

**Clifton Park-Halfmoon Public Library
Request for Proposal**

***Consultant Services:
Rebranding & Marketing
Strategies Development***

Proposals Due:
Friday, March 31, 2017
5:00 PM EST

Clifton Park-Halfmoon Public Library
Alexandra Gutelius, Library Director
475 Moe Road
Clifton Park, NY 12065

NOTICE TO VENDORS

NOTICE IS HEREBY GIVEN, that the Clifton Park-Halfmoon Public Library will receive sealed proposals for **Rebranding and Marketing Strategies Development** in the Library. Such proposals must be filed with the Clifton Park-Halfmoon Public Library at 475 Moe Road Clifton Park, New York 12065 by **March 31, 2017 5:00 PM EST**.

Proposal forms and specifications may be obtained by contacting Alexandra Gutelius at the office of the Clifton Park-Halfmoon Public Library at the above mentioned address (Telephone: 518-371-8622) or by emailing agutelius@sals.edu. Vendors requesting arrangements other than U.S. Mail or email shall be responsible for making such arrangements and all associated costs.

NOTE: The Library shall not be held responsible for the completeness or accuracy of any documents received by a vendor that were not directly issued to that vendor by the Clifton Park-Halfmoon Public Library.

Any vendor submitting a proposal based on incomplete or inaccurate information resulting from documentation received from any third party, shall not have cause for relief from award or completion of a contract in accordance with the official documents on file with the Clifton Park-Halfmoon Public Library.

It is HIGHLY suggested that all vendors interested in participating in this RFP contact the Clifton Park-Halfmoon Public Library directly at the above address or telephone number to assure they have received the most accurate and up to date material concerning this contract.

The Library does not offer or supply anyone the list of people that have obtained a copy of these proposal specifications or cost estimates for the project prior to the awarding of a contract. NO EXCEPTIONS ARE MADE TO THIS POLICY.

Clifton Park-Halfmoon Public Library reserves the right to reject any or all proposals

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INTRODUCTION

The Clifton Park-Halfmoon Public Library is seeking proposals from qualified firms or consultants (“Consultant” or “Vendor”) to develop and facilitate a comprehensive rebranding and marketing strategy process for the Clifton Park-Halfmoon Public Library (“CPH” or “Library”). The selected Consultant will assist CPH in developing its brand and marketing strategies based on results from Long Range Strategic Planning process completed in late 2016. As part of its work developing the Library’s brand and marketing strategy, the Selected Consultant will work primarily with the Board of Trustees, library staff and the Friends of the Library Board.

The purpose of the rebrand and marketing plan is to ensure CPH is improving the external and internal marketing and communications to better inform current patrons and non-users about Library programs, services and collections.

Any rebrand and marketing plan will be driven by community input from the strategic planning process as well as staff expertise and experience and will be based on a thorough understanding of the communities’ changing demographics and interests.

Results from the strategic plan include:

- **New Mission Statement:** The Clifton Park-Halfmoon Public Library nurtures and fosters community connections by providing the space and resources for patrons to be educated, entertained and enriched.
- **New Vision Statement:** The Clifton Park-Halfmoon Public Library is at the heart of our community. The go-to place to meet, learn and do.
- **New Tagline:** Meet. Learn. Do.

The rebrand and marketing plan should align with the goals for the library as determined by the recently completed Long Range Plan. **See appendix for a copy of the plan.**

LIBRARY BACKGROUND

The Clifton Park-Halfmoon Public Library is a special legislative tax district library serving the communities of Clifton Park and Halfmoon, a population of approximately 56,000. In 2016 there were 41,699 card holders, a total circulation of 806,050 and 426,376 visits to the library. The Library has 49 FTE staff members representing 30 salaried employees and 90 part time employees. The 2017 adopted budget was \$4,291,416.

The Clifton Park-Halfmoon Public Library, formerly the Shenendehowa Free Library and the Shenendehowa Public Library, has been in operation since 1969. The Library is governed by an 11 member Board of Trustees representing the towns of Clifton Park and Halfmoon. Library operations are overseen by the Library Director, supported by two assistant directors and department supervisors.

The Library is located in a suburban area north of Albany, NY (the New York State Capital) and

many residents work for the State of New York or several other large employers including GE, a number of colleges and universities and Global Foundries. The demographics in the community are shifting to include a more multicultural population and this is reflected in the patron population at the Library.

