



Zimmerman/Edelson Inc.

Public Relations • Advertising • Marketing

**PROPOSAL FOR
LONG-RANGE PLANNING AND
COMMUNICATION SERVICES**

**BRIARCLIFF MANOR
PUBLIC SCHOOLS**

| | |
|-------------------------|--|
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DATE SUBMITTED

April 16, 2019



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PART I

**PROPOSAL FOR
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QUALIFICATIONS



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AGENCY PROFILE

Zimmerman/Edelson, Inc. was established by its principals, Robert Zimmerman and Ron Edelson, in 1988. In 2012, David Chauvin, the agency's vice president, became the agency's third partner. In 2018, Chauvin was promoted to executive vice president. The agency, with a staff of 24, is a full-service communications, public relations, advertising, marketing and social media agency. Zimmerman/Edelson Inc. has been headquartered in Great Neck, New York since its inception. The agency's resume includes a diverse group of public sector and private industry clients. Current and past public sector clients include Long Island and Westchester school districts, Nassau and Eastern Suffolk BOCES, the New York/New Jersey Port Authority, the New York Power Authority, the Long Island Power Authority, Nassau County OTB, Suffolk County and the Town of Babylon IDAs, counties, towns, villages, a business improvement district, and water districts. Current and past private industry clients have included energy companies, major real estate developers, law firms, a major university, a K-8 religious school, health care agencies, financial companies and retail. Our work ranges from community outreach, public relations, crisis management, and education support to the development of regional and national TV, radio, print, Internet-based and social media-based advertising campaigns. On the advertising side, Zimmerman/Edelson, Inc. has its own in-house graphics, copywriting, electronic, print, social media, media purchasing, and trafficking departments.

Zimmerman/Edelson, Inc. has been working in the education field since 1988, when we began our relationship with the Plainview-Old Bethpage Central School District, a client we still service today. Our education client roster includes public school districts in Nassau, Suffolk and Westchester counties, Nassau BOCES, Hofstra University, Hofstra University Law School, Silverstein Hebrew Academy and the East Woods School. Our work for the education sector includes public information, crisis management, bond referendum communication strategy and campaigns, the production of printed material including newsletters, budget newsletters, calendars, adult education guides, bond referendum materials and special area publications.



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Below is a list of current clients.

EDUCATIONAL

Brentwood Public Schools
East Woods School (Pre-K – 8)
Farmingdale Public Schools
Hofstra University
Hofstra University Law School
Mamaroneck Public Schools
Middle Country Public Schools
Miller Place Public Schools
Nassau BOCES
Plainview-Old Bethpage Public Schools
Port Washington Public Schools
Roosevelt Public Schools
Silverstein Hebrew Academy
Uniondale Public Schools
Valley Stream 13 Public Schools
Westbury Public Schools



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WATER DISTRICTS AND RELATED COMPANIES

Hicksville Water District
H2M Engineering
Long Island Water Conference
Long Island New York Water Corporation
Plainview Water District
Port Washington Water District

MUNICIPAL AGENCIES/ENTITIES

Babylon Industrial Development Agency
Great Neck Plaza Business Improvement District
Great Neck Water Pollution Control District
Nassau Downs OTB
Suffolk County Industrial Development Agency
Town of Babylon
Town of Huntington
Town of North Hempstead

PRIVATE INDUSTRY

AvalonBay Communities
Benjamin Development Company
Brooklyn Sports & Entertainment
Canon U.S.A
Cassena Care
Compass Residences LLP
David Lerner Associates
Healthy Futures Health Care Plan
Hudson Yards
Lockheed Martin
Metropolitan Commercial Bank
Rechler Equities Partners
Republic Jet Center
Roxann Management
Signature Urban Properties
Verizon FiOS

NOT FOR PROFIT

Girl Scouts of Nassau County
Old Westbury Gardens
YWCA of Long Island



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Zimmerman/Edelson, Inc. officers and account personnel:

| | |
|--------------------------------------|--------------------|
| Partners | Robert Zimmerman |
| | Ron Edelson |
| | David Chauvin |
| Vice President | Jake Mendlinger |
| Director of Art Services | Michael Fales |
| Senior Accounts Manager | Greg Gordon |
| Senior Account Executives | Debbie Manetto |
| | Christine Sammarco |
| Associate Account Executives | Kevin Wilkinson |
| | Vincent Frazzetto |
| Assistant Account Executives | Daria Martorana |
| | Joshua Jackson |
| Senior Manager, Media and Production | Maria Coscia |
| Manager, Original Content Division | Greg Quinn |
| Original Content Editor | Robert Barracca |
| Consulting Graphic Designer: | Christine Doll |
| Illustrator | Michael Delia |
| Electronic Media Monitoring | Lynn Smiles |
| Interns: | Caitlin Sawyer |
| | Meaghan D'Amico |
| | Nicole Sappia |
| | Lauren Mansley |



