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Marketing and Communication Leadership Committee Meeting
Thursday, November 1, 2018 @ 11:00 a.m.
Village Hall, Committee Room

AGENDA

1. Call to Order
2. Consider Revised Proposed 2019-2021 Service Agreement with MB Marketing Solutions for the Production and Design Services of Shorewood Today Magazine
3. Adjournment

DATED at Shorewood, Wisconsin, this 29th day of October, 2018.

VILLAGE OF SHOREWOOD
Sara Bruckman, Village Clerk

Should you have any questions or comments regarding any items on this agenda, contact the Manager's Office at 847-2701.

It is possible that members of and possibly a quorum of members of other governmental bodies of the municipality may be in attendance at the above stated meeting to gather information; no action will be taken by any governmental body at the above stated meeting other than the governmental body specifically referred to above in this notice.

Upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals.

SERVICE AGREEMENT

This Agreement is between the Village of Shorewood, Milwaukee County, WI (hereinafter referred to as "Village") and MB Marketing Solutions (hereinafter referred to as "Service Provider") for production of the Shorewood Today magazine (hereinafter referred to as the "Project") for the years 2019 – 2021.

In consideration of the mutual agreements contained herein, the Village and Service Provider agree as follows:

1. The Village will:

The Village will pay the Service Provider \$51,000 in 2019 for professional services as described within this Agreement in 12 monthly installments as services are provided. Professional fees should be in the amount of \$51,000 for 2020 and \$54,060 for 2021 in 12 monthly installments as services are provided. In addition, the Village may need to pay for other costs as outlined in the proposal. Such payment shall be full compensation for all services rendered and for all supervision, labor, supplies, materials, equipment and any other incidental costs. Invoices for payments should be completed on a monthly basis. To expedite payment of invoices under this Agreement, the invoices should be sent to the following:

Tyler Burkart, Assistant Village Manager
Shorewood Village Hall
3930 N. Murray Avenue
Shorewood, WI 53211

2. The Service Provider will:

- a. The Service Provider will provide the following services:
 1. Publish a magazine quarterly that focuses on news, people, and issues in the Shorewood community.
 2. Collaborate with Shorewood community partners to write content and articles for the Shorewood Today magazine. Each magazine should allocate news space for the community partners, which includes the Village of Shorewood, the Shorewood School District, the Shorewood Business Improvement District, and the Shorewood Community Development Authority. Each year there should be one issue at 48 pages, two issues at 44 pages, and one issue at 40 pages unless all community partners agree on having fewer pages published in a calendar year.
 3. Review and edit the articles submitted to assure grammar, style and language is consistent.
 4. Reach out to businesses to advertise in the magazine. Service provider must meet advertising goals as outlined in the attached proposal as well as the Village of Shorewood 2019-21 budgets (estimated revenue for advertising). Advertising rates are established based on the amounts included in the proposal, which is incorporated by reference

herein and may change if there's agreement from all community partners.

5. Coordinate the distribution of the published magazine to all businesses, residents and advertisers. Number of copies needed for distribution is outlined in the proposal.
6. Provide a quarterly report to all community partners updating them on all expenses associated with the magazine, a detailed breakdown of the types and sizes of advertisements in each of the issues, the advertising to editorial ratio to assure it does not exceed the 40% maximum level, costs associated with the magazine such as (but not limited to) printing and mailing, and other significant metrics and feedback important for the community partners to know about.
7. All photographs taken for the Shorewood Today magazine are made readily available for the community partners to utilize. Community partners must provide credit to photographer when using the photographs in any communication channels or publications.
8. Collaborate with Village staff to include electronic copy of the magazine on the Village website available for all residents and community members. Contain and maintain a list of all archived versions electronically of the magazine.
9. Provide payments to Village invoices for all advertising fees.

b. The Service Provider will submit an invoice monthly for the amount due to the Village for services upon completion.

c. The Service Provider will provide all materials, equipment and supplies necessary to perform or provide the services described.

d. The Service Provider will be obligated to perform the services described in accordance with the standards of care, skill and judgment which may be expected of professional who performs similar work.

e. The Service Provider will provide his or her services in a manner and time so as to not cause interference with any of the operations of any Village facility. In the event of a conflict between the schedules of the Service Provider and contractors and employees of the Village, the conflict may be resolved at the discretion of the Village.

3. Duration

This Agreement will become effective upon signature and all work to be completed by December 31 of each year of this contract through 2021. This Agreement may be cancelled on thirty (30) days written notice of either party.

4. Use of Village Name

It is understood and agreed that the name of the Village and the municipal location may not be used by the Service Provider or its agents in any promotional materials without prior approval of the Village.

5. Independent Contractor

It is understood and agreed that the Service Provider is an independent contractor for the performance of all services described within this Agreement.

6. Assignment

This Agreement and interests hereunder are not to be assigned.

