



June 22, 2017

Elke Doom, City Manager
City of Valdez
212 Chenega Avenue
Valdez, AK, 99686

RE: REVISED SCOPE OF WORK

Kimley-Horn and Associates, Inc. is please to present this revised Scope of Work for Community Engagement, development of a citywide Comprehensive Plan and a Marketing and Branding Program. Our revised Scope of Work reflects our collaborative efforts to establish a methodology for the City to achieve its objectives in an efficient and cost-effective manner.

Attached you will find a detailed summary of the task, budgets and deliverables for each component of the work effort.

We look forward to collaborating with the Valdez community on this important endeavor. We are prepared to immediately commence the work effort upon the City's authorization.

Should you have any questions, please contact Keith Pelan keith.pelan@kimley-horn.com at 714-705-1369 or Dave Barquist dave.barquist@kimley-horn.com at 714-705-1317.

Regards,

Keith Pelan, RLA
Principal-in-Charge

David Barquist, AICP
Project Manager

Joe Kaltsas, PE
Managing Principal

June 21, 2017

Exhibit A – Scope of Services

The Kimley-Horn led team will complete the following Scope of Services. The scope requirements for Task 2 and 3, as currently anticipated are shown below understanding that it may be appropriate to make adjustments as the requirements come more into focus during Task 1.

Task 1: Valdez Community Engagement Scope of Work

Scope Overview – This scope of services provides for the community engagement portion of a larger process designed to provide the City of Valdez with a policy framework that will serve as the foundation to guide the Valdez community in reaching its goals. Work tasks that may occur after this initial effort include; 1) an update to the Comprehensive Plan (covered by Task 2), 2) an update to the Zoning Code (not part of this Agreement), 3) a Branding/Marketing program (covered by Task 3), and 4) the preparation of City Design Guidelines (not part of this Agreement).

We anticipate the Community Engagement process will include a series of “on the ground” visits to Valdez where the Kimley-Horn 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 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 Kimley-Horn team to continue the preparation of documentation and prepare for additional site visits.

Task 1.1: Advance Planning and Strategy Preparation

The Kimley-Horn team (we) will collectively meet and prepare for the community engagement process prior to the first site visit to Valdez. This will consist of 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, with schedules and expectations for the input and feedback loop anticipated throughout the duration of the project.

During this planning stage, we will also gather readily available mapping and review existing City documents and recently completed studies. We will prepare preliminary base maps and other graphics that will be utilized throughout the planning process. Readily available mapping would include current Aerial photography, GIS and CAD compatible maps such as parcel maps, utility maps, and other maps that the City already has in their data base.

We will schedule and participate in semi-monthly- 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 strategy 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. It would typically consist of:

- Overview and Clarification of Scope of Work and Deliverables
- Website
- Press releases
- Outreach Schedule and Meeting Summaries
- Questionnaire/Survey
- Key Stakeholder Identification
- Advisory Committee and Working Group Formation

Task 1.1 Deliverables

- *Team Conference Call(s)*
- *Draft Press Release*
- *Outreach Schedule and Meeting Summary*
- *Draft Website Format and Content (to be hosted on the City's website)*
- *Team Contact List and Responsibilities/Assignments*
- *Advisory Committee and Working Group outline of responsibilities*

Task 1.2: Community Kick-off Week (Site Visit 1)

During a full week period (4-5 days on site), the project team will conduct a series of community meetings to kick-off the project. These meetings are intended to provide significant input into the planning process with up to 4-5 Kimley-Horn team members in attendance. During this visit, we will engage in the following work efforts:

- **Community Walk (walking workshop)** – Guided/Self-guided tour of the community, allowing participants to engage in dialogue about the community. A map of the walking tour, with notes, stop locations and other details will assist participants in providing input.
- **Table/Booth at Community Events** – A table/booth will be developed for a variety of public/community events, such as Gold Rush days. The booth will provide an opportunity for the community to understand the planning process, learn about future participation opportunities and engage in dialogue about the future of Valdez.
- **Youth Visioning Workshop** – The team will collaborate with the Valdez City School District to involve students from Gilson Middle School, Hutchens Elementary School and Valdez High School to provide an opportunity to engage w/ young residents. This interactive workshop will allow you to express their desire for today and the future.
- **Staff Visioning Workshop** – Working with the project team, a Vision Workshop for staff will be conducted. Ideally, this workshop will include Executive to rank and file staff. The workshop will explore challenges, opportunities and visions for the future.

