



**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.

Deliverables	Description	Estimated # of 2017 Hours
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.

Deliverables	Description	Estimated # of 2017 Hours
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.

Deliverables	Description	Estimated # of 2017 Hours
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

PRINT COLLATERAL – The following deliverables must be coordinated and executed by the same individual and/or entity.		
Deliverables	Description	Estimated # of 2017 Hours
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
COMMUNITY EVENTS – The following events must be coordinated and executed by the same individual and/or entity.		
Deliverables	Description	Estimated # of 2017 Hours
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"> • Welcome New Neighbors – 2 hour quarterly meetings to introduce new residents to Shorewood • Realtors Open House – meetings with realtors in the area to provide materials and information to market Shorewood • Developers and Commercial Realtors Event – coordinate event to inform developers of business opportunities in Shorewood 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.

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

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
STRATEGIC PLANNING – 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				
WEBSITE STRATEGY – The following deliverables must be coordinated and executed by the same individual and/or entity.				
Paid Media and Advertising				
Website and Digital Management				
ONLINE & MEDIA COMMUNICATIONS – The following deliverables must be coordinated and executed by the same individual and/or entity.				
Social Media				
Public Relations				
PRINT COLLATERAL – The following deliverables must be coordinated and executed by the same individual and/or entity.				
Print Collateral & Communicate Initiatives – Designer & Content Writer				

Deliverable	Person(s) Involved	# of Hours	Rate per hour	Total Cost
COMMUNITY EVENTS – 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:

List any other potential billable costs:

Name (Print)

Title

Signature

Date