

# Request for Proposal (RFP) for Brand Identity for the Massachusetts Library System

RFP issued February 19, 2013 by the  
Massachusetts Library System, Inc. (MLS)  
225 Cedar Hill St. Marlborough, MA  
508-357-2121

MLS Document: RFP/2013-03-01

**Responses Due: 4:00 pm EDT, March 15, 2013**

## **1 Planned Schedule of Events** (subject to change, which, if necessary, will be announced on [www.masslibsystem.org](http://www.masslibsystem.org))

<b>Date</b>	<b>Event</b>
March 6, 2013, 2:00 PM	Conference call to field questions about this RFP. Email <a href="mailto:rfp@masslibsystem.org">rfp@masslibsystem.org</a> for meeting logon information.
March 8, 2013	Questions related to RFP accepted at <a href="mailto:rfp@masslibsystem.org">rfp@masslibsystem.org</a>
March 11, 2013	Summary of phone conference and emailed questions to be posted at <a href="http://www.masslibsystem.org">www.masslibsystem.org</a>
March 15, 2013	RFP responses due by 4:00pm to Massachusetts Library System
April 5, 2013	Decision on Contractor

The Massachusetts Library System, Inc. (MLS) requests proposals to provide a brand identity for the Massachusetts Library System, Inc. and its identified key services (MassCat, BiblioTemps®, delivery, and eContent) and to develop a communication plan to guide MLS to branding success.

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## **Related Documents:**

### ***1.1 Authority: Massachusetts Library System, Inc.***

The Massachusetts Library System, Inc. (MLS) is incorporated as a 501(c)3 not-for-profit corporation. MLS is a multitype library cooperative funded through the Massachusetts Board of Library Commissioners. Chapter 78: Section 19C of the General Laws of Massachusetts authorizes the Board of Library Commissioners to “establish a comprehensive, statewide program of regional library service, consisting of regional library systems . . . for the purpose of providing reference and research services, interlibrary loan, delivery, and other regional services to public, school, academic, and special libraries in the region . . .”

Massachusetts Library System, Inc.  
4 Sandy Lane  
Whately, MA 01093  
508-357-2121

The Massachusetts Library System, Inc. (MLS) was established in 2010 in response to a restructuring of statewide regional library systems. Seven regional entities were dissolved and the MLS, with two offices, was created to fill the void. Further complicating the charged history of the MLS is the prevalence of many organizations, offering overlapping systems and services seemingly all with similar and confusing acronyms. Members are automatically enrolled in MLS by merit of their organizational structure. The MLS requires a brand to distinguish itself within the library landscape, and build upon two years of successful service to foster loyalty and create a unique identity. The MLS Strategic Plan calls for a brand identity and communication plan to be determined by June, 2013. The MLS has budgeted \$25,000 to fund the charges identified in this RFP.

### ***1.2 Other Stakeholders***

Massachusetts Board of Library Commissioners  
(State Agency that funds the MLS)  
98 North Washington Street, Suite 401  
Boston, MA 02114

MLS Public Relations and Branding Task Force, member representatives charged with this procurement and developing brand and communications plan.

MassCat: an MLS operated statewide Integrated Library System (ILS) for school, special and other small libraries.

BiblioTemps®: an MLS operated temporary staffing agency focusing on skilled library workers, serving MLS members.

### ***1.3 Responses Sought***

The Massachusetts Library System, Inc. (MLS) requests proposals to provide a brand identity and related artwork. MLS seeks solutions which provide sub-brands for up to four (4) MLS services: MassCat, BiblioTemps®, delivery, and eContent. Successful solutions will respect the brand identity of our chief funding source, the Massachusetts Board of Library Commissioners. MLS also requests proposals for the development of a communication plan to carry out the branding and awareness goals of MLS.

### ***1.4 RFP Responses***

**We offer two charges for responses** to explore opportunities available from potential contractors.

We encourage respondents to consider responding to Charge 1 and Charge 2.

**Charge 1 – Develop a brand and related materials.** Evaluate needs and develop a brand and appropriate related branding materials for the Massachusetts Library System, Inc. and up to four distinct services of MLS, MassCat, BiblioTemps®, delivery, and eContent.

**Charge 2 – Develop a communication plan.** Develop a communication plan to insure that all member constituencies and stakeholders are informed appropriately about MLS activities.

