

City of Appleton



**Request for Proposals  
Rebranding, Positioning, and Marketing Services**

Proposals Due by TBD



## CITY OF APPLETON REQUEST FOR PROPOSALS

### CITY OF APPLETON REBRANDING, POSITIONING, AND MARKETING SERVICES

Appleton, Wisconsin

#### **CLOSING DATE FOR PROPOSALS: TBD**

Proposals must be received at the City of Appleton, 100 N. Appleton St., Appleton, Wisconsin 54911, on or before the closing date and time indicated above.

Please send the proposal to the attention of: **Sheng Riechers, Senior Communications Specialist**

#### **Statement of Need**

As the City embarks on the second decade of the 21<sup>st</sup> Century, it needs a new logo and overall branding. Appleton's current logo was commissioned by Mayor Richard De Broux, designed, and adopted in 1994 as City Hall moved into its current location in City Center. While the themes of the existing logo around economic vitality and sustainability remain important aspects of the community, our City has grown and changed over the last 27 years in ways that would better be represented by new imagery and typography. Leaving the City's brand unchanged could put the City of Appleton at a competitive disadvantage.

Branding is more than just the logo; it touches every aspect of the City's visual representation and the ways in which the City describes itself. Inconsistent use of the existing logo, including misuse of design elements such as color palette, not only weaken the City's brand identity, it can create doubt around official documents and City representatives. Presently, there are at least a half dozen graphic representations of the City of Appleton in official use that incorporate inconsistent design elements such as apples, trees, etc.

A clear, consistent brand should support the City's strategic priorities. It should also improve service to residents by stating and reinforcing the City's values. Finally, the City's brand should serve as a point of pride for the taxpayers of Appleton.

## **Purpose**

The purpose of this Request for Proposals (RFP) is to solicit proposals to establish a contract through competitive negotiation with a qualified consulting firm with experience in municipal identity/branding, including development of a brand values statement, marketing research (both quantitative and qualitative), and message/positioning development; logo development and associated graphic standards; and recommendations for brand rollout through social media marketing as well as traditional marketing.

The City of Appleton is seeking the development of a comprehensive brand marketing campaign to drive business attraction and retention, energize current residents, position the municipality as a desirable community for relocation, and to enhance general perception. The successful execution of this project will create positive impressions of the City to existing and prospective residents, businesses, visitors, and employees. Considerations must be made to include City, business and industrial assets, tourism initiatives, special events, parks and recreation amenities, and cultural and historical assets. Further, the initiatives must be adaptable to various functions, which include, but are not limited to destination marketing, economic development, and professional recruitment and (employee and resident) retention.

## **City Background**

The City of Appleton is a “full-service” municipality employing approximately 640 individuals (FTEs) in a wide range of occupations including police and fire protection, public works-related services including refuse pickup, street construction, maintenance and cleaning, snow and ice control, planning, inspection, health, parks and recreation, library, mass transit, water and wastewater disposal services, among others. This branding initiative should take into consideration how the City’s overall brand and positioning will accommodate or incorporate the follow departments, which may or may not have their own logo/brand guide:

- Appleton Public Library
- Department of Public Works
- City Attorney
- Utilities
- Technology Services (IT)
- Parks, Recreation & Facilities
- Valley Transit
- Human Resources
- Police
- Fire
- Finance
- Health
- Community and Economic Development
- Mayor

2019 Census Data:

Population: 74,098

Median Household Income: \$58,112

Median Housing Value: \$147, 800

Total Housing Units: 30,447

Number of Firms: 5,714

Percent of households with a broadband internet subscription: 86%

Race: White 80.7%, Asian 7.4%, Hispanic/Latinx 6.1%, Black/African American 3.4%, Multiracial 2.3%, Native American 0.6%

2020 National Recognition:

#1 [Best Place to Raise Kids](#)

#13 [Most Livable Small City](#)

#6 [Best Place to Live on a \\$60,000 Salary](#)

#9 [Best Place to Work in Manufacturing](#)

**Project Contact(s)**

Sheng Riechers

Senior Communications Specialist

Office of the Mayor

100 N. Appleton Street

Appleton, WI 54911

Phone: 920-832-5814

Email: [sheng.riechers@appleton.org](mailto:sheng.riechers@appleton.org)

