



Draft – October 12, 2016

## **Exhibit A**

### **VALDEZ VISION PLAN AND BRANDING**

#### **Scope of Work**

#### **General Note Regarding Organization of Written Scope**

This scope includes three phases. Phase 1 has two parts, the Vision Plan and the Branding effort. Those two tasks will run simultaneously, but may or may not track the exact same timeline (that remains up for some discussion with the City). Also – the both the Vision Plan and Branding processes expect that there will be a “focus group” or a “steering committee” which will be our local eyes and ears as well as a sounding board throughout the process. The City may choose to appoint one committee to oversee both efforts, or these two groups may be separate. They may or may not overlap in their membership rosters. We are able to work within whatever arrangement suits the City.

#### **PHASE 1A: VISION PLAN**

**Scope Overview** – This scope of services has been prepared as a sequential outline of the process we propose for community engagement and preparation of the Vision Plan. We anticipate this process will include a series of “on the ground” visits to Valdez where members of the consultant team will have a presence not only to organize and facilitate interviews and workshops, but also to make ourselves available to the public at large should individuals wish to meet and provide input. It is anticipated that during these visits, the team will work in a **central location provided by the Client** and also be productive in the preparation of the various forms of analysis and documentation outlined herein. Following each of the proposed community visits is a period of “office time” for the consultant team to continue the preparation of documentation and prepare for the subsequent series of on-site meetings.

#### **TASK 1.0 - Advance Planning and Preparation of Community Engagement Strategy**

The Kimley-Horn team (we) will collectively meet and prepare for the community engagement process prior to the first on-site visit to Valdez. This will include the establishment of roles and responsibilities, as well as reporting protocols and overall project timeline, objectives and issues. We will prepare a written outline and approach to the engagement process, including schedules and expectations for the input and feedback loop anticipated throughout the duration of the project.

During this advance planning stage, we will also **gather readily available mapping and review available documents from the City**. We will prepare preliminary base maps and other graphics that will be utilized throughout the planning process.

We will schedule and participate in **bi-weekly conference calls with appropriate City** staff to review progress, discuss the engagement approach, and identify additional needs and concerns.

We will prepare a community engagement plan for the project, the intent of which is to ensure that we receive input from a broad spectrum of participants and otherwise promote the project. The plan will outline anticipated times when team representatives will be on the ground in Valdez, and identify key stakeholders, local interests, community events and meetings, and other work tasks that will take place during each visit. It will detail specific engagement tactics to be employed in maximizing participation opportunities, and will incorporate strategies for a web presence and social media. This schedule will be loosely based on known community events and meetings at which the team may

have a presence, as well as anticipated times when larger community workshops, steering committee meetings, and presentations to **the Planning and Zoning Commission and the City Council** should be held.

*Deliverables:*

- *Written Community Engagement Strategy Plan*
- *Base Mapping*

## **TASK 2.0 - Community Engagement and Background Analysis**

We will execute the community engagement program agreed to in Task 1.0 above. We anticipate that this program will play out over the course of 6-7 months and will entail the following work efforts:

**Task 2.1 – Site Visit 1:** This task will include 6 days on the ground in Valdez with up to 5 team members (scheduled in order to capture two consecutive weekends of stakeholder interviews as well as attendance at community events and field reconnaissance). During this visit, we will work with the Client to **determine the makeup of the project “steering” or “executive” committee**, and establish lines of communication and protocol for the project going forward. **We will rely on the Client to establish and appoint the project “committees” through appropriate methodologies and to outline their “rules of engagement” and to assist in scheduling and facilitating committee meetings as necessary.** This visit will include stakeholder interviews, focus group meetings, and a minimum of one community-wide facilitated workshop. Also during this visit, we will engage in the following additional work efforts:

- Community Walk (walking workshop)
- Youth Visioning Workshop
- Staff Visioning Workshop
- Visioning Charrette
- Advisory Committee Meeting #1 (community and branding committee)
- Stakeholder Interviews ((see also Phase 1B)
- Intercept Surveys with Residents, Business and Visitors
- Social Media (Website, Radio, etc.)
- Community Visioning Festival (Friday or Saturday Capstone)

**Task 2.1.1 - Site Reconnaissance / Document Review:** We will conduct an in-depth field reconnaissance of the community and its surroundings to gain a holistic understanding of the physical, social, and environmental context. The intent is to form a preliminary appraisal of community issues, identify topics to be targeted for further study during our detailed research and analysis tasks, and provide initial thoughts on development opportunities and constraints. As appropriate, we will engage in follow-up reconnaissance to record important site conditions and characteristics.

It should be noted there is a considerable amount of data and analysis previously completed by the city that will contribute to the planning process. The Kimley-Horn team’s intent is to utilize as much of this information as possible so as to not duplicate efforts.

