

Staff Report

VISIONING/BRANDING OF AMES

January 25, 2011

Background

In August, the City Council approved a Request for Proposal (RFP) to seek a visioning consultant to lead the community through a process to address the Council goal: "Create and Promote a Community Vision." As part of selecting the consultant, a 14-member steering committee (Appendix, Item 1) was created representing different sectors of the community. The RFP was posted and distributed, and 10 proposals were received. The steering committee immediately began meeting to review proposals. By relying on evaluation criteria articulated in the RFP, the proposals were graded and discussed. The top three finalists were selected, and representatives of those agencies traveled to Ames at their own expense at the end of December to discuss their proposals.

The top three visioning specialists were Great Destination Strategies, of Seattle, Wash.; North Star Destination Strategies, of Nashville, Tenn.; and Brand Endeavor, of Marina del Ray, Calif. When responding to the City's RFP, the consultants were asked to develop a program which includes (1) the creation of a unifying vision for the community, and (2) the identification of a brand platform that could be used to promote the community. The RFP did not ask for a logos, tag lines, graphics, or a marketing plan. Steering Committee members heard representatives of the three firms explain their approach to visioning, branding, and the Ames project. **After careful consideration of each company's proposal, experience, and strengths, Brand Endeavor was identified as the committee's top choice.** Steering Committee members were impressed with company's background in both public and private sector work, including projects with cities and universities. In her presentation, Brand Endeavor President Christie Harper outlined a comprehensive strategy to interview community sector representatives, acquire "outsider" perspective of Ames, develop an online survey for resident input, and facilitate public input sessions.

In conducting the reference checks for Brand Endeavor, Rosemead, Calif., City Manager Jeff Allred shared, "I have been a city manager for 33 years, and I could not

be more impressed with Christie Harper ... She makes everyone feel like (he or she is) part of the process. When people showed up at public meetings and commented, she made them feel like they were part of the discussion." From Kelli Seeley, formerly with the Hollywood, Calif., Chamber of Commerce, "We interviewed a ton of companies before deciding on Brand Endeavor. For me, a lot of groups we interviewed seemed to already know the answer. They were not interested in the community, what other organizations thought, or what residents wanted. These other companies knew the answer and wanted to get us to their answer. Christie and her team weren't predisposed to a certain outcome. They took us through the process, and they went out and interviewed a lot of different groups to find the real answers."

Visioning vs. Branding

As part of the process of selecting a consultant, the steering committee learned from all three finalists about the differences between a community vision and a community brand. All three stressed that being clear about the definitions from the beginning is critical to a successful process and outcome.

Community **visioning** is a process that allows residents of a city to express what they value about where they live and develop consensus on what they would like to change. The process includes a realistic look at a community and focuses on long-range goals. The product of these discussions is a vision statement. The vision statement helps keep a community on track and guides it through the ups and downs of economic, social, and political change. Goals, projects, and marketing plans come and go, but a vision statement remains relevant for a significant period of time.

Community **branding** is the collection of perceptions among residents, businesses, organizations, and visitors about a city. Branding is the reputation of a community. It is what others think or say about a city when asked to express an opinion.

The Process – First Steps

The Brand Endeavor Visioning process is a 19-week program commencing with a kick-off meeting in Ames that would be scheduled immediately after contract approval. This

first phase, lasting 10 weeks, is considering the “discovery phase” and focuses on data collection and developing an insider and outsider perspective on the Ames community. Members of the current Steering Committee (and possibly others) would transition into the “Core Team,” identified as the group assisting Brand Endeavor throughout the entire program. One of the first tasks will be to finalize the identification of 15 Community Sector Representative Groups (or “Stakeholder Groups,” Appendix, Item 2). In small groups of up to three people, Brand Endeavor will conduct interviews with these representatives to identify opinions and insights on topics such as economic development, education, and quality of life issues. Brand Endeavor also would begin working on a SWOT analysis to provide insight and guidance through the process.

