

AGREEMENT FOR PROFESSIONAL SERVICES #23018
Strategic Outreach and Communication Plan for Workforce Development Board

This Agreement for Professional Services (“**Agreement**”) is between the County of Lake (“**County**”) and Pat Davis Design Group (PDDG) (“**Consultant**”), whose principal business address is 333 University Avenue, Sacramento, CA 95825.

RECITALS

1. Lake County issued an RFP seeking a consultant that provides a Strategic Outreach and Communication Plan (“**Services**”).
2. Consultant responded timely with a proposal dated January 16, 2023 (“**Proposal**”).
3. Based on Consultant’s Proposal, the County and Consultant have negotiated terms under which Consultant will perform the Services.
4. To memorialize the terms and conditions under which Consultant will perform the Services, the parties have drafted this Agreement.

In light of the foregoing, Lake County and Consultant agree as follows:

SECTION 1. AGREEMENT DOCUMENTS

The documents that encompass the parties’ understanding are listed below and shall be considered in the following order of precedence, with the Consultant’s proposal or the RFP supplying terms or specifications only where not superseded by the terms or specifications contained in this Agreement.

- A. This Agreement and its exhibits A, B.
 - a. Consultant’s Implementation Plan dated January 16, 2023.
 - b. Key Personnel
- B. Consultant’s proposal dated January 16, 2023.
- C. The County’s RFP (including any addenda to it).

SECTION 2. SCOPE OF WORK

The scope of work that Consultant agrees to perform is set forth in Exhibit A to this Agreement.

SECTION 3. EFFECTIVE DATE; TERM

This Agreement shall be effective upon execution and shall be in effect for a one-year period with the option to renew for four additional one-year periods. At the end of any contract term, Lake County reserves the right to extend this contract for a period of 60 days for the purpose of negotiating a new or extended agreement. In the event Lake County exercises its right to institute the 60-day extension, prorated rebate calculations shall be applied. For any year beyond the initial contract term, this contract is contingent upon the appropriation of sufficient

funds.

Effective Date. Unless a different effective date is provided above, this Agreement will become effective when all of the parties have signed it, and the date this Agreement is signed by the last party to sign it (as indicated by the date associated with that party's signature) will be deemed the "Effective Date" of this Agreement. If a party signs but fails to date a signature, the date that the other party receives the signing party's signature will be deemed to be the date that the signing party signed this agreement, and the other party may inscribe that date as the date associated with the signing party's signature.

SECTION 4. AGREEMENT PRICE

Lake County shall make periodic payments to Consultant based upon actual progress and Consultant's invoice. Payments shall not exceed the amounts shown in the following schedule, and full payments for each task shall not be made until the task is completed and accepted by Lake County.

DELIVERABLE	TASKS	MONTHLY RATE	QUANTITY	EXTENDED
Social Media	Content Creation, Graphics, Posting to Platforms	\$ 1,330.00	12.00	\$ 15,960.00
Advertising	LinkedIn Digital Ads	\$ 550.00	12.00	\$ 6,600.00
E-Newsletter	Content Creation, Graphics, Distribution	\$ 665.00	12.00	\$ 7,980.00
Website Maintenance	Existing Page Edits, New Page Creation	\$ 760.00	12.00	\$ 9,120.00
Website Fees	Domains, Hosting, SSL	\$ 125.00	12.00	\$ 1,500.00
Graphic Design	Creation of New Collateral Pieces	\$ 570.00	12.00	\$ 6,840.00
TOTALS		\$ 4,000.00	12.00	\$ 48,000.00

SECTION 5. INVOICES & PAYMENT

- A. At the start of this Agreement, the County will issue a purchase order for the work and Consultant shall submit invoices detailing the products and services provided and identify the purchase order number on all invoices.
- B. Consultant shall maintain records showing the actual time its employees and agents devoted to the project, and the costs incurred. Consultant shall permit a representative from Lake County to inspect and audit all of Consultant's data and records for the work and services provided under this Agreement. Consultant shall make these records available at reasonable times during the Agreement period and for one year after the end of the Agreement.
- C. All payments shall be made in accordance with the Illinois Local Government Prompt Payment Act, which generally requires approval of a vendor's bill within 30 days of receiving the invoice for the services contained in it, and payment within an additional 30

days (50 ILCS 505/1 *et seq.*).

- D. Lake County's fiscal year ends on November 30. Invoices for services the Consultant has rendered up until November 30 of each year must be received by Lake County on or before January 15 of the subsequent calendar year.

Other than the timeframe for payments related to the end of Lake County's fiscal year, as stated above, Lake County shall not be held financially liable for payment of any services rendered if the invoice for such services is not sent to the County within 90 days from the date the services were provided.

If this Agreement is terminated prior to its expected expiration date, the Consultant must submit all invoices to Lake County no later than 30 days after the effective date of the termination.

Payment for invoices received beyond the time periods in this subsection will be denied, absent an agreement to the contrary. Failure of the Consultant to invoice the County in the timeframes noted in this section shall constitute the Consultant's waiver of the Consultant's right to payment.

SECTION 6. CONTRACT MODIFICATIONS

In the event changes to the scope of the project or additional work become necessary or desired (a "Modification"), the parties shall follow the procedures set forth in this Section to memorialize the modification (a "Contract Modification"). A Contract Modification shall be effective only if documented in writing, dated and signed by both parties, and expressly referencing this Agreement. The Contract Modification shall set forth in detail: (i) the Modification requested, (ii) the reason for the proposed Modification; (iii) the cost of the Modification; and (iv) the Modification's impact on the time for completing the project.