**Task 2.1.3 - Site and Background Analysis:** Using readily available mapping and information provided by the City, along with the findings of the site reconnaissance conducted in Task 2.1.1, we will prepare a series of maps, diagram, tables, and charts with supporting narrative that clearly communicate our understanding and assessment of the site and its context. The intent of this task is

to ensure a well-rounded and comprehensive understanding of site conditions that will advise and instruct the planning process. This will generally include:

- Overview of Regional Context and Site Conditions, addressing both the natural and built character of Valdez
- Land Use & Housing Resources Analysis, assessing the distribution, character and condition of existing land uses, buildings and structures, including the community’s housing resources. Additionally, we will identify existing land uses and land use policy, ownership patterns (public land ownership and other major land owners), projected and proposed development projects, etc.
- Community Resources Analysis, assessing civic, commercial, and cultural resources located within and near the community, and identify gaps in service provision. Our analysis will generally be qualitative and map-based
- Community Character Analysis, investigating urban structure and form, prevalent development typologies, and local and regional design character and traditions. Consideration will be given to how cultural and heritage values may influence the branding and identity of the community and its districts.
- Environmental Analysis, assessing the environmental and natural character of the community and its surroundings, including identification of environmental assets and constraints (e.g., floodplains), open space character and resources, land use suitability, and opportunities for natural resource and landscape conservation. Our analysis will generally be qualitative and map-based; as appropriate this assessment will incorporate the findings of the technical analysis provided by other members of the consultant team.
- Infrastructure Analysis, assessing the current condition of infrastructure elements including roads, City utilities (water, sewer, stormwater), and public buildings

Field work for this task will be conducted during the initial site visit, and finalized during the in-office time that follows. The Site Analysis Report will serve as an informational and resource document for the project team, as well as for community members and key stakeholders as the project moves forward.

*Deliverable:*

- *Site Analysis Report, presented in graphic and written format as mutually agreed with Client*

Additional work efforts following this initial site visit will be necessary to review and synthesize stakeholder input, and prepare the initial Site Analysis Report.

**Task 3.0 – Community Engagement and Development of Community Vision Alternatives**

**Task 3.1 – Site Visit 2:** This task includes a second 6-day visit to Valdez with up to 4 team members scheduled over a time period similar to Task 2.1. Early in this visit, the Site Analysis Report prepared in Task 2.0 above will be presented to stakeholders, steering committee, Planning and Zoning Commission, and the City Council.

Subsequent to those presentations, we will conduct additional stakeholder interviews, focus group meetings, an additional community-wide facilitated workshop, and a follow up meeting with the project steering committee or other individuals or groups as may be identified.

Also during this second site visit, the project team will be conducting follow-up reconnaissance, further investigation of development opportunities, and conducting discussions regarding land use and community design. During the office time that will follow the second site visit, we will prepare a preliminary vision statement and narrative, development principles and concepts. These will serve as a baseline for preparing future Alternative Development Scenarios, which will identify, assess and prioritize development opportunity sites, focusing on vacant and underutilized parcels while taking into account infrastructure capacity.

**Task 3.1.1 – Alternative Community Vision Scenarios:** Relying on the Background Analysis and input received through community engagement, we will prepare up to three (3) Alternative Community Vision Scenarios for Valdez. These alternatives will draw upon the information and input gathered to date, and are intended to provide an exploration of the future potential associated with varying land use mix and density, community scale and character, and associated mobility, infrastructure, and open space strategies. As appropriate, additional focus will be given to consideration of alternatives for development of a commercial core for the community.

We will evaluate the economic potential of the development alternatives and various opportunity sites for their feasibility as near-term catalytic projects and/or potential locations for growth and development.

Additional office time following this second site visit will be necessary to review stakeholder and steering committee input, and to prepare the Preliminary Vision and Alternative Community Vision Scenarios.

**Task 3.1.2 – Interim Presentation:** We will prepare for and conduct a presentation of the development alternatives to the project steering committee, and to a joint meeting of the Planning and Zoning Commission and City Council. These meetings will include up to 2 members of the consultant team attending meetings over a 2-3 day period.

**Deliverables:**

- *Alternative Development Scenarios; three (3) maximum presented in a format suitable for Project Team, Client, and community review and evaluation*
- *Alternative Development Scenarios Evaluation Matrix*

**Task 3.2 – Community Vision Alternatives Report:** Following this interim presentation, we will evaluate the input received and further assess the strengths and weaknesses of each alternative according to land use suitability; market viability and economic impact; place-making potential; infrastructure capacity and costs; anticipated environmental impacts; etc. We will prepare a report that includes and summarizes as appropriate: 1) the Preliminary Vision & Community Principles; 2) Opportunity Site Assessment; and 3) the Alternative Community Vision Scenarios & Evaluation. This document will provide direction for preparation of the Vision Plan for the community as described in Task 4.0.

**Task 3.3 – Site Visit 3:** This task includes a third 4-day visit to Valdez with up to two team members subsequent to the submittal of the final Community Vision Alternatives Report. The intent of this visit will be to have a presence in the community, and gather any outstanding information that will inform the Vision Plan.

*Deliverables:*

- *Draft Community Vision Alternatives Report presented as an electronic file and in 8.5"x11" or other mutually agreeable format.*
- *Final Community Vision Alternatives Report presented as an electronic file and in 8.5"x11" or other mutually agreeable format.*

**TASK 4.0 – Vision Plan**

**Task 4.1 Preferred Community Vision Alternative:** Based on the outcome of the review and evaluation of Community Vision Alternatives, we will prepare a draft Vision Plan based on the preferred Community Vision Alternative that describes and illustrates the favored concept for growth and change in the community, depicted through illustrative plan, , development yield analysis, explanatory diagrams, and other drawings and renderings as appropriate. The plan shall account for development potential associated with 5, 10, and 25-year planning horizons, and summarize the benefits to the community resulting from implementation of the preferred Vision. Additional detailed analysis with sketch concepts shall be given to the potential development of a commercial core for the community.