- **Business Leaders Forum** – The business community will engage in a forum to discuss needs, opportunities and challenges. Interactive exercises to explore issues will be conducted.
- **Community Visioning Charrette** – We will host a community-wide open forum which will allow members of the community to explore opportunities, challenges and their visions for the future. The meeting will overview the planning process, detail outcomes and provide interactive exercises.
- **Advisory Committee Formation** - During our time on-site, we will engage in further discussion of and recruitment of the proposed advisory committee. This committee should consist of no more than 15 persons, appointed by the City Council, and representing a broad range of community interests. We anticipate that the advisory committee will be formalized after this initial site visit in preparation of meeting with the consulting team during site visit 2.
- **Stakeholder Interviews** - Up to 10 meetings with various stakeholders (individually or in groups) will be conducted. These are ½-1 hour meetings with various representatives in the community, such as Alyeska, School District, Museum, Port, and others.
- **Intercept Surveys with Residents, Business and Visitors** - project team members will visit with local employees, residents and visitors in an “on the street” format, asking questions and gaining feedback on a variety of issues. This will provide an opportunity to talk with people in their own environment.
- **Social Media (Website, radio, etc.)** - A website will be developed, and other outreach methods will be explored, such as Twitter, Facebook, radio, and other media to “get the word out” about the planning process.

This task will also allow for the gathering of information relative to existing conditions to be used in the preparation of the baseline condition assessment proposed in Task 1.3. This information will consist of summary notes, mapping, and photographs.

Task 1.2 Deliverables

- *Agendas/Materials/Presentation/Facilitation/Photography for all meetings and workshops*
- *Website Updates*
- *Written summary of initial insights, with meeting summaries and notes*

Task 1.3: Baseline Condition Assessment

To provide an important basis for discussing community assets, challenges, constraints and opportunities, a baseline conditions assessment will be prepared. This baseline assessment, combined with the information gathered from the Community in Task 1.2, will provide the requisite data to inform future discussions of policies and actions to be undertaken. The information gathered in this task will inform the balance of the community engagement process and will be directly transferable to subsequent work tasks such as the Branding program and the Comprehensive Plan update.

During this task, the Kimley-Horn team will gather background information in these general areas:

- **Planning** - current projects and recent studies.
- **Mapping** - current conditions, in GIS based format.
- **Site Visual Surveys and Investigations** - on-the-ground review of site conditions.
- **Photography** - photographic summary of various typical conditions throughout the City.
- **Infrastructure Facilities** - mapping and general descriptions of infrastructure facilities (roads, utilities, geographic features and limitations), using City provided base maps.
- **Design and Development Constraints and Opportunities** - general textual discussion and mapping of physical constraints and opportunities.
- **Housing Conditions/Availability** - general mapping of existing housing conditions.
- **General Economic/Fiscal Baseline Conditions** - general summary of baseline economic conditions via recent reports and studies.
- **Overview of Regional Context and Site Conditions** - addressing both the natural and built character of Valdez.
- **Land Use** - conduct a preliminary assessment of the distribution, character and condition of existing land uses, buildings and structures.
- **Ownership Patterns** - conduct a preliminary assessment of land ownership (public vs. private and other major land owners).
- **Mapping** - proposed new development or subdivision projects and areas of ongoing concern.
- **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.
- **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.
- **Infrastructure Analysis** - assessing the current general condition of infrastructure elements including roads, City utilities (water, sewer, stormwater), and public buildings

Field work for this task will be conducted during site visit 1, 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.

