



# City of Windsor Heights

Marketing and Special  
Events Management  
December 28, 2015

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# ABOUT CAPTURE

Capture Marketing is a full-service marketing, communication, branding and professional association management company. As a Certified TSB Women Owned Business, we can create multi-layered approaches that include reaching your target audience through direct mail and email campaigns, earned and paid media opportunities and digital marketing campaigns. Capture Marketing works with clients to determine the best way to reach their target audiences and then delivers results that will drive demand for products and support for organizations. Capture Marketing's primary clients involve non-profit and government entities focused on helping them deliver their story through brand development, message creation and digital design.

Below is additional information about the leadership at Capture Marketing who are submitting this proposal



**Natalie Battles**

**President**

Natalie began her career in the healthcare and advocacy industry as a field organizer for the American Cancer Society. Prior to launching Capture Marketing in the fall of 2008, Natalie was a partner in a government relations, public affairs and public relations firm that she founded in 2004, a thriving full-service firm that offered lobbying, grassroots development and media relations services for the healthcare, pharmaceutical and non-profit industries. During her career at Capture Marketing, Natalie has worked with clients ranging from Fortune 500 biotechnology companies to local low-based firms to implement and integrate comprehensive marketing campaigns.



**Lane Till**

**Executive Vice President of Marketing and Communications**

Lane joined the Capture Marketing staff in January of 2011 with a diverse background in marketing, account management, advocacy and grassroots outreach. As director of marketing and communications, Lane works with our clients to develop comprehensive marketing and communication solutions to increase awareness of client messaging and develop their overall strategies. She is responsible for overseeing production of clients' newsletters, policy publications and collateral along with developing and maintaining client websites. Lane is active in the community, sitting on multiple boards and attending community events.



**Carl Lingen**

**Director of Finance and Operations**

Carl has more than 10 years of experience in the human resource, pharmaceutical and business sectors. He derives better ways for businesses to handle finance, budgeting, marketing and sales processes. Carl has a talent for streamlining client operations and association management by utilizing member management systems (MMS) that integrate with websites and accounting. Along with working with organizations to develop constant improvement practices, Carl ties these practices back to financial information showing how investing in better efficiencies promotes better financial health. Carl received his B.S. and master's in business administration from Drake University College of Business Administration. Carl currently serves as president of the Des Moines East and South Chamber of Commerce, which also serves as the leadership to the Friends of SW 7<sup>th</sup> Façade Project in Des Moines.



## SERVICES WE OFFER:



### Marketing

#### Creative Development

- Develop marketing message, logo and identity
- Design, copy, proofreading and layout
- Print marketing and advertising
- Print and electronic campaigns
- E-newsletter design and management
- Video creation and editing
- Video closed captioning
- Video voice overlay and digital creation

#### Creative Development

- Strategic analysis and media lists
- Press kits
- Online media buying
- Customer surveys
- Media releases

#### Public Relations & Branding

- Message creation
- Organizational branding
- Brand analysis
- Assist in design thinking
- Introduction to building a brand
- Communication strategy and implementation
- Guidance for media interviews
- Event marketing and planning

#### Web and Social Media

- Website creation and content management
- Photo, video and flash optimized to website
- Website integration, update and pushed to social media
- SEO management and implementation
- Adsense and Adwords consultation
- Web and social media tracking and reporting



### Advocacy

#### Grassroots Education

- Developing an organization's story
- Developing a grassroots strategy through storytelling
- Coordinate and mobilize advocates
- Empowering advocates workshop
- Direct mail, email, phone and e-newsletter campaigns
- Geocoding and legislative mapping
- Setting up legislative receptions
- Legislative updates



### Management

#### Association Management and Business Consulting: Business or Association Formation

- Business plan development
- 3-year strategy document
- Setting up federal and state ID numbers
- Guidance on buy-sell agreements
- Creating corporate resolutions
- Setting up banking and merchant accounts

#### Administration

- VOIP phones and virtual call assistants
- Email
- Virtual and cloud document retention
- Backup systems
- Database systems and client tracking

#### Financial

- Setting up and training on financial accounting systems
- Billing and invoice management
- Customized reports and training
- Full financial management options available
- Merchant account integration

#### Human Resource

- Business insurance for liability
- Employment-based benefit design
- Payroll services
- Human resource consulting
- Employee handbook creation
- New hire and termination paperwork
- Compensation analysis and design

