

Village of Cottage Grove  
Meeting

Notice of Public

## COMMUNITY DEVELOPMENT AUTHORITY

Monday, March 9, 2020  
Hall

5:30 p.m.

Village

221 E Cottage

Grove Rd.

1. Call To Order
2. Determination Of Quorum And That The Agenda Was Properly Posted.
3. PUBLIC APPEARANCES- Public's Opportunity To Speak About Any Subject That Is Not A Specific Agenda Item.
4. Discuss And Consider Approval Of Minutes Of The February 10, 2020 CDA Meeting.

Documents:

[2-10-2020 CDA MINUTES.PDF](#)

5. Presentation By Greywolf Regarding TID 10 Master Plan.
6. Discuss Marketing Project.

Documents:

[CDA\\_MARKETING\\_2020-03-05.PDF](#)  
[KAUKAUNA WI.PDF](#)  
[SHOREWOOD WI.PDF](#)  
[WAUSAU WI.PDF](#)

7. Future Agenda Items
8. Adjournment

This agenda has been prepared by Staff and approved by the Chair of the Community Development Authority for use at the meeting as listed above. Any item on the agenda is subject to final action. Notice: Persons needing special accommodations should call 608-839-4704 at least 24 hours prior to the meeting. It is possible that members of and possibly a quorum of members of other governmental bodies may be in attendance at the above stated meeting to gather information; no action will be taken by any governmental body at the above-stated meeting other than the governmental body specifically referred to above in this notice.

**VILLAGE OF COTTAGE GROVE  
COMMUNITY DEVELOPMENT AUTHORITY  
Monday, February 10, 2020**

**MINUTES**

**1. Call to order**

The February 10, 2020 regular meeting of the Community Development Authority was called to order at 5:31 p.m. by Lennberg.

**2. Determination of quorum and that the agenda was properly posted.**

It was determined that there was a quorum of members present and that the agenda was properly posted. In attendance were Jeff Lennberg, Mike Elder, Mike Millage, Jerrud Rossing, Kim Sale, Sarah Valencia. Absent and excused was John Hogan. Also, in attendance were Planning Director Erin Ruth, Village Clerk Lisa Kalata, and Kyle Adams from Ruedebusch.

**3. PUBLIC APPEARANCES – *Public’s opportunity to speak about any subject that is not a specific agenda item.***  
None

**4. Discuss and Consider approval of minutes of the January 13, 2020 CDA meeting.**

**Motion** by Valencia to approve the minutes from the January 13, 2020, seconded by Sale. **Motion** carried with a voice vote of 6-0-0.

**5. Discuss marketing project.**

Ruth explained the staff report in the packet, as this is a continued discussion from previous meetings. Ruth provided a matrix showing the different ways in which the marketing could look like with different products. The board agreed that it was a very complete presentation and they will continue to work toward the end goal.

**6. Discuss and consider participating in the CGI Community Video Program.**

Ruth explained that CGI had done the current videos that are the Village website and they are looking to do updated videos which would be no cost to the Village, however they would call local businesses to see if they would sponsor the videos. Valencia questioned if they should wait on the project until they have a better idea of how they want to market Cottage Grove. Sale questioned if the Village could do the calling for sponsors to help offset the cost of the marketing initiatives. Motion by Lennberg to table item six until the next meeting, seconded by Valencia. Motion carried with a voice vote of 6-0-0.

**7. Discuss and consider advertising in the Dane Buy Local Guide.**

Ruth explained that this was passed along from the Chamber and they thought this may be of interest to the committee. Ruth also indicated that he did review the previous issues and did not see other municipalities that advertise, so he is not sure that this would be hitting the right market. Lennberg questioned if there are other Chambers advertising in the guide, which Rossing indicated that he did not see other chambers in the guide. Elder indicated he did not know where the Village would fit into the index. **Motion** by Rossing to not participate this year and revisit next year, seconded by Sale. **Motion** carried with a voice vote of 6-0-0.

