

AGENDA ITEM SUMMARY SHEET
VILLAGE COUNCIL MEETING
December 12, 2018

Agenda Item:

Village of Estero Branding and Roadway Monument Sign Contract Approval RFQ 2018-03

Description:

A Request for Qualifications RFQ 2018-03 was proffered by the Village for the engagement of a firm to provide professional services to develop a branding program with accompanying roadway monument signs. This process included the solicitation of Letters of Interest from firms, the short listing of a minimum of three firms by an evaluation committee, and the final ranking of firms by that committee following presentations by the short-listed firms.

On November 7, 2018, The Village Council approve the ranking of firms under RFQ 2018-03 and authorized the negotiation of a contract with the ranked firm in descending order to initiate the work. Contract negotiations have been completed with the number one ranked firm Frazer Enterprises Inc. DBA vitalink.

The proposed contract is split into six phase or tasks. Following is a brief summary of each.

Phase I: Research & Engagement – Consultant will gain an understanding of Estero and the current branding efforts. This will include extensive research, workshops and surveys.

Phase II: Visual & Brand Messaging – Provide brand alternatives and work with Council and community to refine concepts.

Phase III: Strategy – Work with Estero to define how to rebrand/market Estero.

Phase IV: Finalize & Launch – Create final brand and outline how it should be launched.

Phase V: Monument Sign Design/Permitting – Design and permitting of monument sign on up to two roadways.

Phase VI: Misc. Services – Additional services are they are requested by Estero

The estimated timeline for completion of the work is approximately 9-12 months from the date a contracted is executed.

Action Requested:

Approve the contract with Frazer Enterprises Inc. DBA vitalink for the Branding and Roadway Monument Sign project and authorize the Village Manager to execute the contract documents on behalf of the Village of Estero Council.

Financial Impacts:

Contract amount: Not to exceed \$129,420.

A total of \$131,000 was included in the Fiscal Year 2018/2019 project budget. Budget was provided under Monument Sign/Estero Branding, US-41 Monument Signs and Three Oaks Parkway Monuments Sign.

Attachments:

1. Contract
2. Ownership

ATTACHMENT 1

THIS AGREEMENT, is made and entered into this ___ day of _____ 20__ by and between the Village of Estero, a municipal corporation of the State of Florida, whose address is 9401 Corkscrew Palms Circle #101, Estero, Florida 33928, hereinafter referred to as the "Village," and Frazer Enterprises Inc. DBA vitalink whose address is 10809 Cokesbury Lane, Raleigh, NC 27614, hereinafter referred to as the "Consultant."

WITNESSETH

WHEREAS, the Village has determined that it is necessary to retain a Consultant for the purpose of providing a Branding and Roadway Monument Signs Program for the Village of Estero; and

WHEREAS, these services have been competitively bid in accordance with Ordinance 2015-06; and

WHEREAS, the Consultant is qualified, willing and able to provide and perform all such services in accordance with the terms and conditions of Village of Estero Bid No. RFQ 2018-03; and

WHEREAS, the Consultant was reviewed and selected pursuant to RFQ 2018-03 on December 12, 2018 by the Village Council; and

WHEREAS, the Village, has determined that it would be in the best interest of the Village to award a contract to Consultant for the rendering of those services described in the Scope of Services until the work is completed to the Village's requirements.

NOW, THEREFORE, the Village and the Consultant, in consideration of the mutual covenants contained herein, do agree as follows:

ARTICLE 1.

RECITALS & INCORPORATION OF DOCUMENTS

1.1. The above-stated recitals are incorporated by this reference and made part of this Agreement.

1.2 Village RFQ 2018-03, consisting of pages 1 through and including 22 and the Proposal submitted by Consultant dated August 30, 2018 are hereby specifically made part of this Agreement as if same had been set forth at length herein.

1.3 In the event of any conflict between the documents constituting this Agreement, the documents shall be given precedence in the following order:

- 1) RFQ 2018-03 and any Exhibits or Addenda thereto;
- 2) This Agreement and any Exhibits or Amendments thereto;
- 3) The Proposal submitted by Consultant.

ARTICLE 2.
CONSULTANT'S SCOPE OF SERVICES

2.1. Consultant agrees to perform all the services and provide all the materials requested and described in the Scope of Work which is attached hereto as Exhibit A and incorporated herein by this reference, which are hereinafter collectively referred to as the "Scope of Services."

2.2. Consultant agrees to provide its services and materials in the times allowed for performance contained in the Scope of Services. The Consultant will make no claims for additional compensation or damages owing to suspensions, delays, or hindrances which arise during the performance of this Agreement. Such suspensions, delays or hindrances may only be compensated for by an extension of time as the Village may decide. However, such extension will not operate as a waiver of any other rights of the Village.

2.3. In the event that Village desires Consultant to perform any additional services related to tasks not specifically contained in the Scope of Services, the Village Manager is authorized to approve such services based on the costs contained in Exhibit B provided the total amounts expended to do not exceed the limitation of paragraph 3.1.