Research Tools

By the second week, Brand Endeavor will be reviewing existing research, strategic plans, documents, communications and the City’s website to understand current messaging, views, image, and opinion. They will also perform a peer/competitor analysis of five to six competitor communities. The consultants will be studying what differentiates Ames from other communities and how other communities position themselves. The peers could include other university communities, other Iowa cities, or Midwestern cities. Data collection from Ames residents will be user-friendly through the use of an online survey. With more than 90% of Ames residents and nearly 100% of Iowa State University students having Internet access at home, online surveys have the potential to reach huge portions of the population. To build on existing City resources, Brand Endeavor will provide questions to be included in our 2011 Resident Satisfaction Survey. Through the use of traditional methods such as comment cards and modern methods such as social media sites, it is the goal that all Ames residents are given the opportunity to get involved. Through a purchased research panel, individuals who live outside Ames will be surveyed to provide the “outsider” perspective on Ames. Outsider data will come from residents of eight major Iowa metropolitan statistical areas (MSAs).

First Report – 10 Weeks

At a return trip to Ames, approximately 10 weeks into the process, Brand Endeavor will report the results of the data-gathering efforts. A presentation will be made to the Core Team, and a second presentation will be given to the City Council. Brand Endeavor will solicit feedback on the findings and begin to build consensus on the direction of the

vision. From this point on, the process becomes one of presenting ideas, gathering feedback, refining the concepts, and reintroducing ideas. Armed with all the data, and augmented by the response of the City Council and Core Team, Brand Endeavor will continue its analysis and vision development.

Phase II

At approximately week 15, Brand Endeavor would return to Ames to facilitate public input sessions. These meetings provide the opportunity to present a summary of the data, recommendations, and lead a discussion regarding the implications of the vision and strategic platform. During the process, Brand Endeavor would illustrate how the vision and platform could be used to support various stakeholder groups within the community. Following the public input sessions, Brand Endeavor will provide insight into a branding strategy. Again, **Brand Endeavor will not be delivering a marketing plan or communications strategy, but will recommend areas of focus for next steps.**

The final trip to Ames for Brand Endeavor will be to present a refined vision and strategic platform to the City Council. This culmination of work will include the data analysis of previous research, as well as feedback attained from visits. However, the presentation will be delivered in a way allowing for final feedback. Brand Endeavor will take any final input and compile an electronic document as the last deliverable. There would not be another visit to Ames, but final discussion could take place via web conferencing or over the telephone.

Cost

In evaluating the RFPs, Steering Committee members considered each applicant's proposed process, presentation, creativity and experience, and ranked accordingly. It should be noted that Brand Endeavor's cost structure at \$78,500 (including travel), was in the middle of the final three. North Star's proposal was \$120,000 (plus travel) and Great Destination Strategies plan was \$52,150 (including travel). While the decision to recommend Brand Endeavor was not unanimous, all Steering Committee members in attendance agreed they were satisfied with the outcome. Through reviewing RFPs and interviewing consultants, the process has been informative and exciting. If the community supports and embraces a community visioning experience, the resulting

visioning statement could help unite Ames and encourage collaboration, partnership, and a shared sense of purpose.

CITY MANAGER'S RECOMMENDATION

Based on the input from the Steering Committee, it is the recommendation of the City Manager that the City Council approve the attached agreement with Brand Endeavor to perform the consulting services that will facilitate the accomplishment of one of the City Council's top goals to create and promote a community vision.

Appendix, Item 1

Visioning Consultant Selection Process Team

Name	Affiliation
Steve Schainker	City of Ames
Susan Gwiasda	City of Ames
Brian Dieter	Mary Greeley Medical Center
Jeff Johnson	ISU Alumni Association
Elizabeth Hoffman	ISU
Amy Schwager	ISU student
Tim Taylor	Ames Community School District
Jean Kresse	United Way
Julie Weeks	Ames Convention and Visitor's Bureau
John Klaus	AMOS
Dan Culhane	Ames Chamber of Commerce
Steve Malchow	ISU Athletics
Debbie Lee	Ames Citizen
Catherine Scott	Smart Growth

Appendix, Item 2

Community Sector Representatives (Stakeholder meetings)

Each group would be comprised of up to three people:

1. Business (Large/Industrial)
2. Business (Small/Med-sized/Retail)
3. Education (K-8)
4. Education (Ames High School)
5. Iowa State University (Administration)
6. Iowa State University (Students)
7. Iowa State University (Athletics)
8. Religious Community
9. Nonprofit Organizations
10. Social Services
11. Young Professionals
12. Senior Citizens
13. Health Care
14. Neighborhood Associations
15. Citizens at Large

AGREEMENT FOR CONSULTING SERVICES

THIS AGREEMENT is made and entered into as of the 25 of January, 2011, by and between the City of Ames, an Iowa Municipal Corporation, with offices located at Ames City Hall, Post Office Box 811, 515 Clark Avenue, Ames, Iowa 50010, hereinafter called "CITY", and Brand Endeavor, with offices located at 13836 Bora Bora Way, Suite 114, Marina del Ray, California, hereinafter called "CONSULTANT".