#### Member Management

- Customized member management systems (MMS)
- Integrate MMS with web, newsletters and event registration
- Board, committee and member roles and assignments
- Tracking and coordination of member meetings
- Member dues billing and collection
- Bylaws creation
- Association law and governance

#### Event Management

- Design of receptions, golf outings and annual meetings
- Coordinate RFPs among vendors and venues
- Complete setup and management of event
- Coordinate marketing and communications of event
- Assist in logistics for AV technology
- Coordinate speakers, panelists and guests for event
- Creation of online registration forms
- Manage merchant account payments and reconciliations
- Continuing education certificate management

## PERSONNEL ON PROJECT:



OurTeam



Lane Till

### Executive Vice President of Marketing and Communications

Lane works with our clients to develop comprehensive marketing and communication solutions to increase awareness of client messaging and develop their overall strategies. She will be responsible for overseeing this project and be the main lead for strategy and implementation.

Lane has overseen many non-profit and state agency branding initiatives over her tenure with Capture Marketing. Her astute attention to detail along with creative process allows for a great project lead. She has over five years' experience with Capture Marketing in branding and rebranding projects as well as over 10 years in marketing and has been the leader in the area for state agencies to turn to when they have design and awareness issues.

Lane has a B.A. degree in communications from Iowa State University.



Ali Brown

### Event Coordinator

Ali joins Capture Marketing as our exclusive event coordinator for our clients. Her dedication and attention to detail make her a great addition to our organization. Ali has overseen events ranging from board meetings, receptions to multi-day conferences.

Ali will be the primary contact for all event related items and will help with initial setup, communicate with stakeholders and be at the event to make sure everything is running smoothly.

Ali is an expert on our event management platform, CVENT, to handle RSVPs and to help coordinate invitations and email marketing.

Ali has a B.A. degree in Journalism and Communications from Wartburg College.



Kelsi Lindemann

### Marketing Coordinator

Kelsi is a marketing 'jack of all trades' for Capture Marketing. She will be involved in day-to-day tasks involved of rebranding efforts. Kelsi helps implement the directives from the executive vice president and communicate back to the client any updates.

Kelsi always gets the job done on time and within budget. Her dedication to our clients is the reason for our success and growth. Kelsi has worked on the Department of Education Adult Literacy Campaign and helps manage the ID Action Make Your Mark re-brand. Kelsi brings with her 5 years of marketing experience.

Kelsi has a B.A. degree in communications with an emphasis in public relations.

# MARKETING & EVENT EXPERIENCE

Capture Marketing (CM) is very excited to work with the City of Windsor Heights for your 75<sup>th</sup> Anniversary Plan. We specialize in working with non-profits, city and state entities to implement their marketing and event management needs. We hope our below proposal outlines first our experience with this type of work and second, a comprehensive outline of how to implement.

Working with CM you do not just get one person you get a team to ensure your campaign is a successful one.

Below are some of the services we can offer for this proposal:

## Graphic Design

- In-house graphic design
- Logos
- Flyers
- Digital and web design
- Publications
- Direct mail pieces
- Posters, banners, and billboards

## Public Relations

- Meeting with stakeholders
- Developing messaging and training talking points
- Communicate strategy with stakeholders
- Creation of story ideas and advertising opportunities

## Media Management

- Creation of media releases
- Creation of media kits
- Pitch stories to radio, print and mixed channel medias
- Create media lists and disseminate information
- Media purchasing net of any commissions
- Creation of media calendar and strategy

## Project Management

- We use Central Desktop as our task manager and project management system
- Central Desktop allows outside stakeholders to login to check in on status of milestones and share documents and timelines
- Handle projects ranging from communication, website, events and coalition building efforts

## Event Production

- Dedicated event coordinator for one-point-of-contact
- Utilize Central Desktop and CVENT for event registration and tracking
- Initial strategy development with stakeholders
- Event timeline created showing milestones and event progress
- Event promotion through direct mail, email and advertising efforts
- Personnel available at events to ensure a smooth and successful event
- Oversee contract negotiations, memorandum of understanding and work orders to ensure every event goes as planned
- Handle catering food and beverage logistics if needed
- Ability to design and order any marketing collateral for gifts or giveaways

## Sponsorship Consulting

- Oversee strategy of sponsor donations
- Reach out to stakeholders for commitments
- Create invitations and special VIP access for sponsors
- Audit to ensure sponsor commitments



Strategy



Below are example of some our work.