In the event either party desires a Modification, the Project Manager for such party shall submit to the other party's Project Manager a proposed Contract Modification. If the receiving party does not accept the Contract Modification in writing within 10 business days, the receiving party shall be deemed to have rejected the Contract Modification. If the parties cannot reach agreement on a proposed Modification, Contractor shall nevertheless continue to render performance under this Agreement in accordance with its (unmodified) terms and conditions.

Modifications that involve or increase in the amounts payable by the County may require execution by the County Purchasing Agent. Some increases may also require approval by the County Board. In cases where the Purchasing Agent's signature is required, or where County Board approval is needed, the Contract Modification shall not be deemed rejected by County after 10 days if the County's Project Manager has indicated in writing within the 10-day period an intent to present the Contract Modification for appropriate signature or approval.

SECTION 7. INDEMNIFICATION

Consultant agrees to indemnify and defend Lake County (its employees, elected officials, executives, and agents) from all claims, actions, demands, judgments or liabilities, fines, penalties, and expenses, including without limitation reasonable legal fees and expert costs, arising out of this Agreement and arising from the Consultant's (its employees', executives', and agents') actions, whether negligent, reckless, or intentional. Lake County shall provide notice to Consultant promptly of any such claim, suit, or proceeding, and will assist Consultant, at Consultant's expense, in defending any such claim, suit, or proceeding.

SECTION 8. INSURANCE

The Consultant must obtain, for the Contract term and any extension of it, insurance issued by a company or companies qualified to do business in the State of Illinois with an A.M. Best Rating of at least A and provide the County with a Certificate of Insurance 15 days before the start of the project, and thereafter annually upon each renewal date for contracts/projects that will last more than one year. Insurance in the following types and amounts is necessary:

Commercial General Liability Insurance

In a broad form on an occurrence basis shall be maintained, to include, but not be limited to, coverage for property damage, bodily injury (including death), personal injury and advertising injury in the following coverage forms where exposure exists:

- Premises and Operations
- Independent Contractors
- Products/Completed Operations
- Liability assumed under an Insured Contract/ Contractual Liability
- Personal Injury and Advertising Injury

With limits of liability not less than:

\$ 1,000,000 Each Occurrence

\$ 1,000,000 Products-Completed Operations

\$ 1,000,000 Personal and Advertising injury limit

\$ 2,000,000 General aggregate; the CGL policy shall be endorsed to provide that the General Aggregate limit applies separately to each of the contractor's projects away from premises owned or rented to contractor.

Excess/ Umbrella Liability

The Contractor's Excess/ Umbrella liability insurance shall be written with the umbrella follow form and outline the underlying coverage, limits of insurance will be based on size of project:

\$ 2,000,000 per occurrence limit (*minimum*)

Automobile Liability Insurance

Automobile liability insurance shall be maintained to respond to claims for damages because of bodily injury, death of a person, or property damage arising out of ownership, maintenance, or use of a motor vehicle. This policy shall be written to cover any auto whether owned, leased, hired, or borrowed.

The Contractor's auto liability insurance, as required above, shall be written with limits of insurance not less than the following:

\$ 1,000,000 Combined single Limit (Each Accident)

Workers Compensation (Coverage A) and Employers Liability (Coverage B)

Workers Compensation Insurance covering all liability of the Contractor arising under the Worker's Compensation Act and Worker's Occupational Disease Act at limits in accordance with the laws of the State of Illinois. Employers' Liability Insurance shall be maintained to respond to claims for damages because of bodily injury, occupational sickness, or disease or death of the Contractor's employees, with limits listed below:

Employers Liability

- a) Each Accident \$1,000,000
- b) Disease-Policy Limit \$1,000,000
- c) Disease-Each Employee \$1,000,000

Such Insurance shall contain a waiver of subrogation in favor of Lake County.

Professional Liability – Errors and Omissions

The Engineers/Architects/Consultants for the plans of the project shall be written with limits of insurance not less than the following:

\$ 1,000,000 per claim per policy year

Coverage shall be provided for up to three (3) years after project completion. Policy is to be on a primary basis if other professional liability is carried.

Professional Liability – Cyber Liability

Cyber Liability Insurance for property damage to electronic information and/or data; first- and third-party risks associated with e-business, internet, etc., with limits of insurance not less than the following:

\$ 1,000,000 per occurrence limit

Technology Errors and Omissions

The Contractor's Software Developer and/or IT Consultant for the plans, including developing and implementing technology for Lake County, or of the project, shall be written with limits of insurance not less than the following:

\$ 1,000,000 per occurrence limit

County, acting at its sole option, may waive any of the foregoing insurance requirements upon a request to do so, but no waiver shall be effective unless made in writing. Such waiver may include or be limited to a reduction in the amount of coverage required above. The extent of waiver shall

be determined solely by County's risk manager taking into account the nature of the work and other factors relevant to County's exposure, if any, under this agreement.