Task 1.3 Deliverables

- *Review and Assessment of Existing Documentation*
- *GIS Mapping of existing conditions*
- *Quantified Analysis of Community Features (land use, dwelling units, etc.)*
- *General Infrastructure Mapping*
- *Opportunities/Constraints Mapping*
- *Housing Locations and General Conditions Report*
- *Website Updates*

Task 1.4: Exploring Community Assets and Challenges (Site Visit 2)

This task will further explore the community assets and challenges defined during prior community engagement activities. The intent of this task is to build on prior efforts and begin to define community assets and challenges.

Over a 3-5-day period with 3-4 team members, the following workshops/activities will be conducted:

- **Community Summary Workshop** – A summary workshop exploring “what we’ve learned” during the planning process and begin the definition and assessment of community assets and challenges. The public will be given the opportunity to clarify ideas and opportunities.
- **Business Leaders Forum** – A forum for detailed discussion of community assets and challenges related to business. This forum will seek to define and address the primary challenges to business success and the method/strategies to address them.
- **Staff Workshop** – Like the Business Leaders Forum, this forum will seek to define and address the primary challenges to business success and the method/strategies to address them.
- **City Council Working Session** – A summary status presentation to the City Council for additional input and comment.
- **Advisory Committee Meeting**– A working session with the appointed Advisory Committee for additional input and feedback.
- **Social Media updates (website, radio, etc.)** – Additional updates will be made to the website and other social media platforms, as applicable.

Task 1.4 Deliverables

- *Written summary of meetings and workshops, along with initial findings and preliminary recommendations.*

Task 1.5: Prioritization of Community Assets and Challenges (Site Visit 3)

Tasks 1.2-1.4 above will be utilized to help define the overall community's assets, challenges, opportunities, and constraints. This task will take the information that we've gathered to date, and begin to prioritize a series of recommendations for policies and the best use of community assets to capitalize on existing qualities and to begin addressing shortcomings.

This site visit will include up to four members of the project team in Valdez for 3-5 days to conduct the following workshops/activities:

- Community Summary Workshop
- Advisory Committee Meeting #2
- Business Leaders Strategy Session
- City Council Work Session
- Community Assets/Challenges Workshop

Task 1.5 Deliverables

- *Agendas/Materials/Presentation/Facilitation/Photography for all meetings and workshops*
- *Website Updates*
- *Meeting Summaries/Notes*

Task 1.6: Establishing the Community Vision (Site Visit 4)

Kimley-Horn will conduct site visit four with up to three team members for 2-4 days. During this visit, some final community engagement activities will be conducted to firm up the information and recommendations made in the reports and summaries prepared in Tasks 1.1-1.5. This community summary will be an expression of policy that speaks to what Valdez seeks to be in the future. Up to four members of the project team will be present for the following activities:

- Advisory Committee Meeting #3 to review the draft final report
- City Council Work Session
- Community Visioning Festival – A drop-in style forum to allow additional community input on the draft report.
- Business Leaders Work Session – a facilitated discussion with business leaders to review the draft report

During the office time following site visit 4, the Kimley-Horn team will prepare the following documents:

- A summary Community Engagement Report – this will recap the engagement activities conducted to date in written and graphic summary format
- A finalized Community “vision” or “action” plan
- A policy and priorities summary which shall serve as the basis for the possible next step in this process of updating the City's Comprehensive Plan. This summary will address the following topics, including, but not limited to:
 - Community Vision
 - Land Use and Development
 - Community Design
 - Housing

- Mobility and Transportation
- Economic Development
- Tourism and Visitor Services
- Infrastructure and Community Facilities
- Safety and Resiliency
- Natural Resources Management
- Parks and Recreation
- Ports and Harbor

Task 1.7: Final Reports and Presentations (Site Visit 5)

This task provides for a final visit to Valdez to present the finalized reports to the City. Kimley-Horn will complete presentations to (either jointly or individually):

- Advisory Committee
- Planning and Zoning Commission
- City Council

We anticipate that this visit will be attended by two team members for 2 days only. The fee for this task has been prepared based on this assumption. If the City desires additional presentations to groups or commissions, we can provide those within the time that the trip is scheduled, extend the trip, or make another trip for these purposes (as an additional service with additional fee)

Task 1 Fees

Task 1, as detailed above, will be completed for the sum of the lump sum fees shown below. The following table provides a summary of the proposed fees by subtask for informational purposes only. The fees provided are inclusive of reimbursable expenses (travel, lodging, and meals). Fees will be billed monthly on a percent-complete basis.