**8. Future agenda items**

Marketing, CGI Videos

**10. Adjournment**

**Motion** by Valencia to adjourn at 5:50 pm, seconded by Elder. Motion carried with a voice vote of 6-0-0.

**Lisa Kalata, Clerk  
Village of Cottage Grove  
Approved:**

**These minutes represent the general subject matter discussed in this meeting but do not reflect a verbatim documentation of the subjects and conversations that took place.**



# CDA STAFF REPORT

**MEMO DATE:** March 5, 2020  
**MEETING DATE:** **MARCH 9, 2020**

**TO:** Village of Cottage Grove Community Development Authority  
**CC:** Matt Giese – Village Administrator

**FROM:** [Erin Ruth, AICP – Village Planning Director](#)

**RE:** **Marketing Program Discussion**

## OVERVIEW

The CDA has been establishing the goals and focus points of a potential marketing campaign. As discussed at the last meeting, staff is presenting examples of requests for proposals (RFP) from municipalities for similar services. Three examples are attached from the City of Kaukauna, Village of Shorewood, and City of Wausau.

The three RFPs represent three rather different approaches. Wausau's RFP is two pages long, and it sets a budget of \$15,000 and essentially asks responders to describe what they could do with those funds. At the other extreme, the 10 page Shorewood RFP includes a number of very specific tasks with estimated hours attached to each. Kaukauna's RFP lies somewhere in between by providing general direction while allowing some flexibility in approach.

## STAFF RECOMMENDATION

Staff is seeking feedback on which approach would be most appropriate for the Village in addressing its marketing needs.



**Request for Proposal**  
**Municipal Marketing and Branding Initiative**

Issue Date: October 14, 2019

Due Date: November 6, 2019

Submit To: Robert Jakel, AICP

Director of Planning and Community Development

[planning@kaukauna-wi.org](mailto:planning@kaukauna-wi.org)

[www.cityofkaukauna.com](http://www.cityofkaukauna.com)

## **PURPOSE OF RFP**

The purpose of this Request for Proposal (RFP) is to solicit proposals to establish a lump sum contract through competitive negotiation with a qualified consulting firm with solid experience in marketing research (both quantitative and qualitative), message/positioning development, and municipal identity/branding including development of a brand values statement; logo development and associated graphic standards; and recommendations for brand rollout through social media marketing as well as traditional marketing.

The City of Kaukauna is seeking the development of a comprehensive brand marketing campaign to drive business attraction and retention, energize current residents and position the municipality as a desirable place for relocation, and enhance general perception.

## **SPECIFICATIONS OF RFP**

### **A. PURPOSE**

1. The City of Kaukauna requests proposals by qualified firms to research, create, and develop an implementation plan for a community branding initiative for the City of Kaukauna. Responses to this Request for Proposal (RFP) will provide the City with the information required to assess, evaluate, and select a consultant based on prior experience, qualification, methodology and approach, and work performed in similarly sized communities. It is important to note that this is a community branding initiative, but that the brand will be used primarily as an identity for the City of Kaukauna.
2. The primary goals/objectives to be achieved by the branding initiative include, but are not limited to:
  - a. Uniformity – The brand should convey a common message and image to audiences both within and outside the City of Kaukauna. A defined message that will market the City of Kaukauna locally, statewide, nationally and internationally as a great place to live, work, shop, and do business; a community historically focused on sustainability and conservation; the right place for development, redevelopment and investment; the perfect mix for a business-friendly community.
  - b. Community Identity/Pride – Identify and promote what makes the City of Kaukauna distinct and appealing in a regionally competitive environment for investors, businesses, retailers, visitors, and residents.
  - c. Community and Economic Development Promotion – Promote a healthy economy, attract private investment, new residents and young professionals, and retain key businesses and creative talent.
  - d. Flexibility – The brand must be flexible and adaptable in order to meet the needs of a variety of departments and municipal functions within the City, as well as

groups and businesses within the City in their specific marketing initiatives, while maintaining consistency with their overall brand. It must also be flexible enough to grow and evolve along with any changes in the market.