Liability Insurance Conditions

Contractor agrees that with respect to the above required insurance:

- a) The CGL policy shall be endorsed for the general aggregate to apply on a "per Project" basis;
- b) The Contractor's insurance shall be primary & non-contributory over Lake County's insurance in the event of a claim.
- c) Contractor agrees that with respect to the above required insurance, Lake County shall be named as additional insured, including its agents, officers, and employees and volunteers and be provided with thirty (30) days' notice, in writing by endorsement, of cancellation or material change. A blanket additional insured ISO endorsement is preferred for Contractors who have multiple projects with the County.
- d) Lake County shall be provided with Certificates of Insurance and should include the appropriate corresponding ISO form endorsements evidencing the above required insurance, prior to commencement of this Contract and thereafter with certificates evidencing renewals or replacements of said policies of insurance at least thirty (30) days prior to the expiration or cancellation of any such policies. No manuscript endorsements will be accepted. Any hard copies of said Notices and Certificates of Insurance and Endorsements shall be provided to:

**Lake County
Purchasing Division
18 N. County 9th Floor
Waukegan, Illinois 60085
Attn: RuthAnne Hall, Lake County Purchasing Agent**

- e) **Electronic copies of Notices, Certificates of Insurance and Endorsements can be emailed to Purchasing@lakecountyil.gov in place of hard copies.**

Failure to Comply: In the event the Contractor fails to obtain or maintain any insurance coverage required under this agreement, Lake County may purchase such insurance coverage and charge the expense to the Contractor.

SECTION 9. INDEPENDENT CONTRACTOR; LICENSURE OR CERTIFICATIONS; KEY PERSONNEL

- A. **Independent Contractor Status.** The parties intend that the Consultant will be an independent contractor.

- B. **Licensure or Certifications.** If required by law, the Consultant must at all times be and remain licensed or certified as a qualified provider of the services provided in this Agreement. Consultant shall submit copies of the required licenses or certifications upon the County's request. Consultant shall promptly notify County in writing of any citation Consultant receives from any licensing or certification authority, including all responses and correction plans.
- C. Where the parties have identified particular individuals as being critical to a project ("Key Employees"), then Consultant shall not replace Key Employees without the County's prior written consent, which shall not be unreasonably withheld. Should Key Employees be reassigned, become incapacitated, separate from the Consultant, or be otherwise unable to perform the functions assigned to them, Consultant shall (i) within 10 business days, temporarily replace the person with another properly qualified employee and (ii) within 30 calendar days, permanently replace the person.

Lake County shall have the right to request that Consultant replace Key Employees from the project by setting forth in writing the grounds for the request. Consultant shall have a reasonable time period in which to address the grounds or make a substitution.

See EXHIBIT B

- D. Consultant shall complete its obligations under this Agreement in a sound, economical and efficient manner and in accordance with this Agreement and all applicable laws. Consultant agrees to notify Lake County immediately whenever it is unable to comply with applicable State, Federal, or local laws, rules and regulations. Where non-compliance materially impairs the Consultant from performing the services under this Agreement, the County may terminate the Agreement for cause.

SECTION 10. DISPUTE RESOLUTION

All issues, claims, or disputes that the Consultant raises or makes related to this Agreement shall be resolved in accordance with the Contract Disputes provision of the Lake County Purchasing Ordinance, § 33.097.

SECTION 11. NO IMPLIED WAIVERS

Waivers of a term or condition of this Agreement shall be in writing, and that writing must describe the circumstances giving rise to the waiver. The parties intend that no waiver of any term or condition shall be deemed or construed as a waiver of any other term or condition of this Agreement, and waiver of any breach shall not be deemed to be a waiver of any subsequent breach, whether of the same or a different provision of this Agreement.

SECTION 12. SEVERABILITY

If any provision of this Agreement is unenforceable to any extent, the remainder of this Agreement (or application of that provision to any persons or circumstances other than those as to which it is held unenforceable) will not be affected by that unenforceability and will be enforceable to the fullest extent permitted by law.

SECTION 13. JURISDICTION, VENUE, CHOICE OF LAW AND PROFESSIONAL STANDARDS

This Agreement shall be governed by and construed according to the laws of the State of Illinois. Jurisdiction and venue shall be exclusively found in the 19th Judicial Circuit Court of Lake County, Illinois.

SECTION 14. NOTICES AND COMMUNICATIONS

All notices and communications which may be given by Lake County to Consultant relative to this Agreement shall be addressed to the Consultant at the address shown herein below:

George Dimotakis

President & CEO

Main # 916 563 7148

georged@pddesign.com

Copies of any notices and communications which propose to modify or terminate this Agreement shall be provided to: Lake County Purchasing Division, 18 North County Street, Waukegan, Illinois 60085-4350; Attention: Purchasing Agent.

SECTION 15. ASSIGNMENT, ALTERATIONS AND MODIFICATIONS

This Agreement shall not be assigned, delegated, or modified without the express written consent of both parties. This Agreement supersedes all other agreements, oral or written, between the parties with respect to the subject matter of this Agreement.

If Lake County agrees that the Consultant may assign, delegate, or subcontract the work under this Agreement, Consultant shall remain contractually liable to Lake County unless otherwise agreed in writing.

SECTION 16. TERMINATION

Lake County reserves the right to terminate this Agreement as set forth below.

a. Termination for Convenience:

Lake County reserves the right to terminate this Agreement, or any part of this Agreement, with or without cause, upon 30 days' written notice. In case of such termination, Consultant shall be entitled to receive payment from Lake County for work completed to the date of termination in accordance with the terms and conditions of this Agreement.

b. Termination Due to Material Breach:

In the event that this Agreement is terminated due to the Consultant's material breach, Lake County shall be entitled to purchase substitute items or services elsewhere and charge Consultant with losses the County incurs, including attorney's fees and expenses, notwithstanding any damage limitations the parties may agree to elsewhere.

c. Termination Due to Lack of Appropriations:

If sufficient funds are not appropriated by the Lake County Board to continue the services under this Agreement, then Lake County may terminate this Agreement. Lake County agrees to give written notice of termination to Consultant at least 30 days prior to the end of the last fiscal year for which appropriations were made. Lake County shall remit payment for all work completed and approved or accepted by the County, to the date of termination. Termination under this subsection shall not entitle the Consultant to contractual damages of any kind.

d. Termination Due to Force Majeure Events:

(i) If a Force Majeure Event prevents a party from complying with any one or more obligations under this agreement, that inability to comply will not constitute breach if (1) that party uses reasonable efforts to perform those obligations, (2) that party's inability to perform those obligations is not due to its failure to (A) take reasonable measures to protect itself against events or circumstances of the same type as that Force Majeure Event or (B) develop and maintain a reasonable contingency plan to respond to events or circumstances of the same type as that Force Majeure Event, and (3) that party complies with its obligations under section 16(d)(iii), below.

