

Proposed Partnership for Communication Strategy, Brand Storytelling, and Creative Execution

Open Book Communications  Colonial Church



Introduction + Overview

PARTNERS :
Open Book
Communications +
Colonial Church

PROJECT :
Communication
Strategy + Creative
Execution

SUBMITTED :
June 14, 2021

Thank you for the prospect of serving Colonial Church with communication strategy, brand storytelling, and creative execution. Through our conversations and interactions with you, we are struck by **a deep sense of both provenance and possibility converging for Colonial in this seminal season.** Open Book proposes to come alongside you as partners in this defining time through leadership that helps you reinforce the DNA of who you are while positioning you for the future with coherence and fresh imagination.

The sense of provenance at Colonial is strong. Your 75-year history is rich with stories of beloved traditions, dynamic leaders, global engagement, and radical acts of generosity that have multiplied blessings across generations. Many in Edina and far beyond would point to the shaping impact Colonial has had on their life through offerings as diverse as camps, music, theological study, and social innovation. You have long sought to share your building and steward your land in a true posture of service and invitation.

At the same time, you have faced a series of challenges and leadership transitions that bring you to this season a little weary and hungry for alignment. You've been navigating complex conversations about foundational things: what you will be called, how you will worship, what you are about in the world. These are conversations that have cut deep—especially because of the deep roots of conviction in your congregation. You are a people who care, have passion, and want to see your church fulfill its potential and Christian call. That is no small thing in this age. And with a talented core of new leaders in place and fresh winds of emerging momentum, you are eager to meet this moment with gratitude for the past, grace for the present, and bright hope for the future.

All of these currents converge with the prospect of ambitious change during your 75th year. You are considering changing your name, offering a new articulation of your story, and unveiling a new public expression of your identity and brand—all tremendous undertakings on their own—in a single year. It is our opinion that integrating and sequencing these initiatives so closely is ultimately the best course of action, setting you up for both alignment and traction—**with the power of vision leading the way.**

At Open Book, we are likewise motivated by strategic moves and big possibility. This is present in both the nature of our projects and the profile of our partners. Whether working with secular corporations or faith-forward organizations, entrepreneurs or activists, our focus is always on crystallizing a foundational point of view—and then packaging it in dynamic ways that help an organization accelerate toward new places. **Through compelling communications, we help bridge what is true to what is possible.**

Our specialty is working with organizations during defining seasons. It would be our privilege to come alongside Colonial Church to help you voice, share, and invite people into your story.

Opportunity

The opportunity at hand for Colonial goes beyond a name change or brand facelift. **Your deeper opportunity is to unveil a galvanizing vision, branded with winsome creativity, that enhances individual lives and the communities you serve.** Your opportunity is to come together as a congregation around a shared understanding of who you are—and pursue it with confidence and joy.

OUR PURSUIT:

To leverage the power of a simple and profound story to create clarity, vision, and momentum.

At Open Book, we believe it is the power of story, built around a simple and profound “big idea,” that uniquely moves people. In this, we don’t mean manufacturing or manipulating emotions, nor glossing over specifics. But we do think that *telling people what you do* will never stir people to embrace something as their own as effectively as *inviting them into an idea* greater than themselves.

We want to equip you to articulate a compelling vision that is authentic and true for your church, but also actionable in people’s own lives. People can’t inherently be “part” of a logo, name, or materials; these are things they can observe or consume. But people *can* be part of a story. Your opportunity is to invite people into a story that you, they, and everyone can co-create together.

Approach

Our Open Book team simultaneously serves as consultants to bring focus to an organization’s unique identity and as creators who add creative velocity to its expression. **In that spirit, you would not be hiring a single person or skillset but an in-house team.** We work collaboratively across disciplines while also staying in step with a common purpose. This saves you from having to onboard disparate partners focused on individual products or processes. In turn, this creates efficiencies and adds value for you—and we believe it leads to more integrated, longer-lasting work.