ARTICLE 3.
COMPENSATION AND PAYMENT OF CONSULTANT'S SERVICES

3.1. Village will pay Consultant for those tasks listed in the Scope of Services actually performed by Consultant. The total payment to Consultant will not exceed \$129,420.00 for Consultant's services under this Agreement, performed in accordance with the Scope of Services and this Agreement.

3.2. Payment for services rendered by Consultant will be made on a monthly basis for those tasks listed completed in the preceding month. Services completed will be subject to review and approval by the Village Manager or his designee.

3.3 Payment for tasks will be on an hourly basis and not to exceed the amount shown in Exhibit B attached hereto.

3.4. Consultant must submit all billings for payment of services rendered on a monthly basis to the Village Finance Department (accountspayable@estero-fl.gov) for processing. Billings will be detailed as to the nature of the services performed and must refer to the specific tasks listed in the Scope of Services that were actually performed by Consultant. When hourly billing is utilized, Consultant must report the number of hours on each task in 6-minute increments (tenths of an hour) in its invoices. Billings must include a summary of any amounts previously billed and any credits for amounts previously paid.

3.5. Consultant acknowledges that each billing must be reviewed and approved by the Village Manager or his designee. Should the Village Manager or his designee, determine that the billing is not commensurate with services performed, work accomplished or hours expended, Consultant must adjust billing accordingly. However, Consultant will be entitled to payment of any portion of a billing not in dispute.

3.6. Village will pay Consultant's monthly billings in accordance with Sections 218.70 through 218.80, Florida Statutes, known as the Local Government Prompt Payment Act.

3.7. It is expressly understood by the Village and the Consultant that funding for any successive fiscal years may be contingent upon appropriation of monies by the Village Council or other entities. In the event that funds are not available or appropriated, the Village reserve the right to terminate the Agreement without penalty or liability. Termination will occur (1) upon notice to the Consultant or automatically (2) on the last day of the then current fiscal year or (3) when the appropriation made for the then-current year or specific appropriation for the services covered by this Agreement is spent, whichever event occurs first.

ARTICLE 4. **CONSULTANT'S RESPONSIBILITIES**

4.1. Consultant will perform or furnish consulting and related services to a level of technical skill, ability, and diligence customarily provided by an experienced professional in their field of expertise when rendering the same services, and in accordance with sound principles and practices generally acknowledged by professionals in their field of expertise, as represented to the Consultant, both orally and in writing, to be possessed by Consultant, all in accordance with the standards contained elsewhere in this Agreement and in accordance with generally accepted standards of professional consulting practice and with the laws, statutes, ordinances, codes, rules and regulations governing Consultant's profession. The same standards of care will be required of any subconsultant or subcontractor engaged by Consultant.

4.2. Consultant will be solely responsible for providing their own business equipment, including any vehicles necessary for the performance of their work, and for paying all expenses incurred while performing the services set forth in this Agreement. Expenses to be borne by Consultant include, but are not limited to, license fees, memberships, and dues; automobile and other travel expenses; meals and entertainment; and any applicable insurance premiums. Consultant will be reimbursed for certain allowable expenses upon submission to the Village, including but not limited to, the charges as detailed in Exhibit B used in connection with the services performed pursuant to this Agreement.

4.3. Consultant will, without additional compensation, correct and revise any errors, omissions, or other deficiencies in its work product, services, or materials arising from the negligent act, error or omission of Consultant or any subconsultant or subcontractor engaged by Consultant for one year after the completion of Consultant's services under this Agreement. The foregoing shall be construed as an independent duty to correct rather than a waiver of the Village's rights under any applicable statute of limitations. Village review of, approval of, acceptance of, or payment for any of Consultant's work product, services, or materials shall not be construed to operate as a waiver of any of the Village's rights under this Agreement, or cause of action Village may have arising out of the performance of this Agreement.

4.4. Consultant will, without additional compensation, correct and revise any minor deficiencies in its work product identified that can be addressed in process, even if the deficiencies would not be deemed to arise from a negligent act, error or omission of the Consultant. Minor deficiencies include but are not limited to changes in Americans with Disability Act requirements.

4.5. Consultant will be responsible for notifying the Village promptly whenever a delay is anticipated or experienced, including a delay in approval by any governmental agency having jurisdiction over any work task. The Village shall allow the Consultant to extend response times for valid, documented delays. The Village shall be the sole determiner of the validity of the delays.

ARTICLE 5.
OWNERSHIP AND USE OF DOCUMENTS

5.1. All documents, data, studies, surveys, analyses, sketches, tracings, specifications, plans, designs, design calculations, details, computations, drawings, maps, models, photographs, reports, and other documents and plans resulting from Consultant's services under this Agreement will become the property of and shall be delivered to the Village without restriction or limitation as to use regardless of the format of the document (paper or electronic). However, any use subsequent to or other than for the specific project for which such items were created, shall be at sole risk of the Village.