Responses are sought that accommodate MLS’s goal of reviewing primary proposals and making recommendations to the MLS Executive Board in June 2013.

### ***1.5 RFP Purpose***

The Request for Proposal contains detailed information about the strategic plan and goals of the Massachusetts Library System, Inc. MLS has unique opportunities and challenges in developing a meaningful brand. MLS serves a market of 1,700 libraries in the Commonwealth of Massachusetts. Library types include public, academic, school or special (law libraries, medical libraries, archives, etc.). Libraries are geographically limited to Massachusetts, but may be geographically isolated, rural, urban, or serving small communities. Target audiences may be identified by common interests, professional responsibilities, or technology limitations/options. A thorough understanding of the history of MLS, communication channels available and MLS workflows is necessary for the development of a successful brand and campaign. Further understanding of the distinct services of MLS that also require related brands is expected.

We seek detailed proposals that apply marketing and/or public relations standard practices to the development of a brand identity and communication plan for a non-profit and the related tasks as described in the critical success factors and goals specified

below. Proposals that provide additional services that meet the desirable goals or other useful enhancements identified by respondents are sought.

The purpose of this RFP is to gather proposals from vendors to allow MLS to determine which services are practical and contract for the most cost-effective creative and tangible branding goods and services.

## 2 Critical Success Factors

*2.1 Increased member awareness and engagement.*

*2.2 Implementation of a practical communication plan to promote services and programs.*

*2.3 Improved member satisfaction.*

*2.4 Members have 'a face' for the organization.*

## 3 Goals

*3.1 Charge 1: Develop a brand and related materials.*

**Develop a brand and related materials.** Evaluate needs and develop a brand and appropriate related branding materials for the Massachusetts Library System, Inc. and up to four distinct services of MLS: MassCat, BiblioTemps®, delivery, and eContent.

### **3.1.1 Mandatory goals**

3.1.1.1 Evaluate needs and create brand with related artwork and materials for MLS.

3.1.1.2 Evaluate needs and create brand with related artwork and materials for up to four distinct services of the MLS: MassCat, BiblioTemps®, delivery, and eContent.

*3.2 Charge 2: Develop a communication plan.*

### **3.2.1 Mandatory goals**

3.2.1.1 Develop a communication plan to insure that all member constituencies and stakeholders are appropriately informed about MLS activities.

### **3.2.2 Desirable goals**

3.2.2.1 Design communication plan using channels and tools already available or in use by MLS staff.

## 4 Definitions

BiblioTemps® - A service of the MLS, available only to MLS members. A temporary staffing agency specializing in library staff.

Delivery – A subcontracted service of the MLS coordinating the statewide pick-up and delivery of physical items shared by MLS members.

eContent – electronically accessible content available to MLS members, in the form of databases, online encyclopedia, and eBooks. Paid for by MBLC and the MLS.

MassCat – A service of the MLS, a small scale, but fully operable Integrated Library System available to MLS members.

## 5 Special Issues

### 5.1 General Information

- 5.1.1 The Massachusetts Library System, Inc. (MLS) wishes to obtain proposals for a branding campaign with related artwork and a communication plan. Respondents should indicate preference for contract term on the Response Form.
- 5.1.2 MLS will not be responsible for any costs incurred by a bidder in preparing and submitting a proposal in response to this request.
- 5.1.3 Any information which may have been released either orally or in writing prior to the issuance of this request shall be deemed preliminary and bind neither MLS nor the Contractor.
- 5.1.4 MLS may cancel this proposal in whole or in part at any time.
- 5.1.5 MLS retains the right to award this proposal in whole or in part or to choose not to make an award.
- 5.1.6 MLS shall have a reasonable opportunity to inspect all service performed by, work produced and portfolio of the Contractor.
- 5.1.7 The Contractor is retained solely for the purposes of and to the extent set forth in the proposal. Contractor's relationship to MLS during the term of this contract shall be that of an independent contractor.
- 5.1.8 Contractor is responsible for having all insurance, licenses, permits, etc. which may apply to this type of service.
- 5.1.9 Any appeal of decisions made related to this proposal are subject to the a process to be designated by MLS's Executive Board.
- 5.1.10 MLS prefers the Contractor to have employees who perform the services necessary to carry out this contract. If any part of the work under this proposal is to be performed by a subcontractor, the bidder will provide a complete description of services to be subcontracted along with a complete description of qualifications and capabilities and equipment capacity of the subcontractor. No subcontractor may be used unless the bidder has submitted the above in writing.