Along the way, we rely on open feedback and consistent communication. Facilitating buy-in is fundamental to our process because we are committed to telling an authentic, representational story. But we also rely upon working directly with decision-makers who will manage and filter internal notes so that together we can move things forward with decisiveness. **To that end, we understand Sara Wilhelm Garbers will be the primary point of contact and directional voice for our engagement.**

We do not presume to know all that will emerge over the coming months. Hence, the Open Book process is not one that is overly prescribed or formulaic; we believe our clients are best served with a partnership that leaves room for real-time decision-making.

We have confidence in the best practices we’ve developed, at the same time we also seek to stay in a consistent posture of learning. You would not be hiring us to “work a plan.” You would be hiring us as partner-leaders for a journey with you.

Timeline + Deliverables

We envision a process that would generally sequence as outlined below, during which the congregational vote for a name change would be a strategic transition point between Phase 1 and 2. **If the congregation does not vote to approve a new name change and Colonial thus does not proceed with the work of rebranding or vision roll-out, the continued engagement with Open Book could be postponed or cancelled at the end of Phase One.**

OUR PROCESS:

We adaptively respond as possibilities emerge. We listen intently and think directionally.

You will see that deliverables listed include both process and tangible materials. This is reflective of our approach, in which we operate not as a marketing vendor trading in materials, but as strategic partners specializing in ideas and thought partnership.

In this work, our eye is on your Annual Meeting at the end of April as a strategic milestone for launching a new public identity. Whether all deliverables can be complete by that time will be dependent on the timeline and pace of decision-making that evolves in the months prior. We will think with you about how to sequence or debut materials.

PHASE ONE

1. Discovery + Direction-Setting (July 7-August 31)

Open Book would partner with Colonial to listen, learn, and ask targeted questions to unpack core components of your past, present, and future. This would include:

- Conversations/check-ins with Sara Wilhelm Garbers and Jeff Lindsay, as well as Andrew Zhao (as a representative of the Name Change Task Force), to unpack the landscape of offerings, goals, and organizational priorities
- 12-14 one-on-one interviews with staff, church members, and key stakeholders (done either in-person or via video)
- Review of existing materials, strategy documents, and reports
- Attendance and observation at key Colonial events or experiences
- Open Book review/research of the brand and ministry landscape in which Colonial exists
- Open Book team will formulate ideas and direction, making a comprehensive presentation to you of key findings and ideas to frame next steps

2. Vision + Story Development (September-November/vote)

Building on the discovery work, Open Book would turn to distilling messaging, strategy, and building blocks for your identity and story. This would include:

- Core story creation: exploration of key concepts in pursuit of a “big idea” that will serve as the connective tissue for how you present yourself in messaging and materials; this story concept will animate your vision and anchor your brand



- Story build-out: develop concepts that flesh out your story, including how they could map onto an articulation of mission and vision that is compelling, transferable, and invitational as you launch into this next season
- Name-change consulting + creative direction: strategic touchpoints with the renaming process to stay in step with emerging ideas and to offer creative insights or strategic inputs that might aid the Taskforce’s work
- Story brief: 2-4 page brief that packages story and vision—and can frame the proposed new names; this will give the congregation a common ground from which to evaluate names and understand their respective strengths or possibilities

Phase One would culminate with the congregational vote on a new name.

PHASE TWO

Once there is a definitive congregational vote that confirms a new name, Open Book would continue the work of helping you refine and express your story.

1. Creative Direction + Brand Development (approx. November–January)

- Name + story refinement: We will align the new name with core language that distills the integrated narrative and sets future direction.
- Brand strategy: Open Book will lead work sessions to distill specific priorities and preferences for the Colonial visual brand and build-out.
- Logo development: Building on what is determined in our work sessions, and in concert with the messaging and story development, Open Book will develop a new Colonial logo mark.
 - This will include presenting 3–5 logomarks, with one round of refinements on a chosen direction, shown in different constructs with your name.
 - This will include vision for how to leverage a logo mark into a fuller brand expression. This will be further exemplified in creative materials we make.
 - We will deliver a final logo lock-up, including typefaces and color palette.
- Art direction: Open book will provide strategic direction to determine what photography or visual assets are needed for the website and material creation. *(Note: costs for a photo shoot are not included in our fee because we don’t yet know what is needed; we will decide the right course with you.)*

2. Creative Execution (approx. January–April*) **TBD dependent on previous phases*

We will partner with you to bring your brand to life through cornerstone materials that complement each other as part of a coherent whole.

