

1/12/18

SCOPE OF WORK + PROJECT ESTIMATE_01

PROJECT #: 182183
CLIENT: Pleasant Hill TID
PROJECT NAME: Branding and Website
CLIENT CONTACT: Steve Van Dorn

PROJECT OVERVIEW

Create a logo mark and brand identity kit for Stay Pleasant Hill that communicates the unique personality, mission and offerings of the town within the context of East Bay tourism and business travel.

SCOPE

HUB will work with the Tourism Improvement District of Pleasant Hill to create a brand identity and messaging for Stay Pleasant Hill with the goal of providing a design framework that can be used for marketing, advertising and other promotional pieces.

Using the brand, create a destination website for Stay Pleasant Hill that serves up information about the city, surrounding area and amenities available. The website will serve as a repository for information about the hotels, amenities and events in the city.

PHASE 1: INVESTIGATION + ANALYSIS

At the kick-off meeting—with all decision makers present—we refine and finalize the strategy for and details of the project.

- Review messaging and marketing strategy
- Clarify goals and objectives for the website and brand as a whole, defining intended use cases and refining target audiences

ASSUMPTIONS: Client to review and approve creative brief outlined before design work begins.

TEAM: Director of Creative Development, Project Manager, Design Director, Designer

PHASE 2: CONCEPT DEVELOPMENT

Based on the approved strategy and goals in the creative brief, HUB will develop a visual communication plan for the brand.

- HUB will utilize the information and content provided in the creative brief (and marketing strategy) to develop a visual communication strategy to encapsulate the essence of your brand and how it relates to your audience.

- HUB will share design/ illustration styles and approaches, an updated estimate may be required if a particularly time consuming style or approach is requested. HUB would inform you at the review which style(s) could impact your budget in order to make an informed decision.

For the website, HUB will work with the TID team to define the site architecture and content strategy.

- HUB will create a content outline for the different types of site content and align this with Content Management System requirements
- HUB will create simple experience diagrams that illustrate the structure of the site, basic navigation and content areas

DELIVERABLES: For the brand: Round 1 Presentation will recap the findings and strategic goals for the project and include 2-3 distinct and targeted concepts including inspiration mood boards and sketches for each. Round 2 will be revised concepts based on feedback received. For the website: Round 1 presentation will be content outlines and initial wireframes, with Round 2 being refined wireframes and a content plan based on feedback received on Round 1.

ASSUMPTIONS: For the brand: Client to review, provide consolidated feedback, and choose 1-2 concept directions to refine in Round 1, Round 2 will represent final concepts with the client choosing a direction to move into design. The chosen communication strategy and associated visual language will serve as our North Star, against which all future designs and communications will be applied.

For the website: Client to review, provide consolidated feedback and source content that can be reviewed to inform content plan.

TEAM: Account Manager, Creative Director, Messaging Strategist, 2 Sr. Designers, Sr. Project Manager

PHASE 3: BRAND DESIGN DEVELOPMENT

Based on the chosen concept direction, HUB fleshes out the design, bringing it to a semi-final state.

- HUB to design a cohesive branding package to include:
 - Brand logo and/or typographical treatment
 - Secondary and Tertiary Logo Lockups (up to 3 lockup variations total)
 - Color palette
 - Textures/ patterns/ image usage as applicable to direction
 - Font/typography selection and hierarchy
 - Brand guidelines and usage Style Guide PDF

HUB will design and finalize collateral materials using the approved branding and visual direction.

- This estimate includes design for the following collateral elements:
 - Business card
 - Letterhead
 - Envelope
 - Note card
 - Website landing page and 2 additional static pages
 - Rollout plan for additional collateral needs

DELIVERABLES: Evolved branding logo and typography options based on chosen concept to finalize within 2 additional rounds of revisions, round 3 being final, approved brand look and feel. For the collateral pieces, HUB will provide initial collateral layouts and 2 additional rounds of revisions with Round 3 being final files.