5.2. Consultant agrees that any software, computer systems and databases used for providing the documents necessary to this Agreement will be compatible with existing Village software and systems. It is anticipated that any software utilized will be run on windows based PC's and will consist of Microsoft Office 2013 (or newer) and Adobe Acrobat DC (or newer).

ARTICLE 6.
VILLAGE'S RESPONSIBILITIES

6.1. The Village will perform the responsibilities contained in this Article 6 in a timely manner so as not to delay the services of Consultant.

6.2. The Village will furnish to Consultant, upon request of Consultant and at Village's expense, all existing studies, reports and other available data pertinent to the services to be performed under this Agreement which are within the Village's possession. However, Consultant will be required to evaluate all materials furnished hereunder using reasonable professional judgment before relying on such materials.

6.3. The Village will provide reasonable access and entry to all public property required by Consultant to perform the services described in this Agreement. All such access and entry shall be provided at the Village's expense. The Village will also use reasonable efforts to obtain permission for reasonable access and entry to any private property required by Consultant to perform the services described in this Agreement.

6.4. The Village will review all documents, plans, or other materials provided by Consultant in a timely manner so as to not delay the process of the Consultant.

ARTICLE 7.
TERM / TERMINATION

7.1. The term of this Agreement will begin on the date and year first written above and shall be continued until superseded by a subsequent Village agreement, the monetary limit in 3.1 is reached, or unless otherwise terminated in accordance herewith.

7.2. The Village will have the right at any time upon thirty (30) calendar days written notice to the Consultant to terminate the services of the Consultant and, in that event, the Consultant must cease work and will deliver to the Village all documents, (including reports, designs, specifications, and all other data) prepared or obtained by the Consultant in connection with its services. The Village will, upon receipt of the aforesaid documents, pay to the Consultant, and the Consultant will accept as full payment for its services, fees for all work done in full or in part in accordance with Scopes of Services.

7.3. In the event that the Consultant has abandoned performance under this Agreement, then the Village may terminate this Agreement upon three (3) calendar day's written notice to the Consultant indicating its intention to terminate. The written notice will state the evidence indicating the Consultant's abandonment. Payment for services performed prior to the Consultant's abandonment will be as stated in Section 3 above.

ARTICLE 8.
NOTICES

8.1. Any notice required or permitted to be sent herein shall be sent certified mail, return receipt requested to the parties at the addresses listed above to the designated contacts below:

Consultant: Frazer Enterprises Inc. DBA vitalink Village: Steve Sarkozy

8.2. Each party shall immediately notify the other of any changes in address or designated contact.

ARTICLE 9.
ASSIGNMENT

9.1. This Agreement, or any interest herein, will not be assigned, transferred or otherwise encumbered, under any circumstances by Consultant without the prior written consent of the Village. Further, no portion of this Agreement may be performed by subcontractors or subconsultants without written notice to and approval of such action by the Village. The Village and Consultant each binds themselves, their agents, successors, assigns and legal representatives to the other party hereto, their agents, successors, assigns, and legal representatives in respect to all covenants, agreements, and obligations contained in this Agreement any obligations incorporated herein.

ARTICLE 10.
EXTENT OF AGREEMENT / SEVERABILITY / MODIFICATION

10.1. This Agreement represents the entire and integrated agreement between the Village and Consultant and supersedes all prior negotiations, representations or agreements, either written or oral.

10.2. In the event any provision of this Agreement be held invalid and unenforceable, the remaining provisions will remain valid and binding upon the parties. One or more waivers by either party of any breach of any provision, term, condition or covenant will not be construed by the other party as a waiver of any subsequent breach.

10.3. No modification, amendment or alteration in the terms or conditions contained herein will be effective unless contained in a written document executed by both parties.

10.4. This is a nonexclusive contract. The Village has the right to enter into contracts with other consultants providing similar services.

ARTICLE 11.
GOVERNING LAW / VENUE

11.1. This Agreement shall be governed and construed in accordance with Florida law. In the event any litigation arises between the parties in connection with this Agreement, venue for such litigation shall lie exclusively in Lee County, Florida.

ARTICLE 12.
INDEPENDENT CONTRACTOR STATUS

12.1. Consultant is an independent contractor and is not an employee, servant, agent, partner or joint venturer of the Village.

12.2. Neither the Village nor any of its employees will have any control over the conduct of Consultant or any of Consultant's employees, except as herein set forth, and Consultant expressly warrants not to represent at any time or in any manner that Consultant or any of Consultant's agents, servants or employees are in any manner agents, servants or employees of the Village. It is understood and agreed that Consultant is, and will remain at all times remain, a wholly independent contractor and that Consultant's obligations to the Village are solely as prescribed by this Agreement.