CREATIVITY THAT
DRIVES CHANGE:

*We believe
creative materials
serve as strategic
and beautiful
vehicles of story
that add velocity
to your whole
brand.*



When it comes to creative work, our approach is turnkey; it encompasses concept, writing, and design. We would rely on your close partnership—but we would never rely on you to, for instance, draft content and “pass it on” for us to paste in place. **We operate as partners at every level to create custom work that adds long-term value.**

Storybook Execution

Open Book will create an 8-12 page print storybook that features your new name, story, and visual identity. This evergreen piece could be used as an invitational tool, gift to guests, mailer to members, and/or internal “culture book” to ensure alignment for a new season.

Video Execution

Open Book will create a 2–3 minute vision video to capture your ethos and fresh vision. An evergreen vision video would be a strategic tool for alignment and invitation, potentially as an anchor for the new website. Video offers a distinct opportunity to combine auditory and visual storytelling in a way that evokes emotion and imagination. Open Book would provide concept, scripting, design, animation, and production oversight to create an evergreen video. For reference, see past Open Book videos at vimeo.com/teamopenbook.

Website Execution

Open Book will deliver a beautiful, functional website to serve as your digital front door. The Open Book approach to websites is one that leads with story and invitation instead of being a digital bulletin board. Our commitment is to create a modern, invitational, clear, storytelling site that is responsive across devices and screen sizes. As we create this website, we will also be reinforcing and elevating your overall brand. As a result, the completed website will provide a strong brand foundation of visual language and messaging framework to keep building from.

We will build the website in Webflow, an all-in-one platform that offers flexibility in dynamic design, fluid motion, and ease of long-term management. This process will encompass the following:

- Planning sessions to:
 - Discuss information priorities and hierarchy
 - Review current site and content pages for relevancy and ideate new needs
 - Review reference websites
 - Discuss Open Book recommendations for content strategy
- Open Book will propose design solutions that include:
 - Site map and content plan
 - Ways to integrate lead messaging/brand story throughout the website
 - Wireframes and design of home page and key landing pages

- Based on the direction established through key landing pages, Open Book will turn to the creation/building of the individual website pages and experience.
 - Open Book will build and develop the site in Webflow.
 - Our process includes concept, writing, design, and front-end development; we will be in regular contact with you so you can review content and direction.
- On the determined go-live date, Open Book will handle the migration process.
- Open Book will lead a training session on how to manage and update the website.

Brand + Visual Style Guide

Open Book will package the foundations of your new logo and visual brand elements, equipping you with a blueprint for design and visual storytelling going forward.

Note about Branded Collateral

The process of a rename and rebrand is huge for a church because of the myriad materials in use. Our role will be to lay the groundwork and create cornerstone pieces for reference, as well as provide you with assets to take things forward yourself. If there are hours available in our budget with you, we may be able to provide design work for additional pieces within this engagement. You can also engage Open Book for graphic design services for specific pieces at an hourly fee.

Pricing

For the deliverables and process outlined above, we anticipate a fee of \$200,000-210,000 dependent on total number of hours invested. Based on the expected timeline, we propose a payment schedule of \$20,000 per month for nine months (July 2021-March 2022) and the final amount due upon project completion. Our fee is a function of the hours we expect to invest, based on comparable projects and known complexities. If the scope, length, or complexity of the project grows beyond what our budget of hours allows, extra pricing will apply.

If the congregation does not vote in support of a new name, this engagement would pause or be canceled upon a total fee paid of \$100,000.

This fee is inclusive of:

- | | |
|---------------------------------|---------------------------------|
| • Consultation + Brand Strategy | • Photography + Video Direction |
| • Brand Development | • Animation + Video Editing |
| • Creative Direction | • Writing + Message Crafting |
| • Design + Layout | • Front-end Web Development |

Expenses:

Any out-of-pocket expenses will be billed as additional. This includes travel expenses, should that be relevant, and all printing costs. And it includes creative expenses such as fonts, domain or hosting fees, photography or videography capture, or other design

assets. Costs will only be invoiced as expenses are incurred. During website development, if we discover advanced functionality is needed in databases or JavaScript—or integration with outside software or APIs—we will discuss additional website developer fees that may also be required, depending on the technical needs and priorities identified.