- e. Endorsement – The brand must be authentic and resonate with community leadership in the City of Kaukauna and with business leadership in the greater Fox Cities area.

## **ELIGIBILITY**

1. The consultant should specialize in project management, research, marketing, and creative design as it relates to the development of a community brand. To be eligible to respond to the RFP, the consultant must demonstrate that it is a firm with significant experience with community branding initiatives. Priority will be given to those firms that have experience with local governments in this type of work.
2. The City of Kaukauna desires to issue a contract to a single qualified consultant to lead the project. Consulting proposals based on a consortium approach where more than one firm will provide support within a consulting team are acceptable with a single project manager point of contact.

## **SCOPE OF WORK**

Project Management – The consultant will lead all aspects of the City of Kaukauna community marketing and branding initiative, including the following:

1. Advisory to the Steering Committee (to be determined) – This team will be composed of representatives from the City and community (business) leaders. Meetings throughout the process will be required.
2. Lead for facilitating various focus groups comprised of community leadership and business owners to determine existing attitudes, perceptions, opportunities and challenges to enhancing the City's image.
3. Facilitator during the research process and/or testing of the new brand – Include descriptions of community engagement efforts that will take place during this process. The consultant will be expected to employ creative means of public involvement to ensure that community leaders and the business community are aware of and involved in the project.
4. Research – Research will be the basis for the development of a brand concept, creative elements, messaging/positioning and the overall brand initiative. The consultant will create and implement a brand research plan, which will include qualitative and quantitative research with key publics to identify the following:
  - a. The key elements of the City of Kaukauna.
  - b. Analysis of competitor marketing strategies.

- c. Measures that will be used to determine if the branding effort is successful.
5. Strategic Plan – The consultant will develop strategic objectives that will help better inform the City of Kaukauna on implementation, management and ongoing promotion of the brand to include, but not be limited to the following:
  - a. Promotion of the use of the brand among City of Kaukauna departments.
  - b. Maintenance and consistency of brand image and messaging while providing suitable flexibility for the target audiences of the participating agencies.
  - c. Recommendations of ways to articulate the brand; define markets and promotional avenues; and advise on strategies to better promote and create brand awareness.
6. Creative/Development of Brand – The consultant will develop creative elements that include design concepts, logos, messages, brand statement, tagline, and other products to support the overall brand initiative. A minimum of three distinct creative options must be presented, based on the results of the research. The selected logo design will be delivered, with the final option delivered with a style manual and guidelines for use and the capability of use in the following
  - a. Print and electronic advertising
  - b. Website design
  - c. Media placement
  - d. Public relations
  - e. Events
  - f. Templates
7. Implementation Plan – The consultant will develop an action plan for implementation of the brand in sufficient detail to allow Steering Committee to understand the approach and work plan. An Action Plan should include, but not be limited to the following:
  - a. Estimated costs/budget associated with the implementation process.
  - b. Proposed timelines for development of creative elements.
  - c. Recommended positioning logo and brand guidelines.
  - d. Implementation plans for brand identity applications and brand identity maintenance plan.

## **SPECIFIC PROPOSAL PREPARATION INSTRUCTIONS**

Proposals should be as thorough and detailed as possible so that the City may properly evaluate the capabilities of the firm to provide the required Services and Results.

The Firm shall submit one (1) electronic copy by email to [planning@kaukauna-wi.org](mailto:planning@kaukauna-wi.org), or by emailing a link to a file sharing platform. Please do not send hard (paper) copies by mail.

1. A description of the firm's capabilities and experience conducting similar plans. Include a description of the firm, its organizational structure, location of the principal office and the location of the office that would manage this project.