7. Liability

The Village represents that it does not carry any insurance covering liability of its independent contractors, including the Service Provider. Service Provider is solely responsible for obtaining any insurance coverage that may be necessary to carry out its business, including workers compensation coverage and/or liability coverage as dictated by state statute. Nothing in this agreement is intended to abrogate the immunities or limitations of liability as enumerated in Wis. Stat. § 893.80 that may be asserted by either the Village or the Service Provider.

8. Wisconsin Law

This Agreement shall be governed by and construed with the laws of the State of Wisconsin.

9. Complete Agreement

This Agreement represents the entire of listing of the terms between the parties. This Agreement may be modified only in writing by an amendment signed by both parties.

10. Endorsement

By endorsing this Agreement both the Service Provider and the Village indicate that each has the authority to bind to the terms of this Contract.

Dated: _____

VILLAGE OF SHOREWOOD

BY: _____

Allison Rozek, Village President

Dated: _____

MB MARKETING SOLUTIONS

BY: _____

Michelle Boehm, MB Marketing Solutions Executive Director

MB Marketing Solutions
REVISED PROPOSAL FOR SERVICE
SHOREWOOD TODAY MAGAZINE



July 18, 2018

1) Transmittal Information

MB Marketing Solutions, Michelle Boehm
2401 E. Newton Ave., Shorewood, WI 53211

(414) 698-4369
michelle.boehm@sbcglobal.net

In 2015 MB Marketing Solutions (MB) assembled a team of Shorewood-based marketing and communications professionals to complete a strategic redesign for, and subsequently produce and distribute, *Shorewood Today* magazine as a quarterly lifestyle magazine that celebrates the initiatives, events and people of the Shorewood residential, school district and business communities. This team (please see personnel section, below) has successfully produced *Shorewood Today* for 13 consecutive quarterly issues and remains under contract through the end of 2018 to produce two more issues (fall and winter). All team members have enthusiastically agreed to submit the following proposal of service to continue producing the magazine under a longer-term contract as desired by the Village of Shorewood.

Shorewood Today is produced quarterly in collaboration with four stakeholders: the Village of Shorewood (Village), Shorewood School District (District), Business Improvement District (BID) and Community Development Authority (CDA). The magazine's stated objective is to inform readers and showcase Shorewood initiatives, events and services in a way that celebrates Shorewood as a place to live, work, play, attend school, shop and visit. *Shorewood Today* is the stakeholders' premier communication tool, reaching the broadest audience of any Village, District, BID or CDA communication vehicle with a quarterly circulation of 8,300 to all homeowners, renters, businesses, advertisers, realtors, school families and staff, along with availability at Village Hall, the Shorewood Library, Metro Market and all coffee shops in the Business District. Current and previous issues are also available digitally, for free, via the Village website, and articles are regularly shared on social media.

In the Village's most recent marketing research survey, respondents identified *Shorewood Today* as one of the two highest-ranking communication vehicles, along with the garbage kart flyers occasionally distributed by the Department of Public Works.

2) Approach

a. Production

Frequency

The MB team strongly recommends maintaining the magazine's current approach of producing four 36- to 48-page issues annually for the term of the contract (Spring/March, Summer/June, Fall/September, Winter/December). This quarterly schedule and page allocation provides the stakeholders with opportunities to present in-depth content that other communications vehicles do not accommodate, to reinforce important initiatives and messages from the stakeholders in a vehicle that is delivered directly to the audience, and to engage readers through printed visuals and content that reflect the community's brand and the stakeholders' priorities and initiatives. It also provides an excellent opportunity for our advertisers to target and reach a specific and desirable audience at an extremely competitive cost (*please see section 5*).

A bi-monthly production schedule would present considerable challenges for stakeholders, labor-wise and cost-wise. Producing six issues per year at the same high quality would require:

- significantly more resources than currently allocated because of fixed/hard costs associated with each issue (most notably mailing) even if the publication's number of pages were reduced;

- significantly more advertising sales revenue to cover the increased cost, which would require increasing rates and deviating from a stated goal of offering an affordable vehicle for advertisers to reach the magazine’s audience;
- additional labor (District) and/or cost (Village, BID) for stakeholders in providing content

Our professional recommendation is that rather than increasing production frequency of *Shorewood Today* at considerable increased expense, the Village, BID and District communication goals can be met more effectively and efficiently through other marketing and communications vehicles/channels (electronic, website, and targeted direct mail as needed) that enable less costly distribution and more efficient delivery, less intensive labor and more timely communication.

These include E-newsletters, Infinite Campus, letters, postcards, kart flyers, social media and stakeholder websites. (These communications recommendations are not part of this proposal, but rather listed here to reinforce the idea of them being used in concert with *Shorewood Today* to achieve stakeholder communications goals.)

Content

We recommend maintaining the magazine’s current content structure, which is unique to Shorewood and hearkens back to the magazine’s founding objectives to meet stakeholder communications goals.