*Deliverables:*

- *Draft Community Vision Alternatives Report presented as an electronic file and in 8.5"x11" or other mutually agreeable format.*
- *Final Community Vision Alternatives Report presented as an electronic file and in 8.5"x11" or other mutually agreeable format.*

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*Deliverables:*

- *Preferred Development Scenario, presented in a format suitable for Project Team, Client, and community review and evaluation*

**Task 4.2 – Draft Vision Plan Presentations:** We will prepare for and conduct a presentation of the draft Vision Plan to the project steering committee, and to a joint meeting of the Planning and Zoning Commission and City Council (based on a mutually agreed schedule). These meetings will include up to 2 members of the consultant team attending meetings over a 2-3 day period.

*Deliverables*

- *Draft Vision Plan presented as an electronic file and in 8.5"x11" or other mutually agreeable format.*

**Task 4.3 Final Vision Plan:** Based on input received in Task 4.2, we will prepare a Final Vision Plan that includes: 1) updated Vision & Development Principles and 2) the Preferred Development Scenario. The Vision Plan is intended to serve as a communications piece to engage community members and stakeholders, and as a point of reference as the planning process moves forward; it will be subject to further refinement through the process of preparing a more detailed Comprehensive Plan (reference Phase 2). Emphasis will be placed on presenting proposals for the overall physical development of the community. Detailed policy prescriptions, district development proposals, and implementation measures will not be addressed in this document, although the viability of the plan and its future implementation will be considered. Particular attention will be given to providing a highly graphic, user friendly document.

We will present the Final Vision Plan to a joint meeting of the project steering committee, Planning and Zoning Commission, and the City Council based on a mutually agreeable schedule. We anticipate a timeframe of 6-8 weeks following Task 4.2 above to complete the Final Vision Plan.

#### *Deliverables*

- *Final Vision Plan presented as an electronic file and in 8.5"x11" or other mutually agreeable format.*

## **PHASE 1B: COMMUNITY BRANDING**

**Scope Overview** – Successful community branding must be a grassroots effort, involving those most rooted in your community. This process is ongoing. It starts with educating people on what branding is and what it can mean for them. It continues with focus groups, interviews and surveys designed to get people’s actual opinions about things. It soars when we help you put together a Friends of Valdez ambassador group that will initially work to inform the brand and eventually become the most vocal advocacy group for Valdez.

### **Task 1.0 – Community Engagement and Education**

We will work with the Client to establish a “Friends of Valdez” (Friends) working committee, which should consist of a group of 12-15 influential voices from across your community. This group comprises leaders representing diverse interests including students, matriarchs, historians, artists, parents, librarians, coaches, athletes, teachers, doctors, merchants, journalists, architects, bloggers, event planners – anyone with a valuable opinion and a love for Valdez.

This group may be appointed and engaged concurrent with the appointment and establishment of the Vision Plan steering committee described in Phase 1A, Task 2.1. The Friends group is likely not the same group as the steering committee, but may have some member overlap.

During the Branding: Site Visit, the Friends group will be assembled as a focus group. We will educate them on branding in general, brainstorm the possibilities for their group, and discuss how an ambassador group can promote the brand and remain independent. The Friends will then be charged with spreading the word about the branding effort in the community and to take the pulse of their constituencies.

Using the available hashtag #friendsofValdez, we will set up a platform that the group can use to discuss issues important to their constituencies. Your Friends of Valdez group is not working to “sell in” the brand, they are answering questions, addressing concerns and cultivating good ideas.

We will establish an Educational and Brand Story Web site which will serve as an online tool for Valdez residents and stakeholders to learn more about the branding effort, the current state of the process and to get involved either in the research stage or to become a champion after the launch of the new brand. In addition, this website transitions throughout the process from a purely educational site, to one that describes the core branding strategy after the strategic DNA statement is approved and then becomes a brand story website at the completion of your BrandPrint.

We will provide a general press release on what a community brand is and what it does. It will highlight the need for the public's help during the process and communicates the date, time and location of upcoming educational presentation(s). Not only does this start the public education process, it opens up lines of discussion with the press. If appropriate, we will also meet with members of the press during our site visit.

We will conduct one or more live PowerPoint presentations during our Branding: Site Visit to private and public sector stakeholder groups (determined and assembled by Valdez) for purposes of educating and furthering buy-in of the Valdez branding initiative. We will work with the Client to determine who these audiences are and what you want to convey. The presentation will be crafted to meet those goals. We will provide the Valdez team with a copy of the community branding PowerPoint presentation (with detailed notes), which will give you the ability to carry on the education and engagement via additional presentations, distribution to interested parties or placement on community websites.