ARTICLE 13.
AUDIT AND RECORDS REQUIREMENTS

13.1. Consultant will maintain books, records, documents, and other evidence directly pertaining to or connected with the services under this Agreement which will be available and accessible at Consultant's local offices for the purpose of inspection, audit, and copying during normal business hours by the Village, or any of its authorized representatives. Such records must be retained for a minimum of five (5) years after

completion of the services. Prior to destruction of any records, the Consultant will notify the Village and deliver to the Village any records the Village requests. Consultant will require all subconsultants and subcontractors to comply with the provisions of this paragraph by insertion of the requirements hereof in a written contract agreement between Consultant and the subconsultant or subcontractor.

13.2 If the records are unavailable locally or electronically, it will be the Consultant's responsibility to insure that all required records are provided at the Consultant's expense including payment of travel and maintenance costs incurred by the Village's authorized representatives or designees in accessing records maintained out of the county. The direct costs of copying records, excluding any overhead cost, will be at the Village's expense.

13.3. Consultant must fully cooperate with all public records requests by providing the necessary records to the Village promptly upon notice unless the records are exempt from Section 24 (a) of Article I of the State Constitution and Chapter 119, Florida Statutes. Failure by Consultant to promptly respond to notices requesting records constitutes grounds for unilateral cancellation by the Village at any time, with no recourse available to Consultant. Records may be provided in the form or format in which they are kept including electronic files. Consultant's right to claim an exemption from disclosure will not be deemed failure to comply with this article.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE ESTERO VILLAGE CLERK (CUSTODIAN OF PUBLIC RECORDS) AT 239-221-5035, hall@estero-fl.gov, OR VILLAGE HALL, 9401 CORKSCREW PALMS CIRCLE, ESTERO, FL 33928.

ARTICLE 14. INDEMNIFICATION

14.1. For ten dollars (\$10.00) and other good and valuable consideration, the receipt of which is hereby acknowledged, Consultant will pay on behalf of or indemnify and hold harmless the Village, its officials, officers, employees, agents and volunteers from and against any and all claims, actions, damages, fees, fines, penalties, defense costs, including attorneys' fees and court costs (whether such fees and costs are incurred in negotiations, collection of attorneys' fees or at the trial level or on appeal), suits or liabilities, of whatever kind of nature, caused by any negligent or intentional act, error, omission, or default of Consultant or Consultant's officers, employees, agents, servants, volunteers or subcontractors or consultants, if any, caused by the performance or failure to perform under the terms of this Agreement.

14.2 Consultant must carry a commercial liability insurance policy in coverage amounts as determined by the Village Manager and naming the Village of Estero as additional insured.

ARTICLE 15.
EMPLOYEE RESTRICTIONS

15.1. The Village of Estero will not intentionally award publicly-funded contracts to any contractor who knowingly employs unauthorized alien workers, constituting a violation of the employment provisions contained in 8 U.S.C. Section 1324a(e) [Section 274A(e) of the Immigration and Nationality Act (“INA”)]. The Village shall consider employment by any contractor or subconsultant or subcontractor of unauthorized aliens a violation of Section 274A(e) of the INA. Such violation by the Consultant of the employment provisions contained in Section 274A(e) of the INA will be grounds for termination of this Agreement by the Village.

15.2. If an owner (except a stockholder in a publicly traded corporation) or an employee of the Consultant has been convicted of any offenses requiring registration as a sexual offender or sexual predator, regardless of the location of conviction, the Consultant will ensure that the offender’s or predator’s work on the project is consistent with the terms of his probation and registry requirements.

15.3. The Consultant will incorporate the terms of paragraphs 15.1 and 15.2 into all contracts with any subconsultants or subcontractors.

ARTICLE 16.
NO CONTINGENT FEES

16.1. Consultant certifies that it has not employed or retained any company or person, other than a bona fide employee working solely for Consultant to solicit or secure this Agreement and that it has not paid or agreed to pay any person, company, corporation, individual or firm, other than a bona fide employee working solely for Consultant any fee, commission, percentage, gift or other consideration contingent upon or resulting from the award or making of this Agreement. For the breach or violation of this provision, Village has the right to terminate the Agreement without liability at its discretion, to deduct from the contract price, or otherwise recover, the full amount of such fee, commission, percentage, gift or consideration.

ARTICLE 17.
TRUTH-IN-NEGOTIATION CERTIFICATE

17.1. If applicable, in accordance with Section 287.055(4), Florida Statutes, signature of this Agreement by Consultant shall act as the execution of a truth-in-negotiation certificate stating that wage rates and other factual unit costs supporting the compensation of this Agreement are accurate, complete, and current at the time of contracting. The original contract price and any additions thereto shall be adjusted to exclude any significant sums by which Village determines the contract price was

increased due to inaccurate, incomplete, or noncurrent wage rates and other factual unit costs. All such contract adjustments shall be made within one (1) year following the end of this Agreement.

IN WITNESS WHEREOF, the parties hereto have caused the execution of these premises as of the date and year first above written.