Our team’s redesign and restructuring of the magazine in 2015 intentionally organized the content to (a) more clearly and effectively deliver stakeholder information and (b) enhance community connection through additional features that reflect the community values of volunteerism (“Do-Gooder”), personal connection (“Hi, Neighbor”), and historical pride (“A Look Back”). The magazine’s current content structure enables inclusion of content most relevant for readers, carefully curated by stakeholders and the editorial team to keep the community informed and connected.

Distribution

We recommend continuing free distribution of 8,300 units, which includes 7,200 mailed units with the balance of 1,100 distributed by the District to non-resident families and by our team to the aforementioned public spaces, as well as continuing the free digital availability that enables more widespread electronic sharing and content consumption.

Mailed:	7,200
Distributed:	<u>1,100</u>
TOTAL	8,300

b. Staff

The MB team has many decades of combined professional experience in all aspects of magazine creation, advertising strategy including ratio/pricing/sales, and production and distribution, including nearly four years of experience working together to produce *Shorewood Today*.

The team is highly collaborative and passionately committed to creating a publication of the highest quality that meets the goals of our stakeholder clients and engages our audience. We bring to this project an unparalleled combination of professional experience, specific experience with this publication and its stakeholders, relationship with long-term advertisers, institutional knowledge of the Village, BID and District, and commitment to the project.

Our deep understanding of the stakeholders we represent and of the objectives of *Shorewood Today* means that we are able to create accurate, on-target content and visuals; be sensitive to community concerns and keep the magazine targeted and tailored in a way that best serves our stakeholders, advertisers and community.

The MB team members are pleased to provide contracted services at a considerable discount to our individual market rates and we take great pride in our accomplishments to date in publishing 13 outstanding issues of *Shorewood Today* on time and on budget.

The MB staff includes an editor/managing editor; art director/designer; professional photographer; business manager/ad sales manager; and proofreader. Reporting and writing most content for the magazine is handled and paid for separately by each stakeholder. The editor/managing editor also contributes content and collaborates with staff from the Senior Resource Center, Shorewood Library and Shorewood Historical Society to curate relevant content from these important community organizations.

Hourly Rates

<u>Name</u>	<u>Role</u>	<u>Market Rate/Hr</u>	<u>Discounted (<i>Shorewood Today</i>) Rate/Hr</u>
Michelle Boehm	Business Manager/Ad Sales	\$100-\$150	\$85
Paula Wheeler	Editor/Managing Editor	\$125-\$135	\$90
Karen Parr	Designer/Art Director	\$100-\$150	\$85
Jonathan Kirn	Photographer	\$100-\$200	\$60
Becky Dubin Jenkins	Proofreader	N/A	\$75

c. **Estimated Hours**

Estimated hours are based on our experience producing 13 issues of *Shorewood Today* magazine since 2015.

Business Manager, Ad Sales	145
Editor	160
Proofreader	8
Designer	185 and up
Photographer	<u>120</u>
Total Estimated Hours	618 and up

3) Personnel Experience

a. Michelle Boehm, Business Manager/Advertising Sales/Contract Administrator

Michelle is principle of MB Marketing Solutions, the contract holder for *Shorewood Today*. Her business is certified as a Disadvantaged Business Enterprise (DBE) with Milwaukee County. Michelle has worked in advertising and marketing for over 25 years including work with the Village of Shorewood and Shorewood Business Improvement District’s marketing initiatives, client-side roles with Noodles & Company and American Family Insurance and ad agencies in Milwaukee (Cramer-Krasselt, Branigan Communications, Versant, Blue Horse) and Chicago (Foote, Cone & Belding and Wells, Rich, Greene). Michelle has lived in Shorewood for over 20 years and her two children attended Shorewood schools and graduated from Shorewood High School.

b. Paula Wheeler, Editor

Paula is the current editor of *Shorewood Today* and has more than 20 years of experience in the communications business. She is a trained journalist and copy editor and award-winning writer. She gained significant experience in agency and corporate public relations before becoming a professional communications contractor in 1999. She has produced marketing communications and editorial content for a variety of clients including Marquette University, Alverno College, American University, the University of Chicago, Morningstar, Inc., The Goldman Sachs Foundation, the White House Historical Association, Lundbeck Pharmaceuticals, Baxter Healthcare, Peapod, Inc., the National Institutes of Health and many more. She is skilled in collaborating with designers and art directors and has worked with a number of high-profile design/marketing firms including VSA Partners in Chicago and Design Army in Washington, D.C. From 2011 to 2013 she led the marketing team for the Shorewood Business Improvement District and created the BID's content for *Shorewood Today*. Paula has lived in Shorewood for more than 12 years and has two children in the Shorewood School District. Her work is available for review at www.pkwcomm.com.