#### *Deliverables*

- *Educational Website*
- *Educational Presentation*
- *Branding Initiative Press Release*

#### **Task 2.0 – Research**

During this task we will evaluate the environment, the competitive situation, stakeholder attitudes, community attitudes, current communications and the perceptions of target audiences and influencers. This includes:

- *Situation Analysis:* To establish the current lay of the land from the perspective of your critical partners, we both administer a questionnaire to each internal group or organization and meet with these groups to more fully understand your general history, political landscape, resources, competitors, etc.
- *Research, Planning, Communications and Media Audit:* We conduct a comprehensive review of any relevant research and planning documents. In addition, we review and analyze existing marketing materials, branding, logos and messaging from public and private sector partners as well as recent press related to Valdez.
- *Undercover Interviews/Ethnography:* North Star will send our ethnographer to spend approximately a month living in Valdez and being part of the community. During this visit, the ethnographer will conduct interviews to gain an in-depth qualitative understanding of how residents and visitors experience and think about Valdez. This effort will include reaching out to people that can be difficult to reach using conventional methods, by going to where they live, where they work and where they congregate. This approach involves asking open-ended questions and allowing respondents to speak in their own words in their natural environment

about their personal experiences with Valdez, what Valdez means to them, and how do they define their home.

- *In-depth Survey:* This open-ended right-brained survey challenges stakeholders to provide deeper comments and opinions. We administer the survey digitally and in paper form to the list provided by you, guaranteeing all your valuable stakeholders are able to participate. This tool extends your participant universe and allows you to layer trending opinions with in-depth perspectives.
- *Branding: Site Visit*
  - *Sales Review:* Conduct further in-depth review of how Valdez sells itself, formally and informally, to key business prospects, developers, professional candidates, students, potential home buyers, etc. We want to hear your presentations, see what they see and receive any materials they receive.
  - *Key Stakeholder Interviews:* Some of our most valuable nuggets for the purposes of defining your DNA and crafting your creative work come from these intensive one-on-one interviews with key stakeholders (including leaders from city department staff, real estate agents, park officials, elected officials, business community, schools, civic organizations, etc.). We also want to talk to articulate individuals who are passionate about Valdez (poets, coaches, ministers, historians, matriarchs, patriarchs and more). We know you want us to talk to everyone, so we continue the conversations via phone once we get back to the office. Because we can react to the information they give us with original questions, these interviews often lead us down exciting discovery paths not revealed by quantitative surveys.
  - *Focus Groups:* We will also assemble a range of perspectives during 2-3 focus groups during the site visit. Focus groups engage 12-15 at a time and can be organized by type (businesses, tourism attractions, etc.)
- *Online/Social Media Community Survey:* Using some of the themes identified in the in-depth survey, we will craft a quantitative survey posted online for community-wide participation. We promote this survey using traditional and social media.
- *Brand Barometer:* This proprietary research tool measures the likelihood of your residents to advocate Valdez for starting a business or quality of life, compared to other places in the United States. This will provide us with a benchmarking tool for measuring internal attitudinal change moving forward.
- *Influencer Perception Study:* Working from a combined list of site selectors, relocation executives, meeting planners, regional and state level executives in economic development and tourism as well as other external influencers you provide with a list we compile, we will conduct qualitative, in-depth interviews with professionals outside Valdez. These interviews uncover valuable 30,000 ft. perspectives.
- *Quantitative Perception Study:* This survey is conducted using a statistically significant random sampling of consumers and non-consumers in outside markets using existing inquiry records. Data will be cross-tabulated in a number of ways to reveal the most insightful patterns between consumer and non-consumer groups. For instance, perceptions and attitudes for those who have visited Valdez will be compared and contrasted to those who

have not visited and are reporting perceptions purely on reputation. This Consumer and Non-Consumer Awareness and Perception Study measures:

- Overall awareness and perceptions of Valdez.
  - Overall awareness and perceptions of the competition.
  - Measurements of Valdez’s delivery of quality of life indicators.
  - Consumer experiences with Valdez.
  - Attitudes regarding Valdez’s strengths and weaknesses.
  - Consumer opinions regarding what needs to be added or taken away.
  - Changes in consumer perceptions of Valdez after visiting.
  - Patterns of visitation activities associated with consumer’s primary purpose of visitation.
- *Competitive Positioning Review*: A brand message and marketing strategy analysis to evaluate Valdez’s position relative to the competition in the state and in the region.
- *Tapestry® Consumer Profile*: Tapestry provides a visitor profile that is entirely unique to your consumers. Lifestyle, preferences, media usage, buying behavior and more, this report is useful for identifying potential growth visitor markets, budget allocation, production development and event planning.
    - *Who Report*: Consumer demographic and socio-economic classifications; this report also compares your consumers to the profiles of your community. In other words, are your residents like or unlike your visits?
    - *What Report*: Profile of consumer lifestyle and media habits such as media usage, household buying preferences, recreational interests, civic involvements, dining choices, retail preferences, lodging tendencies, travel behavior and more.
    - *Where Report*: Grid showing relative comparisons of feeder markets based on the highest concentration of consumers.
    - *Consumer Mapping*: Origin information from existing databases (inquiries, lodging properties, attractions, etc.)

*Deliverables*

- *Research report assembled and delivered following research and strategy prestantion in Task 3.0*

**Task 3.0 – Insights and Strategy**

This task includes the analysis of all of the input received to date through the branding outreach and the vision planning processes, and the synthesis of that information into a succinct storyline. From this storyline, we will create a strategic DNA statement for Valdez, which will be a critical touch point for all branded activity moving forward.

Based on these insights, we will develop a guiding statement for your brand. This statement will serve as the touch point for all Valdez activity moving forward. Included in this DNA definition is:

- Target audience: For whom Valdez has the most appeal
- Frame of reference: Geographic context of Valdez
- Point of difference: What makes Valdez special
- Benefit: Why it should matter to the consumer

From the approved DNA statement, we will prepare a “Research and Strategy” Presentation, which will include a review of all relevant research, insights and recommended DNA Definition. We will preview this presentation with key branding committee members for purposes of editing and fine-tuning. We will then present the finalized presentation at a larger stakeholder meeting.