Frazer Enterprises Inc. DBA vitalink

WITNESSES:

Signed By: _____

Signed by: _____

Print Name: _____

Print Name: _____

Date: _____

Title: _____

Signed By: _____

Date: _____

Print Name: _____

Date: _____

VILLAGE OF ESTERO

By: _____

Steve Sarkozy, Village Manager

Date: _____

ATTEST:

By: _____

Kathy Hall, MMC, Village Clerk

APPROVED AS TO FORM AND LEGAL SUFFICIENCY

By: _____

Burt Saunders, Village Attorney

- Exhibit List:
- Exhibit A – Scope of Services
- Exhibit B – Pricing Proposal

EXHIBIT A

**RFQ 2018-03 VILLAGE OF ESTERO BRANDING AND ROADWAY MONUMENT
SIGNS**

STATEMENT OF WORK

A. PROJECT OVERVIEW

Please see attached Scope of Work.

B. SCOPE OF SERVICES

Please see attached Scope of Work.

C. SCHEDULE

Please see attached Scope of Work.

D. COMPENSATION

Please see attached Scope of Work.

EXHIBIT B
PRICING PROPOSAL

Please see attached Scope of Work.



The Process

We will approach the project using a phased approach, with some overlap between the phases.

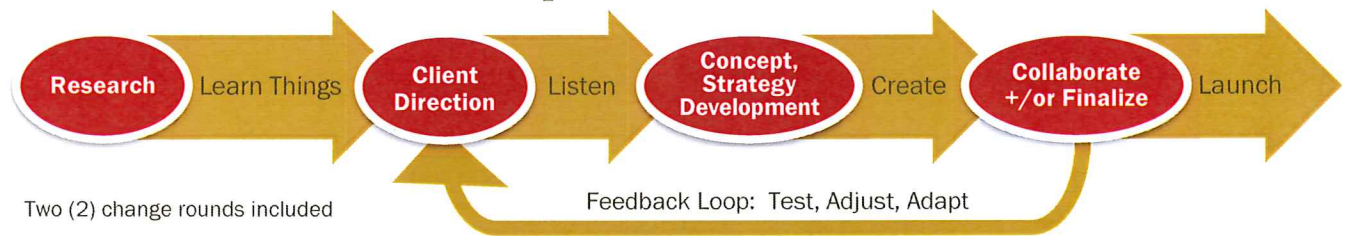
Client direction

When you begin to discuss a new brand, it is critical to engage internal and external stakeholders from the beginning and throughout the process. vitalink will meet with your team to ensure we have a strong understanding of your goals for the branding. We will work with you to identify stakeholders and key influencers, as their opinions and support will be valuable during this process.

Concept strategy, development

Developing brands is one part art, one part science, and one part collaboration. vitalink has developed many brands and strategies throughout the past 20+ years. These brands have supported economic development, sports, travel and tourism, cities and towns, universities, non-profits and government agencies.

Our Process + Feedback Loop



Research will form the basis of our creative development and strategy. As we work through the entire project, we will meet with your team and ask for ongoing feedback. We want your stakeholders to have a voice in the process! Our team will do some additional research in the collaborative process of developing the creative, monument signs and rollout strategies. Then it's time for the concepts to "percolate" to allow time for the brand to be fully realized by our creative team.

Our creative director will be engaged in the session when we present the initial creative concepts and will explain his interpretation of the research and his rationale behind each selection, including his reasoning for the design, color, iconography and font choices as they relate to your target audience(s) and your message. In many cases, this discussion and engagement will help stakeholders come to a consensus. At a minimum, it will help people understand the process and respect that his or her opinion was heard, even if it may not be reflected in the final choice. We welcome feedback and want your team (and the community) to be happy with the new brand.

Collaborate + finalize

Your team will be an integral part of the branding and monument sign development process. We will begin the engagement with an in-person team meeting and continue through the process via phone and/or video conference calls and additional on-site meetings as we develop the brand and strategic approach and customize the tools you will receive for the time bank. It is important



that you understand when and where we will need your input (and time) during the process. We utilize a collaboration tool like Basecamp to keep the project on track so the team members you specify can access the project files and notes at any time.

Phase I | Research & Engagement

Our approach

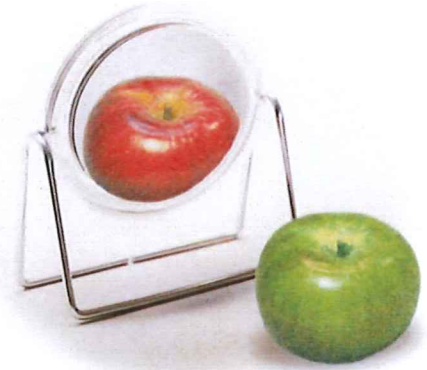
We believe it's important to communicate with your team on all aspects of the project. This helps us understand your goals and vision for the brand, and ensure we take advantage of your team's skills and knowledge. Your team will be involved throughout the process to the level you prefer – we do not want to take too much of your time but also want to keep you in the loop as we complete our work.

