

Dane County Contract Cover Sheet

RES 273

Dept./Division	Henry Vilas Zoo /684
Vendor Name	Affirm/STAPLES MARKETING LLC..
Vendor MUNIS #	7363
Brief Contract Title/Description	Develop, produce and implement a strategic marketing plan for Henry Vilas Zoo in 2021.
Contract Term	01/01/21 - 12/31/21
Total Contract Amount	\$ 50,000

Contract # <small>Admin will assign</small>	14047B
Addendum	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Type of Contract	
<input checked="" type="checkbox"/>	Dane County Contract
<input type="checkbox"/>	Grant
<input type="checkbox"/>	County Lessee
<input type="checkbox"/>	County Lessor
<input type="checkbox"/>	Intergovernmental
<input type="checkbox"/>	Purchase of Property
<input type="checkbox"/>	Property Sale
<input type="checkbox"/>	Other

Purchasing Authority	<input type="checkbox"/> \$11,000 or under – Best Judgment (1 quote required)		
	<input type="checkbox"/> Between \$11,000 – \$37,000 (\$0 – \$25,000 Public Works) (3 quotes required)		
	<input checked="" type="checkbox"/> Over \$37,000 (\$25,000 Public Works) (Formal RFB/RFP required)	RFB/RFP #	120049
	<input type="checkbox"/> Bid Waiver – \$37,000 or under (\$25,000 or under Public Works)		
	<input type="checkbox"/> Bid Waiver – Over \$37,000 (N/A to Public Works)		
	<input type="checkbox"/> N/A – Grants, Leases, Intergovernmental, Property Purchase/Sale, Other		

MUNIS Req.	Org Code	ZOO	Obj Code	21491	Amount	\$ 50,000
Req #	Org Code		Obj Code		Amount	\$
Year	2020	Org Code	Obj Code		Amount	\$

Resolution	A resolution is required if the contract exceeds \$100,000 (\$40,000 Public Works). A copy of the Resolution must be attached to the contract cover sheet.		
	<input type="checkbox"/> Contract does not exceed \$100,000 (\$40,000 Public Works) – a resolution is not required.		
	<input checked="" type="checkbox"/> Contract exceeds \$100,000 (\$40,000 Public Works) – resolution required.	Res #	273
	<input type="checkbox"/> A copy of the Resolution is attached to the contract cover sheet.	Year	20-21

Contract Review/Approvals				
Initials	Dept.	Date In	Date Out	Comments
MG	Received by DOA	11/12/20		
	Controller			approvals from all departments via email attached herein
	Purchasing			
	Corporation Counsel			
	Risk Management			
	County Executive			

Dane County Dept. Contact Info		Vendor Contact Info	
Name	Ronda Schwetz	Name	Danny Mager
Phone #	608-266-4708	Phone #	262.650.9900 x104
Email	Schwetz.Ronda@henryvilaszoo.gov	Email	dmager@affirmagency.com
Address	702 S. Randall Ave Madison WI 53715	Address	N28W23050 Roundy Drive, Suite 100 Pewaukee, WI 53072

Certification: The attached contract is a:	
<input checked="" type="checkbox"/>	Dane County Contract <u>without</u> any modifications.
<input type="checkbox"/>	Dane County Contract <u>with</u> modifications. The modifications have been reviewed by:
<input type="checkbox"/>	Non-standard contract.

Contract Cover Sheet Signature

Department Approval of Contract		
Dept. Head / Authorized Designee	Signature	Date
	Printed Name	
	Ronda Schwetz	

Contracts Exceeding \$100,000

Major Contracts Review – DCO Sect. 25.11(3)

Director of Administration	Signature	Date
	Comments	
Corporation Counsel	Signature	Date
	Comments	

Goldade, Michelle

From: Goldade, Michelle
Sent: Tuesday, November 17, 2020 9:54 AM
To: Hicklin, Charles; Clow, Carolyn; Gault, David; Lowndes, Daniel
Cc: Stavn, Stephanie
Subject: Contract #14047B
Attachments: 14047B.pdf

Tracking:	Recipient	Read	Response
	Hicklin, Charles	Read: 11/17/2020 9:55 AM	Approve: 11/17/2020 9:56 AM
	Clow, Carolyn		Approve: 11/17/2020 1:06 PM
	Gault, David	Read: 11/17/2020 9:58 AM	Approve: 11/17/2020 10:11 AM
	Lowndes, Daniel	Read: 11/17/2020 10:34 AM	Approve: 11/17/2020 10:34 AM
	Stavn, Stephanie	Read: 11/17/2020 10:46 AM	

Contract #14047B
Department: Zoo
Vendor: Affirm/Staples Marketing
Contract Description: Develop, produce & implement a strategic marketing plan for the Henry Vilas Zoo (RES 273)
Contract Term: 1/1/21 – 12/31/21
Contract Amount: \$50,000

Please review the contract and indicate using the vote button above if you approve or disapprove of this contract.