W I T N E S S E T H:

WHEREAS, the City desires to retain professional services for Visioning/Branding Services, and

WHEREAS, the Consultant represents that it is qualified to perform the services under this contract.

NOW, THEREFORE, and in consideration of mutual covenants hereinafter contained, it is mutually agreed between the parties as follows:

1. SCOPE OF WORK: The services to be performed by Consultant include preparation of documents or consultation on the items described in Exhibit "A", attached hereto and by this reference made a part hereof.
2. AMENDMENTS TO SCOPE OF WORK: There shall be no increase in the amount of payment, Scope of Work or Time of Performance as stated in this Agreement except by written amendment approved by the City.
3. CONSULTANT'S COMPENSATION AND METHOD OF PAYMENT: For the services listed below and described in Exhibit "A", Consultant shall be paid for the amount stated in Exhibit "A".
4. TIME OF PERFORMANCE: Subject to cooperation by the City as set forth in Paragraph 5 below, Consultant agrees that it will diligently and responsibly pursue the performance of the services required of it by this Agreement for completion on or before the timeline agreed upon in "Exhibit A."
5. COOPERATION BY CITY: All public information, data, reports, records, and maps as are existing, available to City as public records, and which are necessary for carrying out the work as outlined in the Scope of Services, shall be furnished to the Consultant without charge by the City. The City shall cooperate with the Consultant in every way possible to facilitate, without undue delay, the work to be performed under this Agreement, including turnaround of reviews and approvals.
6. DESIGNATED REPRESENTATIVES: The following individuals are hereby designated as representatives of City and Consultant respectively to act as liaison between parties:

CITY
Susan Gwiasda
Project Manager, City of Ames

CONSULTANT
Christie Harper
President, Brand Endeavor

Susan Gwiasda shall be the Project Manager in charge of monitoring performance by the Consultant, and shall be responsible for review of all work products prepared by Consultant. Any change in designated representatives shall be promptly reported to the other party in order to insure proper coordination.

7. STANDARDS OF PERFORMANCE. Consultant shall comply with all applicable laws, ordinances, and codes of the Federal, State and local governments while performing the services described herein in a good, skillful, and professional manner.
8. OWNERSHIP OF DOCUMENTS: All reports, files, drawings, and other material prepared under this Agreement shall become the property of the City upon full payment by the City to Consultant for same.
9. PERSONNEL AND ASSIGNMENT: Consultant represents that it has all personnel required to perform the services under this agreement. Consultant's personnel shall not be employed by, nor have any direct contractual relationship with the City. All services required hereunder shall be performed by Consultant, its employees or personnel under direct contract with Consultant. The Consultant shall not otherwise assign the performance of the Agreement nor any part thereof without the prior written consent of the City.
10. AUTHORITY OF CONSULTANT: Consultant shall be an independent contractor and, unless expressly authorized by the City, shall not incur or have the power to incur, any debt obligation, or liability whatever against the City, or bind the City in any manner. Consultant shall not disseminate any information or reports without the prior approval of the City in writing.
11. CONSULTANT'S ACCOUNTING RECORDS: Records of the Consultant's direct personnel, subconsultants, and reimbursable and other expenses pertaining to the work and records of accounts between City and consultants shall be kept on a generally recognized standard accounting basis and shall be available to City or its authorized representatives at mutually convenient times.
12. QUALITY: City has the final responsibility to review, proof or approve all Deliverables. Any Final Deliverables City does not reject in writing within 10 days after delivery by Consultant is deemed accepted by City "as is." Consultant makes no representation or warranty of merchantability or fitness for purpose of any Final Deliverables, nor does Consultant guarantee any level of profit, response or success for City based on Consultant's work. Consultant will correct, at its own expense, any properly rejected Final Deliverables, but only to the extent the rejection is based on Consultant's failure to meet written project specifications. Any other corrections or changes will be at City's additional expense at Consultant's prevailing rates for time and materials. Except as expressly specified in this paragraph, City's acceptance of

Final Deliverables is not a condition to its obligations to make timely payment of Consultant's invoices.