The Library operates within a 55,000 square foot facility that was opened to the public in December 2006. Since that time, use of the building and collections has grown and changed. Use of print materials is declining, while the demand for digital materials is growing.

The Library plays a key role in educating, entertaining and enriching life in the community. Annually the Library hosts or participates in over 1,200 library programs, including author talks and signings, family and multicultural programs, and technology programs, to name a few. Further, nearly 440 community programs and meetings were held at the Library's facility in 2016.

The Friends of the Clifton Park-Halfmoon Public Library is a volunteer organization that supports CPH in a myriad of ways. Their partnership includes championing the Library efforts, endowing financial gifts for special projects, initiating and organizing cultural and educational events. Consideration must be given to this important organization as one of the many audiences of our Library and partner to support CPH's mission and vision.

SCOPE OF WORK

CPH intends to contract with a consultant to work cooperatively with the Board of Trustees, Library staff and select community stakeholders as appropriate to create a comprehensive, actionable, marketing plan and to develop the Library's brand.

Once the branding and marketing plan is complete the Library will be able to provide the staff and Board with the communication tools to help them share information about who we are, what we do, and how we positively impact our community.

The Library needs a clear unified communication approach with one voice. Whether communication is verbal, visual or in writing the message needs to be clear, meaningful, consistent and memorable.

This stated project is considered part one (1) of a two-part project. The second part will be a redesign of CPH's website, www.cphlibrary.org, for which a separate RFP will be issued.

PROJECT PHASES

1. Brand Strategy Development

Conduct necessary research to determine audiences and perceptions of CPH Library's brand. Audit current Library print and digital communications to determine implied and stated messages. Develop brand strategy that outlines primary audiences, brand values, personality. Develop a new visual identity (logo). Using newly developed tagline, vision and mission statements from the Long Range Strategic Plan (see above).

Deliverables: Findings summary and brand strategy document that conveys the Library's personality and targets identified audiences.

2. Writing and Editorial Copy Style Guide

Develop effective messages that serve the new brand and to ensure that all CPH staff and Board are better communicators and representatives of our organization. Messages, including CPH's new tagline, Meet. Learn. Do., would allow staff to consistently and confidently tell the Library's story in a consistent tone and voice routinely using the same words and terminology.

Deliverables:

- Standard Key Messages that include:
 - Uniform information about the Library to be used in such items as grant applications or press releases
 - The vision of the Library and messages/stories to illustrate the work we do
 - High-level information about the library such as an elevator speech
- Standard Manual including:
 - Voice and tone
 - Writing guide
 - Editorial style guide

3. Visual Brand Style Guide:

- Standard manual that can be used for both print and digital identity including:
 - Logo
 - Color Palette
 - Typography including a typographic hierarchy
 - Iconography
 - Photography including photographic style
 - Graphic Elements including social media buttons
Brand Architecture and Design Hierarchy
- Print Collateral and Templates:
 - Letterhead-Library & Board
 - Business cards-Staff and Board
 - Press releases

- Program Brochures
- Flyers
- Annual Report
- Budget Mailer

4. Marketing Plan, Brand Launch and Implementation

Develop a marketing plan for print, digital and social media that includes strategies for promotion of ongoing programs and services at CPH. Facilitate training of new brand identity with Library leadership and key staff so it can be effectively rolled out both internally and externally to ensure brand alignment. Consultant will assist Library staff to implement and launch externally to the community. Elements to include but are not limited to: Name, logo, and external communications such as presentations and annual reports

Deliverables: Marketing Plan, rebranding launch schedule and appropriate training

5. Optional Services: recommended by the Consultant not mentioned in above scope of work and project phases.

TIMELINE

CPH expects the Selected Consultant to complete all activities defined above within **four months** of contract start. Vendors are expected to develop a project plan that defines milestones and deliverable due dates in accordance with these timeline. Such project plans should ensure that all phases of the stated project are developed and delivered to the CPH Board of Trustees within the four month timeframe. However, recognizing that unforeseen circumstances may arise that delays this project, CPH, at its sole discretion, may extend the terms of the contract to allow additional time to complete the services defined in this RFP.

PROPOSAL SUBMISSION AND REQUIREMENTS

1. All proposals shall be delivered to and received at the exact location indicated on the “Notice To Vendors” prior to the time indicated in the “Notice To Vendors”. No proposals will be accepted after the designated time indicated in the “Notice to Vendors”. NOTE: This includes any changes listed on the latest addendum issued by the Clifton Park-Halfmoon Public Library, if any. Delay in mail delivery is not an exception to the deadline for receipt of proposals.
2. One (1) original proposal and four (4) copies of each proposal shall be submitted in a sealed envelope, box or other container. The outside of the envelope or container should include the RFP name, due date and time and company name.