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## GENERAL INFORMATION

### General Information and Requirements

1. In accordance with WI Statutes, all proposals received, and all materials contained therein, once opened are public record, and subject to disclosure to any person, organization, or firm, including other firms responding to this Request for Proposals.
2. The City of Appleton reserves the right to accept or reject any or all proposals, or part thereof, to waive any informalities or technicalities, or to award contracts in the best interest of the City of Appleton. In all instances, the City of Appleton's decision shall be final.
3. The City of Appleton reserves the right to reject any or all items in the proposal, if in its judgment the item does not meet the needs of the City of Appleton, or for any reason it deems suitable.
4. Prospective firms hereby warrant by virtue of submission of proposals that all terms, conditions, and requirements as stated in this document are valid, enforceable, and binding upon the selected firm.
5. Indemnification Clause  
The prospective firm agrees to indemnify, defend and hold harmless the City and its officers, officials, employees and agents from against any and all liability, loss, damage expense, costs (including attorney fees) arising out of the submitted proposal, caused in whole or in part by provider or anyone for whose acts any of them may be liable, except where caused by sole negligence or willful misconduct of the City.
6. Eligibility
  - a. The consultant should specialize in project management, research, marketing, and creative design as it relates to the development of a community brand. To be eligible to respond to the RFP, the consultant must demonstrate that it is a firm with significant knowledge and experience in providing branding, positioning and marketing services.
  - b. Priority will be given to those firms that have experience with local governments in this type of work.
  - c. Three (3) references required. Include samples from these references.
  - d. The City of Appleton desires to issue a contract to a single qualified consultant to lead the project. Consulting proposals based on a consortium approach where more than one firm will provide support within a consulting team are acceptable with a single project manager point of contact.

### Submission of proposals

1. The Proposals shall be mailed or delivered to Senior Communications Specialist on or before the deadline indicated above. (see contact information on page 1)
2. Proposal shall be on company letterhead and signed by an authorized representative of the company.
3. Firms will submit their proposal along with their fee structure document for performing the required services outlined in this RFP. The fee structure will be in a separate documented named "Fee Structure." Submissions containing the proposal and any related materials shall be named in the following manner: *"Rebranding, Positioning, and Marketing Services"*.
4. The firm shall submit one (1) electronic copy by email to [AppletonRebrand@appleton.org](mailto:AppletonRebrand@appleton.org). The following must appear in the subject line of the email: *Rebranding, Positioning and Marketing Services*. Proposals may only be sent electronically; hard copies that are delivered or mailed will be rejected.
5. The City of Appleton will not be liable for any costs incidental for the preparation of the RFP.

## **Evaluation of the Proposals**

1. The City of Appleton will evaluate and analyze all proposals, and select the firm that, in the City of Appleton's sole and final judgment, represents the best qualified and fiscally responsible solution for the City of Appleton. The City of Appleton reserves the right to seek clarification from prospective firms on any issue in their proposal or take any other action it determines necessary to evaluate the proposals and construct a solution that is in the City of Appleton's best interest. The City of Appleton also specifically reserves the right to conduct candidate interviews.
2. Proposal will be evaluated by the City using the following criteria:
  - a. Experience and success with providing rebranding, positioning, and marketing services to similar organizations
  - b. Skill, ability, and capacity to perform the specific scope of services required
  - c. Specific plans or methodology to be used to perform the services
  - d. Proposed metrics to measure success
  - e. Reference letters from other clients
  - f. Quality of proposal and samples
  - g. Proposed lump sum fee and pricing structure
3. The City reserves the right to (a) accept or reject any/or all submissions of proposals; (b) to waive any irregularity, technicality, informality or discrepancy in a proposal; (c) accept any alternative submission of proposals presented, which in its opinion, would best serve the interests of the City; (d) give full and proper evaluation of the Vendor or team presenting the proposal.