Task Name	Fee
Task 1.1: Advance Planning and Strategy Preparation	\$22,000
Task 1.2: Community Kick-Off Week (Site Visit 1)	\$52,500
Task 1.3: Baseline Condition Assessment	\$46,500
Task 1.4: Exploring Community Assets and Challenges (Site Visit 2)	\$35,000
Task 1.5: Prioritization of Community Assets and Challenges (Site Visit 3)	\$41,500
Task 1.6: Establishing the Community Vision (Site Visit 4)	\$77,500
Task 1.7: Final Reports and Presentations	\$75,000
Total	\$350,000

Additional Meetings

Should additional 'in person' meetings be requested within the above scope, they will be provided on an hourly plus expense basis. We estimate the following for additional meetings:

Option 1: One person for 1 day in Valdez for meetings plus travel time:	Budget: \$12,000
Option 2: Two people for 1 day in Valdez for meetings plus travel time:	Budget: \$21,000
Additional cost per person per extra day in Valdez (labor and expense):	Budget: \$3,500

End of Task 1 Scope

Task 2: Comprehensive Plan Update

Scope of Work

Scope Overview: This Scope of Work provides for the preparation of an update to the City's Comprehensive Plan with updates to Goals, Objectives and Policies. The content and magnitude of this update will be largely based on the findings of the Community Engagement process outlined in Task 1 above. Kimley-Horn anticipates beginning this task somewhere around 7-9 months into the scope of the Community Engagement process. While the exact requirements of this Task hasn't yet been determined, we are basing this general outline on work that Kimley-Horn has performed for numerous municipalities. This portion of the work will also provide for site visits to Valdez, and presentations/workshops with various City Boards and commissions, the Planning and Zoning Commission, and the City Council as described below.

The following is a general summary of the work in the Comprehensive Plan update effort:

The update to the City's Comprehensive Plan is anticipated to have several topical Chapters, or Elements. The exact topical chapters and the depth of each will be defined during the Community Engagement process conducted in Task One above

- Community Vision
- Land Use and Development
- Community Design
- Housing
- Mobility and Transportation
- Economic Development
- Tourism and Visitor Services
- Infrastructure and Community Facilities
- Safety and Resiliency
- Natural Resources Management
- Flora and Fauna
- Fishery
- Oil
- Watercourses
- Parks and Recreation
- Ports and Harbor
- Capital Improvements and Implementation

Each element will provide background data, applicable mapping and exhibits, policies, programs and recommended implementation actions. The conclusions from previously completed plans and studies which are found by the City to still be valid will be incorporated into the applicable elements. It is understood that detailed studies will not be prepared for these element under this contract. As an example, the Housing Element will provide applicable policies, programs and recommended implementation actions relative to community housing resources but this Task does not include the preparation of a detailed Housing Study for the City.

We anticipate the process for the Comprehensive Plan update to include a series of individual tasks. These are generally outlined below, however, the order of the preparation of the various elements, and the review process is subject to change based on the establishment of priorities between the City and Kimley-Horn.

Task 2.1: Identification of Comprehensive Plan Elements

Based on the findings of the Community Engagement process, Kimley-Horn will review with the City the priorities to be addressed in the Comprehensive Plan, as well as identify the elements that are necessary for inclusion. From this, we will prepare a schedule and a general outline of the contents of the plan

Task 2.1 Deliverables

- *Outline of Contents*
- *Schedule*

Task 2.2: Comprehensive Plan Outreach Activities (Site Visit 1)

This task will consist of a 3-5 day site visit with at least 2 members of the Kimley-Horn team to conduct additional outreach in the form of workshops, meetings with Boards and Commissions, and discussions with various groups as applicable to certain elements of the Comprehensive Plan. This outreach may be focused on specific user groups and/or the community at large depending on the nature of the input desired. It is anticipated that some or all of the following meetings could occur during this and subsequent site visits as detailed below:

- Meetings with the Comprehensive Plan Advisory Committee
- Community Wide Workshops
- City Council Work Sessions
- City Council Public Hearings
- Various Commission Workshops

Task 2.2 Deliverables

- *Meeting Agendas/Summaries*

Task 2.3: Comprehensive Plan Update Draft

Based on the results of Task 2.1 and 2.2 above, Kimley-Horn will begin the preparation of a draft of the document. This will likely be prepared 3-4 elements at a time, so that the City may review portions on an ongoing basis rather than the entire plan at once.