13. TERMINATION: Either party may terminate this Agreement, with cause, upon thirty (30) days written notice to the other. In the event of such termination, Consultant shall be compensated for all services performed and expenses incurred to the date of termination. Such compensation shall be paid within thirty (30) days of termination. In no event shall the amount due exceed the amount set forth in Exhibit "A". In the event of disagreement as to a portion of an amount claimed to be owed to the Consultant, the amount not in dispute shall be remitted promptly and the parties shall attempt to resolve their differences with respect to any remaining amounts.
14. NOTICE: Whenever it shall be necessary for either party to serve notice on the other respecting this Agreement, such notice shall be served by mail and email addressed to the City at: Ames City Hall, P.O. Box 811, 515 Clark Avenue, Ames, Iowa 50010, sgwiasda@city.ames.ia.us or to the Consultant at: Brand Endeavor, 13836 Bora Bora Way, Suite 114, Marina del Ray, California 90292, christie@brandendeavor.com, unless or until a different address may be furnished in writing by either party to the other, and such notice shall be deemed to have been served within seventy-two (72) hours after the same has been deposited in the United States Post Office, postage paid. This shall be valid and sufficient notice for all purposes.
15. CONFLICT OF INTEREST: Consultant represents and agrees the Consultant has not employed any person to solicit or procure this Agreement, and has not made, and will not make, any payment or any agreement for payment of any commission, percentage, brokerage, contingent fees, or other compensation in connection with the procurement of this Agreement.
16. INDEMNIFICATION: Neither party hereto shall be liable for any damages proximately resulting from the negligent or wrongful actions or omissions of the other party, employees, agents or contractors performing under this Agreement.
17. WORKER'S COMPENSATION: Consultant agrees to provide any necessary Worker's Compensation insurance, as may be required by law, at Consultant's own cost and expense for itself and any employees employed by Consultant. Consultant, and consulting agent and employees in the performance of this Agreement, shall act in an independent capacity and not as officers, employees, or agents of the City.
18. NON-DISCRIMINATION: During the performance of the Agreement, the Consultant shall not unlawfully discriminate against any employee or applicant for employment because of race, color, creed, religion, national origin, sex, sexual orientation, disability, or age. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship.

19. LIMITATION OF DAMAGES: NEITHER PARTY SHALL BE LIABLE FOR ANY CONSEQUENTIAL, SPECIAL, INDIRECT OR PUNITIVE DAMAGES ARISING OUT OF THIS AGREEMENT.
20. ATTORNEY'S FEES: In the event that either party brings a legal action to enforce its rights or seek any remedies under this Agreement or attached Exhibit, the prevailing party shall be entitled to recover from the other party all reasonable attorney's fees and costs which the prevailing party incurred in seeking legal counsel and pursuing the action.
21. ENTIRE AGREEMENT: This Agreement shall constitute the entire Agreement between the parties. This Agreement supersedes any and all prior negotiations, representation, or agreements, either written or oral, express or implied. Any amendments to or clarification necessary to this Agreement shall be in a writing executed by all parties to the Agreement.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed effective the day and year first set forth above.

CITY OF AMES, IOWA

CONSULTANT

By: _____

Ann H. Campbell, Mayor

Attest by:

Diane R. Voss, City Clerk

By: _____

Agreement for Consulting Services

EXHIBIT A**CITY OF AMES
VISIONING/BRANDING SERVICES
Statement of Work***January 20, 2011***Project Objective**

To establish a common vision and brand promise for Ames that:

- Provides a focus for city initiatives, including policy planning;
- Distinguishes Ames from its peers or competitors; and
- Directs future communications and marketing initiatives

It is imperative that the visioning/branding process considers and incorporates the views of a wide array of Ames stakeholders, including the “silent majority” citizens who do not usually participate in city affairs.