c. Karen Parr, Art Director/Designer

Karen Parr is the current art director for *Shorewood Today* and led the 2015 full redesign of the magazine's aesthetic. She has more than 20 years of experience in graphic design, art direction and production of print collateral and editorial magazines. This includes developing concepts, designing page layouts (editorial and ad content) and coordinating/art directing photo shoots. She currently produces three college magazines for Marquette University in addition to *Shorewood Today*. Karen uses the most current versions of the Adobe Creative Suite software. She is highly experienced in working with printers and managing deadlines and production schedules. Karen resides in Riverwest and has two children who attended St. Robert School in Shorewood. She is a frequent visitor to Shorewood.

d. Jonathan Kirn, Photographer

Jon is the current photographer for *Shorewood Today* magazine and a 35-year-veteran of the media and photography business. He began as a staff photographer and picture editor for the *West Bend Daily News* and the Arlington Heights, Ill.-based *Daily Herald* and was also a contract photographer for *The New York Times* in Chicago from 1988 to 1996. His images have been published in hundreds of publications around the world including *Time*, *Newsweek*, *US News and World Report*, *Sports Illustrated*, *The Washington Post*, and *The Los Angeles Times*. He has done extensive public relations and corporate photography for companies including McDonalds, Pepsico, Quaker Oats, Burger King, Microsoft, Verizon, Sprint, Singapore Airlines, American Airlines, Case Corporation and Sears. For 15 years he photographed sporting events for Major League Baseball, NFL Properties, and Donruss/Leaf Trading Cards. He has also completed wide-ranging global assignments for multiple international nongovernmental organizations.

Jon is a contributing Creative Photographer for Getty Images, the current photographer for the Milwaukee Symphony Orchestra and a frequent contractor for Marquette University. Jon has lived in Shorewood for more than six years. He has two children in the Shorewood School District and frequently photographs school events.

We have a special photography arrangement with our staff photographer, Jonathan Kirn. Photography is included in our staff compensation, which means the stakeholders own the images that are used in *Shorewood Today* magazine. Typically, organizations must pay photographers for photo ownership on top of photography labor fees, and that fee can be considerably high. We understand you will be clarifying photography ownership with all potential vendors, for accurate comparisons.

e. **Becky Dubin Jenkins, Proofreader**

Becky is a skilled reporter and writer, trained copy editor and seasoned communications professional. She is the executive director for marketing and communications at Alverno College and previously served as a writer and publications editor for Marquette University. Becky is a longtime resident of Shorewood and her daughter is a student in the Shorewood School District.

4) Cost

Shorewood Today is a nonprofit communication tool produced on behalf of its municipal stakeholders. Working with the stakeholders to carefully balance income and expense for the magazine is a priority for our team and for the past four years, we have produced the magazine on time and within budget. Keeping costs low is always top of mind. Income is derived from advertising (78%) and stakeholder investment (22%). Expenses include staff, printing and mailing/postage.

If the insurance requirement is waived, we can reduce the budget by \$1,000 which would keep the staff fee for 2019 the same as 2018. Our photographer does have insurance, but MB Marketing Solutions does not and is not required by other clients to carry it.

Following is a summary of estimated income vs. expense for *Shorewood Today* over the 2018-2021 period that illustrates nominal a decrease in 2019, same rates for 2020, and a nominal increase for 2021:

Expenses	2018	2019	Index	2020	Index	2021	Index
Staff	\$51,000	\$51,000	100	\$51,000	100	\$54,060	106
Mailing/Postage	\$8,500	\$8,500	100	\$8,500	100	\$9,010	106
Printing	\$35,500	\$34,000	96	\$34,000	100	\$36,040	106
Total Expense	\$95,000	\$93,500	98	\$93,500	100	\$99,110	106
Income							
Partner Income*	\$23,400	\$20,900	89	\$20,900	100	\$22,110	106
Advertising	\$71,600	\$72,600	101	\$72,600	100	\$77,000	106
Total Income	\$95,000	\$93,500	98	\$93,500	100	\$99,110	106
Difference	\$0	\$0		\$0		\$0	

* Split evenly between Village, BID, Schools, CDA

a. **Income Surplus**

We request that any surplus income at the end of the year be earmarked for carryover to the following year for reinvestment in the magazine.

b. **Printing**

The professional printing vendor for *Shorewood Today* is a key consideration. Printing is the second-highest unit cost after the staffing fee; it greatly affects the quality of the finished product, which impacts the user experience; and the vendor must have the ability and willingness to work within our very structured production timeline without sacrificing quality. In addition to quality, there are considerations regarding quantity, as the number of magazines printed and number of pages in each issue directly impact the cost of printing and postage (*covered in next section*).

The original estimates in the proposal were for four issues at 40 pages each, using the same paper and binding as we use now which can be a good way to compare printers. However, the actual printing costs will be higher because the size of the magazine ranges from 40-48 pages depending on the issue. For example, this year we had 44 pages in spring, 48 in summer, 48 in fall and expect 40 in winter but it will depend on the amount of editorial from the stakeholders balanced with advertising, so we don't exceed the 60/40 ratio. We also have a nominal expense from Shorewood Press to print proof copies.