Initial work meetings will include:

- > A senior pre-planning prep via phone to get some basic questions answered and discuss and finalize details of the project.
- > We will hold a **kick-off meeting and core team workshop** to meet the team and get initial feedback on (trip 1):
 - > Identifying key stakeholder groups and best ways to reach each
 - > Understanding community influencers we will want to engage
 - > Discuss the strengths, weaknesses, opportunities and threats
 - > Understand the long-term vision for Estero

Recommended Research + Engagement:

- > We will **review existing materials** and familiarize ourselves with Estero and the surrounding communities (trip 1).
- > Complete a **brand audit**, review of existing materials, website and online presence. This audit will include recommendations.
- > A **SWOT analysis** will identify Village (and area) strengths/offerings that could be used to draw new business, residents, and visitors. Any weaknesses discovered will be outlined, with recommendations to address them, when feasible. (We typically recommend focusing on strengths as addressing weaknesses often requires longer-term systemic fixes.) This evaluation will include opportunities we identify and recommend the Village pursue and any threats that might impact our approach. Results from this analysis will be detailed in a report and incorporated into our recommendations and approach.
- > An **internal workshop #2** (conducted via a web meeting) will allow us to get perceptions about Estero from this critical group (see detail under public stakeholder workshops)
- > vitalink's **Perception vs Reality Research Survey** compares brand perceptions by stakeholder group. These results help us identify common themes for brand development and messaging. This research allows us to build your core brand truth.



REMEMBER: Their perception is your reality.

- > Online survey promoted via your email list* and ask partners to do the same. We may also promote the survey via the media, social media, community associations, or on your website.
- > Includes 4-6 stakeholder groups, such as:
 - ✓ Residents
 - ✓ Business owners
 - ✓ Internal team members
 - ✓ Partners
 - ✓ Elected or government officials
 - ✓ Community or non-profit organizations
 - ✓ Students
 - ✓ Others you identify
- > The survey includes quantitative questions (for example, we may ask participants to rank the area on certain key factors) as well as questions to capture qualitative data to build themes, messaging, and communication preferences. We are also able to delve into the data and look at differences in how groups perceive the community, very important as we can customize messaging.
- > Geographic or demographic data (i.e., neighborhoods, presence of children, etc.) may be captured to use for segmenting and evaluating response data.
- > You may include 1-2 custom questions per stakeholder group to capture additional information.

**We have found response rates are higher when the sender is known. vitalink will provide the email content and survey link for the Village to distribute to its email list(s). This also maintains list privacy.*

- > **Public stakeholder workshop sessions** (trip 2: 6 sessions, 60-90 minutes each, 8-12 participants per group)) to learn from those invested in the process. We will coordinate meeting locations and recruit participants. If there are community influencers you would like us to include, we will do so. We will work with you to determine the groups, but they may include:
 - > Residents – year round and seasonal
 - > Business owners/managers
 - > Local officials, non-profits
- > Prepare common themes gleaned from research in a **report with brand insights**, present findings during Village Council Presentation (trip 3)



Phase II | Visual & Brand Messaging

Approach

Messaging will be developed based on our understanding of your goals, clarification of target personas, and positive perceptions garnered from stakeholder feedback and research. From this research, we will develop a brand logo identity, value proposition, and messaging. We will engage your team in a creative consensus workshop to review brand options, color palettes, typography, and messaging. A/B testing will confirm direction among stakeholders. Once approved by your selection committee, final assets will be delivered in Phase IV. This visual and brand messaging also includes design of the monument sign concepts.

Deliverables

Phase II deliverables include:

- > Creative logo & brand essence based on research (minimum of **3 brand logo options** for initial review), includes rationale for color, typography, imagery assets (trip 3)
- > Develop research-based value proposition (what makes Estero unique) and messaging by audience (as dictated by research, it may be different for residents vs business)
- > Creative consensus workshop (onsite visit, trip 3) to review brand options, color palettes, typography, assets required, and message
- > Revise/adjust brand logo concepts prior to testing
- > We will conduct public A/B testing of the concepts via a short online survey and report the test results to the selection committee
- > Confirm with selection committee the chosen brand logo options and finalize brand platform (trip 4)
- > Work with Village attorneys to help provide necessary information for any trademarks
- > **Design monument sign concepts** (minimum of 3 options for initial review). There are many monument options, from elaborate structures with intricate landscaping and sophisticated water features, to more simple but elegant sign options. We will discuss budget and design limitations (if any) prior to beginning the design process. We want the concepts we present to be realistic and in line with your expectations. (trip 4)
- > An internal consensus workshop on monument sign design will take place when we present the initial concepts. This will allow your team to provide feedback. (trip 5)
- > We will then finalize monument sign designs based on input from the internal consensus workshop and present in a Village Council Presentation.