We anticipate the initial review of the draft document to be done by staff, the Advisory Committee, and the Planning and Zoning Commission. The review process would likely entail conference calls, staff markups of draft documents, and in-person workshops/presentations with the various review groups.

Task 2.3 Deliverables

- *Document Drafts (in sections)*
- *Meeting/Workshop summaries*

Task 2.4: Comprehensive Plan Draft Review Meetings (on-site)

This task will include a 2-3 day site visit with 1 or 2 members of the Kimley-Horn team to conduct in-person workshops and review of the Plan Update Draft of the first 3-4 elements. Input received during this review visit will be incorporated into the revised document while the next series of elements are being drafted.

Note: Tasks 2.3 and 2.4 above will be repeated up to four times during this process as the various groups of Plan Elements are drafted and reviewed.

Task 2.4 Deliverables

- *Meeting Agendas/Summaries*

Task 2.5: Preparation of Finalized Document

Once all plan elements have been drafted, reviewed, and edited appropriately, we will prepare a draft of the entire Comprehensive Plan. We will provide the draft plan to the City in electronic format in advance of Task 2.6 below.

Task 2.5 Deliverables

- *Final Document(s)*

Task 2.6: Final Presentations

We will make a final visit to Valdez for 2-3 days to present the finalized plan to the various boards and commissions. Any additional input received during this visit will be incorporated into the final plan. We will provide the City with electronic copies of the final document for publication as appropriate.

Task 2.3 Deliverables

- *Meeting Agenda/Summary*

Task 2 Fees

Task 2, as detailed above, will be completed for the sum of the lump sum fees shown below. The following table provides a summary of the proposed fees by subtask for informational purposes only. The fees provided are inclusive of reimbursable expenses (travel, lodging, and meals). Fees will be billed monthly on a percent-complete basis.

Task Name	Fee
Task 2.1: Identification of Elements	\$7,500
Task 2.2: Site Visit 1	\$42,500
Task 2.3: Plan Update Draft*	\$175,000
Task 2.4: Review Meetings (on-site) *	\$75,000
Task 2.5: Preparation of Finalized Document	\$45,000
Task 2.6: Final Presentations	\$35,000
Total	\$380,000

Additional Meetings

Should additional 'in person' meetings be requested within the above scope, they will be provided on an hourly plus expense basis. We estimate the following for additional meetings:

Option 1: One person for 1 day in Valdez for meetings plus travel time:	Budget: \$12,000
Option 2: Two people for 1 day in Valdez for meetings plus travel time:	Budget: \$21,000
Additional cost per person per extra day in Valdez (labor and expense):	Budget: \$3,500

End of Task 2 Scope

Task 3: Branding and Marketing Program Scope of Work

Task 3.1: Community Engagement and Education

Kimley-Horn, in conjunction with our subconsultant (North Star), (“we”) will assist the Client in the establishment of the Valdez Champions working committee, which should consist of a group of 12-15 influential voices from across the community who will specifically be engaged in the development of the Branding and Marketing Program. This group should typically comprise leaders representing diverse interests including students, matriarchs, historians, artists, parents, librarians, coaches, athletes, teachers, doctors, merchants, journalists, architects, bloggers, event planners. The City and consulting team will discuss the makeup of this group. We can assist with language for communication with this group but the invitation will come from the City. This should be an ongoing database that can be used throughout this project and beyond, particularly with implementation efforts. The City will expend a minimal amount of time compiling the list and using it to distribute information under advisement of the consulting team throughout the process.