2. A summary of professional qualifications and experience of the individuals the firm would assign to the project and their individual project responsibilities. Indicate whether these individuals have worked together on previous projects. Indicate each individual's current commitment, availability to start this project in Q1 2020 and percentage of time that they will be assigned to complete their project tasks on this job.
3. Specific plans or methodology to be used to perform the services with timeline proposed for each phase of the project. Include a description of community engagement efforts included and deliverables proposed.
4. Estimated timeline for completion through implementation.
5. References (names and contact information) for clients for which the firm performed projects of a similar type and size within the last five years. Describe in detail, each projects outcome and the process your firm used to achieve those outcomes. Reference letters are recommended.
6. A work sample of a completed project(s) that is representative of the work proposed for the City.
7. Proposal Lump Sum Fee (not-to-exceed) for this project. Provide a detailed cost for each phase of the project, including but not limited to, the number of meetings with stakeholders, travel expenses, and document production costs.
8. Proposed engagement agreement with terms and conditions.

## **EVALUATION CRITERIA**

Proposals will be evaluated by the City using the following criteria:

1. Qualifications and experience of the firm and individuals to be assigned to this project in providing requested services.
2. Specific plans or methodology to be used to perform the services.
3. Reference letters from other clients.
4. Quality of illustrative examples.
5. Proposed Lump Sum Fee.
6. All qualified submissions received by the deadline will be analyzed by the City according to the criteria outlined in this RFP. Failure to comply with the provisions of the RFP may cause a proposal to be rejected.
7. The City reserves the right to (a) accept or reject any/or all submissions of proposals; (b) to waive any irregularity, technicality, informality or discrepancy in a proposal; (c) accept any alternative submission of proposals presented, which in its opinion, would best serve the interests of the City; (d) give full and proper evaluation of the Vendor or team presenting the proposal.
8. The City shall be the sole judge of the proposals, and the resulting negotiated agreement that is in its best interest, and its decision shall be final.



**Village of Shorewood,  
Wisconsin**

**Request for Proposal  
2017 Marketing & Communication Services**

Date of Issue: Monday, December 19, 2016

Proposals must be received by: Friday, 4:30 p.m. CST, January 20, 2017

# **VILLAGE OF SHOREWOOD REQUEST FOR PROPOSALS**

## **I. PURPOSE**

The Village of Shorewood is requesting proposals for 2017 marketing and communication services.

There is no expressed nor any implied obligation for the Village to reimburse responding firms for any expenses incurred in preparing proposals in response to this request. During the evaluation process, the Village reserves the right, where it may serve the Village's best interests, to request additional information or clarification from proposers, or to allow corrections of errors or omissions. At the discretion of the Village, firms submitting proposals may be requested to make oral presentations as part of the evaluation process.

The Village Board secured funding for the Village's 2017 marketing and communication services through the adoption of the 2017 budget. The marketing partners collaborated with the Marketing and Communications Advisory and Leadership Committees to formulate a 2017 marketing and communication operational plan to execute several of the tasks for the program. No subcontracting will be permitted, unless agreed to with all partners involved in the marketing collaboration prior to execution of the contract.

## **II. INFORMATION ABOUT THE VILLAGE AND INTRODUCTION**

The Village of Shorewood, incorporated in 1900, is a border suburb of Milwaukee located between Lake Michigan and the Milwaukee River. Today, the community is a fully developed community of approximately 13,100 people. It covers an area of approximately 1.6 square miles making Shorewood the most densely populated community in the State of Wisconsin.

The community is primarily residential with a diverse mixture of single-family homes, duplexes and apartments. The community boasts a revitalized and vibrant business district centered on the main streets of North Oakland Avenue and East Capitol Drive. There is no industrial development within the community. Open space and parkland comprise approximately 130 acres or 13% of the community's land area.