Owner Matt Fox is a long-time Shorewood resident who has demonstrated superior flexibility and commitment to excellence on this project, consistently provided a superior printed product while also meeting or beating scheduled deadlines and offered price breaks and gratis services to keep quality high and costs low. A priority in our redesign was to enhance the color quality of the photography. To meet this goal, Fox advises us on all our photography (we average 50 photos per issue) and makes color adjustments to each photo in order to get the most accurate and pleasing color for print. Notably, Fox has consistently made editorial edits when needed at the proofing stage at no extra charge, while other printers typically charge for these edits. Our team strongly prefers to continue printing Shorewood Today with The Fox Company.

Attached are printing quotes for 8,400* copies of a single issue of *Shorewood Today* magazine using 80# silk text paper are included from the following professional printers. Annual costs are detailed below and have been increased by 10% to project printing costs with an average of 44 pages per issue:

- i. The Fox Company, Matt Fox
11000 W. Becher St.
Milwaukee, WI 53227
(414) 321-4700
\$34,000
- ii. The Marek Group, Roger Meidenbauer
W228 N821 Westmound Drive
Waukesha, WI 53186
(262) 549-8900
\$27,668 + edits at \$75 hour = estimated total of \$ 32,000
- iii. Delzer Lithograph, Jim Polzin
510 S. West Ave.
Waukesha, WI 53186
(262) 522-2606
\$24,404 + edits at \$150/hour per issue = estimated total of \$ 30,000

**As stated above in the proposal, our total printed quantity has been 8,300 units of each issue. However, because page 3 of the RFP stated a quantity of 8,400, we wanted comparisons to be equal across submitted proposals and are therefore requesting print quotes for a quantity of 8,400.*

- c. Stakeholder Investment
Eliminating the insurance requirement and reducing the print budget would decrease the overall cost by \$2,500, bringing the stakeholder amounts to \$5,225 from \$5,850 per stakeholder (down 11%). That is a reduction in cost of \$1,306.25 per issue. We would keep everything the same for the next two years with a 6% increase the third year, if there is no postage increase and nothing crazy like a paper tariff in the coming years.

We evaluated different budget scenarios to determine how reducing or eliminating stakeholder investments without changing the preferred ad-to-editorial ratio of 40/60 would affect advertising rates:

- Reducing the stakeholder investment to \$4,000 apiece would require a 13% increase in advertising rates.
- Eliminating the stakeholder investment altogether would require a 35% increase in advertising rates.

We believe both scenarios would negatively affect advertising sales and make it more difficult to attract small businesses to advertise, a stated concern in the Village’s RFP for this project.

d. Postage and Mailing

We recommend maintaining the annual postage and mailing budget at \$8,500 for 2019 and 2020 and increasing to \$9,000 in 2021. Should the postage rates change in the meantime, the cost for mailing will need to be adjusted.

The cost for postage changes with each issue based on the number of pages in the magazine (affects weight) which ranges from 40-48. *Shorewood Today* uses a bulk postage rate with Shorewood indicia permit #4741 which is \$0.2035 for approximately 7,200 resident and business addresses within the Village. We use Glennco as a mailing house to process the mailing of each issue. The average cost for processing and mailing each issue is approximately \$1,930. This includes delivering overage (extra issues) to Village Hall when the mailing is complete.

We performed a mail house review this past year by securing bids from three different businesses (Glennco, Bulk Mail Services and DG Marketing) and Glennco was by far the best at meeting our schedule requirements, being dependable and having the best rate therefor we plan to continue using Glennco for mailing *Shorewood Today*.

5) **Advertising Plan**

Paid advertising continues to provide the bulk of revenue for *Shorewood Today* and represents at least 75% of the annual budget. Our team recognizes that competitive ad rates are extremely important to advertisers of all sizes, especially small businesses. Rates for advertisements in *Shorewood Today* continue to be a very good value and are the lowest ad costs in the north shore area based on a recent competitive analysis of other print vehicles in and around Shorewood and the Milwaukee area.

<u>Print</u>	<u>Issued</u>	<u>Distribution</u>	<u>Coverage</u>	<u>Unit Size</u>	<u>Cost/Ad</u>	<u>Circulation</u>
Bay Leaves	Monthly	free by mail	WFB	1/2P4C	\$900	5,500
Edible Milwaukee	Quarterly	free at kiosk	DMA	1/2P4C	\$2,145	15,000
Journal/Sentinel (Daily)	Daily	paid	DMA	1/2P4C	\$3,794	189,639
Journal/Sentinel (Sunday)	Sunday	paid	DMA	1/2P4C	\$5,760	304,610
Northshore Now (Thur)	Thurs	paid	North Shore	1/2P4C	\$938	14,695
M Magazine	Monthly	free by mail	DMA	1/2P4C	\$2,057	45,669
Milwaukee Magazine	Monthly	paid	DMA	1/2P4C	\$2,499	30,456
Shepherd Express	Weekly	free at kiosk	Milwaukee	1/2P4C	\$1,115	60,000
Shorewood Today	Quarterly	free by mail	Shorewood	1/2P4C	\$575	8,300