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***BRIARCLIFF MANOR PUBLIC SCHOOLS
ASSIGNMENT PERSONNEL***

| | |
|--------------------------|-----------------|
| Partners: | Ron Edelson |
| Vice President: | Jake Mendlinger |
| Account Executive: | Daria Martorana |
| Original Content Editor: | Greg Quinn |
| Graphic Designer: | Mike Fales |



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RONALD MARTIN EDELSON, PARTNER

Ron Edelson is a co-president and founder of Zimmerman Edelson, Inc. He has been involved in marketing, promotion and public relations for over 30 years. Ron's diverse background includes working with manufacturers, financial industry clients, municipalities, not-for-profit organizations and multinational corporations. He has been honored by chambers of commerce and local and state urban development organizations and is frequently called on by state and national trade associations and organizations to speak on marketing, public relations and advertising. Ron also serves as executive director of the Great Neck Plaza Business Improvement District. The Great Neck Plaza BID promotes business development for both the retail and commercial sectors of Great Neck Plaza's economy. Prior to co-founding Zimmerman/Edelson, Ron was senior vice president of marketing at Global Motors, Inc., an importer of foreign automobiles. Ron oversees the graphics division of the agency and is the lead team member on all school district bond referendum assignments.

JAKE MENDLINGER, VICE PRESIDENT

Jake Mendlinger brings to Zimmerman/Edelson, Inc. an extensive background in business-focused media relations and crisis management. As vice president at the agency, Jake is responsible for overseeing day-to-day activities of the agency's public relations personnel, providing strategic-communication counsel, and co-managing the agency's education services division with the agency's co-founding partner Ron Edelson. Prior to Zimmerman/Edelson, Inc., Jake worked at Kwitken + Company in Manhattan, where he helped lead several of the company's largest financial services accounts including American Express Global Merchant Services and Astoria Federal Savings. Jake also worked at ABI Marketing PR in Manhattan, where he specialized in developing editorial content and securing media coverage for industrial, life sciences and medical-device manufacturing companies.



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DARIA MARTORANO

As an assistant account executive, Daria Martorana is responsible for handling day-to-day media relations and providing communications guidance for many of Zimmerman/Edelson, Inc.'s largest school districts. In addition to writing and pitching, Daria utilizes her background in graphic design, social media and brand development to spearhead innovative communication approaches for the agency's public school district clients. Prior to joining Zimmerman/Edelson, Inc., Daria worked with the Battier Take Charge Foundation, a non-profit organization devoted to the development and education of underserved youth. She served as a content creator, where she developed social media campaigns and evaluated social media analytics for trends and campaign success.

GREGG QUINN, MANAGER, ORIGINAL CONTENT DIVISION

Gregory Quinn is a content strategist and editor for Zimmerman/Edelson. He is also the manager of the agency's original content development division. In this role, Greg is tasked with leading the creative direction of a variety of clients—including educational, municipal, nonprofit and for-profit clients. His responsibilities include copywriting, ad strategy, creative design, copy editing, social media and voice acting. Gregory is a graduate of Salem State University, a graduate of the United Nations Worldview Institute, and an alumnus of AmeriCorps' National Civilian Community Corps and State and National programs. Greg is the recipient of several professional creative writing awards and accolades.

MIKE FALES, DIRECTOR OF GRAPHIC ART SERVICES

Mike Fales, director of graphic art services for Zimmerman/Edelson, Inc., has been in the graphic design industry for 20 years. Prior to joining Zimmerman/Edelson, Inc. in 1999, Mr. Fales was an award-winning freelance artist. At Zimmerman/Edelson, Inc., Mike is responsible for supervising the work of the agency's graphic artists and illustrators, as well as serving as lead graphic designer on the agency's largest accounts.



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BOND REFERENDUM SERVICES REFERENCES

Great Neck Public Schools
Dr. Teresa Prendergast, Superintendent
516 441 4001

Scarsdale Public Schools
Mr. Stuart Matthey, Assistant Superintendent for Business
914 721 2400

Uniondale Public Schools
Dr. William Lloyd, Superintendent
516 560 8800

Valley Stream District #13
Dr. Constance Evelyn, Superintendent
516 568 6100

Westbury Public Schools
Mr. Eudes S. Budhai
516 874 1829



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PRIOR EXPERIENCE WITH BOND REFERENDUMS

Over the agency's 30-year history working with public school districts on Long Island and in Westchester County, we have worked on over 20 bond referendums, all but one being successful on the first vote. With the one referendum that did not pass on the first vote, we were successful on the second vote.