The Village of Shorewood, the Shorewood School District, and the Shorewood Business Improvement District (BID) decided starting in 2006 to collaborate on marketing and communication services in order to produce service efficiencies along with assuring consistent and streamlined branding and marketing practices throughout the Village. The partners involved in the collaboration worked with the new marketing team on creating Shorewood's branding standards, marketing objectives, targeted audiences, and positioning statement, and incorporating these principles into the marketing materials and events that promote Shorewood. A group of residents along with partner representatives work on the Marketing and Communications Advisory Committee (MAC) to provide guidance and direction on day-to-day marketing and communication activities. The Marketing and Communications Leadership Committee (MLC)

meets periodically to offer a vision towards the annual marketing and communication operational plan, review significant metrics indicating the performance of the marketing and communication activities, and approve annual contract(s) impacting the community's marketing and communication efforts.

Shorewood's marketing and communication objectives include:

- **Awareness.** Increase awareness of our high quality schools, positive lifestyle and community, vibrant businesses and open, accessible government services to advance the reputation of the Shorewood community.
- **Engagement.** Attract new businesses and residents to move to Shorewood in order to increase demand for homes, maintain student enrollment, and increase diversification of businesses.
- **Advocacy.** Contribute to the vitality of Shorewood through investment of citizen and business time, treasure and talents, including: Philanthropy, Ambassadorship, Home and building improvements, and Community volunteerism.

The following positioning statement was created as a short description of how the key stakeholders want people inside and outside of Shorewood to perceive the community:

“Shorewood is a safe close-knit community with an exceptional blend of big-city amenities, small-town accessibility and a nationally ranked school district. Shorewood's lakefront location, historic architecture and fresh, pedestrian-friendly streetscapes – along with desirable housing options, well-maintained parks and a vibrant business district – attract residents and visitors of all ages and stages of life.”

The following are three significant target audiences of our marketing and communication program:

- Current residents and businesses
- Prospective residents and businesses
- Influencers to residents and businesses including realtors, media, alumni, corporate recruiters and larger employers

After completing a marketing summit in October 2016 with all the partners involved in the marketing and communications program, the positioning statement, target audiences, taglines, and messaging strategies are in the process of being re-evaluated. The partners along with the MAC and MLC are working together to update these important marketing aspects and reflect any changes in the 2017 marketing and communication activities.

### III. SCOPE OF WORK

There are a number of deliverables that need to be completed for the 2017 marketing and communication plan. The following table outlines each of the deliverables and includes a short description, estimated number of hours needed to complete the activity, and other community partners involved in the deliverable. The Village is asking all parties to identify which of the following deliverables they are able to perform. More direction on proposal requirements is included in the next section.

**STRATEGIC PLANNING** – The following deliverables must be coordinated and executed by the same individual and/or entity.

<b>Deliverables</b>	<b>Description</b>	<b>Estimated # of 2017 Hours</b>
Coordination of Strategic Planning and Brand Strategies	The marketing team will meet monthly for 1-2 hours to discuss the execution of brand strategies as recommended from the Marketing Summit. Contractors will be awarded bids for other deliverables included in the marketing program will be asked to attend these meetings in order to be updated on marketing projects and develop monthly priorities with other team members.	40
Develop 2018 Marketing and Communications Plan	Contractor collaborates with partners to create the 2018 Marketing and Communications Plan starting in June 2017.	80

**WEBSITE STRATEGY** – The following deliverables must be coordinated and executed by the same individual and/or entity.

<b>Deliverables</b>	<b>Description</b>	<b>Estimated # of 2017 Hours</b>
Paid Media Advertising	Contractor works with partners to execute paid media advertising with an emphasis on co-op and digital strategies (i.e. learning key words on search engines, digital banners).	50
Website and Digital Management	Partners update their website and digital content as the consultant provides guidance and recommendations to partners to assure brand strategies and best practices are used effectively.	25

**ONLINE & MEDIA COMMUNICATIONS** – The following deliverables must be coordinated and executed by the same individual and/or entity.