During the Branding Site Visit, the Champions group will be assembled as a focus group. We will provide them information on branding in general, brainstorm the possibilities for their group, and discuss how an ambassador group can promote the brand and remain independent. The Champions 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 #ValdezChampions, we will set up a platform that the group can use to discuss issues important to their constituencies. Your Valdez Champions 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 at key milestones 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 lines of discussion with the press. If appropriate, we will meet with members of the press during the time allotted for our site visit

We will conduct PowerPoint presentations during the time allotted for our Branding: Site Visit to private and public sector stakeholder groups (determined and assembled by the Client) 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.

Task 3.1 Deliverables

- *Educational Website (hosted on City website)*
- *Educational Presentation*
- *Branding Initiative Press Release*
- *Valdez Champions social media platform for discussions*

Task 3.2: Research

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

- **Situation Analysis** - To establish the current lay of the land from the perspective of your critical partners, we will administer an online questionnaire to each internal group or organization and can meet with these groups (during the site visit) to more fully understand your general history, political landscape, resources, competitors, etc. The City will assist in distributing this questionnaire via email to key partners in the project.
- **Research, Planning, Communications and Media Audit** - We will conduct a comprehensive review of readily available research and planning documents provided by the Client. In addition, we will review and analyze existing marketing materials, branding, logos and messaging from public and private sector partners as well as recent press related to Valdez. These items are gathered by the City and its partners early in the process and shared online or shipped to North Star.
- **Undercover Interviews/Ethnography** – If deemed necessary by Kimley-Horn, North Star (Kimley-Horn's subconsultant) will pursue an ethnographic study during approximately a month in Valdez, with our team member living there as 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. He/she can participate in volunteer efforts, ride-alongs, road crews, fishing expeditions, and other common (and not so common) experiences in 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. The conversations are more casual and reflect a basic curiosity with a purpose as we get to know the community on a very personal basis. Only minimal time is required by the City in making introductions to some influencers and events.
- **In-Depth Survey** - This open-ended survey challenges stakeholders to provide deeper comments and opinions. We administer the survey digitally and in paper form to the list provided by you, allowing your valuable stakeholders to participate. This tool extends your participant universe and allows you to layer trending opinions with in-depth perspectives. We are seeking a response rate of about 125 for this qualitative survey. This should be extended to a cross-section of business and community leaders across Valdez. We find success in gaining that response rate if the survey is distributed to 300-400 individuals. We can advise the City on how to determine that list. After reviewing and approving the survey draft, the City

will distribute an online link to the survey via email to its list. North Star will provide the link and intro email language to be customized by the City.

- **Branding: Site Visit**

***NOTE:** North Star will guide the City and its partners in identifying a date and timeframe for this site visit to allow engagement with stakeholders, residents, and visitors (North Star expects this visit to be 7 days with attention paid to event calendars). A sample itinerary builder template will be provided to identify the types of conversations and groups we seek to engage on the visit. Site Visit conversations are summarized and presented as part of the Research and Strategy Presentation and subsequent report. The City and its partners will be responsible for scheduling all parts of the Site Visit. North Star will advise and direct for ease and efficiency.*

- **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. Nothing new should be prepared for this Sales Review. This should demonstrate how you currently speak about and promote the community for investment.
- **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 continue the conversations via phone once we get back to the office. North Star will work with the City and its partners to determine the ideal number of conversations among interviews and focus groups. North Star estimate up to 25-30 interviews.
- **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 as we target groups including millennials and empty nesters.
- **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. The City and its partners will share available

contacts and referrals among this group. Names will also be uncovered through the course of the research. North Star will add to this list with its own network of contacts and will seek (without aid from the City) input from competitors, nearby communities, and regional voices. The overall list usually numbers 2-3 dozen possible contacts.

- **Quantitative Perception Study** - his 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 to reveal patterns between consumer and non-consumer groups. For instance, perceptions and attitudes for those who have visited Valdez will be compared 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** - This task includes the preparation of a brand message and marketing strategy analysis to evaluate Valdez's position relative to the competition in the state and in the region. The City and its partners will identify its 5 key competitors (or 3 competitors for tourism and 3 for economic development). North Star will conduct a positioning review for Valdez and these identified competitors. This broad examination is aligned with the general perception research gathered within Valdez and from the outside among consumers.