#### *Deliverables*

- *Research and Strategy Presentation*
- *Research report assembled and delivered*

#### **Task 4.0 – Creativity and Design**

This task encompasses the effort involved in transforming the insight and strategy developed to date into tangible creative products that embody Valdez. We will analyze the current creative elements used by the City of Valdez and highlight strengths and weaknesses therein. An in-depth creative brief and creative workshop guides this work. We will create alternative straplines, logos, color and messaging (with graphic standards). Additional deliverables will also be developed to express the new brand identity in the context of its future use.

We will conduct a creative workshop with the Valdez creative team that explores the roles of different creative elements and identifies creative preferences. The goal of this workshop is to hone in on the type of work you want without limiting the creative thinking of our writers, graphic designers and art directors.

We will provide a minimum of five different straplines along with rationales for the strengths of each line. We will conduct trademark and Google searches to ensure the availability of each line to ensure that it is available to you and not already trademarked or in use.

We will prepare a slate of 8-10 alternative logos, which will represent a range of options, for presentation to the Valdez creative team (3-4 people identified in conjunction with North Star). We will provide one round of revisions to the selected mark. Once the preferred logo has been chosen and perfected, we produce it with and without the state name and with and without the strapline in both vertical and horizontal lockups.

We will provide versions of the logo for each individual public sector organization. We will also provide the private sector with details on the framework to be used in any number of ways moving forward.

The logo will be prepared in both black and white and color versions. We will present two color palettes and visual looks for the logo, and will facilitate a meeting with the Creative Team to select one look to be applied to all subsequent deliverables.

We will prepare a graphic standards guide for the logo which will contain the necessary information for using your logo, color, typefaces, language, narrative and other key elements to ensure consistency across all mediums and from any organization. We will provide the Client with both digital and printed versions of this Guide and the final logo.

We will prepare a brand narrative based on Valdez’ DNA Definition. This narrative, celebrating what makes Valdez special, is described in artistic and compelling language for connecting emotionally with consumers. The narrative defines the community’s personality and tone of voice. It can be woven into ad copy, placed on websites, integrated into speeches and distributed to businesses to use in

their own communications about the place they call home. Sub-narratives for target audiences will also be provided.

We will prepare a brand narrative based on Valdez' DNA Definition. This narrative about what makes Valdez special is described in artistic and compelling language for connecting emotionally with consumers. The narrative defines your personality and Valdez tone of voice. It can be woven into ad copy, placed on websites, integrated into speeches and distributed to businesses to use in their own communications about the place they call home. Sub-narratives for target audiences will also be provided.

We will work with the Client to identify 10-12 custom deliverables that target your specific goals, and brings the logo, line, color, photography, narrative, graphic elements and much more to life in the real world, in locations such as:

- Community Portal Website
- Organizational Website Design
- Social Media Application
- Partnership Opportunities
- Print and Electronic Advertising
- Billboard Design
- Signage (gateways and wayfinding)
- Stationery
- PowerPoint Templates
- Merchandising
- Community Outreach

#### *Deliverables*

- *Camera-ready art for logo and line*
- *Graphic Standards Guide*
- *Design Templates for Communication Materials*

#### **Task 5.0 – Implementation Plan**

We will provide the Client with a detailed implementation plan that will cover the first two years of implementation with detailed explanations and examples of every recommendation. It will prioritize both long and short-term strategies and will be written to employ a variety of communication tools. This plan will address the following:

- Identification of specific goals and areas of emphasis for the logo in the first two years
- Marketing and Communication action plan – how should the brand influence marketing and communication efforts from the City, economic development, tourism and partner organizations
- Business partner integration and promotion – how does the logo integrate into everyday lives and local business operations
- Public Relations – we will create relevant story ideas that work together to build the brand message. This will include direction for how to leverage social media in the distribution of these stories and for interaction with your audiences.
- Staff Integration Recommendations – we will provide specific steps for integrating the brand internally in communications, materials, language, stationery, email signatures, etc. as well as ideas for generating excitement for and interest in your brand internally.

- Promotion & Assimilation Tactics: In addition to the above target areas, we will also provide traditional and nontraditional integration direction across the following tactical areas:
  - Online/social media
  - Guerrilla marketing
  - Targeted events/festivals
  - Policy
  - Sports
  - Environmental applications
  - Arts
  - Incentives
  - Exports
  - Awards
  - Education

### *Deliverables*

- *Two-year brand assimilation and implementation study*

### **Task 6.0 – Workshops and Training**

We will prepare a presentation that will cover the high points of the branding research and strategy and provide a thorough explanation of the foundational creative development, and the steps included in the action plan. We will deliver this presentation up to three times to the groups or committees of your choice.

We will conduct up to three training workshops within Valdez. This workshop will focus on brand education and on strategies participants can use to spread the word about the brand or integrate it into their own initiatives. These workshops will be tailored to suit the audience for each workshop (Staff/Partner Agencies, “Friends of Valdez” and Private Sector Partners).

We will conduct a special ‘Friends of Valdez’ workshop, to share the tools, ideas and designs to help them start spreading the word about their hometown.