Discounts for advertisers are important, too. We will continue to offer a 10% discount for businesses located in Shorewood, 10% for non-profit organizations and 10% for advertisers who want to pre-pay for all four of their ads at one time (which lessens the administrative burden on the Village of Shorewood finance department.) As our advertisers know, these discounts are cumulative, so most advertisers earn at least a 20% discount on their annual advertising. Premium placement charges are important to some advertisers and will go up to 25% from 20%. In most cases the premiums are offset by the discounts that local advertisers earn.

Ad rates for 2019 and 2020 will remain flat as there was an increase in 2018. Rates will go up slightly in 2021 (6%) after holding for three years. The advertising budget for all three years of the proposal represents 75% or 76% of total income which is in line with historical amounts.

<u>Ad Sizes</u>	<u>2018</u>	<u>2019</u>	<u>Index</u>	<u>2020</u>	<u>Index</u>	<u>2021</u>	<u>Index</u>
Full Page Spread	\$1,380	\$1,380	100	\$1,380	100	\$1,450	105
1/2-page ads	\$575	\$575	100	\$575	100	\$600	104
1/3-page ads	\$475	\$475	100	\$475	100	\$500	105
1/4-page ads	\$375	\$375	100	\$375	100	\$400	107
1/6-page ads	\$275	\$275	100	\$275	100	\$300	109
TOTAL ads	\$1,700	\$1,700	100	\$1,700	100	\$1,800	106

Our team believes that to create a lifestyle magazine that is valued for its content, the advertising must be limited to a maximum of 40% so that *Shorewood Today* is not perceived as a shopper to its readers. This has been the case since we began working on the magazine in 2015 and we will continue to adhere to a 40% advertising limit.

6) Contract

The Village of Shorewood has provided a contract for us each year and we would agree to continue with the Village contract.

7) Insurance

Upon receipt of signed contract, MB Marketing Solutions will secure professional liability and general liability business insurance.

8) Examples of Similar Work

- a. Our team redesigned *Shorewood Today* in Q1 of 2015 and has produced 13 quarterly issues of the magazine since that time. Links to the past issues are at <http://www.villageofshorewood.org/384/Shorewood-Today-Magazine>. Each issue has been produced on-time and within budget.
- b. Karen and Paula collaborated on the concept, design and writing for the [Marquette University Law School View Book](#) and work together on the Marquette School of Dentistry's [Dental Images](#) magazine. Karen art directs and designs [Marquette Engineer](#) and Paula has written feature stories for the magazines for Marquette's colleges of education, engineering, arts and sciences, health sciences, nursing and the college's *Discover* magazine. All can be found on issuu.com.
- c. Jon and Karen also have collaborated on photo shoots for a variety of Marquette University projects.

9) References, Testimonials and Advertiser Survey

a. Colleagues, Clients, Advertisers and Community Leaders

Please feel free to reach out to any of the following individuals; we have also shared some of their testimonials, below.

- i. Ted Knight, Chief Advancement Officer, Shorewood School District, tknight@shorewood.k12.wi.us
“Our 2017 Shorewood Community Survey confirmed that Shorewood Today is our #1 vehicle for communicating with non-parents in the community. This makes Shorewood Today a very valuable communications tool for us. If we can successfully convey the strategic objectives and ongoing achievements of our District to the community, this really helps us advance our District and make Shorewood residents aware of the value we provide. This ties in directly with our District Operational Expectation (OE) #9, ‘Communicating with the Public.’”

**When asked about frequency of printing the magazine, Ted indicated that he preferred sticking with a quarterly schedule for Shorewood Today.*

- ii. Katelin Watson, Communications Manager, Shorewood School District, kwatson@shorewood.k12.wi.us
iii. Chris Swartz, former Village Manager, Village of Shorewood, eatpeaches57@gmail.com
iv. Michael O’Brien, BID Board President, myobrien@att.net, 414.791.5050
v. Elizabeth Price, Director, Shorewood Senior Resource Center, eprice@villageofshorewood.org

“I really want to share with you a compliment about Shorewood Today. I came back from vacation and found it in my mailbox. The cover and = content are outstanding. It reflects so well on our Village. I felt proud to be a part of the community. The aesthetic is clean and crisp and I love the level of communication that I have with the ST Team. They are responsive and sensitive to our needs at the SRC. We are lucky to have such great talent here.”