Event	Results	Outreach and Community Partners	Services Contracted For
ID Action – Together We Can Conference	Over 125 participants Over 20 exhibitors and community partners	CM managed the first and second conference for ID Action. We used our relationships developed in building member involvement to help promote the conference. The conference was an immediate success, and the council has asked for it to take place annually.	Event Management Public Relations Marketing Website Sponsorship Publications
Iowa Physical Therapy Association Conference	Over 130 participants Over 15 exhibitors	CM drove attendance and exhibitors up by developing better messaging and marketing advertising for the event. CM went directly to targeted community partners to help increase exhibitor participation.	Event Management Marketing Email Marketing Website Foundation Giving
Iowa Lifespan Respite – Care for Caregivers Conference Iowa Department on Aging	First year still in progress	CM created a first-ever conference for Lifespan Respite and was given eight months to complete it. CM rose to the occasion and coordinated marketing and public relations efforts among state, non-profit and for-profit entities to help cosponsor the event.	Event Management Public Relations Coalition Building and Strategic Planning Marketing Financial
Iowa Taxpayers Association – Annual Meeting and Tax Symposium	Over 120 exhibitors Over 15 different speakers	CM works with professionals all over the country to secure speaking engagements for tax and public affairs professionals. CM also makes sure the agenda meets licensure requirements for CE credit.	Event Management Media Management Sponsorship Marketing Email Marketing
COABE Conference Adult Education and Literacy Council Iowa Department of Education	Over 325 participants	CM helped the Department of Education come up with a successful strategy, design and promotion of their event and handled project management between multiple stakeholders and departments.	Event Management Digital and print design Marketing Media Management

## PROPOSED APPROACH



A strong brand builds a powerful connection between your message and the consumer, whether it is your target demographic, stakeholder groups, state and local media or even the general public. Your brand is your collection of messaging and imagery that conveys your identity to the marketplace. Developing a strong brand doesn't start or stop with a logo design. A strong brand is built by understanding the marketplace, identifying the mission and objectives of the company and developing comprehensive marketing and communication strategies to create a market presence.

Capture Marketing will work with the city and use the current logo and develop a brand matrix around the 75<sup>th</sup> anniversary celebration.

### Initial Onboarding and CAPTURE Day

**Research the Needs-** Capture Marketing has extensive experience onboarding new clients and has a process in place that ensures we take a deliberate assessment of all the needs of each project. We also have a project management system in place that will clearly demonstrate to the city how we will develop, implement and manage all of the marketing and communications.

The onboarding process starts with a CAPTURE meeting and will cover all aspects of the project from gathering the past work and history of the project to resources that are relevant, stakeholder's information and resources, current demographics and analysis of the target market along with any other relevant information the Alliance deems useful to the project. This is a critical step for our team to become immersed in the subject matter and to develop the subsequent branding and marketing initiatives outlined in the RFP.

Capture Marketing will ensure the strategic planning process will provide the framework to achieve the city's goal of positioning itself as a vibrant, exciting, and progressive to residents and visitors. The following are the steps that will be implemented to achieve these goals:

1. Review target and message
2. Utilize current logo developed
3. New tag line
4. Brand package
5. Brand guide that all businesses can use
6. Evaluations for continuous improvement

The project management system, Central Desktop, used on this project will provide the city team with a clearly defined overview and with the timeline for each steps that will take place to develop the brand and collateral. This will include when and how it will be implemented and all responsible parties identified as to how it will be managed.

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### Overall 75th Anniversary Marketing Deliverables

**Campaign Concept-** It is our understanding the City of Windsor Heights has already done significant work towards visioning and stakeholder information gathering. Capture Marketing recognizes the aggressive timeline for this proposal and will use the vision, target, and logo set out by city to complete the first phase of input gathering from stakeholders.

Capture Marketing will facilitate up to two input-gathering sessions with local community stakeholder groups. One meeting may be in the evening to help cater to business demands.

For a successful launch of this campaign it is important to get organic commitment from the community and allow them to own the 75<sup>th</sup> Anniversary design and use their own marketing efforts to help promote each event. It is important that the community embraces the brand and logo.

#### Implementation of Marketing Collateral

A website landing page will be developed to keep down costs of developing a full website. The main landing page will be a call to action for the upcoming event for the 75<sup>th</sup> anniversary celebration along with links to upcoming events.

CM recommends using a top-down approach where marketing collateral and branding is created at the top level and then disseminated down to local businesses and stakeholders to further promote. This is done through training of stakeholders such as the city, businesses, and the chamber of commerce on how to use the marketing collateral as well as sample social media promotions they can use on their own accounts.