3. Questions or clarifications about the scope of work be made in writing to the Library. Such questions must be in the possession of the Library by the date indicated in **submission deadlines / tentative project schedule** unless otherwise indicated. Verbal questions may not be entertained. Vendors are not to contact any employee of the library other than the person indicated below.

4. The **Proposal Form** should be submitted in a sealed envelope separate from the rest of the proposal documents. The envelope shall indicate the name of the RFP being responded to and the name of the firm submitting the cost proposal.

PROPOSAL FORMAT

In order to fully respond to this RFP, each proposal must include:

1. A **cover letter** providing a description of the Vendor, including its name and address, and the name, address, telephone number and email address of the Vendor's principal contact.
2. An **executive summary** of the proposal, not exceeding one page in length, which summarizes the highlights and benefits of the proposal to the Library.
3. A **work plan** that includes a:
 1. Description of the Rebranding and Marketing Plan methodology recommended for CPH and to be used to meet the requirements of this RFP.
 2. Project plan that specifically describes how the Vendor intends to successfully complete each phase of the project defined above. The project plan should clearly identify all of the tasks and activities the Vendor will complete to successfully provide the services requested in this RFP.
 3. Project timeline and schedule for completion of all activities, that should demonstrate all work will be completed within four-month timeframes defined in this RFP.
4. A **summary of qualifications** for the Vendor, which includes recent and relevant experience.
5. A **list of key personnel** who would be providing services. For each person listed, include the relationship with the Vendor, including current job title, employment history with the Vendor, and resume that include the type and length of any relevant experience.
6. **References** of a minimum of three (3) recent previous clients in the area of Rebranding and Marketing Strategy Planning and permission to contact them. For each reference, include the company name, contact name, contact phone number, the type of work done and the scope of the project.
7. The **forms attached** to this document must be included in the proposal as follows:
 - a. **Proposal Form in a separately sealed envelope** by phase and/or project component, including optional aspects of the proposal. Include all supplies, travel time, mileage and other costs associated with the project. Progress payments will be allowed at the conclusion of each phase over the term of the work.
 - b. **Non-Collusive Certification**
 - c. **Indemnification Agreement**

EVALUATION PROCESS

The Clifton Park-Halfmoon Public Library Board will select the consultant(s) based on qualifications and the proposal which comes closest to matching all the requirements listed in this request for proposal and which in the Board's judgment provides the best value for the Library and the CPH community.

PROPOSAL REVIEW SCHEDULE

Questions regarding the RFP will be accepted in writing via email agutelius@sals.edu through 5:00 PM EST on Tuesday March 14, 2017.

Responses to question and any addenda will be posted on the Library's website www.cphlibrary.org > About The Library > Board of Trustees > Rebranding & Marketing RFP by 5:00 PM EST on Friday March 17, 2017.

INTERVIEW

Interviews shall be held by a subcommittee of Library staff and members of the CPH Library Board. It is strongly recommended that the consultant's proposed manager, as the person with whom the Library Director will be dealing with most on the project, be the primary participant at the interview, but any and all key staff are also invited to participate. Interviews will be strictly limited to 60 minutes, shall include a brief presentation by the consultant on their proposed approach to the project lasting no more than 20 minutes, and will be followed by questions and answers.

SUBMISSION DEADLINES / TENTATIVE PROJECT SCHEDULE

Library issues RFP	March 3, 2017
Deadline for written questions	March 17, 2017, 5:00pm EST
Library issues responses	March 22, 2017
Deadline for proposal submission	March 31, 2017 5:00pm EST
Consultant interviews	Early to Mid-April 2017
Consultant Recommendation to Library Board	April 24, 2017
Anticipated Contract Start Date	May 2017
Approval of Marketing Plan by Library Board	September 2017

NOTE: This timeline should be considered a draft. The Library reserves the right to deviate from this schedule.