(ii) For purposes of this agreement, "Force Majeure Event" means, with respect to a party, any event or circumstance, whether or not foreseeable, that was not caused by that party and any consequences of that event or circumstance.

(iii) If a Force Majeure Event occurs, the noncomplying party shall promptly notify the other party of occurrence of that Force Majeure Event and may terminate the Agreement based on it, with an obligation to pay only for services performed prior to the Force Majeure Event.

SECTION 17. CONFIDENTIALITY

Both parties acknowledge that Consultant's documents and dealings related to this Agreement are subject to the Illinois Open Meetings Act (5 ILCS 120/1 *et seq.*) and the Illinois Freedom of Information Act (5 ILCS 140/1 *et seq.*). Consultant agrees to comply with all pertinent federal and state statutes, rules and regulations and County ordinances related to confidentiality.

SECTION 18. WORK PRODUCT

All work product prepared by Consultant pursuant to this Agreement, including, but not limited to, policies, reports, analysis, plans, designs, calculations, work drawings, studies, photographs, models, and recommendations shall be the property of Lake County. Consultant shall deliver the work product to Lake County upon completion of Consultant's work, or termination of the Agreement, whichever comes first. Consultant may retain copies of such work product for its records; however, Consultant may not use, print, share, disseminate, or publish any work product related to this Agreement without the consent of Lake County.

SECTION 19. PRESS/NEWS RELEASES

Consultant may not issue any press or news releases regarding this Agreement without prior approval from Lake County. Consultant shall provide notice to Lake County's Chief Communications Officer if contacted by the media regarding the services set forth in this Agreement.

SECTION 20. DEBARMENT AND SUSPENSION

The Lake County Purchasing Ordinance § 33.125 through 33.126 defines the County's Authority and Decision to Debar.

The Consultant certifies to the best of his or her knowledge and belief that the Consultant:

- A. Is not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency.
- B. Has not within a 3-year period preceding this contract been convicted of or had a civil judgment rendered against it for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain or performing a public (Federal, State, or local) transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statement, or receiving stolen property;

- C. Is not presently indicted or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and
- D. Has not, within a three-year period preceding this contract, had one or more public transactions (Federal, State, or local) terminated for cause or default.

Consultant agrees that, during the term of this Agreement, Consultant shall report to the County's contract administrator, within 10 days, any allegations to or findings by the National Labor Relations Board (NLRB) or Illinois Labor Relations Board (ILRB) that Consultant has violated a statute or regulation regarding labor standards or relations. If an investigation by the County results in a final determination that the matter adversely affects Consultant's responsibilities under this Agreement, then the County may terminate this contract.

SECTION 21. NON-DISCRIMINATION

During the term of this agreement, Consultant agrees to and shall comply with (1) the Equal Opportunity Employer provisions of Section 2000e of Chapter 21, Title 42 of the United States Code and Federal Executive Order Number 11246, as amended by Executive Order 11375, and (2) Chapter 33 of Title III of the Lake County Code of Ordinances (titled "Purchasing").

Signed:

COUNTY OF LAKE

PAT DAVIS DESIGN GROUP, INC.

By: _____
Its Purchasing Agent

By: _____
Its President & CEO

Date: _____

Date: _____

IMPLEMENTATION PLAN**EXHIBIT A**Strategic Approach*Overview*

We are uniquely well-positioned to facilitate continued implementation of the existing Board outreach and communication plan as we created the initial plan two years ago and have managed all aspects of its implementation ever since. Over the past two years, we have seen measurable successes and continued improvement in key metrics based on plan tactics, including steady growth in social media engagement, website visitor activity, and open rate for the monthly e-newsletter.

Based on the above, it is our intent to continue the implementation trajectory of the past two years, while also actively seeking out opportunities for continuous improvement. For example, we see an opportunity to enhance the content developed for the Board's social media accounts, including continuing to "tag" applicable board members and partners. We also desire to expand the monthly e-newsletter topics/stories to build upon the exceptional open rate the e-newsletter has achieved over the past year. We also plan to produce additional outreach collateral, ideally translated into appropriate languages for the county, and to promote these new pieces via the Board's social media accounts and website. Lastly, we see an opportunity to further refine and expand the Board's website presence by developing additional content for various web pages and promoting more events and newsworthy articles.

Key Deliverables

The key deliverables to be deployed over the initial 12-month contract period are outlined below.

- Social Media – 2x per week posting to LinkedIn, Twitter, and Facebook
- Advertising – ongoing LinkedIn "follower" digital ad (to run continuously)
- E-Newsletter – 12 issues per year, distributed monthly (includes Constant Contact subscription)
- Website Maintenance – ongoing maintenance/edits, as needed
- Website Fees – annual domain registration, website hosting, and SSL certificate
- Graphic Design – complete creative development and copywriting of (1) annual report, (4) press releases, and an assortment of additional design deliverables (flyers, brochures, templates, etc.)