We reserve the right to approve or disapprove any and all such subcontractors and to revoke any approval previously given.

- 5.1.11 MLS reserves the right to reject any proposal which, in our judgment, fails to meet the requirements of this proposal or which is incomplete, conditional, or obscure; or which contains additions or deletions not called for, erasures, alterations, or other irregularities; or in which errors occur.
- 5.1.12 MLS reserves the right to waive discrepancies or permit a responder to clarify such discrepancies and so conduct discussions with all qualified responders in any manner necessary to serve the best interests of MLS. MLS reserves the right to award a contract based on written proposals received without prior discussions or negotiations.
- 5.1.13 Final acceptance of a proposal will be based on all information from the response form, attachments, and subsequent communications with responders.
- 5.1.14 All artwork and related material provided as final copy by the Contractor will become the property, without restriction, of the Massachusetts Library System, Inc. to be used, altered or adjusted as MLS sees fit.

## **6 Submission Procedures**

### ***6.1 Instructions for Responding to this RFP***

#### **6.1.1 Who May Respond**

**Responses are welcome from potential vendors or service providers. Our preference is to contract with a single organization for all services included in this RFP.**

How to Respond

Responses must be submitted electronically, in a format which is easy to duplicate (preferably Word or PDF). Responses can be emailed to [rfp@masslibsystem.org](mailto:rfp@masslibsystem.org), with a subject line of "RFP/2013-03-01"

Alternately, proposals stored on CD or flash drive can be mailed in sealed envelope that clearly identifies the party submitting the proposal and includes RFP/2013-03-01 written on the outside of the packaging.

Send to:

MLS Brand Identity RFP/2013-03-01  
Massachusetts Library System, Inc.  
4 Sandy Lane  
Whately, MA 01093

Proposals may not rely on web links. Bidders who wish to include web-based content should provide screen captures.

Proposals may be changed or withdrawn prior to the due date by submission of such change in writing in a sealed envelope, identifying the submitting party and indicating that it contains a correction of the proposal for delivery service.

## ***6.2 Questions Regarding this RFP***

Any questions regarding this RFP should be sent to: [rfp@masslibsystem.org](mailto:rfp@masslibsystem.org)

You must include full contact information with your question. Contact information will not be shared with other potential respondents, however, questions and answers will be shared to ensure that all potential respondents have access to the same information. These answers will be posted at: <http://www.masslibsystem.org>.

## ***6.3 Other Communications***

Other communication regarding this RFP should be directed to: [rfp@masslibsystem.org](mailto:rfp@masslibsystem.org)

## ***6.4 Proposal Pricing and Billing Conditions***

Bidders must indicate if a fixed price, or hourly rate of service will be used for billing.

### **6.4.1 Billing and pricing**

If a billing is determined by time and materials, vendors should include entire fringe, overhead and other indirect costs as well as type of expenses (travel, copying postage/delivery, etc.) that will be reimbursed as actual out-of-pocket cost. A guide to the basis of reimbursable costs must be provided (mileage reimbursement at IRS- approved rate for use of a motor vehicle, cost per copy, etc.) A total cap on costs should be provided.

If billing is determined as a fixed price, vendors should detail the services/deliverables and related costs to be paid. A payment schedule with milestones should be provided.

Estimated prices are not acceptable. Rates quoted must remain firm for the first year of services. All billing should detail any markups through third-party vendors.

If vendors respond to both Charge 1 and Charge 2 any discounts for contracting both services should be indicated.

### **6.4.2 Payment Calendar**

Provide a calendar showing payment schedules.

## **7 Evaluation Criteria Checklist**

- 7.1.1 Please address all the criteria listed on the appropriate Charge (Charge 1 or Charge 2) Respondent Form in your written proposal. You do not have to limit your proposal to only these criteria; and should consider the entire proposal in your response.
  
- 7.1.2 Provide a separate response for each Charge you are responding to, should you choose to respond to both Charges.
  
- 7.1.3 Proposals will be rated based on how well responses correspond with MLS needs. Some questions will be weighted more heavily than others to reflect their importance.