ASSUMPTIONS: Client to provide all necessary specifications, copy, and content in a close to final state before design begins and provide consolidated feedback from all stakeholders for each round. HUB will provide due diligence, however, client is responsible for final proofing and approval of content and copy

TEAM: Account Manager, Creative Director, Messaging Strategist, 2 Sr. Designers, Sr. Project Manager

PHASE 4: WEB DESIGN & DEVELOPMENT

Once the brand identity has been finalized, HUB will use the new brand to design the staypleasanthill.com website. The focus will be on usability and promotion – ensuring that the resulting site is a powerful resource for our target audience, and beyond.

Our process can be summarized as follows:

DESIGN DEVELOPMENT: Creating interface design comps, CSS layouts and page templates. Development begins with simple animated wireframes and click-throughs, that follow site architecture and a full development plan is created.

CONTENT DEVELOPMENT: Working from the content plan developed in previous phases, HUB finalizes the requirements and recommendations for site imagery, copy and video. HUB will work with the TID to research assets, facilitating finding photographers, videographers and stock options as needed.

Development will begin on the content management system that will drive the site. Existing content will be added to the database, and a plan for populating new content into the CMS will be created.

PRODUCTION: Working from approved designs and templates, HUB will do all the art production for the site, ensuring that imagery, visual styles and content is creating to the desired specifications. Development of the site will be well underway, with the building of site templates, pages and navigation coming together in a functional beta that can be tested and used by the client and a small group of users to validate the design and functionality.

Working from the beta, the team will work toward a release candidate (a fully-functional, designed, final version of the site) that will be put through a full round of quality assurance testing.

QUALITY ASSURANCE: HUB will test the site across three channels: functionality, content implementation and visual design. Issues will be tracked, addressed and verified as fixed to ensure that the site is ready for launch.

DEPLOY: HUB will oversee the launch of the website, ensuring that the transition is smooth and that there is documentation of training of committee member and staff on the technical details and content management system.

PHASE 5: FINALIZATION

HUB update and finalize all final art files, as well as a final brand usage guideline. All final art files will be packaged and delivered to empower the client to own the brand and website going forward.

DELIVERABLES:

- Final brand usage guidelines PDF
- Final brand guidelines and collateral files InDesign IDML files, assets, and logo(s) (logos supplied as jpeg and eps files)
- Final CMS, database, template, CSS, and HTML files

PHASE 6: POST PROJECT DEBRIEF

HUB and client discuss the overall project, progress against the marketing strategy and defining subsequent project phases.

- Post Project Brief
- Planning, budgeting, and scheduling upcoming needs

PROPOSED SCHEDULE

This estimate is contingent upon the schedule and timelines outlined below; if deadlines should change we will provide an updated estimate. This estimate does not include evening or weekend design support.

Project Brief	January 23, 2018
Phase 1: Brief Recap/ SOW Update if needed	2 working days from brief
Phase 2: Concept Mood Boards + Sketches	2-3 weeks from brief
Phase 2: Revised Concepts	1 week from Round 1
Phase 3: Design Round 1	2-3 weeks
Phase 3: Design Round 2	1-2 weeks from feedback
Phase 3: Design Round 3, Final Style Guide	1 week from feedback
Phase 3: Collateral Round 1	1 week from approval
Phase 3: Collateral Round 2, Final Elements	1 week from feedback
Phase 4: Web Designs, Round 1	3 weeks from Phase 3, Round 2
Phase 4: Web Designs, Round 2	1-2 weeks from feedback
Phase 4: Web Development, Beta	1 month from Design Rd 1
Phase 4: Web Development, Release Candidate	2 weeks from beta feedback
Phase 5: Finalization	TBD

**Note that some phases may be combined or adjusted in order to best facilitate the design process.

DESIGN ESTIMATE

Phase 1: Investigate & Analyze	\$2,000
Phase 2: Concept Development	\$8,000
Phase 3: Design Development & Collateral	\$10,000
Phase 4: Website Design & Production	\$18,000
Phase 5: Finalization	\$2,000
TOTAL	\$40,000