- vi. Rachel Collins/Hayley Johnson, Shorewood Public Library, hayley.johnson@mcfls.org
vii. Jennifer Anderson, Reporter/Writer, *Shorewood Today*, jennifer.anderson@wi.rr.com
viii. Saj Thachenkary, former President, Shorewood Foundation, thachenkary@msoe.edu

“As long-time Village residents, we’ve enjoyed Shorewood Today as an indispensable resource for keeping our community informed and engaged. As a Shorewood Foundation board member, its editorial coverage and advertising allow the board to communicate directly to Shorewood residents. It fills a void by capturing the local, day-to-day stories, news and events that make Shorewood distinct. The value of the magazine cannot be overstated. We are fortunate to have a dedicated team of seasoned professionals with a deep understanding of and connection to the community producing a magazine that consistently connects with its audience to effectively convey why Shorewood is such a wonderful place to live, work and visit.”

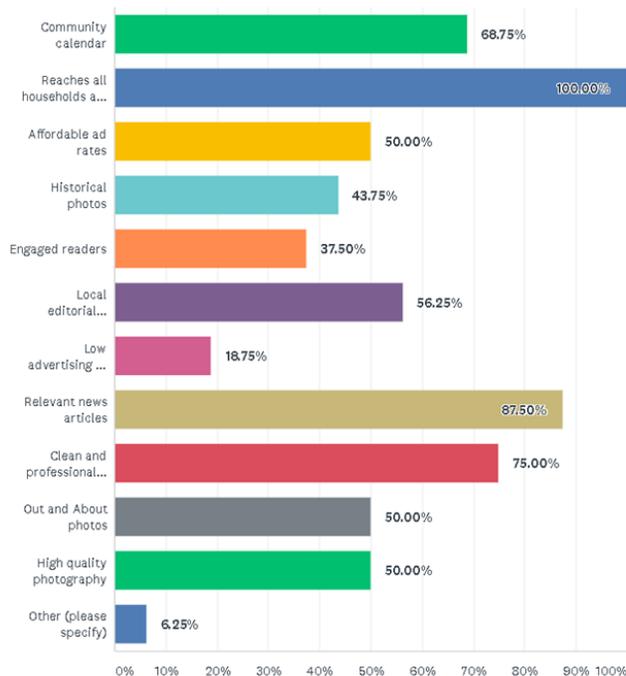
- ix. Guy Johnson, former President, Shorewood Village Board, gwj2423@gmail.com

“The current Shorewood Today team serves our community well. Friends and neighbors eagerly look forward to each new edition. The stories, photos, and quality of its layout make it a publication we can be proud of. It plays a major role in making Shorewood a vital place in which to live and shop.”

- x. Andrew McCabe, Allstate – McCabe Agency, longtime advertiser, BID board member
“My experience with Shorewood Today has been excellent. Shorewood Today is a very cost-effective way to connect and get in front of local residents and businesses 4 times a year. The content, articles and advertising are well organized and relevant and the team behind the publication is easy to work with. Keep up the good work, Shorewood Today!”
- i. Krystal Kimmel, Shorewest Realtor, longtime advertiser, kkimmel@shorewest.com
- ii. Advertiser Survey
 Our five-question survey garnered a 33 % response rate, significantly higher than the average 10 % response rate. Overall, advertisers indicate a high level of satisfaction with the magazine and feel they get a good value for their advertising investment.

Highlights:

- On average, advertisers ranked the quality of *Shorewood Today* at 8.75 on a scale of 1 to 10 (with 10 being highest in quality) **No advertiser ranked the magazine below “8”: 50% of respondents gave an 8, 25% a 9 and 25% a 10.**
- The value of advertising in *Shorewood Today* scored an average of 8.44 (maximum 10). **No advertiser ranked the magazine below “7”: 25% of advertisers ranked the value at 10, 25% at 9, 31.25 at 8 and 12.5% at 7.**
- Advertisers were asked to select the qualities they valued about the magazine. Highlights:
 - 100% of respondents selected “Reaches all households and businesses in Shorewood”
 - 87.5% identified “Includes relevant news articles”
 - 75% selected “Clean and professional design”
 - 68.75% selected “Community calendar”



MB Marketing Solutions
REVISED PROPOSAL FOR SERVICE
SHOREWOOD TODAY MAGAZINE



October 26, 2018

1) **Transmittal Information**

MB Marketing Solutions, Michelle Boehm
2401 E. Newton Ave., Shorewood, WI 53211

(414) 698-4369
michelle.boehm@sbcglobal.net

2) **Approach**

a. **Production**

Frequency

Four 40- to 48-page issues annually for the term of the contract (Spring/March, Summer/June, Fall/September, Winter/December).