We will collaborate with the Valdez team to assist in the planning and implementation of your initial roll-out.

### *Deliverables*

- *Final Presentation*
- *Workshop Guide*

### **Task 7.0 – Evaluation and Results Tracking**

This task includes work involved in answering two basic questions: 1) have responses to the brand among target audiences changed in the way that was intended; and 2) have these changes resulted in action that will achieve the desired objectives of the brand?

We will provide a 12-month follow up after a year of your brand implementation to discuss the successes enjoyed and hurdles that you are working to overcome. We provide suggestions and direction for next steps in your continual brand integration.

We will provide a Brand Barometer measurement after your first twelve months of implementation to track the progress of the community, based on the benchmarks established during the research phase of this project. This current national sampling mitigates swings in the economy and gives you the truest look at advocacy for Valdez and therefore the success of your first year's effort by one measure.

The purpose of this effort is to gain an in-depth understanding of the brand perceptions of the community among consumers. We have included up to 80 additional hours of effort over the course of the 12-month period after completion of Task 6.0 to answer questions and provide follow-up.

*Deliverables*

- *Brand Barometer score and comparison to benchmarks and national averages*
- *Observations and recommendations following first year of implementation*

End of Phase 1 Scope

### Phase 1A and 1B Schedule

For initial review and consideration, we have outlined a potential timeline for the project based on the tasks included in this scope of services.

Schedule items in *italics* represent milestones in the *Branding process*. Regular font represents milestones in the Vision Plan process.

Staff review of Scope and Fee:	October 13-19, 2016
Revisions and contracting paperwork	October 19-21, 2016
Target City Council Agenda	November 15, 2016
Advance Planning/Community Engagement Plan (CEP)	November 21, 2016 – January 6, 2017
<i>Branding Research and Education Begin</i>	<i>November 21, 2016</i>
Submit CEP to Client	January 6, 2017
Client review of CEP	January 6 – 13, 2017
Finalize CEP and Prepare for Site Visit 1	January 16 – 27, 2017
Site Visit 1	February 6 - 11, 2017
<i>Branding Ethnographic Studies in Valdez</i>	<i>February or March 2017</i>
Prepare Site and Background Analysis (SBA)	February 13 – March 17, 2017
Submit SBA to Client	March 17, 2017
<i>Branding – Northstar (NS) Site Visit</i>	<i>March 13-20 or April 10-17, 2017</i>
Site Visit 2	March 26 – April 1, 2017
Prepare Development Alternatives Report (DAR)	April 3 – June 2, 2017
Interim Presentations of DAR (in Valdez)	May 15 – 17, 2017
Finalize DAR	May 17 - June 9, 2017
<i>Branding: NS Research and Strategy Presentation in Valdez</i>	<i>Mid-July 2017</i>
Submit DAR to Client	June 9, 2017
Client review of DAR	June 9 – 30, 2017
Finalize DAR	July 3 – 21, 2017
Site Visit 3/DAR presentations (in Valdez)	July 24 – 28, 2017
<i>Branding: NS Creative and Action Process Begins</i>	<i>Mid-July 2017</i>
Prepare Draft Vision Plan with preferred DAR	July 31 – August 29, 2017
Submit Draft Vision Plan to Client	August 29, 2017
Client review of Draft Vision Plan	August 29 – September 11, 2017
Draft Vision Plan Presentations (in Valdez)	September 11 – 13, 2017
Prepare Final Vision Plan	September 13 – October 27, 2017
Submit Final Vision Plan to Client	October 27, 2017
<i>Branding: Final Presentation in Valdez</i>	<i>November 2017</i>
Final Vision Plan Presentations (in Valdez)	November 6-8, 2017
Follow up Coordination and Assistance	Ongoing

## **PHASE 2: VALDEZ COMPREHENSIVE PLAN, ZONING CODE AND DESIGN GUIDELINES**

### **Task 2.1 - Community Engagement**

The following engagement activities are anticipated for Phase 2:

- Community Workshop #1: Introduction to the Comprehensive Plan, Zoning Code and Design Guidelines Planning Process
- Task Force/Ad Hoc Committee Meetings (up to 5)
- Joint Study Sessions with City Council (up to 3)
- Workshop #2: Exploring Policies and Programs w/ Valdez Community
- Workshop#3: Community Review of Draft Plans
- Joint Study Session to review draft plans

### **Task 2.2 - Development of Comprehensive Plan Document**

The Valdez Comprehensive Plan will constitute the primary policy guidance document for the City. The Plan document will include the following topical chapters:

- Land Use
- Housing
- Mobility and Transportation
- Conservation and the Environment
- Community Resources and Facilities
- Community Design
- Open Space
- Recreation
- Economic Development
- Community Safety

Each of these chapters will provide policies, programs and actions for implementation in addition to maps, tables and graphics the illustrate community-wide polies, programs and implementing actions.

### **Task 2.3 - Comprehensive Zoning Code Update**

**Kick off Meeting** - The consultant team will conduct a kick-off meeting with appropriate City staff members to:

- Review the City's expectations for the Zoning Code.
- Refine and detail the project scope, budget, and schedule as necessary.
- Discuss problems and issues associated with present City land use and development regulations (including regulatory topics that need attention but are not fully addressed in current ordinances).
- Tour the City in order to gain further understanding of the development issues and opportunities and related Zoning Code amendments. Here we will be reviewing development projects to understand how and why they turned out the way they did.
- Review and discuss preliminary format and organization alternatives.