Tapestry® Consumer Profile: Tapestry provides a visitor profile that is 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 visitors?
 - *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 a high concentration of consumers.
 - *Consumer Mapping:* Origin information from existing databases (inquiries, lodging properties, attractions, etc.) that can be gathered locally from the Visitors Bureau or other sources.
 - *Consumer Leakage:* Comparison of supply against demand—and a simple way to identify business opportunity

Task 3.2 Deliverables

- *Research report assembled and delivered following research and strategy presentation in Task 3.3. This report includes raw data from surveys conducted.*

Task 3.3: Insights and Strategy

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

Task 3.3 Deliverables

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

Task 3.4: 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. Guided by the creative brief and a creative workshop, we will analyze the current creative elements used by the City of Valdez and highlight strengths and weaknesses therein. We will create alternative straplines, logos, color and messaging (with graphic standards).

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 up to five different straplines along with rationales for the strengths of each line. We will conduct trademark and Google searches to determine the availability of each line 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 developed, 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 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 the 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 the 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
- Signage (gateways and wayfinding)
- Stationery
- PowerPoint Templates
- Merchandising
- Community Outreach

Task 3.4 Deliverables

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

Task 3.5: Implementation Plan

We will provide the Client with a marketing action plan (accomplishing goal of Comprehensive Marketing Plan) that will cover the first two years of implementation with detailed explanations and examples of each 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 graphic identity 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
- Alignment with City's Economic Diversification Strategy – how creative and implementation efforts can advance the goals of diversification
- 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

Task 3.5 Deliverables

- *Two-year brand assimilation and implementation study*

Task 3.6: 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, Valdez Champions and Private Sector Partners).

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

We will conduct a conference call or web meeting to collaborate with the Valdez team on the planning and implementation of the initial roll-out.

Task 6 Deliverables

- *Final Presentation*
- *Workshop Guide*

Task 3.7: 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. This examination can determine the level of adoption from the business community and other aspects of community buy-in. 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 a 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 3.6 to answer questions and provide follow-up. We can spend these hours during a follow-up visit to Valdez to conduct interviews and supplemental coaching sessions that can conclude with additional recommendations for the second year of implementation. Or we can spend them incrementally as a partner and resource to evaluate specific concerns and goals for implementation as you begin to put the brand to work (quarterly or semi-annually). Observations can be made about the level of success of delivering what your new brand promises. North Star can also examine success in economic investment, job growth, and visitor attraction numbers and determine with Valdez brand leaders what type of additional ROI study is needed and desired (outside this scope).

Task 3.7 Deliverables

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

Task 3 Fees

Task 3, as detailed above, will be completed for the sum of the lump sum fees shown below. The following table provides a summary of the proposed fees by subtask for informational purposes only. The fees provided are inclusive of reimbursable expenses (travel, lodging, and meals). Fees will be billed monthly on a percent-complete basis.

Task Name	Fee
Task 3.1: Community Engagement and Education	\$10,000
Task 3.2: Research	\$100,000
Task 3.3: Insights and Strategy	\$20,000
Task 3.4: Creativity and Design	\$40,000
Task 3.5: Implementation Plan	\$20,000
Task 3.6: Workshops and Training	\$15,000
Task 3.7: Evaluation and Results Tracking	\$15,000
Total	\$220,000

Additional Meetings

Should additional 'in person' meetings be requested within the above scope, they will be provided on an hourly plus expense basis. We estimate the following for additional meetings:

Option 1: One person for 1 day in Valdez for meetings plus travel time:	Budget: \$12,000
Option 2: Two people for 1 day in Valdez for meetings plus travel time:	Budget: \$21,000
Additional cost per person per extra day in Valdez (labor and expense):	Budget: \$3,500

End of Task 3 Scope

Summary of Fees by Task

Task Name	Fee
Task 1: Valdez Community Engagement	\$350,000
Task 2: Comprehensive Plan Update	\$380,000
Task 3: Branding and Marketing Program	\$220,000
Total	\$950,000