Reporting

Our team will monitor all the tactics and their respective deployment on a quarterly basis and will provide periodic reports to the Board and staff, including measuring such KPIs as social media impressions and clicks, website visitors and web page activity, monthly e-newsletter open rate, and a recap of any produced graphic design deliverables or distributed press releases.

County Staff Involvement

We foresee direct involvement from Lake County staff at key milestones, such as providing early input and direction, reviewing all draft materials and providing feedback, providing any needed final approvals, and assisting in the facilitation of dialogue with board members, as needed.

Implementation Schedule

The implementation schedule on the following page outlines the timing by month for the various deliverables. For the purposes of the graphic design deliverables and press releases, we assumed at least one each per quarter to be produced. This schedule can be refined in any way to best meet the needs of the project.

IMPLEMENTATION PLAN

Strategic Approach (Cont.)

Implementation Schedule (Cont.)

<u>Month (2023)</u>	<u>Tasks</u>
March	Project Kick-off, Initial Client Intake Session Social Media Posting (2x per week), LinkedIn Follower Ad Development and Deployment March E-Newsletter Creation and Distribution
April	Website Maintenance (as needed), Website Fees (Domains, Hosting, and SSL) Social Media Posting (2x per week), LinkedIn Follower Ad (continued deployment) April E-Newsletter Creation and Distribution Website Maintenance (as needed), Website Fees (Domains, Hosting, and SSL) Graphic Design Deliverable Creation (TBD)
May	Social Media Posting (2x per week), LinkedIn Follower Ad (continued deployment) May E-Newsletter Creation and Distribution
June	Website Maintenance (as needed), Website Fees (Domains, Hosting, and SSL) Social Media Posting (2x per week), LinkedIn Follower Ad (continued deployment) June E-Newsletter Creation and Distribution Website Maintenance (as needed), Website Fees (Domains, Hosting, and SSL) Press Release Development (TBD)
July	Quarterly Review of Social Media and Website Analytics Social Media Posting (2x per week), LinkedIn Follower Ad (continued deployment) July E-Newsletter Creation and Distribution Website Maintenance (as needed), Website Fees (Domains, Hosting, and SSL) Graphic Design Deliverable Creation (TBD)
August	Social Media Posting (2x per week), LinkedIn Follower Ad (continued deployment) August E-Newsletter Creation and Distribution
September	Website Maintenance (as needed), Website Fees (Domains, Hosting, and SSL) Social Media Posting (2x per week), LinkedIn Follower Ad (continued deployment) September E-Newsletter Creation and Distribution Website Maintenance (as needed), Website Fees (Domains, Hosting, and SSL) Press Release Development (TBD)
October	Quarterly Review of Social Media and Website Analytics Social Media Posting (2x per week), LinkedIn Follower Ad (continued deployment) October E-Newsletter Creation and Distribution Website Maintenance (as needed), Website Fees (Domains, Hosting, and SSL) Graphic Design Deliverable Creation (TBD)
November	Social Media Posting (2x per week), LinkedIn Follower Ad (continued deployment) November E-Newsletter Creation and Distribution
December	Website Maintenance (as needed), Website Fees (Domains, Hosting, and SSL) Social Media Posting (2x per week), LinkedIn Follower Ad (continued deployment) December E-Newsletter Creation and Distribution Website Maintenance (as needed), Website Fees (Domains, Hosting, and SSL) Press Release Development (TBD) Quarterly Review of Social Media and Website Analytics

IMPLEMENTATION PLAN

Strategic Approach (Cont.)

Implementation Schedule (Cont.)

<u>Month (2024)</u>	<u>Tasks</u>
January	Social Media Posting (2x per week), LinkedIn Follower Ad (continued deployment) January E-Newsletter Creation and Distribution Website Maintenance (as needed), Website Fees (Domains, Hosting, and SSL) Graphic Design Deliverable Creation (TBD)
February	Social Media Posting (2x per week), LinkedIn Follower Ad (continued deployment) February E-Newsletter Creation and Distribution Website Maintenance (as needed), Website Fees (Domains, Hosting, and SSL)

Below is our standard methodology for creative and graphic design tasks.

Concept Development: Each assignment will begin with a consultation between our Project Manager and client staff. The purpose of the consultation will be to carefully discuss each task, possible themes, guidelines for the graphics and visuals, review of content and photos, and any other pertinent design criteria which should be considered in the development of preliminary concepts. Special attention will be paid to any existing branding in place.

Following the consultation, our team will discuss distribution of work, timelines, and assignment of preliminary creative development. Our creative process typically includes development of two unique concepts. Each concept will be crafted based upon the design direction collected during the consultation, coupled with our team's experience with similar projects. Concepts will be delivered via PDF. Following the presentation of initial concepts, client staff will have the opportunity to request revisions to one selected concept that will then be refined to achieve final approval.

Copywriting/Editing: As needed, our team will be available to provide copywriting and editing services to assist with content creation, refinement, and proofreading. Any new content to be created will first be developed in draft form, presented to client staff for review, and then refined to obtain final approval. For proofreading and/or editing tasks, we will review all client-provided content prior to placement in the layout and will track changes for recommended edits. As needed, additional rounds of review may also occur once the copy has been placed into the full layout.

Production: Once the final look and feel has been approved, our creative team will begin application of this design throughout the entire layout of each deliverable. We will also assist with locating stock photography, as needed, and will develop any custom graphics (icons, infographics, etc.) during this phase.

At the conclusion of any copy placement, photos and graphics, and overall design development, we will present the first electronic PDF proof of the entire layout. Client staff will then carefully review each deliverable in its entirety and note content revisions, layout changes, and any photo adjustments. Following the receipt of these edits, we will incorporate the requested revisions and present a second electronic PDF proof. The proofing and review period will continue for one additional round, and then the final electronic proof will be prepared for client approval.