We recommend that you assign a Core Team for this project made up of individuals who will be critical to the project's success. The Core Team will provide input, review our work, and guide us as we move through this process. One person from the Core Team should be assigned to be our day-to-day contact. The 14-member steering committee that provided input during the vendor selection process represents a broad spectrum of interests throughout the city. This committee (or a sub-committee from this group) will be an ideal Core Team and will be critical for generating overall buy-in and consensus.

Phase 1: Discovery

Includes Project Tasks 1, 2 and 3 from your requested Scope of Work

A. Kickoff Meeting (Trip #1)

Brand Endeavor will facilitate a meeting with the Core Team in Ames to begin our immersion into the current state of the City's brand. We will solicit the team's opinions about the City's strengths, weaknesses, opportunities and threats (SWOT). We will discuss your stakeholder segments and the team's perception of their needs and request input about trends or other issues affecting Ames and its peers today. It will be critical to understand the short and long-term goals for various civic and community groups (e.g., tourism, talent attraction, infrastructure, economic growth, etc.). The “business objectives” of the city will not only guide the development of the vision, but also the future implementation plans - civic and marketing.

Additionally, we will facilitate a discussion about potential peers/competitors. The purpose will be to begin to define what parameters qualify a city as a competitor or peer and discuss cities that may fit the definition. We will also discuss the details of the online survey - reviewing methodology and confirming respondent groups and demographics. Finally, we will review our work plan and timetable to ensure that expectations are being met and efforts are properly aligned.

B. Stakeholder Interviews

We will conduct up to 15 individual or small group interviews with key stakeholders whose opinions and insights will contribute to the success of the project. These interviews will uncover stakeholder perceptions about the City's strengths and weaknesses, its position relative to competitors, the needs of key stakeholders, and opportunities for the City to evolve going forward. We will consult with you prior to the kickoff about how to configure the interviews, but they may involve small group discussions of education, economic development, safety, arts & culture, resident life, etc. We anticipate conducting these interviews in person on the same visit as our Kickoff Meeting, or by phone following the kickoff. When our interviews are complete, we will deliver a Word document containing "sanitized" (to protect interviewee confidentiality) notes from each of the interviews for Ames to refer to in the future.

As a further method of collecting input from the "silent majority," we will support the City of Ames' efforts to collect additional data from citizens, including:

- Providing up to 4 questions for the Resident Satisfaction Survey
- Developing limited survey questions and copy for "comment cards" to be distributed by City employees at various events and through schools
- Developing limited content for any marketing efforts the City may employ to attract citizens to various stakeholder meetings

C. Materials Review

We will review any existing research, strategic plans, or other documents you may have that would be relevant to our exploration. We will also review your existing communications and website to understand your current messaging to various audiences. We will rely on you to gather those materials. Finally, we will conduct secondary online research about the City and any relevant marketplace trends. As a further method of collecting input from the "silent majority," we will support the City of Ames' efforts to collect additional data from citizens, including:

D. Competitive/Peer Analysis

We will review the branding practices of 5-6 important peers/competitors to understand how they position themselves and how Ames might be able to distinguish itself among them. The parameters of your competition (university towns, research destinations, other Iowa/Midwestern cities) will be discussed in the kickoff and stakeholder interviews, and we will ultimately recommend a competitive set for this analysis. We will rely on you to gather any materials that we cannot easily obtain through public requests or online sources.

E. Online Survey

We will design and conduct an online survey among citizens (including the student population and neighbors of Ames.) A differentiating brand identity is ideally born from within, from the consistencies that exist in the perspectives of those who know and love you best. But, that "insider" perspective must be perceived as credible by outsiders to ensure that the brand is effective at driving business results – so we also need the perspective of Ames "outsiders."

Citizens (inclusive of the "silent majority") and students will provide the "insider" perspective. These individuals have chosen to live, work or to pursue their education within the city of Ames. They will be identified by zip code: 50010, 50011, 50012, 50013 and 50014 (or Story County).