Most recently, we successfully managed the communication efforts of Great Neck School District's 2017 \$68 million referendum, Scarsdale School District's 2018 \$65 million referendum, Uniondale School District's 2018 \$158 million referendum, and Westbury School District's 2018 \$58 million referendum. It is of special note that with the each of these successful referendums, the turnout was either a record or near-record turnout for the district.

Provided with this proposal are samples of materials developed for these bond referendums.

The team that would be assigned to the Briarcliff Manor project – Ron Edelson, a founder of the agency; Jake Mendlinger, the agency's vice president and co-manager of the agency's educational division; Greg Quinn, the agency's original content development division manager; and Mike Fales, the agency's director of graphic services, were the team members on each of the referendums noted above. Daria Martorana will bring social media expertise to the communications efforts developed for Briarcliff Manor's bond referendum vote efforts.



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PART II

**PROPOSAL FOR
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PUBLIC SCHOOLS**

SCOPE OF SERVICES



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DESCRIPTION OF SERVICES

LONG-RANGE PLANNING/BOND REFERENDUM PLANNING (Phase 1 of the Briarcliff Manor RFP)

Bringing a bond referendum to the public successfully requires a great deal of pre-planning and strategy. The history of public education in the tri-state region, especially in the past several years, has demonstrated that bond referendums are viewed differently than regular school budgets; in many districts that have had great success in passing annual school budgets, bond referendums have resulted in pocket opponent groups that represent strong resistance and defeat at the polls. This is akin to what happened in the Briarcliff School District in December 2018. Similarly, in districts where annual budgets have met with resistance, bonds have passed. This was our experience with the Uniondale School District. What this points out is that past successes or failures on annual or bond votes are not reliable predictors of future voter behavior.

Zimmerman/Edelson, Inc.'s experience, as well as a careful study of successful and defeated bond referendum efforts, including the 2018 Briarcliff bond vote, clearly indicates that setting the groundwork for a new Briarcliff Manor bond referendum is crucial to its successful passage. As noted in Briarcliff Manor's RFP, pre-planning tied into a five-year plan identifying program goals, space needs and capital improvement requirements, will be essential. Most important, influencer stakeholder adoption of the plan, including a commitment to the academic and facilities needs identified, is critical for subsequent bond referendum approval. To accomplish this, influencer stakeholders need to be identified – internally within the Briarcliff Manor School District and those in the Briarcliff Manor community – and brought into the planning process from the outset.



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In the RFP, it is stated that the LRP/communications consultant will work with the District and the District's architect to evaluate K-12 facility capacity to advance safety/security, student guidance and support services, DW educational program, science and library/maker space capacity, and athletic programs. While Zimmerman/Edelson, Inc. can recommend advisory committee representation and assist in the compilation of the advisory group, we cannot present ourselves as having extensive experience in being the meeting facilitators for these types of meetings. We have worked with consultants with this area of expertise, and have worked with districts, such as Scarsdale, where the assistant superintendent for business was the committee facilitator with assistance from the district's architects. As an example, our role with Scarsdale in these meetings was to assist in the interpretation of meeting comments, extrapolate from discussions main messaging points and provide feedback to the district on our assessment of projects that could potentially be problematic for a final referendum plan.

Having said this, we can provide the following long-range planning, or in the context of the RFP, the pre-planning necessary to develop the specifics of a proposed bond referendum:

- ❖ Advise on long-range planning/facilities advisory committee member make-up, including District and community representation.
- ❖ Coordinate dates, times and locations of meetings/facilities tours necessary for the work of the long-range planning/facilities advisory committee.
- ❖ Consult with the District and the District's architect on specific goals and discussion boundaries for the work of the long-range planning/facilities advisory committee.
- ❖ Based on the framework of topics to be addressed by the long-range planning/facilities advisory committee, establish a specific timeline for activities required to complete the advisory committee's work. It should be noted that if the goal is to have a bond



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referendum in the spring of 2020 – the vote should be scheduled for no later than mid-March 2020, with advisory committee work to be completed by the December break in 2019. If the vote is not to take place in the spring of 2020, then it is our recommendation that the vote not be held until the fall of 2020, after the start of the 2020-2021 school year. While bond referendums have been held in June, it is a problematic date as a district must be careful not to have bond communications overlap or be confusing with school budget vote communications. To hold off with bond communications until after the May budget vote leaves arguably insufficient time to effectively establish the bond referendum message and implement necessary referendum communication activities before the June vote.