**Any additional needs will be billed at our hourly rates, or, if time allows will be estimated individually once design and production needs are established

HOURLY RATE SCHEDULE

Creative Direction/ Strategy/ Sr. Account Mgmt.	\$225/hr
Art Direction/ Sr. Design/ Account Mgmt.	\$180/hr
Design/ Copywriting/ Sr. Project Management	\$125/hr
Production/ Layout Design/ Project Management	\$115/hr
RUSH: See details below	1.5x rates

Nights/ Weekend: See details below	2x rates
On-Site Support: See details below	2x rates

ADDITIONAL INFORMATION & ASSUMPTIONS

- This estimate expires 1 month after submitted to client unless otherwise accepted by client. Delay in acceptance of this estimate may mean a re-evaluation of the project scope.
- HUB asks to have a single client contact to approve all artwork and provide necessary information.
- HUB will provide due diligence, however, client is responsible for final sign off and approval of copy and content before releasing to print.
- This estimate assumes a continuous project based on the proposed schedule above. If the project is put on hold or delayed by client for any reason, HUB will reassess the project at restart and will notify the client in writing prior to restart of any necessary revisions to the budget.
- Any delays in approvals may impact HUB's ability to provide deliverables as outlined in the production schedule, and therefore may affect the cost estimate.
- All requested changes will be reviewed against the scope of work. Changes that are determined to be out of scope or that are requested after approval dates will be billed as change orders in addition to this estimate.
- Any additional needs will be billed at our hourly rates, or, if time allows will be estimated individually once design and production needs are established.
- If further design exploration is needed beyond what is outlined above a revised scope of work, schedule, and estimate may be required. Design is a conversation that creates a visual language from ideas and verbal direction. Ideas can be interpreted in a variety of ways; periodically, personal understanding and taste may lead to the need for a longer conversation and additional design rounds to create the most successful product.
- Copywriting and copy editing services are available and will be estimated upon request.
- Any shipping and/or courier fees will be added to the client's invoice at project completion.
- Acquisition of imagery, image purchases, and photo shoots will be estimated as the need arises.
- HUB will invoice half of the estimated cost at start of work for any project over \$5,000, unless otherwise noted.
- Defining Rounds and Scope:
 - A "Round" is defined as any over-arching design change, a change in general design direction or inspiration, further development of design inspiration or layouts, revised layouts and/or content affecting at least 20% of the total element content.
 - For purposes of clarity and organization, each presentation you receive will be labeled with a new round number.
 - Consolidated, complete feedback is requested at each round to keep scope and revisions clear.

RUSH RATE AGREEMENT

Rush rates will be applied to any work that is required to-be-turned in under 24 hours, of unrealistic scope within a given timeframe, or outside of normal business hours.

- Weekend work:
 - 2x standard rates
 - Notice preferred by Wednesday 5pm to secure a team
 - Available days and hours will be outlined before we accept/ begin weekend work
 - Confirm quick availability of stakeholders for questions and reviews, provide cell numbers and direct desk lines before EOD Friday
 - Evening/ Early morning work:
 - 1.5x standard rates until 8pm, 2x standard rates after 8pm
 - 2x standard rates for work or meetings requested before 8am
- Holiday work:
 - Any requested work on any HUB holiday must be requested before project begins and at least 3 days prior to secure a team
 - 2.5x standard rates during 9-5hrs
 - 3x standard rates before 9am or after 5pm
- 24hrs Turn
 - 1.5x standard rates = under 24hrs turn time or unrealistic scope within a given timeframe
 - Above standards also apply

This scope of work and estimate is based on the information provided to date. I have also attached our general Terms & Conditions for your reference. Please return a signed copy of this estimate to HUB.

We look forward to working with you!