Phase III | Strategy

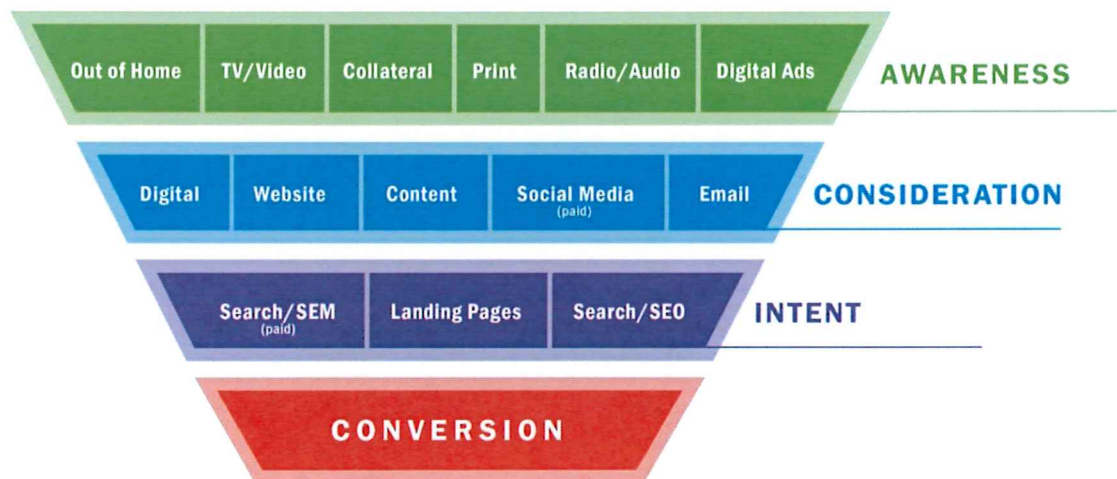
Approach

Research and collaboration will inform this phase on strategy. We have included an onsite meeting to discuss your vision and priorities for Estero.

The Strategic Roll-Out Plan

We will **provide recommendations** on the strategic roll-out for the new brand and monument signs. The plan will need to be enhanced to include such things as:

- > Specific strategies for communicating with audiences within the defined brand platform
- > Messaging by target group
- > Action recommendations for tools like traditional, social, and digital media, public relations, community partnerships and public engagement
- > Channel mix recommendations for any paid/unpaid traditional, social, and digital campaigns that help users flow through the conversion funnel



- > Target completion dates and midpoint checks set
- > Set key performance indicators (KPIs)
- > High level budget recommendations based on your input

We will include **success measures** and **assign S.M.A.R.T. goals** (specific, measurable, achievable, realistic, timed) so you may measure and track success of the communications plan.



Additional resources

In addition to recommended primary research in Phase I, vitalink goes above and beyond to tap available resources. Here are just some of the 3rd party sources we may pull from that will inform brand, creative development, messaging, target audiences, and strategies for your communications plan.



Deliverables

Phase III deliverables include:

- > Define vision & priorities (onsite meeting, trip 5)
- > Develop **strategic roll-out plan** for the brand and monument signs
 - o Monument signage vendor recommendations/monument signage process/implementation plan outlined. This will include recommendations for landscaping, permits, site engineering, site & sign survey prep work (as needed), estimated construction time, and recommended timeline.
- > Monument sign plan workshop (web meeting) to finalize the internal details and timeline.
- > Village Council presentation of strategic roll-out plan (trip 6)

Phase IV | Finalize & Launch

Approach

This phase is where our work comes together to prepare us for the brand and monument sign launch.

Deliverables

- > Deliver brand assets with and without tagline, if appropriate (logos in color/b&w/reverse in standard file formats (.jpg, .png, .eps, etc.) favicon (website “tab” avatar), social media icons, website assets. in all standard file formats (.jpg, .png, .eps, tiff); favicon(s); and social media icons
- > A brand style guide (electronic copy) for use by partners, vendors, and your internal team. This guide includes proper logo usage, color palette, fonts and other how to information to help with brand consistency.
- > Training for your internal team on the new brand and style guide (we recommend you video the training for use with new team members – this is not included in the cost) (trip 7)



Phase V | Monument Sign Design/Permitting

The exact scope and fee for the detailed construction plans for monument signs along up to two roadways will be determined after Phase IV is complete. Following are the expected services. A contract for these services will be negotiated and executed after Phase IV is completed.

- > Manage design and permitting of up to four monument signs.
- > Certified engineering drawings for up to four monument signs.
- > Civil and structure engineering for the proposed monument signs.
- > Landscape Architecture design around sign, if determined to be appropriate.
- > Permitting of monument signs through SFWMD, Village of Estero, Lee County and/or FDOT.
- > Coordinate monument sign installation with selected vendor.
- > Coordinate landscape with selected vendor, if determined to be appropriate.