Our neighbors will provide the “outsider” perspective. These are individuals who have chosen to live and work in Iowa, but who have been attracted to another major metro area other than Ames. In other words, they are perhaps the best combination of those who both mirror potential Ames prospects and those who are familiar enough with Ames to offer a valid perspective. Neighbors will be identified as residents from the 8 major MSAs of Iowa outside of Ames:

- Cedar Rapids, IA MSA
- Davenport, Moline, Rock Island, IA/IL MSA
- Des Moines, IA MSA
- Dubuque, IA MSA
- Iowa City, IA MSA
- Omaha, NE/IA MSA
- Sioux City, IA/NE/SD MSA
- Waterloo, Cedar Falls, MSA

We will drive traffic to the survey through three methods:

1. We will purchase and utilize an existing online research panel including people who live in Ames, Iowa and in one of the 8 additional metro areas defined above.
2. You will help supplement the “insider” segment with any citizen or student lists containing email addresses. We believe that the Core Team members may be particularly helpful in securing email address lists that may include local ISU alumni, faculty and staff, as well as employees of other larger employers in the area. If Core Team members do not want to turn over their proprietary email lists (although we will guarantee that the lists will be used for no other purpose than recruiting for this survey,) we can provide them with an email message that they can distribute themselves.

You will also print and mail a letter or postcard to your utility customer list directing participants to a URL link to the survey to ensure that the voice of the silent majority (those not actively participating in city council meetings, etc.) is included in the survey. There will be no additional hard costs for the research based on your supplemental participants – so we encourage you to be as aggressive as you can to capture a wide range of citizen opinions.

We will provide a field in the survey for respondents to indicate where they live in Ames in order to distinguish between respondents who live in incorporated versus unincorporated areas of the City.

3. Additionally, and if applicable, a redirect to the survey may be posted on any relevant city social network sites directed towards the citizens and/or students of Ames – Facebook and/or Twitter, for example.

We believe that this approach will yield the right combination of responsiveness and cost-effectiveness, and will include participation from a wide variety of citizens, not just those who normally participate in civic affairs.

Brand Endeavor will help facilitate as many completed surveys as possible given our sample resources. Because it will not impact data analysis time, there is no limit to the total number of completes we may collect. The final number will, however determine the statistical significance of the results. Naturally, the more completes, the richer the integrity of the data.

Note: We have run counts to help understand what may be expected in terms of the total number of survey completes. We can easily reach 300 completes among “outsiders” using the online panel. But, given the limited geography, we can expect the online purchased research panel to yield approximately 30 completes among those living in one of the five Ames city zip codes. Therefore, the ability to supplement respondents using names supplied by the city will be necessary if we are to analyze the insider (citizen) and outsider segments separately. And, if sample size permits, citizens and student opinions will be reviewed separately, as well.

The survey software we will utilize does not allow multiple responses from the same computer.

Brand Endeavor will:

- Develop the questionnaire (approximately 20 minutes in length,)
- Program, host, test and field the survey
- Acquire the sample
- Provide copy for any mailers/invites printed or distributed by the City of Ames or Core Team members
- Collect and analyze the data
- Prepare a final report complete with findings and implications that inform and direct the brand strategy
- Provide an excel file containing all of the raw data from the survey so the city may archive the results and refer to them in the future as needed

F. Online Survey Results, SWOT Analysis & Consensus Building (Trip #2)

F1. Core Team Presentation

We will present our findings to the Core Team at a meeting in Ames. The objective of this meeting will be to not only share the findings, but provide an assessment of those findings as they relate to the development of the City’s vision (brand core). Included will be a SWOT Analysis in the form of a summary chart, derived from our discovery in Steps A-E. The online survey results we will bring the objectivity required to build a foundation for consensus among your diverse stakeholder group.

F2. City Council Presentation

We will present the findings from the research (refined based on the Core Team feedback) to the Council. The objective will be to not only share the findings and provide an assessment of those findings but to solicit feedback and begin to build buy-in and consensus. We will conduct this presentation during the same trip as the Core Team presentation (Step F1.)

Phase 1 Deliverables:

- Kickoff meeting in Ames
- Up to 15 stakeholder interviews (same trip as kickoff or by phone) – findings presented in Phase 2, steps B, C and D
- Materials review – findings presented in Phase 2, steps B, C and D
- Analysis of 5-6 peers/competitors – findings presented in Phase 2, steps B, C and D
- SWOT Analysis
- Online survey – residents of Ames (insider view) and other Iowa cities (outsider view)
- Core Team and City Council Presentations of survey results

Phase 2: Analysis and Vision Development

Includes Project Tasks 4 and 5 from your requested Scope of Work

Our proposed process in Phase 2 is iterative – presenting to one group and then refining before presenting to the next. We have found that this method of incorporating feedback is reassuring to stakeholders and contributes significantly to consensus building and ultimate success.