<b>Deliverables</b>	<b>Description</b>	<b>Estimated # of 2017 Hours</b>
Social Media	The contractor posts content for only large events as requested by the partners that market Shorewood. All partners administer one or more social media platforms. Partners post content to residents for communication and awareness purposes.	40
Public Relations	Contractor performs public relations through press releases sent out to TV and radio stations and newspapers; stories will be about significant Village items that impact residents, business owners and visitors to improve awareness and advocacy of particular events and news.	150

<b>PRINT COLLATERAL</b> – The following deliverables must be coordinated and executed by the same individual and/or entity.		
<b>Deliverables</b>	<b>Description</b>	<b>Estimated # of 2017 Hours</b>
Print Collateral and Communicating Other Initiatives	To increase awareness about Shorewood (i.e. Why Shorewood booklet), the contractor refreshes or creates print collateral for events, including content writing and design work. Only consider cost of time, not printing costs.	110
<b>COMMUNITY EVENTS</b> – The following events must be coordinated and executed by the same individual and/or entity.		
<b>Deliverables</b>	<b>Description</b>	<b>Estimated # of 2017 Hours</b>
Fourth of July	Contractor coordinates event with two major sponsors and potentially performs fundraising activities. Contractor coordinates Oakland Ave. parade by lining up parade participants along with coordinating the Atwater Park festivities before the fireworks, (President’s introduction speech, recognition of the groups and people involved, musical entertainment, other entertainment for kids and families, etc.)	120 (no fundraising) 240 (with fundraising)
Summer Concert Series	Contractor produces four concerts in July and August to bring the community together and enjoy music in Hubbard Park and/or other Village venues. Contractor produces marketing materials, schedules bands, and available for the setup and execution the day of the event to handle logistical issues. Fundraising will need to be completed in order to fully finance the concert series.	100
Other Community Building Events	Contractor coordinates events established with the MAC/MLC to meet marketing objectives. Some current events include: <ul style="list-style-type: none"> <li>• <b>Welcome New Neighbors</b> – 2 hour quarterly meetings to introduce new residents to Shorewood</li> <li>• <b>Realtors Open House</b> – meetings with realtors in the area to provide materials and information to market Shorewood</li> <li>• <b>Developers and Commercial Realtors Event</b> – coordinate event to inform developers of business opportunities in Shorewood</li> </ul> Additional funds budgeted for contractor to work with staff to create additional events for any of the listed marketing target audiences.	175  (This estimate includes time for additional events based on other concepts from consultant.)

#### **IV. PROPOSAL REQUIREMENTS**

The proposal should provide a concise description of the proposer's capabilities to satisfy the requirements for each deliverable specified in the Scope of Work. If your firm cannot fulfill a requirement, please include a section that explains why and how you can still provide this service adequately.

While additional information may be presented, the items listed in Scope of Work must be completely addressed in your proposal.

Submit an electronic copy in PDF via email to [tburkart@villageofshorewood.org](mailto:tburkart@villageofshorewood.org).

The proposal should include the following:

1. **Title Page:** Title page must include the request for proposal's subject; the company's name; the name, address and telephone number of the contact person; and the date of the proposal.
2. **Table of Contents**
3. **Transmittal Letter:** A signed letter of transmittal briefly stating the proposer's understanding of the services to be provided, the commitment to perform the services, a statement why the proposer believes itself to be best qualified to provide web design and CMS services to the Village of Shorewood and a statement that the proposal is a firm and irrevocable offer for year stated in the RFP.
4. **Detailed Proposal:** The detailed proposal must address all deliverables set forth in the Scope of work of this request for proposal.
5. **Cost Proposal**
6. **References**
7. **Proof of Insurance**
8. **Sample Agreement**

#### **V. PROJECTED SCHEDULE OF EVENTS**

Issue Request for Proposals	December 19, 2016
Scope Definition Meeting with Staff	January 3 – 10, 2017
Proposals Due (4:30 PM CST)	January 20, 2017
Review of Proposals (estimated)	January 23 – 30, 2017
Approval by MAC and MLC	January 30 – February 10, 2017
Approval by Village Board (estimated)	February 20, 2017

#### **VI. COST PROPOSAL**

Please See Attachment A

## **VII. FIRM QUALIFICATIONS AND EXPERIENCES**

Please provide:

1. Recent examples of your work, preferably from municipal governments.
2. Contact information for follow-up questions
3. Brief information about your company's history, size, number of clients, organization and/or any other information that might aid us in the decision-making process.

