to supplement qualification statement. We should be able to determine the experience and skillset of the team to accomplish goals and scope.

Description of proposed approach and methodology - explain how you will carry out the scope of services. The proposal should describe scope of work, identify major task to carry out scope, roles and responsibilities of project team, and clearly define deliverables. The description should convey the team's understanding of the initiative.

Schedule - create a proposed schedule/duration of activities required for scope completion.

Proposed fee for the scope of work - list as a lump sum fee, further indicating break down of the fee by task and projected hours.

Certificate of Insurance - indicate coverage consistent with requirements (see attachment)

ADDITIONAL PROPOSAL INFORMATION & REQUIRMENTS

One electronic copy (with all attachments) must be received by the Zoo, via <http://www.philadelphiazoo.org/branding> by **10 July 2023 5:00 pm** Eastern Daylight Time.

SELECTION PROCESS - The Zoo will evaluate all submissions for completeness and compliance with the terms and conditions of the RFP. A Selection Committee, consisting of representatives from the Zoo, along with other individuals deemed necessary, will review qualifications of submittals and evaluate the respondents, based on the following broad criteria:

- **Qualifications and Experience of Firms and Personnel:** The review team will evaluate the qualifications of personnel through the lens of the project goals.
- **Understanding of the Project:** The review team will evaluate the consultants' understanding of the Project's goals and objectives as shown through the overall conceptual approach, organization, project schedule, allocation of resources by task, methodologies, and presentation of the proposal.
- **Fees:** The Zoo will evaluate the proposed fees considering best value to the project.

RESERVATION OF RIGHTS

The Zoo reserves the right, in its sole discretion, to reject at any time, any or all proposals and to withdraw this RFP without notice. The Zoo reserves the right to waive compliance with and/or change any of the items of this request. The Zoo reserves and may exercise the following rights and options with respect to this selection process: to request some or all of the design firms to provide additional material, clarification, confirmation, or modification of any information in the submission; to supplement, amend, substitute, or otherwise modify this RFP any time prior to selection of one or more firms for negotiation, and to cancel this RFP with or without issuing another RFP; to request that some or all of the design firms modify proposals based on the review of all proposals; to terminate any negotiations at any time; to accept or reject at any time prior to the execution of a professional services contractual agreement all submissions and/or to withdraw the RFP without notice; to expressly waive any defect or technicality in any proposal; to solicit new proposals; to negotiate contract fee based on milestone payments; to assign any or all of the finalized and executed contract to a third party.

INFORMATION PROVIDED BY FIRMS

The Zoo's receipt or discussion of any information (including information contained in a proposal, ideas, models, drawings, or other material communicated or exhibited) does not impose any obligations whatsoever on the Zoo or entitle the firm or any other person or entity to any compensation therefore. Any such information given to the Zoo before, with or after the submission of a proposal, either orally or in writing, is not given in confidence and may be used, or disclosed to others, for any purpose at any time, without obligation or compensation, and without liability of any kind whatsoever. Any statement which is inconsistent with the terms of this paragraph shall be void and of no effect. The provisions of this paragraph are not intended, however, to grant to the Zoo rights to use anything which is the subject of valid existing or potential letters of patent or which is copyrighted, nor are they intended to permit the Zoo to commercially appropriate images. Liability: The Zoo shall not be liable to any firm or to

any third party for any claims or damages occasioned by the solicitation, rejection, negotiation or selection of proposals regarding this requirement. Each firm or other respondent agrees to bear all costs of its response and participation in the process described in this RFP; there shall be no reimbursement for any costs relating to the preparation of responses or proposals in connection with this process.

In the event that the Zoo becomes aware of any material misrepresentation in the information supplied by a firm, the Zoo shall have the right to reject at any time the proposal of the firm, to refuse to negotiate or continue negotiations with the firm and to take any other action, including retaining any deposit made by the firm, as shall be deemed appropriate by the Zoo, in its sole discretion.

The Zoo reserves the right to request, at any time in the selection process, such additional information or materials as it may deem useful or appropriate to evaluate each firm's qualifications and past experience. Submission of a proposal shall constitute the firm's permission to the Zoo to make such inquiries concerning the firm and members of the team as the Zoo, in its sole discretion, deems useful or appropriate.

INSURANCE REQUIREMENTS

Agreement Exhibit

Endorsements:

General Liability:

- List Zoological Society of Philadelphia, Philadelphia Zoo as an additional insured on a primary and non-contributory basis, including ongoing and completed operations
- Waiver of subrogation in favor, and loss payee listed in the name, of: Zoological Society of Philadelphia, Philadelphia Zoo
- 30 days notice of cancellation from the carrier to Zoological Society of Philadelphia
- Per project aggregate
- There must not be any limitation or exclusion of coverage for Pennsylvania labor law applicable for the insured and for additional insured's

Auto:

- List Zoological Society of Philadelphia, Philadelphia Zoo as an additional insured on a primary and non-contributory basis.

- Waiver of subrogation in favor, and loss payee listed in the name, of: Zoological Society of Philadelphia, Philadelphia Zoo
- 30 days notice of cancellation from the carrier to Zoological Society of Philadelphia

Umbrella:

- 30 days notice of cancellation from the carrier to Zoological Society of Philadelphia
- There must not be any limitation or exclusion of coverage for Pennsylvania Labor Law which applies for the insured and for additional insured's

Workers Comp:

- Waiver of subrogation in favor, and loss payee listed in the name, of: Zoological Society of Philadelphia, Philadelphia Zoo
- 30 days notice of cancellation from the carrier to Zoological Society of Philadelphia

Supplier Additional Requirements:

- All risk coverage for property in transit and, if applicable, ocean cargo coverage)

Installation Additional Requirements:

- Installation floater coverage

Limits:

- General Liability:**
 - \$1,000,000 per occurrence
 - \$2,000,000 aggregate
 - \$1,000,000 personal injury
 - \$2,000,000 products/completed operations aggregate
 - \$1,000,000 contractual
 - \$500,000 legal liability
 - \$5,000 medical payments

Auto:

- \$1,000,000 CSL for bodily injury and property damage

Umbrella:

- \$2,000,000 per occurrence
- \$5,000,000 aggregate

Workers Comp:

- Statutory

Proof of Insurance:

- Lessee shall furnish Philadelphia Zoo with original Certificates of Insurance evidencing the required coverage to be in force during the term of this Agreement and renewal Certificates of Insurance if the coverages have an expiration or renewal date occurring during the term of this Agreement. Lessee shall provide thirty (30) calendar days prior written notice to Philadelphia Zoo in the event coverage is substantially changed, canceled, or non-renewed.

RFP

PHILADELPHIA ZOO

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