Michelle Goldade

Administrative Manager
Dane County Department of Administration
Room 425, City-County Building
210 Martin Luther King, Jr. Boulevard
Madison, WI 53703
PH: 608/266-4941
Fax: 608/266-4425
TDD: Call WI Relay 711

ADDENDUM TO THE AFFIRM CONTRACT WITH THE HENRY VILAS ZOO

After a challenging year that included closing for almost three months for the first time in 100+ years due to COVID-19, Henry Vilas Zoo contracted the Affirm Agency to help strategize 2020 marketing and fundraising for the zoo. The Henry Vilas Zoo seeks to continue the existing contract to engage Affirm to develop and implement the zoo’s marketing strategy for one year with three possible one-year extensions at the cost of \$50,000 per year for a total of \$200,000. This includes both operational and fundraising strategies and materials.

The Henry Vilas Zoo 2021 marketing and fundraising strategy will include:

Affirm performing the marketing planning, production, implementation, management including evaluation and measurement.

Henry Vilas Zoo has successfully implemented the “We Missed You at the Zoo” campaign designed and managed by Affirm resulting in over 185,000 visitors to the zoo since it reopened on June 18, 2020 raising \$135,000 in cash donations on site during that time as well as an additional \$190,000 in other donations to the Henry Vilas Zoo.

Additionally, by opening Henry Vilas Zoo safely during the COVID 19 pandemic, the zoo has provided a free, outdoor, family friendly and safe venue for the residents of Dane County. The Zoo has also been able to continue revenue-generating operations to help offset the loss of both revenue and donations during the three-month closure.

NOW, THEREFORE BE IT RESOLVED the County Board approved the contract extension with Affirm at a cost of \$200,000 over four years.

BE IT FINALLY RESOLVED that the County Executive and county Clerk to execute the addendum to the Affirm contract with the zoo, and authorized the Controller to issue checks for payment of invoices.



DANE COUNTY CONTRACT ADDENDUM

THIS ADDENDUM, made and entered into effective as of the date by which both parties hereto have executed this document, by and between the County of Dane (hereinafter referred to as "County") and AFFIRM (hereinafter, "Provider").

WITNESSETH:

WHEREAS Provider and County, by a separate document (hereinafter, the "Master Agreement"), Dane County Contract #14047, have previously entered into a contractual relationship pursuant to which Provider provides marketing & advertising, media buying, video & audio production, market research, brand management, graphic design and social medial planning services for the Henry Vilas Zoo, and

WHEREAS County and Provider wish to amend the Master Agreement in order to add additional work for 2021.

NOW, THEREFORE, in consideration of the above premises and the mutual covenants of the parties hereinafter set forth, the receipt and sufficiency of which is hereby acknowledged by each party for itself, the parties do agree as follows:

1. The Master Agreement shall remain in full force and effect unchanged in any manner by this addendum except as changes are expressly set forth herein. This addendum shall control only to the extent of any conflict between the terms of the Master Agreement and this addendum.
2. **Scope of Work**
In order to successfully build on and extend the impact of the successful marketing initiatives to date, AFFIRM may perform the following for Henry Vilas Zoo in 2021:
 - Campaign planning, including research and analysis, updating the strategic marketing and fundraising plan and planning meetings
 - Campaign production, including concepting, creative design and production of advertising, marketing and fundraising deliverables which may include direct mail, television commercials, radio ads, print ads, online ads, out-of-home advertising, social media and website updates
 - Campaign implementation, including media planning, buying, and added-value negotiation with media vendors
 - Campaign evaluation and measurement, including project management, meetings, reporting, and post-campaign research



DANE COUNTY CONTRACT ADDENDUM

Deliverables for 2021 include the following:

A. HENRY VILAS ZOO Fundraising/Membership/Marketing Planning and Project Management

PROVIDER will develop and oversee a strategic, integrated 2021 plan for marketing, membership and fundraising strategy, counsel and account service. The final approved plan will provide the blueprint for moving forward with marketing and outreach to individual donors, Zoo members and corporate donors to support the Zoo's operations, membership, annual appeal, events and capital campaign efforts. This plan will include recommended advertising flights during times of the year that are traditionally strong for zoos to communicate with target audiences.