- ❖ Develop and service press releases regarding progress of the long-range planning/facilities advisory committee's work
- ❖ Work with the District's architect and District administration in developing progress report Board meeting presentations to keep the Board and the community updated on the work of the long-range planning/facilities advisory committee's work.
- ❖ Create a subsection of the District's website dedicated to the work of the long-range planning/facilities advisory committee; update website section as needed.



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PUBLIC INFORMATION BOND REFERENDUM SERVICES (Phase 2 of the Briarcliff Manor RFP)

- ❖ Assist in the development of the grassroots support that will be needed within the school district as well as in the community.
- ❖ Orchestrate the activities of support groups.
- ❖ Organize the message that will be communicated to the public, whether through meetings, in printed material, or through the media, in a consistent and easily understandable fashion.
- ❖ Assist in developing materials and orchestrating the presentation that will be used at PTA and other targeted community group meetings.
- ❖ Develop the presentation that will be given to the local and regional media.
- ❖ Schedule meetings with the media timed to keep them abreast of all developments.
- ❖ Create a series of printed materials and develop a strategically timed distribution schedule for these mailings.
- ❖ Prepare Board members and the administration for questions from the public, whether at formal meetings or impromptu discussions.
- ❖ When feasible, work with PTA and other community groups to organize telemarketing efforts to turn out the vote.
- ❖ Work with parent/major supporter groups in defining and implementing strategies and activities designed to get out the vote.



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Once the particulars and specifics of a proposed bond referendum are finalized, Zimmerman/Edelson, Inc. will provide the following services:

1. In concert with school district officials, develop the message that will be used in all communications regarding the bond referendum - *the need has to be crystallized and structured in such a way that there will be no question regarding the necessity for this particular bond issue at this particular time.*
2. Help develop the overall strategy and time line for all bond referendum communication activities.
3. Make recommendations, after meeting with school district officials, regarding the make-up of the road-show team - those individuals who will be making the presentations to the PTA and other targeted community groups.
4. Make recommendations regarding the development of materials for community group meetings (note: costs of producing materials not included as part of this bond referendum services proposal would be additional and quoted upon request)
5. Development of bond video(s) – video(s) will explain need for this bond referendum at this particular time. Footage will include administration and Board interviews, teacher interviews, parent interviews and footage of school assets.



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6. Development of newsletters/flyers for distribution:
 - first newsletter: reviews the essential aspects of the proposed bond referendum, focusing on the capital projects, academic benefits and financial aspects of the proposed plan.
 - second newsletter reviewing the major (positive) points of the bond referendum, to arrive one or two days before the vote.
 - flyers to be used for distribution at district events

7. Creation of a referendum-dedicated section of the District's website; development of materials to be posted to the referendum pages on the district's website.

7. Development of all press releases and other materials for the local as well as regional press.

8. Development of talking points for administration officials and Board members to be used at public meetings.

9. Development of a "red-flag" list of possible objections to the bond referendum; development of effective responses to potential objections. Role-play "adversarial" scenarios with school district administration officials and Board members as preparation for formal presentations and impromptu discussions with community members.

10. Consultations and meetings with school district officials, as needed, on areas specifically noted above or any other topics or issues related to the success of the proposed bond referendum.



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PART III

PROPOSAL FOR

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PUBLIC SCHOOLS**

COSTS



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Services and fees:

PHASE 1

- Long-range planning/bond referendum pre-planning services described in this proposal (estimate is that the timeframe for these services is approximately 5 months in total, with a time commitment - at District and in office work of approximately 50-70 hours):

\$ 10,000.00

PHASE 2

- Bond referendum public information outreach services as described in this proposal (fee also covers production of two bond-related videos; two newsletters; flyers as needed, including those created for use at community meetings; bond-related posters for display in school buildings; creation of bond subsection of District website):

\$ 15,000.00

TOTAL AMOUNT

\$ 25,000.00 *

* costs of printing and mailing additional; costs of producing PowerPoint presentations are additional.

We are proposing contracting this assignment through Eastern Suffolk BOCES. Briarcliff Manor will receive BOCES aid on services rendered.



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AFFIRMATIVE ACTION POLICY

It is the policy of Zimmerman/Edelson, Inc. to provide equal opportunity in employment and upward mobility for all qualified persons, to prohibit discrimination in employment because of age, color, handicap, marital status, national origin, race, religion, sex or sexual orientation, and to promote the full realization of equal employment opportunity through a positive, continuing, result-oriented program of affirmative action throughout the company. This policy includes, but is not limited to, requirements of all applicable federal and state laws. In support of this policy, the company affirms its right to take appropriate action if it or other duly constituted authorities should determine that applicable federal and state equal employment opportunity laws and regulations have been violated, or that the effect and intent of their policy have been willfully and/or habitually abrogated.