## **SCOPE OF WORK**

1. Project Management – The consultant will lead all aspects of the City's community marketing and branding initiative, including the following:
  - a. Serve as advisor to the Steering Committee (to be determined) – This team will be made up of representatives from the City and community. Meetings throughout the process will be required.
  - b. Facilitate various focus groups comprised of community members, City employees and businesses to determine existing attitudes, perceptions, opportunities, and challenges to enhancing the City's image. The consultant will be expected to employ creative means of public involvement and community engagement to ensure that community members are aware of and involved in the project.
  - c. Serve as the purchasing agent between the City of Appleton and vendors involved in the branding initiative. The City will not pay any agency commission fees associated with this service.
2. Research – Research will be the basis for the development of a brand concept, creative elements, messaging/positioning, and the overall brand initiative. The consultant will create and implement a brand research plan, which will include qualitative and quantitative research with key stakeholders to identify the following:
  - a. The key elements of the City of Appleton
  - b. Analysis of competitor marketing strategies
  - c. Measures that will be used to determine if the branding effort is successful
3. Strategic Plan – The consultant will develop strategic objectives that will help better inform the City of Appleton on implementation, management, and ongoing promotion of the brand to include, but not limited to the following:
  - a. Promotion of the use of the brand among City of Appleton departments
  - b. Maintenance and consistency of brand image and messaging while providing suitable flexibility for the target audiences of the participating departments
  - c. Recommendations of ways to articulate the brand; define markets and promotional avenues; and advise on strategies to better promote and create brand awareness

4. Creative/Development of Brand – The consultant will develop creative elements that include slogan/tag line, logo, typeface, voice/tone, market positioning, personality, and other deliverables to support the overall brand initiative. A minimum of three distinct creative options must be presented, based on the results of the research. The selected logo design will be delivered, with the final option delivered with a style manual and guidelines for use in the following
  - a. Print and electronic advertising
  - b. Website design
  - c. Media placement (TV/Radio/Outdoor)
  - d. Public relations
  - e. Events
  - f. Collateral (letterhead, business cards, memos, etc.)
  - g. Signage (building, street, welcome, vehicles, etc.)
5. Implementation Plan – The consultant will develop an action plan for implementation of the brand in sufficient detail to allow the Steering Committee to understand the approach and work plan. An Action Plan should include, but not be limited to the following:
  - a. Estimated costs/budget associated with the implementation process
  - b. Proposed timelines for development of creative elements
  - c. Recommended positioning, logo and brand guidelines
  - d. Plan for brand identity applications and brand identity maintenance
  - e. Plan for how public officials, City employees/volunteers, businesses and residents will work together to implement and promote the new brand
6. Goals/Objectives – the primary goals/objectives to be achieved by the branding initiative include but are not limited to:
  - a. Consistency – The brand should convey a consistent message and image to audiences both within and outside the City of Appleton. A defined message that will market the City of Appleton locally, statewide, nationally and internationally as a great place to live, work, and play; a community historically focused on sustainability and conservation; the right place for development, redevelopment and investment; the perfect mix for a business-friendly community.
  - b. Community Identity/Pride – Identify and promote what makes the City of Appleton distinct and appealing in a regionally competitive environment for investors, businesses, retailers, visitors, and residents.
  - c. Community and Economic Development Promotion – Promote a healthy economy, attract private investment, new residents, and young professionals, and retain key businesses and creative talent.
  - d. Flexibility – The brand must be flexible and adaptable in order to meet the needs of a variety of departments and municipal functions within the City, as well as groups and businesses within the City (chamber of commerce, convention and visitor’s bureau, etc.). It must also be flexible enough to grow and evolve along with any changes in the market.
  - e. Endorsement – The brand must be authentic and resonate with community members in the City of Appleton and the greater Fox Cities area.

## PROPOSAL REQUIREMENTS

Each proposal will include six (6) sections. Each section is laid out below with the expectations clearly defined for each section. Each section also has a percentage identified, that percentage is the weighting value added to the final score for each section as determined by the selection committee.