Phase VI | Miscellaneous Services

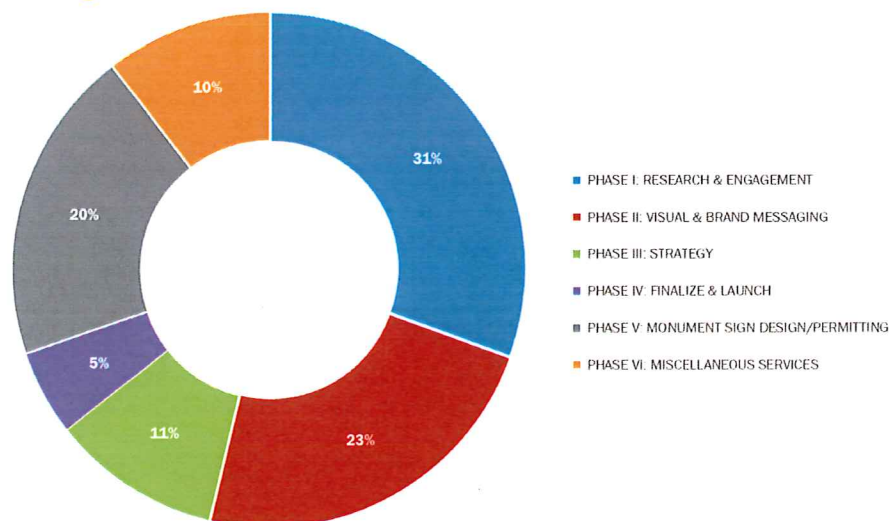
Miscellaneous Services provides a reserve of extra hours/funding should they be needed as the project proceeds. Work under this task must be approved by Village staff prior to starting any work. This will cover services that were not anticipated at the start of the project. This could include design of a Village flag, street pole flag design, bannerstands, collateral material, new website, &/or web content.

- > Reimbursable Expenses – including but not limited to possible website partner hard costs (should we go that route - if not, it could be reallocated) and some limited printing/production/photography potential costs

Village of Estero

BRANDING & ROADWAY MONUMENT SIGN PROGRAM

Budget Distribution





Budget Recommendations

Scope of Work/Deliverables (Phase total & additional line item)	Total Hours	Total Dollars
PHASE I: RESEARCH & ENGAGEMENT	221	\$ 26,265
Reimbursable Expenses - travel (hotel, flight, per diem, auto expenses) and online survey software tool		\$ 13,317
PHASE II: VISUAL & BRAND MESSAGING	216	\$ 26,670
Reimbursable Expenses - travel (hotel, flight, per diem, auto expenses) and online survey software tool		\$ 3,295
PHASE III: STRATEGY	99	\$ 11,800
Reimbursable Expenses - travel (hotel, flight, per diem, auto expenses)		\$ 1,988
PHASE IV: FINALIZE & LAUNCH	44	\$ 5,385
Reimbursable Expenses - travel (hotel, flight, per diem, auto expenses)		\$ 1,525
PHASE V: MONUMENT SIGN DESIGN/PERMITTING	71	\$ 8,275
Reimbursable Expenses - civil/structural engineering, permit cost, landscape costs (if determined to be appropriate)		\$ 17,400
PHASE VI: MISCELLANEOUS SERVICES	105	\$ 13,000
Reimbursable Expenses - Including but not limited to possible website hard costs (should we go that route - if not, it could be reallocated) and some limited printing/production/photography potential costs		\$ 500
PROJECT TOTALS - YEAR 1	756	\$ 129,420

We advise six-phase approach to best handle your goals and objectives. Phase VI: Miscellaneous Services provides a reserve of extra hours/funding should they be needed as the project proceeds and with Estero approval. Seven in person trips are included.

We have done our best to estimate these costs, though as we complete the strategy phase some elements, some resources may have to be reallocated (with your approval). Reimbursable Expenses total not to exceed \$38,025.

Quote does not include attorney fees to trademark, sign construction and installation costs. While quote does include permitting, design size/type/location may impact variance and permit costs. We will discuss any issues that may arise and present solutions for your approval.



High Level Timeline

There is some overlap between phases. The timeline is twelve months.

PHASE I: Months 1-4
PHASE II: Months 2-6
PHASE III: Months 3-8
PHASE IV-VI: Months 6-12

ATTACHMENT 2

RFQ No.: 2018-03

VILLAGE OF ESTERO, FLORIDA
VENDOR DISCLOSURE FORM

Project No.: RFQ 2018-03

Project Name: VILLAGE OF ESTERO BRANDING AND ROADWAY MONUMENT SIGNS

Please check as appropriate:

I am the sole proprietor/owner. The company is not publicly held.

The company is not publicly held.
The names and addresses of the owners having a greater than 5% interest is attached.

The company is publicly held.
The names and addresses of the owners having a greater than 5% interest is attached.

I do hereby certify that to the best of my knowledge and belief certify that the information above and attached is true and correct.

Signed: 

Vendor
Printed Name Jeanne L. F. Foster

Date: August 13 2018