**THE FORMS ON THE FOLLOWING PAGES MUST BE
INCLUDED IN EACH PROPOSAL
ONE PROPOSAL MUST BE MARKED ORIGINAL AND
INCLUDE ALL ORIGINAL SIGNED FORMS**

**Clifton Park-Halfmoon Public Library
Proposal Form (page 1 of 3)**

Request for Proposal: Consultant Services: Rebranding & Marketing Strategies Plan

Proposal Due: Friday, March 31, 2017 5:00 PM EST

Clifton Park-Halfmoon Public Library
Alexandra Gutelius
475 Moe Road, Clifton Park, NY 12065

The undersigned respondent, having examined the specifications and other documents, hereby agrees to supply the product as per the attached specifications and to provide the service or perform other work stipulated in, required by and in accordance with the proposal documents attached for and in consideration of the proposed price, and certifies that it meets minimum Vendor qualifications.

The undersigned acknowledges receipt of addenda No(s) _____.
(Each addendum number must be listed separately.)

Please Submit: Five (5) complete copies of your proposal

To be considered, all proposals must:

- _____ **Be signed**
- _____ **Include all forms and worksheets**
- _____ **Be received prior to the due date and time**

Vendor Name: _____

Address: _____

Telephone: _____ **Fax:** _____

Principal Contact Name: _____

Principal Contact Email: _____

**Clifton Park-Halfmoon Public Library
Proposal Form (page 2 of 3)**

Vendors should break out the individual unit costs that make up the total cost proposal in the space provided below. Vendors should provide a total cost for each of the four phases identified above. In addition, Vendors should provide costs for any other phases or project components recommended based on the Vendors experience in providing the required services.

Lump sum cost for basic proposal as recommended: \$ _____

Breakout of Phases and/or Components as recommended:

<u>Description</u>	<u>Cost</u>
Phase 1: Brand Strategy Development	
_____	\$ _____
_____	\$ _____
_____	\$ _____
Phase 2: Writing and Editorial Style Guide	
_____	\$ _____
_____	\$ _____
_____	\$ _____
Phase 3: Visual Brand Style Guide	
_____	\$ _____
_____	\$ _____
_____	\$ _____
Phase 4: Marketing Plan	
_____	\$ _____
_____	\$ _____
_____	\$ _____

**Clifton Park-Halfmoon Public Library
Proposal Form (page 3 of 3)**

Optional alternate or additional components:

<u>Description</u>	<u>Cost</u>
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

The undersigned, having examined the specifications, hereby agrees to supply the services and to perform other work stipulated in, required by and in accordance with the proposal documents for and in consideration of the proposed price. The price quoted will remain firm for a minimum period of ninety (90) days following the opening of the proposal.

Authorized Representative Name: _____
(typed or printed)

Title: _____

Signature: _____ **Date:** _____

NOTE: By signing and submitting this Proposal for consideration by the Clifton Park-Halfmoon Public Library, the Consultant acknowledges that they have read, understand and agree to all aspects of the specifications as presented without reservation, exception or alteration.

**Clifton Park-Halfmoon Public Library
Non-Collusive Certification**

By submission of this RFP, each vendor and each person signing on behalf of any Consultant certifies, and in the case of a joint proposal, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of knowledge and belief:

- 1) The prices in this proposal have been arrived at independently without collusion, consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other vendor or with any competitor;

- 2) Unless otherwise required by law, the prices which have been quoted in this proposal have not been knowingly disclosed by the vendor prior to opening, directly or indirectly, to any other vendor or to any competitor; and

- 3) No attempt has been made or will be made by the vendor to induce any other person, partnership, or corporation to submit or not to submit a proposal for the purpose of restricting competition.

Name of Firm: _____
Individual or Legal Name of Firm or Corporation

Mailing Address: _____

City/State/Zip: _____

BY: _____
Signature of Representative of Firm or Corporation (blue or other non-black ink)

Dated: _____

**Clifton Park-Halfmoon Public Library
Indemnification Agreement**

The Consultant agrees:

(a) that except for the amount, if any, of damage contributed to, caused by or resulting from the negligence of the Clifton Park-Halfmoon Public Library, the Consultant agrees to indemnify and hold harmless the Clifton Park-Halfmoon Public Library, its officers, employees and agents from and against any and all liability, damage, claims, demands, costs, judgments, fees, attorney's fees or loss arising directly or indirectly out of the performance or failure to perform hereunder by the Consultant or third parties under the direction or control of the Consultant; and

(b) to provide defense for and defend, at its sole expense, any and all claims, demands or causes of action directly or indirectly arising out of the Agreement and to bear all other costs and expenses related thereto.

Authorized Signature

Date

Notary Public