B. HENRY VILAS ZOO Capital and Annual Giving Campaign Fundraising Marketing Materials Development

PROVIDER may write, design and create the following tools needed for fundraising marketing:

I. Capital Campaign Theme/Brandmark

The capital campaign theme and brandmark will serve as the unified rallying cry for the planned capital campaign fundraising efforts. It will be memorable, fit the spirit of the Zoo, communicate the capital improvements being made to zoo, why these improvements are vital to the Zoo's growth and success, be appealing to a wide range of donors and audiences, and reinforce the value of the Zoo to the community at large.

II. Capital Campaign Case for Support/Value Proposition

PROVIDER will draft and format a document that outlines:

- Brief background on the Henry Vilas Zoo
- Value to the community/conservation
- Need for all of the funding support – capital

Visuals needed include: photos of the Zoo, photos of animals & Zoo events, renderings or photos of suggested new facilities. This document will be a quick read, with a clean layout so that the information is presented in an appealing, easy-to-navigate manner, but will maintain a look that indicates that the Zoo is prioritizing the investment of funds in its animals and operations.

III. Capital Campaign Pledge/Giving Levels

Based on content/input from the Zoo's fundraising leads, PROVIDER will create a document that cleanly and concisely outlines the quiet campaign giving levels and provides a way for a donor to sign and document his or her pledge. This document is likely to be a WORD template so that certain sections can be customized to the donor prospect.



DANE COUNTY CONTRACT ADDENDUM

IV. Capital Campaign Email Template

Based on content/input from the Zoo, PROVIDER will create a membership email template that can be used by Zoo staff to renew existing members and reach out to potential new members. The template can be set up to work in whatever email platform the Zoo uses. The branding and messaging will be consistent with the campaign theme.

V. Capital Campaign Social Media Graphics/Messaging

PROVIDER will create 3-5 social media graphics and messages that encourage membership renewal and new memberships. The messaging and branding will be consistent with the overall campaign messaging and theme.

VI. Annual Giving Email Message/Template

In order to fill the ongoing needs for annual giving, PROVIDER will create an email template and messaging relative to the overall campaign theme and branding that will encourage annual giving donations (previously known as "Feed the Zoo") on a periodic and strategic basis as outlined in the strategic plan. The template can be set up in the Zoo's email platform and can be updated and scheduled for distribution by Zoo staff throughout the year.

VII. Annual Giving Letter

PROVIDER will draft and create an Annual Giving letter that can be sent to individuals who have given in the past, but for whom the Zoo does not have an email address. The messaging and branding will be consistent with the overall campaign theme.

VIII. Annual Giving Social Media Graphics/Content

PROVIDER will create 5-7 Annual Giving social media graphics and messages that support the Annual Giving needs and are consistent with the campaign theme and branding.

IX. Media Planning, Buying, Placement to Support Marketing/Fundraising

PROVIDER will plan, buy and place paid media on behalf of Henry Vilas Zoo in support of Zoo branding, membership, educational programs and events (Zoo Run, Giving Tuesday, Zoo Lights, Spring/Summer busy season, educational



DANE COUNTY CONTRACT ADDENDUM

This Statement of Work covers planned assignments for Calendar Year 2021 beginning January 1, 2021. Any additional requested services in 2021 will be executed by amendment.

Approval and Deliverables

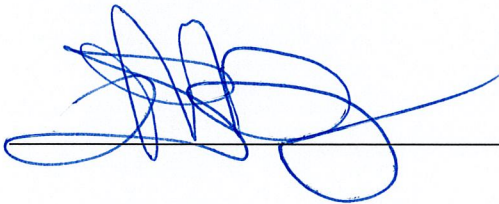
Henry Vilas Zoo will review and approve all materials and products before they are finalized for use. The Zoo will also review and approve the media placement plan prior to implementation. All materials and products developed for the campaign are owned by Dane County Henry Vilas Zoo upon full payment to PROVIDER.

COUNTY shall approve all media purchases prior to the purchase being made by PROVIDER.

3. The scope of the work is increased by \$50,000.00 for a total contract amount of \$131,800.00 and the term of the contract is extended through December 31, 2021.

IN WITNESS WHEREOF, the parties, by their respective authorized representatives, have set their hands and seals as of the dates set forth below.

FOR PROVIDER:



11/12/20
Date Signed

FOR COUNTY:

Joseph T. Parisi, Dane County Executive

Date Signed