Ownership + Usage Rights

Upon final payment, Open Book assigns and transfers all rights, including copyrights, for this work to Colonial Church. Open Book will only use the work for marketing purposes. As it pertains to artwork, you will own the completed artwork, but we retain the rights to all production files as well as the rights to any concepts not selected. You represent to us and guarantee that you own or are legally permitted to use any elements of text, graphics, photos, logos, or other artwork or production files you furnish to us at any stage. You agree to hold us harmless, and protect and defend us, from any claim arising from the use of such elements furnished by you. The parties also agree that, without Open Book’s prior written consent and an additional usage fee to be agreed upon, Colonial Church is not permitted to share, sell, transfer, assign, license, or otherwise provide Open Book’s work, or any other materials underlying that work—including the concepts, content, or files created by Open Book for Colonial Church—to any third party or partner to adopt or use as their own.

Closing

The work ahead will present many challenges and complexities. We are confident it can lead to transformational alignment and action for the good of your congregation and community. In this, we recognize you are making a significant investment by working with Open Book. But we are committed to delivering an experience where our fee is not a “sunk cost” but a true investment in the future of your organization and presence in the world.

Agreed + Accepted

OPEN BOOK COMMUNICATIONS

COLONIAL CHURCH

BY: _____

BY: _____

Sharon Sampson, Founder + CEO

Jeff Lindsay, Senior Pastor

DATE: _____

DATE: _____

Thank you for the opportunity to serve you in inviting people into your story.



Appendix:
Relevant Work by Open Book

Digital + Brand:

- TreeHouse (brand, messaging, website): <https://treehousehope.org>
- Westminster Seminary (brand, messaging, website): <https://wts.edu>
- Grace Commons Church in Boulder, CO (brand, messaging, website, name change): <https://www.gracecommons.org>
- Riverbridge (brand, messaging, website): <https://riverbridge.com>
- Endurance Capital Partners (brand, messaging, website): <https://www.endurancecapitalpartners.com>
- Face2face Masks (brand, messaging, website): <https://face2face.webflow.io>
(Note: this was a timebound venture; they are no longer doing sales)

Video (script, design + animation):

- “The Power of One” (smallcircle relational discipleship): <https://vimeo.com/397034793>
- “For Boulder, With Love” (Grace Commons in Boulder, CO): <https://vimeo.com/389335624>
- “You Are A Whole Person” (Anselm House at the University of Minnesota): <https://vimeo.com/183685435>
- “Ending Hopelessness Among Teens” (TreeHouse): <https://vimeo.com/334773085>
- “Every Home Loved” (Encounter*Life* / Every Home for Christ International): <https://vimeo.com/345534442>
- Rise Campaign: “The Defining Moment is Now” (Redeemer Presbyterian Campaign): <https://vimeo.com/157174627>

Print (all content + design):

- Storybook for Grace Commons Church (Boulder, CO) to introduce new name and brand <https://tinyurl.com/wcmvw32b>
- “Imagine Church” Vision Book for Christ Presbyterian Church (Edina, MN) <https://issuu.com/christpresbyterianchurch/docs/imaginechurch-pages>
- Storybook for First Presbyterian Church “Here to Serve” campaign (Houston, TX) <https://fpchouston.org/am-site/media/fpchere-to-servestorybookwebpdf.pdf>
- Campaign Look Book for Westminster Seminary <https://tinyurl.com/y59zwsby>
- Storybook for Anselm House (student organization at University of Minnesota) http://anselmhouse.org/wp-content/uploads/2016/09/anselm_storybook_WEB.pdf
- Storybook for TreeHouse (nonprofit serving teens) https://treehousehope.org/wp-content/uploads/2019/05/TreeHouse_Storybook.pdf
- RUF – New York City “Staying Power” vision + campaign: <https://tinyurl.com/yxfpl4y6>
- Campaign Book for Redeemer Presbyterian Church (New York, NY) <https://rise.redeemer.com/wp-content/uploads/2016/03/RISEBOOK-website2.pdf>