### **Executive Summary and Introductory Letter (5%)**

1. Executive Summary
  - a. Fees must not be included in this letter or in any portion of the submittal except on the “Fee Structure” document.
  - b. Executive Summary defines proposal elements in less than one (1) page. Provide an overview of the proposed services and plan, your organization, and its ability to be able to provide the services proposed.
2. Introductory Letter
  - a. This letter shall stipulate the following:
  - b. All terms and conditions outlined in the RFP are acceptable to the Consultant, or if not, clearly define those elements and reasons for the objection.
  - c. Person(s) authorized to represent the Consultant during the evaluation process, any negotiations, and signing of agreements that may result.
  - d. Any additional items that the Consultant believes should be added to the project.
3. Misc.
  - a. The proposal is not more than 50 pages in length and sections are bound separately

### **Description of Firm (15%)**

This relates to the Consultant’s firm and any sub-consultants. All sub-consultants and their respective roles, qualifications, and experience must be clearly identified. This section will provide a basis for judging how well the Consultant’s qualifications and experience relate to this specific project. Consultant firm profiles may be included. Elements that will be evaluated are:

1. Background & Stability of the Consultant firm. (Length of time in business, ownership, affiliations, financials, etc.)
2. Background of any sub-consulting firm(s) used on this project and an explanation of prior relationships with the consultant.
3. Three (3) relevant projects the Consulting firm has completed. **Please only provide examples of projects that the project team members have worked on.**
  - a. Each example should include a brief summary of the project, including how you measured and met success, image samples of the final product(s), and total lump sum cost with percentage breakdown of account management fees, creative development fees and media buying costs.
  - b. Provide references for each example and include name, title, address, email, and phone number for the contact person.
4. Please describe how the Consulting Firm(s) handles conflicts, errors, and/or missing information in design concepts and project specifications.
5. Please describe the Consulting Firm’s quality assurance/quality control (QA/QC) policies and procedures designed to minimize or eliminate errors, omissions and/or missing information.
6. Available resources from the firm.

### **Project Team (35%)**

This criterion relates to the project principal, project manager, key staff, and sub consultant staff. This section will provide a basis for judging how well the project team's qualifications, experience with similar projects, and time allocation relate to this specific project. Individual resumes must be included. Proposed hours for each project team member must be identified in this section. Elements that will be evaluated are:

1. Number of people and hours assigned to this project with information to be provided in a spreadsheet format that clearly identifies staff and hours.
2. The lead for each discipline (i.e. – graphic designer with the most billable project time) shall have a **minimum of five (5) years of experience** with comparable projects. Please provide references and examples.
3. Extent of principal and project manager involvement in meeting with the Project Team as often as necessary to meet objectives and additional meetings, as consultant believes necessary to enhance this project.
4. Key project team members on similar projects and unique qualifications that make them a valuable resource on this specific project, including experience with other design teams and consulting firms.
5. Project team members are experienced with rebranding and/or working with municipal organizations.
6. Key project team member roles during this project.
7. Does the project team cover all phases of this project?
8. Project Manager's technical and managerial experience with projects of similar scope and nature.
9. Provide examples of the firm's responsiveness capabilities.

### **Project Understanding (35%)**

A discussion of the approach the Consultant will use to complete the project. The proposal shall include a clear and concise understanding of the project, the work to be completed, and the coordination required based on existing information. Elements that will be evaluated are:

1. Detailed description of Firm's approach provided for each task demonstrating project understanding and needs.
2. Clear and concise explanation of specific tasks and associated schedule that provides quantifiable deliverables.
3. Defines issues to be resolved in the course of the project.
4. Incorporates coordination and involvement of City staff within key elements.
5. Description of project quality control that will meet the City of Appleton's needs and meet budget parameters.
6. Key project meetings identified with staff to ensure that a high-quality project will be delivered.
7. Recognition of elements with project not identified in this proposal the City of Appleton may wish to consider.
8. Include value-added services or creativity to proposal elements and/or incorporate new desirable elements not originally identified.
9. Firm makes clear their ability to effectively meet scope of work.

### **Project Schedule (10%)**

This relates to the Consultant's time requirements to complete those tasks identified. Elements that will be evaluated include:

1. Time required to complete tasks (duration)
2. Inter-relations between tasks (dependencies)
3. Key events during the project (milestones)
4. Critical input points from the City of Appleton
5. Ability to meet the overall schedule

### **Additional Information**

The Consultant may submit any information they believe relevant that does not fit within the body of the proposal. This may include brochures, company information, supplemental resumes, additional project descriptions, and any other information the consultant believes is useful. This additional submittal will be used by the Project Team as they see fit and may not have a significant bearing on the selection process.