## **VIII. REFERENCES**

Proposers are to provide the Village with at least **THREE (3)** references or customers utilizing your services that are similar to those requested. Wisconsin municipalities or entities are preferred. The Village may contact the references provided.

## **IX. EVALUATION PROCESS**

Proposals will be evaluated by a selection committee consisting of members of the marketing committees.

During the evaluation process, the selection committee may, at its discretion, request any one or all firms to make oral presentations. Such presentations will provide firms with an opportunity to answer any questions the committee(s) may have on a firm's proposal. Not all firms may be asked to make such oral presentations.

The selection committee will select the proposal which is judged to be the most responsive to the Village's requirements and based on ability and fee appears to be best able to serve the Village. The selection committee will present its recommendation to the Marketing Advisory Committee and the Marketing Leadership Committee. Both of these committees will review the recommendation from the selection committee and, if in agreement, make a recommendation for contract award to the Village Board. Award of the contract is approved by the Village Board.

## **X. EVALUATION CRITERIA**

The following represents the principal selection criteria which will be considered during the evaluation process:

- Does the consultant have the necessary resources and capacity to provide the marketing and communication services within specified time and quality?
- What is the quality of the consultant's marketing projects and services?
- Has the consultant performed marketing services at a similar size and scope?
- Does the consultant have the capability to provide future maintenance and service?
- Is the consultant responsive to bid document specifications?
- Does the consultant offer a competitive price?

- How has the consultant shown creativity in previous projects associated with marketing and communication activities?

## **XI. RIGHT TO REJECT**

The Village reserves the right to reject part of any and/or all proposals, waive formalities or to accept the proposal which best serves the interests of the Village.

## **XII. QUESTIONS AND INQUIRIES**

Questions and inquiries concerning this request for proposal should be directed to:

Tyler Burkart

Assistant Village Manager

414-847-2705

[tburkart@villageofshorewood.org](mailto:tburkart@villageofshorewood.org)

## Attachment A

The Firm or Person: \_\_\_\_\_ submits the following proposal:

The undersigned, on behalf of the Vendor, certifies: (1) this offer is made without previous understanding, conflict of interest, agreement or connection with any person, firm, or corporation making a quotation on the same project; (2) is in all respects fair and without collusion or fraud; (3) the person whose signature appears below is legally empowered to bind the firm in whose name the quotation is entered; (4) he/she has read the complete Request for Quotation and understands all provisions to perform the work required by the proposed purchase contract documents referred to therein (as altered, amended or modified by addenda); (5) if accepted by the Village, this quotation is guaranteed as written and will be implemented as stated; and (6) mistakes in writing of the submitted quotation will be the sole responsibility of the bidder.

Below is a list of deliverables incorporated in the 2017 marketing and communications program. Please list in your proposal as few or as many of the services you are willing to provide. If there is a deliverable you wish not to provide, please leave that item blank.

Based on the description, if you feel the number of hours need to be increased or decreased in order to effectively perform the deliverable, please include your adjusted estimate of hours in the below chart.