Media buying will be difficult to implement for television, radio and/or social media for the whole year unless a significant budget is allocated. However, CM is familiar with tight budgets and recommends the following instead:

#### Partnership with Businesses

Whether television, radio or social media is the medium chosen, we would recommend and have seen great success in doing co-op ads with businesses. A great partnership is possibly with a business, chamber of commerce and the city. In a certain advertising spot the chamber could be a focus of the advertising with a congratulations to the city. The business partners in and talks about their local service and the end of the advertisement uses the template, we hope to see you at our next 75<sup>th</sup> anniversary event which is on... at...

This allows different stakeholders to be involved and allows for local businesses to get cheaper advertising and allows the city to promote certain events. We would recommend doing a pump advertising with flighted times two to three weeks in advance of three main events.

Any media advertising sourced is net of any commissions allowing the cost savings to be passed on to the city. CM will also seek out earned media opportunities including local advertising channels such as Michael Libbie's Insights on Business radio program.

#### Public Relations and Collateral Development

Public relations will entail an open communication between the city and community stakeholders. Our goal is not to only publicize events but to also engage the community in volunteer services. The marketing collateral developed will help support these efforts along with seeking sponsorship support.

To help keep costs down, CM recommends designing collateral templates such as flyers or posters that have the same design on top, however allow for event and date information to be changed on the bottom. This will allow for a consistent use of brand packaging.

**Video Development and Creation**

Depending on the need of video CM can help create a storyboard, find characters and execute a small video. A video consisting of five to seven minutes is acceptable for a presentation video, however anything used through social media should be around 30-seconds.

We would recommend creating an additional 30-second video that takes the highlights from the longer video. The 30-second video should be able to stand on its own without the use of sound. Digital image overlay may need to be used to help the audience understand what is happening in the story.

**Magazine development**

CM has the ability to create, design and outlay a 75<sup>th</sup> anniversary magazine for the city. The process will be extensive and take several months to develop. A thorough process will be developed for editorial content and we would recommend the use of our photographer for print ready pictures. The cost proposal outlined is for time and design. It does not include any printing costs.

Description of Services	Total Cost
Milestone 1: Research the needs	\$ 360
Milestone 2: Campaign Concept	\$ 2,700
Milestone 3: Website - Landing page with up to 3 internal pages for calendar, events and contact info	\$4,500
Website hosting and domain registration per year	\$ 360
Milestone 4: Media Buying 12 months	Not included. If funds available will allocate. Estimated to need \$20,000.
Milestone 5: Public Relations 12 months	\$ 12,000
Milestone 6: Social media/Website Management 12 months	\$ 5,760
Milestone 7: Print Deliverables Design and Creation 2 advertising templates 3 postcards 2 posters 1 banner 1 window cling 1 yard sign 1 billboard	\$ 4,600
Milestone 8: Print Deliverables Printing and Production	Not included
Milestone 9: Promotional video	\$ 4,000
Milestone 10: Magazine up to 24 pages design, layout and copy editing	\$ 3,000
<b>Total</b>	<b>\$ 37,280</b>

**Project and Event Management**

CM's specialty is on project and event management. Our dedicated staff will ensure that every aspect of the project is overseen. We will assist with initial strategy, budget, implementation and coordination with stakeholders. CM's team will make sure your event is a success.

Running an event is not just setting up the logistics but also promoting and handling the public relations. CM has the staff to integrate each of these events and help promote through social media, web and print. We will help in developing a media plan that outlines the most effective media outreach within the city's budget. Our internal staff will also coordinate and track volunteers and educate them on promotion of each event which is the most effective form of advertising.

Our ability to use state of the art event management registration allows us to get accurate RSVPs, handle name badges, reporting, and budgeting of each event to keep the city on track and on budget.

Description of Services	Total Cost
Event 1: Campaign Launch Reception -Scope, budget, schedule, implementation, vendor management and team coordination -Event venue -Catering -Registration fees -Printing	\$ 2,000  Not included Not included \$5.00 per registrant additional Not included
Event 2: Celebrate Windsor Heights	\$ 180
Event 3: Environmental Sustainability Series	\$ 180
Event 4: Easter Egg Hunt	\$ 180
Event 5: Community Festival -Scope, budget, schedule, implementation, vendor management and team coordination -Event venue -Catering -Registration fees -Printing	\$ 3,400  Not included Not included \$5.00 per registrant additional Not included
Event 6: WHAMM/Pancake Breakfast	\$ 630
Event 7: WH Annual Garage Sale/Clean-up	\$ 180
Event 8: Bicycle Rodeo	\$ 360
Event 9: Founder's Gala -Scope, budget, schedule, implementation, vendor management and team coordination -Event venue -Catering -Registration fees -Printing	\$ 3,760  Not included Not included \$5.00 per registrant additional Not included