## **FEE INFORMATION**

Proposed consultant fees for this project must be submitted in a separate document named "**Fee Structure**". The fee structure relates to the total estimated fee for this project as described by the consultant in Section Proposal Requirements – Project Understanding and Project Schedule. The fee structure should provide a schedule of fees for all relevant products and services described in the Scope of Work, including but not limited to cost of project management, strategic development, and paid media. Proposed resources for each task must be identified, including hours and wage rates for consultants and sub consultants. The Consultant must identify work the Consultant will not provide and must be provided by the City of Appleton. Elements that will be evaluated include:

1. Availability of resources from the consultant and sub consultant(s) for the project.
2. Estimated hours and fees to complete individual work elements.
3. Total **not-to-exceed** fee for the project. Note that your fee is to complete a scope of work as outlined in the RFP. If the account executive underestimates the amount of effort required to complete the work, they will **not** receive extra compensation. The account executive is expected to plan to the City of Appleton's project budget and perform thorough cost estimating. If the bids exceed the project budget the account executive will complete re-plan and bidding at no additional cost to the City to meet the project budget.
4. List of tasks not performed by consultant or sub consultant(s) for project that must be performed by the City.
5. Identify firm's reimbursable expenses and detailed costs of expenses.

## EVALUATION PROCESS

A Steering Committee will evaluate proposals. The proposals will be evaluated and ranked based on the information submitted in the proposals according to the evaluation criteria. The City of Appleton is intending to identify a Consultant with the following attributes:

1. Compliance with, and satisfaction of the requirements of this RFP.
2. Qualified and experienced team members who have designed and successfully implemented similar projects.
3. A demonstrated ability to provide a variety of functional and flexible designs through creative use of community engagement, resources and project team input.
4. A demonstrated ability to work with municipalities, elected officials and involve the general public on similar type projects.
5. A demonstrated ability to assemble a comprehensive and well-coordinated set of project documents.
6. A demonstrated ability to effectively coordinate and complete all tasks described above.
7. A demonstrated ability to produce accurate cost estimates and effective cost control.
8. A demonstrated ability to provide effective and timely administration of project deliverables.
9. A demonstrated ability to provide effective design cost control.

Project fees will be evaluated separately after ratings of the proposals are completed. Weighing of the project fee will be subjective; however, lowest cost does not assure selection. The City of Appleton reserves the right to select any Consultant it believes to be in its best interest and to negotiate fees or to reject any or all proposals at its sole discretion. The proposals will require an estimated ten (10) working days for evaluation.

The Steering Committee may request that consultant firms schedule trips for the Steering Committee to view relevant projects. If the Steering Committee deems interviews are required, they will be held approximately two weeks after the proposals are received. The Steering Committee will make a recommendation to the City of Appleton Community and Economic Development Committee and the Finance Committee, who will recommend the award of the contract to the Common Council. These officials have the right to terminate the project or to change the contract or budget, subject to subsequent agreement by the proposed Consultant.

The City of Appleton will not be liable for any costs incidental to the preparation of the Request for Proposals, presentations, or interviews relating to the selection process.

### **Public Information**

Proposals will be treated as proprietary and confidential from the time of receipt and through the review process; however, the Consultant shall understand that all submitted proposals become the property of the City of Appleton and information included therein or attached thereto shall become public record pursuant to Wisconsin Statute after recommendation for endorsement of contract is made. Any specific portions of the proposal which the Consultant desires to remain confidential due to legitimate "proprietary information" or "trade secret" must be clearly labeled as such upon submittal. Any such designations as "proprietary information" or "trade secret" must be strictly limited by the Consultant with the understanding that the Wisconsin Public Records Law supports a presumption of disclosure.

**Moreover, Consultant agrees to indemnify, defend and hold harmless the City of Appleton and its officers, officials, employees and agents from against any and all liability, loss, damage expense, costs (including attorney fees) arising out of the release or non-release of all or part of Consultant's submitted proposal in response to a request for said information pursuant to Wisconsin's Public Records Law.**

## TIMETABLE

- Issue RFP – TBD
- Submit questions by – TBD
- Receive answers by – TBD
- Request for Proposal Deadline – TBD
- RFP Review Begins – TBD
- In-Person Interviews Anticipated to Begin – TBD
- CED Committee Approval – TBD
- Finance Committee Approval – TBD
- City Council Approval – TBD

## INSURANCE

Provider shall furnish required certificate of insurance specified below for small exposure work and is attached to this document. The certificate shall name the CITY; its officers and employees, as additional insured.