A. Analysis and Development of Vision (Brand Core) and Strategic Platform

We will analyze the findings from Phase 1. Based on that analysis, we will develop a recommended vision and strategic platform for Ames. The strategic platform will include a clear articulation of the following:

- **WHO** we're for – the target audience
- **WHAT** we do – our core business
- **WHY** we do it – our vision/reason for being
- **HOW** we do it – the unique attributes that define our behavior
- **WHO** we are – our personality

Based on the strategic platform, we will draft a compelling 1-2 sentence Vision Statement (Brand Core) that will serve as the core idea upon which we will build the Ames brand. We will also demonstrate the real-world potential of the strategic platform in (2) before-and-after content examples (i.e., your website “about us” page or existing brochure copy).

Knowing how people think of Ames today and armed with a clear understanding of the equities and distinctions of the City (uncovered in Phase 1), we will clarify a unifying idea around which to rally city constituents to action.

B. Core Team Vision/Strategic Platform Presentation and Ideation (Trip #3)

In the first critical step towards building consensus among the core team, we will present the following to the team at a meeting in Ames:

- Brand 101 and the importance of a vision to the City of Ames
- A summary of the findings that led to our recommendations
- A clear explanation of the recommended strategic platform
- The vision statement (brand core) itself
- Before-and-after content examples
- An overview of next steps

After reviewing the recommendations, we will facilitate a one-hour work session to solicit feedback and ideas for implementation inspired by the vision and platform. We are interested in the Core Team's view on how they believe the vision can come to life throughout the city and beyond. These ideas will be incorporated as appropriate into the final recommendations presentation. We will conduct one round of refinement to the presentation based on the Core Team's feedback.

C. Citizen Workshops & Vision Extension (Trip #4)

To ensure both understanding and buy-in, we recommend presenting the findings and recommendations in two town-hall style citizen meetings over two days. As we did with the Core Team, we will present the recommendations and then facilitate a discussion regarding the implications of the vision (brand core) and strategic platform. We will illustrate how the vision and platform can be used to meet and support the needs of the various stakeholder groups within the city. We will also solicit feedback and ideas on how to extend the vision both today and in the future.

We will conduct one round of refinement based on any relevant feedback provided during the citizens meetings before presenting to the City Council.

Please note that we expect/recommend at least one member of the Core Team be a participant in the citizen workshops.

D. Brand Implementation Recommendations

Understanding that defining your vision (brand core) is a first step, we will recommend which initiatives should be the focus for implementation in your marketing/communications strategy. At this juncture, we will not be delivering a marketing plan or communications strategy, but rather will recommend key areas of focus as you embark on these important next steps.

E. Final Presentations (Trip #5)

We will summarize our findings from the citizen workshops and incorporate ideas into the final recommendations presentation. We will also include the Implementation Recommendations in this presentation.

E1. Core Team Presentation

We will make the Final Presentation to the Core Team at a meeting in Ames.

E2. City Council Presentation

We will present the Final Presentation (refined based on the Core Team feedback) to the Council. We will conduct this presentation during the same trip as the Core Team presentation (Step E1.) *Please note that we expect/recommend at least one member of the Core Team be a participant in the presentation to the City Council*