Final File Preparation: Once the final approval has been received from client staff, we will prepare the final art files for the selected print vendor. Our team will provide full print management services to the extent requested by the client. As appropriate, we will also prepare digital and web-friendly assets for use by client staff on the various digital design deliverables. Our team will also collaborate with client IT staff and/or vendors to ensure creative deliverables are easily integrated into the client's existing web, social, and e-marketing platforms.

IMPLEMENTATION PLAN

Strategic Approach (Cont.)

Below is our standard methodology for content development and refinement tasks.

We begin all copywriting assignments in a manner similar to our other creative services with the initial client intake session. We will discuss scope, length, and intended audience. When we create content from scratch, we typically provide a draft of one page or section first, to ensure we are on the correct path, using the correct tone, etc. When we are editing existing copy, we typically perform full copyediting with tracked changes so client staff can quickly and easily see what was edited. For all original content to be developed, we will either perform the necessary content research or reference client-provided materials which will be digested into the appropriate customer/user content.

Once the first draft of content has been reviewed by the client team we will proceed with any requested edits and provide a clean draft. This process typically continues for two to three rounds. When content is being placed into a creative deliverable, we generally place the near-final copy into the actual layout so the client team can easily see the flow, hierarchy, and organization of the content in its actual environment. This also easily facilitates one additional round of client review. All content, whether original or edited, will be presented to the client team for final approval before proceeding to the next phase/task.

Below is our standard methodology for developing and implementing social media campaigns.

Our approach to social media development is comprehensive in that we always look at each campaign from the top down. We will work closely with client staff to clearly identify the goals of any social media effort, review all existing efforts in use, and draft our proposed strategy for the new campaign. The strategy will outline elements such as messaging, topics, ideas for visuals, recommended frequency of postings (based upon available budget), and proposed success metrics. In partnership with client staff we will refine the strategy to begin implementation.

With the approved social media plan and strategy in place, we will then develop the editorial (content) calendar on a biweekly or monthly basis, dependent upon the chosen frequency of postings. The editorial calendar will clearly identify the specific topics and draft content for each post, with a clear identification of how the content will be customized as applicable to the various social media platforms. Any graphics to be used will also be identified in the content calendar. Client staff will provide input on the editorial calendar and our team will refine and finalize all content. If at some point client staff are comfortable with our team implementing the social media posts without a predetermined content calendar we can easily assume full responsibility. Content development will be ongoing.

If part of the scope, the next step is to physically post approved content to each agreed-upon social media platform. Once the posting has successfully occurred, our team will also assist in monitoring each post/account, encouraging engagement with followers, and enhancing posts, as relevant. As budgets allow, our marketing team will also make recommendations for paid social media ad placement, promoted posts, and other paid/sponsored content.

In instances where client staff may desire to create a new social media account, our marketing team can also easily assist. We regularly create new social media accounts for clients and can seamlessly assist client staff in choosing an appropriate handle, drafting the bio/write-up, and uploading an appropriate avatar and profile image.

IMPLEMENTATION PLAN

Strategic Approach (Cont.)

Below is our standard methodology for website design and development tasks.

Concept Development: The assignment will begin with an initial consultation between our Project Manager and designated client staff. The purpose of the consultation will be to carefully discuss the website's possible themes, guidelines for the graphics and visuals, review of content and photos, and any other pertinent design criteria which should be considered in the development of preliminary 'look and feel' concepts and/or refreshed graphics.

Following the consultation, our creative team will meet internally to discuss distribution of work, timelines, and assignment of preliminary creative development. Our standard creative process includes development of two unique concepts of a sample website home page and one sample interior web page. Each concept will be crafted based upon the design direction collected during the initial consultation, coupled with our team's experience with similar websites. Concepts will be delivered via PDF for review. Following the presentation of initial concepts, client staff will have the opportunity to request revisions to one selected concept that will then be refined to achieve final approval.

Production: Once the final look and feel has been approved, our creative team will begin application of this design throughout the entire website. This process begins with building out the templated interior pages for each section of the website. The basic template includes all elements of the main menu, navigation, header, footer, and basic page structure (body copy, hero image/video, sidebar, and other supporting copy blocks and visuals).

It is during this phase that we will also assist in the development of the full sitemap, header menu, side/footer menus, dropdowns, and any additional navigational elements. All of these elements will be displayed visually in the web page templates to help communicate the interconnectivity of each page of the new website.