### CITY OF APPLETON INSURANCE REQUIREMENTS “PROFESSIONAL SERVICES”

It is hereby agreed and understood that the insurance required by the City of Appleton is primary coverage insurance and that any insurance or self-insurance maintained by the City of Appleton, its officers, council members, agents, employees or authorized volunteers will not contribute to a loss. Proof of the required insurance must be submitted to the applicable City of Appleton department before the contract or purchase order is considered for approval by the City of Appleton. All insurance must be in full force and effect prior to commencing work and must remain in full force and effect for the longer of the following: (a) until the entire job is completed, (b) for the length of time that is specified in the contract, or (c) as listed below.

### PROFESSIONAL LIABILITY

- A. Liability limits:
  - (1) \$1,000,000 - Each claim, and
  - (2) \$1,000,000 - Annual aggregate.
- B. Must continue coverage for two (2) years after final acceptance of service/job.

### GENERAL LIABILITY COVERAGE

- C. Commercial General Liability limits:
  - (1) \$1,000,000 - Each occurrence limit,
  - (2) \$1,000,000 - Personal Liability and Advertising Injury,
  - (3) \$2,000,000 - General aggregate, and
  - (4) \$2,000,000 - Products-Completed Operations aggregate, which must be carried for two (2) years after the acceptance of the completed work.
- D. Claims made form of coverage is not acceptable.

- E. Insurance must include:
- (1) Premises and Operations liability,
  - (2) Contractual liability,
  - (3) Personal Injury,
  - (4) Explosion, Collapse and Underground coverage, and
  - (5) The general aggregate must apply separately to this project/location.

## BUSINESS AUTOMOBILE LIABILITY

- A. Liability limits:
- (1) \$1,000,000 - Combined single limit for Bodily Injury and Property Damage for each accident.
- B. Must cover liability for Symbol #1 – “Any Auto” – including owned, non-owned and hired automobile liability.

## WORKERS’ COMPENSATION AND EMPLOYERS LIABILITY – If required by Wisconsin State Statute or any workers’ compensation statute of a different State.

- A. Liability limits:
- (1) \$100,000 - Each accident,
  - (2) \$500,000 - Disease Policy limit, and
  - (3) \$100,000 - Disease, for each employee.

UMBRELLA LIABILITY – If exposure exists, provide coverage at least as broad as the underlying General Liability, Business Automatable Liability, Workers’ Compensation and Employer’s Liability, with a minimum limit of \$5,000,000 for each occurrence and \$5,000,000 aggregate, and a maximum self-insured retention of \$10,000.

## ADDITIONAL REQUIREMENTS

- B. Primary and Non-Contributory Requirement – All insurance must be primary and non-contributory to any insurance or self-insurance carried by City of Appleton.
- C. Acceptability of Insurers – Insurance is to be placed with insurers who have an *A.M. Best* rating of no less than A- and a Financial Size Category of no less than Class VI, and who are authorized as an admitted insurance company in the State of Wisconsin.
- D. Additional Insured Requirements – The following must be named as additional insured on all Liability Policies for liability arising out of project work: “City of Appleton, and its officers, council members, agents, employees and authorized volunteers.” On the Commercial General Liability Policy, the additional insured coverage must be on ISO Form CG 20 10 07 04 and also include Products–Completed Operations equivalent to ISO Form CG 20 37 07 04 or their equivalents for a minimum of two (2) years after acceptance of work. This does not apply to Workers Compensation Policies.
- E. Certificates of Insurance – Certificates of Insurance must be acceptable to the City of Appleton and must be submitted prior to commencement of the work to the applicable department. In addition, ISO Form CG 20 10 07 04, for ongoing work exposure, and ISO Form CG 20 37 07 04, for products-completed operations exposure, or their equivalents, must be provided to the City. These certificates must contain a provision that coverage afforded under the policies will not be canceled or non-renewed until at least 30 days’ prior written notice has been given to the City.

## **EXHIBITS**

The following Exhibits are attached.

Exhibit A – Current Brand Guide

Exhibit B – 2021 Communications Plan

Exhibit C – Various Graphic Representations Currently in Use

DRAFT

EXHIBIT A

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EXHIBIT B

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