- Receive from the City documents relevant to the Zoning Code including, but not limited to, the existing Zoning Code marked up with staff comments, the City staff's fix-it wish list,

**Document Review**

The consultant team will review all City documents relevant to the Zoning Code. This subtask will involve particular attention to highlighting the goals and policies of the Comprehensive Plan. We will also work with City staff to review the overall I Code to identify other provisions that should be included in the Zoning Code, or that will at least need to be understood so that no conflicts occur with the Zoning Code provisions.

**Existing Code Forensic Assessment and Site Analysis**

The Kimley-Horn team will provide an initial forensic assessment of the existing Zoning. The assessment will evaluate content, stylization, organization, and overall function and readability of the document. This assessment will be useful in the initial outreach efforts and will provide the basis for the issues matrix and draft document outline.

**Stakeholder Meetings**

This task would consist of a series of short meetings scheduled over one business day. The meetings will engage with individuals and groups identified by the City's project manager as key contacts within the community who can identify issues of public interest and concern relative to the City's development regulations and development review process. These meetings would begin with introductions of the attendees (consultants, City staff, neighborhood groups, Chamber of Commerce, local builder groups, community representatives, etc.) and continue with a brief explanation of the detailed work plan, schedule, and anticipated products associated with the Zoning Code. The consultants and City staff would then ask for comments from attendees regarding their specific Zoning Code experience and concerns, and suggestions on how to address them.

**Code Update Task Force Meetings**

The Kimley-Horn team recommends the formation of a Zoning Code Update Task Force consisting of members of the City staff, elected and appointed officials. Representatives from Economic Development, Planning, Code Enforcement, Engineering and the city's policy-makers are important contributors to the development and implementation of the Zoning Code. Therefore, a core group of individuals would be assigned to provide more focused, technical discussion of the Zoning Code and Design Guidelines.

- Meeting #1 – Project Introduction and Purpose – introduce the project process and role of the Task Force. Discuss preliminary issues and opportunities with the update. Describe and discuss the Level I, II and III priorities as described in the April 19, 2016 Request for Proposals.
- Meeting#2 – Issues and Opportunities Identification – detail discussion of Zoning Code and Design Guidelines issues and opportunities, preferred amendments, organization, content and stylization of the Code and Design Guidelines documents.

**Outreach Summary and Issues Identification and Summary Matrix**

Based upon the results of meetings with staff, our document review, and public outreach, the team will prepare an initial Summary Matrix of Zoning Code Issues. The matrix will identify the shortcomings of the existing Zoning Code, the revisions deemed necessary to correct these deficiencies, and where the revisions will be addressed in the Zoning Code. The matrix can be used

to track revisions to the existing Zoning Code and to assist in the preparation of a staff report when the time comes to adopt the Zoning Code and Design Guidelines. It is expected that the matrix will undergo significant revision as the project progresses toward completion.

*Deliverable*

- *Summary Matrix of Zoning Code Issues (one electronic copy)*

**Prepare Updated Code Outline, Table of Contents and Style Guidelines**

Based on the input received from staff, the team will prepare a draft annotated outline, style sheet, and sample chapter format to illustrate the intended format and style of the Zoning Code. After staff review, the team will discuss with staff any desired changes. The consultant team will work with City staff to provide information on the status of the Zoning Code project on the City’s website.

*Deliverable*

- *Zoning Code format and style sheet; sample chapter in tentatively approved format (one electronic copy)*
- *Project update sheets (up to 10 one page documents) and one Public Review Draft in PDF format suitable for posting on City’s website.*

**Planning Commission/City Council Study Session**

A joint Study Session with The Planning and Zoning Commission and the City Council is recommended at the conclusion of Tasks XX through XX. The Study Session will provide an opportunity for the City’s decision-makers to provide comment/direction prior to amending the Zoning Code and creating the Comprehensive Design Guidelines documents. The purposes of the study session would be to review the overall objectives for the Zoning Code, the project work plan and schedule, the anticipated products of the effort, and the list of issues guiding the Zoning Code and Design Guidelines update preparation. The study session would also provide the opportunity for individual Commission and Council members to express their thoughts on the project, for the Commission and Council to discuss and/or add issues to the list for consideration, and for other citizens in attendance to provide their input.

*Deliverable*

- *PowerPoint Presentation and attendance and participation at the Study Session*

**Task 2.4 - Draft Code and Design Guidelines**

**Reorganized Code Document** The first step in this process is to prepare a comprehensive and completely reorganized document to prepare for the comprehensive update to the Zoning Code. This will include a complete reorganization of the document prior to the physical edits to the existing Code language.

We suggest preparation and delivery of the Administrative Draft of the new Zoning Code in segments, rather than in one deliverable, for City staff to review. We have found that it is easier for staff to give timely feedback and to review the overall content of the Draft Zoning Code when it is presented in segments. As an alternative, the consultant team will prepare the Administrative Draft Zoning Code as one comprehensive document, if that approach is preferable. The order and content of the segments can be tailored based upon City preferences. The following components are anticipated:

- A land use classification system that clearly identifies the uses that may be allowed in each zoning district. This classification system will serve to consolidate the City’s current use categories and use descriptions by providing for uses that are not currently addressed and by

using clear terminology to define each allowable use. The classification system will employ up-to-date terminology, and an appropriate combination of specific and generic land use types, instead of a lengthy “encyclopedic” list of allowed uses that can quickly become obsolete. Definitions of all the land use types included within the classification system will also be provided.