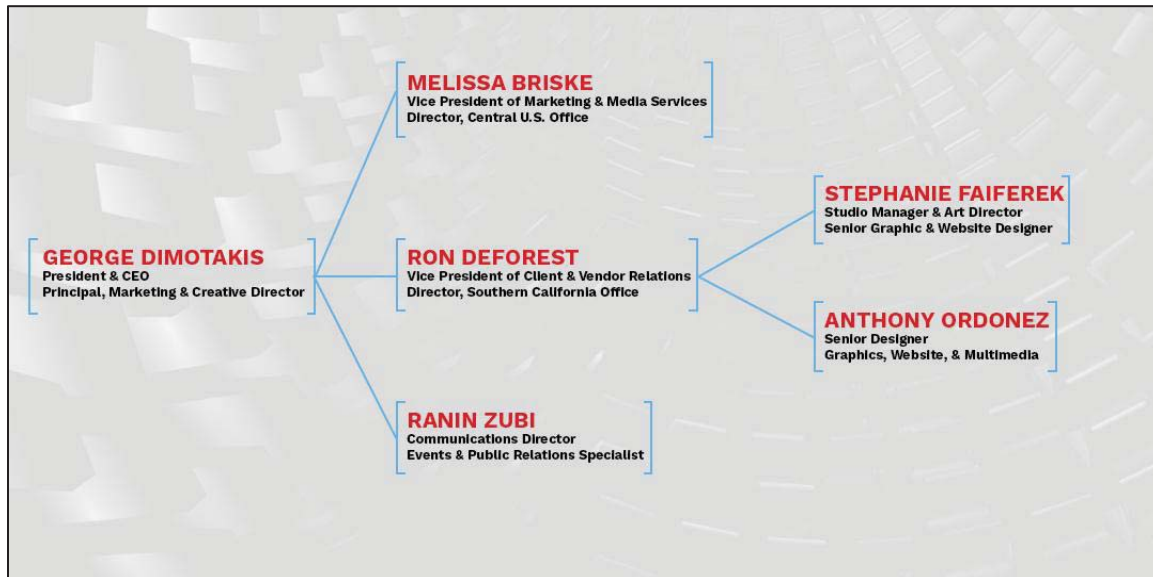
During the production phase, we will manage all client-provided copy placement, photos and graphics, and overall design development. Client staff will provide all content in final form, preferably in MS Word documents, along with photos and graphics of appropriate quality for website use. The entire website will be built out and presented as an online HTML proof stored in a secure staging area. During this phase is also when select features will be added to the site, such as embedded social media and e-newsletter signup. Client staff will have the opportunity to review the full site and provide any needed edits and modifications. Our creative team will apply the requested revisions and present a second complete proof of the entire website, with one additional round of review for final client approval.

Final File Preparation, Upload, and Training Manual: Once final client approval has been received, we will prepare the full website for upload to the chosen hosting server. Note: Client staff will provide our team with access to any domains and/or hosting accounts already owned by the client. During the upload phase, we will perform extensive testing of the new website to ensure the navigation is functioning properly, as well as ensure all content and graphics are displaying properly. It is also during this phase that we will optimize the new site for mobile compatibility. Once all elements of the final website have been tested and verified, we will prepare the new website to go live on the server. We will also install Google Analytics and provide client staff with a detailed WordPress training manual.

This phase will conclude with any final refinements that may be needed post-launch. Once the approved website is live, our team will then begin providing ongoing website maintenance and support, as requested.

IMPLEMENTATION PLAN

Organizational Chart



Staff Assignment

For this specific engagement, the follow staff assignments and roles will apply:

George Dimotakis – strategic planning, project lead, creative direction

Ron Deforest – project co-lead, internal team management, account management

Mel Briske – communications/messaging strategy development

Ranin Zubi – communications/messaging support

Stephanie Faiferek – creative/web development services

Anthony Ordonez – creative/web development services

Customer Service

Pat Davis Design Group has developed a strict project management and quality control policy that is our guiding light for project assignment, monitoring, and completion. Please see below for the highlights of our management plan.

- Each project is assigned to a dedicated Account Manager.
- Account Managers are responsible for keeping all creative and marketing staff on schedule, and report to the firm's Principal or Directors, as applicable.
- Budgets, deliverables, and deadlines are tracked at the end of each week.
- Weekly production meetings are held to monitor productivity and milestones.
- Internal monthly and quarterly progress reports are prepared for ongoing client engagements.
- All projects involving printing, fabrication, or production are reviewed for accuracy and completeness prior to sending artwork to the vendor.
- Project staff is available in a multitude of ways – virtual, email, text, etc.

IMPLEMENTATION PLAN

Management Staff Resumes

George Dimotakis — President and CEO, Principal, Marketing and Creative Director

Mr. Dimotakis serves as the President & CEO and has been at the helm of PDDG since 2006. Prior to that, he served as Vice President and Marketing Director for five years. In his role as President & CEO, he leads the strategic growth of the agency, including management of PDDG's four domestic and international offices. Mr. Dimotakis is responsible for working closely with the agency's senior leadership team to guide high-level marketing communications initiatives for a broad range of clients in more than 25 industries, including economic development, workforce development, tourism, higher education, transportation, energy/utility, and agriculture.

Mr. Dimotakis has more than 21 years of experience in various roles of branding, marketing, visual communications, strategic planning, and project management. He also leads the marketing communications team in strategy development, research, implementation, and integration of marketing, advertising, public relations, and social media programs. Additionally, he provides senior-level oversight of the firm's account management team, contributing to the development of integrated campaign planning, budgeting, and scheduling.

Recognized nationally for many of the agency's past marketing communications campaigns, Mr. Dimotakis has led high-level programs for the Institute of International Education, California Department of Transportation (Caltrans), Peninsula Clean Energy, Maricopa Economic Development Alliance, and Lake County Workforce Development.

Mr. Dimotakis holds a double bachelor's degree in Marketing and Strategic Management from CSU Sacramento. He also is a member of Delta Sigma Pi, the premier professional business fraternity.

In addition to his leadership of Pat Davis Design Group, Mr. Dimotakis also leads several privately funded startup businesses, including management and oversight of an agricultural company and multiple real estate ventures.

Ron Deforest — Vice President of Client and Vendor Services, Director of Southern California Office

Mr. Deforest serves as Vice President of Client and Vendor Services, providing day-to-day oversight of the agency's creative and account teams and vendor partners. Additionally, he supports PDDG's business development goals by directly assisting with new client initiatives, including expansion of the firm's existing portfolio across all agency offices. Mr. Deforest provides dedicated account management services for many of the agency's largest clients and manages PDDG's growing roster of vendor partners, including print, digital, and software suppliers.