Many thanks,
Lindsey Charlet
Owner, HUB Collective

TERMS AND CONDITIONS

By execution of these Terms and Conditions, you confirm acceptance of the agreement between you and HUB Collective, Ltd. regarding the work to be performed by HUB Collective, Ltd. (“HUB”), as described in the attached scope of work and schedule and fee estimate, and as supplemented by these Terms and Conditions which specify the additional terms and conditions under which the work will be performed.

The schedule and fees are estimates only. They are based on information we had at the time of the estimate and are subject to change as more information becomes available or as circumstances change.

A “Round of Creative” is defined as any over-arching design change, a change in general design direction or inspiration, further development of design inspiration or layouts, revised layouts and/or content affecting at least 20% of the total element content. Additional work, revision, or design steps beyond those assumed or outlined in this document will be considered out-of-scope. We reserve the right to charge additional amounts for all such out-of-scope work at then current rates. We will make a good-faith effort to notify you in advance of the estimated cost to perform out-of-scope work, but there may be times when prior notice is impractical or not possible. In these cases, we will use our best professional judgment. You agree to pay us for the value of all work we perform.

We ask that you designate one individual to serve as your duly authorized client contact in the space provided below. The contact will approve all artwork, provide all necessary information and client materials, and will be responsible for making all key decision makers available at each stage of the project. We have a right to rely on this person’s decisions and instructions.

We will make commercially reasonable efforts to provide a timely and professional product. We cannot, however, guaranty that the product will be perfect, or that it will achieve a specific desired result or outcome. HUB expressly disclaims any and all warranties, express or implied, including but not limited to warranties of merchantability and fitness for a particular purpose. We are not responsible for materials that you provide us, and by signing below you represent and warrant that you have all rights necessary to use those materials and concepts, and agree to indemnify, defend, reimburse and hold HUB and its owners, officers, directors, employees, contractors, representatives and agents harmless from any and all claims for infringement or misuse of others’ rights arising from or related to those materials. HUB is not and will not be liable for, and you waive any and all claims for, any and all incidental, consequential, punitive, special, or exemplary damages or attorney fees arising from or in connection with the project, including without limitation lost profits or business interruption. In no event will we be liable to you or anyone else for any claims, liabilities or obligations of any nature in an amount exceeding the amount we actually receive from you for the project.

Please approve the estimate and scope of work by signing and returning a copy of this page in the space provided below. Upon receipt of your approval, we will send an invoice 50% of any estimate over \$5000 or as outlined in billing plan outlined in scope of work. We will send a final invoice for the balance due upon completion of the project. If the project is discontinued for any reason, you agree to compensate us for all time spent on the project on a percentage-of-completion basis, including costs incurred plus a 5% cancellation fee. Payment is due 30 days after the date of each invoice. We reserve the right to charge interest on unpaid amounts at a rate equal to the lesser of 1.5% per month, or the highest rate not prohibited by law, until paid in full. By accepting the estimate, you agree that HUB has a security interest in all of the project materials and products to secure payment for our services.

These Terms and Conditions are attached to and incorporated in the scope of work and schedule and fee estimate, which together constitute the parties’ entire agreement regarding the work. This agreement may not be modified except upon the written agreement signed by an authorized representative of both parties. If any provision herein shall be determined to be illegal or unenforceable, such determination shall not affect any other provision and all such other provisions shall remain in full force and effect. The waiver by either party of a breach of any term of provision will not be construed as a waiver of any subsequent breach of the same or any other term of provision by either party. This agreement is governed by Oregon law, and all legal actions taken with respect to it must be filed in the federal and state courts sitting in Multnomah County, Oregon. Such venue is exclusive.

These terms and conditions, together with the scope of work and schedule and fee estimate, constitute the exclusive agreement of the parties with respect to the subject matter of it, and supersede all prior agreements, oral or written. Except as set forth in these terms and conditions or the scope of work and schedule and fee estimate, there are no promises, representations, agreements or understandings, oral or written, among the parties relating to the subject matter hereof and thereof.

ACKNOWLEDGED AND AGREED TO ON THIS DATE: _____

CLIENT SIGNATURE: _____

NAME: _____

TITLE: _____