Event 10: Movies in the Park	\$ 630
Event 11: Music in the Park	\$ 630
Event 12: Garden Tour -Scope, budget, schedule, implementation, vendor management and team coordination -Event venue -Catering -Registration fees -Printing	\$ 3,760  Not included Not included \$5.00 per registrant additional Not included
Event 13: 4 <sup>th</sup> of July Celebration	\$ 630
Event 14: Junior Detectives	\$ 180
Event 15: Car Show	\$ 180
Event 16: National Night Out	\$ 180
Event 17: Watershed Clean-Up Festival	\$ 180
Event 18: Ice Cream Social	\$ 630
Event 19: Yappy Hour	\$ 630
Event 20: Halloween/Trick or Treat	\$ 180
Event 21: WH75 Gives!	\$ 630
Event 22: Windsor Wonderland -Scope, budget, schedule, implementation, vendor management and team coordination -Event venue -Catering -Registration fees -Printing	\$ 3,760  Not included Not included \$5.00 per registrant Not included
<b>Total</b>	<b>\$ 23,070</b>

**Sponsorship Deliverables**

Capture Marketing can assist in fundraising, however there must be a partnership with local chambers and the city itself to reach the right stakeholders. A brochure or flyer will be created to help communicate the vision of the community festival.

Fundraising is usually done within a year or two in advance. Due to this tight timeline additional resources will have to be made by our staff to handle the outreach, follow up and execute the sponsor opportunities.

Description of Services	Total Cost
Sponsorship strategic planning and research	\$ 1,000
Outreach and securing sponsorships	\$ 2,000
Executing sponsor opportunities	\$ 1,000
<b>Total</b>	<b>\$ 4,000</b>

## PROJECT BUDGET

Below is the pricing for the scope of services outlined. Price quotes will be honored for 120 days after the date of this proposal.



Pricing

Description of Services	Total Cost
Marketing Deliverables	\$ 37,280
Event and Project Management	\$ 23,070
Sponsorship Deliverables	\$ 4,000
<b>Total</b>	<b>\$ 64,350</b>
Additional items for consideration	
Media budget for social media, television and radio	\$ 20,000
Printing Budget for marketing collateral	\$ 9,000

### Terms and Conditions

\*Please note the above proposal only outlines the costs indicated in the scope of work. Any additional services will be billed separately and must be agreed upon by both parties. This proposal does not include printing costs of any creation of materials.

\*\*Please note if any shipping or postage prices are included that they are subject to change with or without notice and may be contingent on applicable valid postal permits.

# PORTFOLIO OF WORK



Clockwise: Your Future Starts Here billboard, business card, Kaleidoscope of Collaboration event logo, and brochure. The logo was developed to be modern and future-proof. The logo uses bold colors to make a statement regarding action and to convey a new beginning.



### ID Action Make Your Mark

Creation of brand and conference for the Iowa Disability and Developmental Council.



The theme for the ID Action conference was entitled, "Make Your Mark," because the council wanted individuals in communities to take action other than voting. The imagery was created from an inspired action similar to a comic book. The splash movement is to spring people into action and represents fun and energy. The colors are consistent with the ID Action brand manual already in place.

A promotional graphic for the ID Action "Make Your Mark!" Self-Advocacy Conference. The background is a blurred photo of a conference room with people seated at tables. The "MAKE YOUR MARK!" logo is prominently displayed in the center. To the left, there is text and a list of breakout sessions. At the top, the ID Action logo is visible. At the bottom right, there is a red callout box with white text.

**Do YOU want to make a difference in your community?**

Whatever mark you make, it means you have had an impact and something is different because you were here.

Join ID Action in Coralville this October for the Make Your Mark! conference and learn how you can make an impact in your community. Breakout sessions will include:

- Storytelling
- Community Engagement
- Leadership
- 2016 Iowa Caucus

Attendees will leave the Make Your Mark! conference with information and tools they need to be active in their communities and Make Their Mark!

**idaction**  
We're counting on you.

**MAKE YOUR MARK!**

**Self-Advocacy Conference**  
October 7-9, 2015

The ID Action "Make Your Mark!" Self-Advocacy Conference is an opportunity learn and grow as advocates and agents for change.

## CLIENT REFERENCES

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Additional references may be requested.