With more than 21 years of experience in high-level internal and external account management and business development, Mr. Deforest has worked with small and large teams across multiple office locations. Since joining PDDG in 2009, he has contributed to the growth of PDDG's footprint across the country, and currently manages the Southern California office. Prior to his most recent promotion, he served as the Senior Accounts Director, providing a broad range of account management services, with a particular focus on PDDG's public sector and non-profit clients.

Mr. Deforest has relevant experience on assignments for California State University Sacramento, City of Santee, Sonoma County Water Agency, City of Suffolk, and Virginia Career Works Northern Region.

Beyond his diverse experience with PDDG, Ron is also currently pursuing a History Degree from Sierra College.

IMPLEMENTATION PLAN

Management Staff Resumes (Cont.)

Melissa “Mel” Briske — Vice President of Marketing and Media Services, Director of Central U.S. Office

Ms. Briske serves as Vice President of Marketing and Media Services. In this role, she manages all aspects of business development, provides project management to clients in more than 25 unique industries, and guides marketing and communications strategy for client engagements across the country. She also oversees strategic partnerships, guides future growth of the company, and participates in daily functions of contract management, fiscal planning, and staff relations.

Ms. Briske joined PDDG in 2013 and has more than 25 years of marketing, public relations, and leadership experience in a multitude of industries. Before being promoted to Vice President of Marketing and Media Services, Melissa served in senior-level marketing, leadership, and training roles with a global home-services franchisor and in the finance industry.

On a regular basis, Ms. Briske is actively engaged with projects for the Monterey County Workforce Development Board, EPIC-Network, California Department of Transportation (Caltrans), and Advance Central Pennsylvania.

In addition to her extensive professional background, Mel holds a BA from Baylor University, an MBA in Strategic Leadership from Amberton University, and is currently pursuing Executive Certification in Corporate Communications from Cornell University.

Ranin Zubi — Communications Director, Events and Public Relations Specialist

Ms. Zubi joined the team at PDDG after spending 12 years in management positions at several of California's largest financial institutions. Her diverse background includes project management, small and large team oversight, marketing plan development and implementation, event planning, social media strategy and integration, and business development.

Over the past eight years, Ms. Zubi has managed more than 30 special events, ranging from 15 people to more than 2,000 people. She is involved in all aspects of event planning for PDDG clients, including site selection, marketing, vendor relations, registration, event design, speaker recruiting, onsite logistics, and event evaluation.

Additionally, Ms. Zubi is closely involved with many of the firm's large marketing and public relations campaigns, including her ongoing work for the Lake County Workforce Development Board, Town of Gilbert, Maricopa Economic Development Alliance, City of Sacramento, and Institute of International Education. She actively contributes to all social media campaigns currently managed by the firm, including developing integrated strategies for content, messaging, advertising, and tracking.

Ms. Zubi holds a bachelor's degree in Communications, with a focus on Public Relations, from CSU Sacramento.

IMPLEMENTATION PLAN

Creative Staff Resumes

Stephanie Faiferek — Studio Manager and Art Director, Senior Graphic and Website Designer

Ms. Faiferek is an incredibly valuable member of the creative team at PDDG and has been with the agency since 2008. She comes to the firm with a bachelor's degree in Graphic Design from California State University Sacramento. Her talents are quite varied, including extensive award-winning illustration design, multimedia and website development, branding and print production, and packaging design.

Prior to joining PDDG, Ms. Faiferek worked at University Enterprises, providing graphic design, illustration, web design, and print production services for all retail and restaurant outlets on the CSU Sacramento campus. Additionally, she previously ran a successful freelance design company.

Since joining the team, Ms. Faiferek has provided creative solutions for California State University Sacramento, Heart of Texas Workforce Development Board, California Transportation Commission, Town of Gilbert, Albuquerque Regional Economic Alliance, and Peninsula Clean Energy, among many others. She has a specialty in high-end website design, tradeshow design, and large-scale brand integration campaigns. She also is extremely well versed in economic and workforce development marketing.

Anthony Ordonez — Senior Designer (Graphics, Website, and Multimedia)

Mr. Ordonez is a seasoned senior graphic designer with nearly 20 years of experience in multiple high-level design positions, including 10 years of experience producing visual design solutions for some of the world's most recognizable musicians. Mr. Ordonez has an immense and diverse background in branding, print, and web design.

With a careful eye for detail and a respected pride for his craft, Mr. Ordonez regularly develops creative concepts for PDDG projects ranging from logos and branding platforms to print collateral, websites, signage, and digital art. He is also extremely proficient in creating animations, custom illustrations, and iconography.

As a key member of the PDDG team, Mr. Ordonez provides creative support and design services for California State University Sacramento, the Town of Gilbert, American Building Supply, Workforce Solutions for the Heart of Texas, SkillSource Group, and the City of Santee.

Mr. Ordonez holds a bachelor's degree in Graphic Design from CSU Sacramento.



Agreement #23018 for
Strategic Outreach and Communication Plan for Workforce Development Board

EXHIBIT B

KEY PERSONNEL:

NAME	POSITION	TASK
George Dimotakis	President & CEO	Principal, Marketing & Creative Director
Ron Deforest	Vice President	Client and Vendor Services
Melissa Briske	Vice President	Marketing & Media Services
Ranin Zubi	Communications Director	Events & Public Relations Specialist
Stephanie Faiferek	Studio Manager & Art Director	Senior Graphic & Website Designer
Anthony Ordonez	Senior Designer	Graphics, Website & Multimedia