F. Final Refinement and Electronic Document

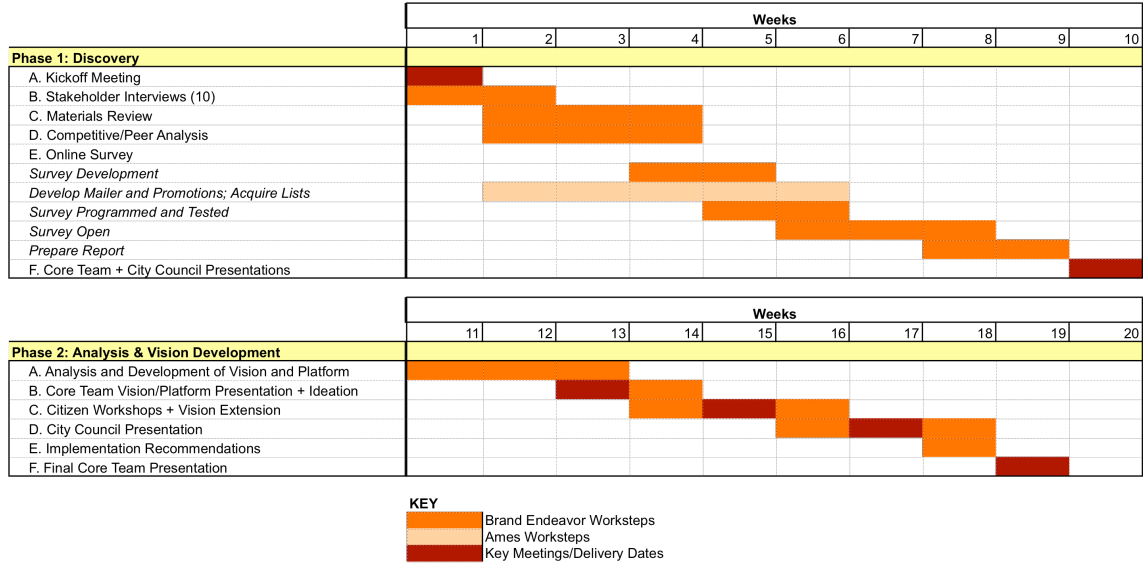
We will incorporate any feedback from the Core Team and City Council into a final PowerPoint document/presentation, which we will deliver electronically and review with you by web conference or phone.

Phase 2 Deliverables:

- Development of Vision (brand core) and Strategic Platform
- Core Team presentation and ideation in Ames
- 2 Citizen vision presentation and extension workshops in Ames
- Brand Implementation recommendations
- Final Presentations to Core Team and City Council in Ames
- 3 rounds of refinement following Core Team, Citizen and Final presentations
- Final electronic document incorporating all feedback

Project Schedule

Below is our proposed project schedule. Of course, the schedule is contingent upon the availability of the Core Team, Council and Citizens to participate in the proposed work steps, and may need to be adjusted accordingly.



Project Cost

Following is a summary of fees for each work step. Also included are fees for research hard costs and not-to-exceed estimates for travel and production. To the extent possible, we have minimized the size of the team that will travel to Ames in order to save on both travel time (billed at a half rate) and travel costs.

Work step	Fees
Phase 1: Discovery	\$28,000
A. Kickoff Meeting (Trip #1)	\$8,000
B. Stakeholder Interviews (up to 15)	\$3,000
C. Materials Review	\$800
D. Competitive/Peer Analysis (5-6)	\$800
E. Online Survey*	\$11,000
F. Online Survey Results Presentation (Trip #2)	\$4,400
Phase 2: Analysis and Vision Development	\$32,000
A. Analysis and Development of Vision and Strategic Platform	\$9,500
B. Core Team Vision/Strategic Platform Presentation and Ideation (Trip #3)	\$4,500
C. Citizen Workshops (2) & Vision Extension (Trip #4)	\$9,500
D. Brand Implementation Recommendations	\$2,500
E. Final Presentations to Core Team and City Council (Trip #5)	\$4,000
F. Final Refinement and Electronic Document	\$2,000
Total Fees	\$60,000
Research Hard Costs*	\$10,500
Not-to-Exceed Out-of-Pocket Expenses**	not to exceed \$8,000
Total Not-to-Exceed Project Cost	\$78,500

* Research Hard Costs cover the costs associated with conducting consumer research, such as data input, list acquisition, respondent incentives, translation services or focus group facility costs. These costs are not included in professional fees. Based on the research methodology proposed, these costs will be \$10,500 for 300 completed online surveys (20 minutes in length @ 80% incidence.)

** Out-of-Pocket Expenses include such items as document production, FedEx delivery, reference materials or travel expenses (including air, hotel, ground transportation and meals.) We anticipate that these expenses will not exceed \$8,000 based on an estimate of 9 total trips (spread across the 3 team members) at approximately \$800 per trip for air, hotel and meals. These expenses will be billed without a handling fee as they are incurred. We will do everything we can to minimize these costs.

Our fees will be billed upon the completion of each work step as shown above. All invoices are due within 14 days of the invoice date.