Content

No changes.

b. **Staff**

<u>Name</u>	<u>Role</u>	<u>Market Rate/Hour</u>	<u>Discounted (<i>Shorewood Today</i>) Rate/Hour</u>
Michelle Boehm	Business Manager/Ad Sales	\$100-\$150	\$85
Paula Wheeler	Editor/Managing Editor	\$125-\$135	\$90
Karen Parr	Designer/Art Director	\$100-\$150	\$85
Jonathan Kirn	Photographer	\$100-\$200	\$60
Becky Dubin Jenkins	Proofreader	N/A	\$75

3) **Revised Income Estimates (Per Village Board Request)**

We have revised income estimates based on reduced stakeholder contributions and increased annual ad rates to compensate for the change. Index to previous year is reflected.

a. **Fees and Expenses**

Fees and expenses for 2019 remain at \$89,500, a 6% decrease from 2018 fees and expenses, to produce *Shorewood Today* magazine in its current format and at its current quality.

b. **Historical Advertising Budget and Rate Increases**

The table below shows the 2017-2018 advertising budget increase of 10%, as well as the advertising rate increase of 6% for 2018. Based on the magazine’s historical approach to advertising rate increases, we originally proposed holding advertising rates for three years.

c. **Village Board’s Request, and Impact on Advertising Budget, Rates, Sales**

The Village Board has requested a 66% decrease in stakeholder revenue from 2018 to 2019, which amounts to \$2,000 each from the four stakeholders.

This would introduce a \$9,900 deficit to the \$89,500 production budget. Addressing this deficit would require an 18% increase in advertising rates from 2018 to 2019. This increase is three times greater than the most recent ad rate increase of 6% from 2017 to 2018.

Based on our experience managing advertising sales for *Shorewood Today* for the past four years, we believe this would cause a significant departure of advertisers and put projected advertising revenue in

jeopardy, as well as requiring more staff time devoted to advertising sales to potentially find new advertisers to achieve sales targets.

In addition, part of the original intent in founding *Shorewood Today* was to offer Shorewood businesses (the majority of whom are part of the Shorewood BID, a magazine stakeholder) a low-cost way to directly reach Shorewood residents and the community through advertising. That opportunity is of significant value to the BID as a stakeholder.

Reducing stakeholder contribution rates to the amounts requested by the Village Board would negatively impact this benefit, depart from the partnership concept originally created to produce the magazine, and require balancing our production budget on the backs of our local advertisers.

d. Printing

Per the proposal dated 9/7/18, we plan to work with The Fox Company for printing at a rate of \$30,000 for 2019.

e. Postage and Mailing

The annual postage and mailing budget remains at \$8,500 for 2019. Should the postage rates change in the meantime, the cost for mailing will need to be adjusted.

Note/Disclaimer: Though modest increases to printing, postage and mailing have been forecast in the three-year recommendation, actual costs are subject to market conditions and hard costs.

f. Distribution

We've been asked to reduce overall circulation from 8,300 to 8,100 by maintaining 7,300 mailed units and reducing the number of kiosk copies by at least 200.

Mailed:	7,300
Distributed:	<u>800</u>
TOTAL	8,100

g. Income Surplus

We request that any surplus income at the end of the year be earmarked for carryover to the following year for reinvestment in the magazine.

4. Recommendation

In response to the Village Board's request for a further reduction in stakeholder contributions over and above that in our original proposal, we recommend a compromise that reduces the stakeholder contribution to \$3,375 per year and holds that amount for three years (a 42% decrease versus the 2018 stakeholder contribution). To compensate for the decrease in stakeholder revenue, we recommend implementing a more reasonable 6% increase to the advertising rates for each of the next three years, rather than an 18% increase in one year.

	2018		2019		2020		2021	
Annual Income								
Income	2018	Index*	2019	Index*	2019	Index*	2019	Index*
Partner Income	\$23,400	104	\$13,500	58	\$13,500	100	\$13,500	100
Advertising	\$71,600	110	\$76,000	106	\$80,000	105	\$84,500	106
Total Income	\$95,000	109	\$89,500	94	\$93,500	104	\$98,000	105
Per Partner	\$5,850	104	\$3,375	58	\$3,375	100	\$3,375	100

Annual Expenses								
Expenses	2018	Index*	2019	Index*	2019	Index*	2019	Index*
Staff	\$51,000	102	\$51,000	100	\$53,000	104	\$55,500	105
Mailing/Postage	\$8,500	113	\$8,500	100	\$9,000	106	\$9,500	106
Printing	\$35,500	108	\$30,000	85	\$31,500	105	\$33,000	105
Total Expense	\$95,000	105	\$89,500	94	\$93,500	104	\$98,000	105

Annual Advertising Rates										Index to
Ad Sizes	2017	2018	Index*	2019	Index*	2019	Index*	2019	Index*	2018
1/2 page	\$550	\$575	105	\$600	104	\$625	104	\$650	104	113
1/3 page	\$450	\$475	106	\$500	105	\$525	105	\$550	105	116
1/4 page	\$350	\$375	107	\$400	107	\$425	106	\$450	106	120
1/6 page	\$250	\$275	110	\$300	109	\$325	108	\$350	108	127
TOTAL	\$1,600	\$1,700	106	\$1,800	106	\$1,900	106	\$2,000	105	118
* Index reflects percent change from previous year										