- The zoning districts, the land uses allowed within them, and the type of ministerial or discretionary land use approval required for each use (some uses may be allowed with no land use permit, subject to compliance with applicable standards and obtaining any necessary construction permits). Special attention will be given to reviewing each zoning district with staff to ensure that specific allowable uses are appropriate in each zone and consistent with the updated General Plan.
- Development standards for each zoning district (e.g., building envelope standards, height limitations, setback requirements, site coverage requirements, etc.) organized in tables and graphically illustrated wherever possible
- Ensure consistency with the Comprehensive Plan land use designations and implementation of Comprehensive Plan policies. Careful review of land use policy programs and policies will be undertaken.
- Incorporate provisions and standards that expand upon and implement the goals and policies found in the City’s recently adopted Specific Plans addressing pedestrian oriented, transit-supportive development.

We will send each set of provisions to City staff for review as they are completed. Staff will be expected to provide their comments on the draft using Microsoft Word’s “track-changes” tools and speaking in one voice. We will then meet and/or conference call with City staff to discuss desired changes, and direction for the next step in the process.

### **Task 2.5 - Comprehensive Design Guidelines**

The Valdez Comprehensive Design Guidelines are a post-entitlement planning tool to ensure the provisions of the Zoning Code and Comprehensive Plan are implemented at the project level. While not a regulating document, the Design Guidelines should express the City’s intent for quality design in the City of Valdez.

The following considerations will be reflected in the Design Guidelines document.

- Organization, format, and table of contents
- Organization by use type and geographic location to coordinate w/ Comprehensive Plan and Zoning Code content
- Robust graphic quality and visual imagery
- Development of Users Guide and Design Review Checklist

The Comprehensive Design Guideline document will provide for intuitive organization, detailed table of contents by land use type, maximization of graphic descriptions, increased stylization, and readability.

We will send each set of provisions to City staff for review as they are completed. Staff will be expected to provide their comments on the draft using Microsoft Word’s “track-changes” tools and

speaking in one voice. We will then meet and/or conference call with City staff to discuss desired changes.

### **Task 2.6 - Zoning Code and Comprehensive Design Guidelines Review and Approval Preliminary draft Zoning Code and Design Guidelines.**

This task will include revisions to the contents of the administrative draft segments based on previous staff input, and preparation of the remaining parts of the preliminary draft Zoning Code and Design Guidelines, including a detailed table of contents, and the inclusion of all the graphics and illustrations needed for the new Zoning Code.

Graphics will be used throughout the Zoning Code and Design Guidelines wherever they may assist users in visualizing the meaning and applicability of development standards, or otherwise improving understanding or ease of use. The administrative provisions may incorporate flowcharts and other graphics if City staff and the consultant team determine that the illustration of procedures would be helpful. We will not artificially limit the number of illustrations/graphics to be included in the Zoning Code, but will instead provide graphics wherever they will be of use.

We will assemble a complete preliminary draft Zoning Code and Design Guidelines and forward copies to City staff for review and comment. Staff will be expected to provide their comments on the draft using Microsoft Word's "track-changes" tools and speaking in one voice. We will then meet and/or conference call with City staff to discuss desired changes.

#### **Stakeholder Review of Draft Document**

The Kimley-Horn team will conduct one public workshop with stakeholders to review the Zoning Code and Design Guidelines and receive comments from the participants.

#### **Task Force Review of Draft Documents**

The Kimley-Horn team recommends two meetings with the Zoning Task Force to review the document and provide comments to City staff before the release of the entire document package for public review.

##### *Deliverable*

- Preliminary draft Zoning Code (one electronic Copy)

#### **Screencheck draft Zoning Code and Design Guidelines.**

A Screencheck draft Zoning Code and Design Guidelines will be prepared and provided to the City to verify that all requested changes to the preliminary draft have been properly completed, and that all final graphics are acceptable.

##### *Deliverable*

- Screencheck draft Zoning Code (one electronic copy)

#### **Public Review Draft and Final Zoning Code and Design Guidelines.**

A Public Review draft Zoning Code and Design Guidelines will be prepared and provided to the City for review by the Planning Commission, City Council, and the general public during the workshop/public hearing process.

*Deliverable*

- *Public review draft and Final Zoning Code (one electronic copy)*

**Public Hearings**

Adoption of Comprehensive Plan

Adoption of Zoning Code

Adoption of Comprehensive Design Guidelines

**PHASE 3: CAPITAL IMPROVEMENTS AND IMPLEMENTATION STRATEGIES**

**Scope Overview** – Future development of projects in the community should be guided by a comprehensive implementation strategy plan and capital improvements program.

**Task 3.1 Implementation Strategy Plan**

Identification of Short, Medium and Long-term Implementation Strategies

Responsibilities and Actions Matrix

Capital Improvement Programming Plan

Capital Improvement Cost Analysis

**Task 3.2 Capital Improvement Projects**

Schematic Design Phase

Design Phase

Bidding Phase

Construction Phase

Program Management

***End of Scope***