Deliverable	Person(s) Involved	# of Hours	Rate per hour	Total Cost
<b>STRATEGIC PLANNING</b> – The following deliverables must be coordinated and executed by the same individual and/or entity.				
Coordination of Strategic Planning and Brand Strategies				
Develop 2018 Marketing and Communications Plan				
<b>WEBSITE STRATEGY</b> – The following deliverables must be coordinated and executed by the same individual and/or entity.				
Paid Media and Advertising				
Website and Digital Management				
<b>ONLINE &amp; MEDIA COMMUNICATIONS</b> – The following deliverables must be coordinated and executed by the same individual and/or entity.				
Social Media				
Public Relations				
<b>PRINT COLLATERAL</b> – The following deliverables must be coordinated and executed by the same individual and/or entity.				
Print Collateral & Communicate Initiatives – Designer & Content Writer				

<b>Deliverable</b>	<b>Person(s) Involved</b>	<b># of Hours</b>	<b>Rate per hour</b>	<b>Total Cost</b>
<b>COMMUNITY EVENTS</b> – The following events must be coordinated and executed by the same individual and/or entity.				
Fourth of July (if fundraising is involved)				
Fourth of July (if fundraising is not involved)				
Summer Concert Series				
Other Community Building Events				
Total				

List some of the other concepts you have in regards to promotional events:

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List any other potential billable costs:

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\_\_\_\_\_  
Name (Print)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



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Office of the Mayor  
Robert B. Mielke

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TEL: (715) 261-6800  
FAX: (715) 261-6808

December 19, 2018

Dear Interested Parties,

The City of Wausau is pleased to request proposals for marketing and communications services to support redevelopment and community/economic development programs of the City in 2019.

This RFP is to select a firm(s) or organization(s) who may support a broad set of City activities including building awareness of City redevelopment projects, improving understanding of existing and new programs, building upon the existing wausome.org campaign, enhancing City social media and public outreach, leading strategic discussions, and assisting with initiatives which may result from these strategic discussions.

A final set of deliverables and contract amount will be determined based on the proposal and a work plan determined with the selected firm(s). The City's expected marketing budget for this effort for 2019 is approximately \$15,000.

Event	Date
1. RFP Released	December 19, 2018
2. Proposals for Services Due	January 25, 2019
4. Review of Proposals (tentative)	February 5, 2019

Questions and/or requests for additional information on the RFP and the City of Wausau should be submitted in writing by contacting:

Christian Schock, [christian.schock@ci.wausau.wi.us](mailto:christian.schock@ci.wausau.wi.us)

Sincerely,

Robert B. Mielke  
Mayor

## Proposal Requirements

1. **Summary:** Describe the professional qualifications and expertise in the field of strategic visioning, community involvement, social media, graphic communications, media engagement/purchasing/placement, and other general and community engagement marketing efforts.
2. **Approach:** What are some of the proposed ways you would assist the City in improving strategic communication, brand identity, and community involvement to support the City's development goals?

## Evaluation Criteria

Weighting of criteria is used by the City as a tool in selecting the best proposal. The City may change criteria and criteria weights at any time. Evaluation scores or rankings do not create any right or expectation of a contract award. Background checks and references may also be considered.

The following elements will be the primary considerations in evaluating all submitted proposals and in the selection of a marketing consultant (out of a total of 100):

*Proposer has a track record of developing successful strategic programs and supporting community efforts for a variety of clients- especially municipalities and nonprofit organizations.*

### **50 Points**

*Proposal presents potential approaches which are innovative, pragmatic and interesting ways to support the City's development goals and programs through marketing.*

### **50 Points**

## Submission Information

Proposals shall meet the following criteria:

1. Proposals shall be prepared on standard 8 1/2" X 11" letter-size paper;
2. Email digital copy of proposal to [christian.schock@ci.wausau.wi.us](mailto:christian.schock@ci.wausau.wi.us) by 4:30 p.m. on January 25, 2019.

The City of Wausau reserves the right to:

- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential proposer.
- Award a contract on the basis of initial offers received, without discussions or requests for best and final offers.
- Split the contract for marketing services among a variety of firm(s) based on their skills and expertise; and negotiate separate contracts for each.
- Negotiate a final work plan, deliverables and budget, which will be reviewed by the Economic Development Committee in consultation with the City administration and staff.