REQUEST FOR BID # AA08-RH-2564

To: Anne Marie Morse  
Telephone: 413-545-2723 
FAX: 413-577-0287 
Department: Outreach Marketing & Communications 
Date Prepared: 10/29/2007

Quantity
Description
Unit Price
Total Price

BIDS ARE REQUESTED FOR CONTRACTS WITH A CONSULTANT, CONSULTANTS OR CONSULTING FIRM TO DEVELOP A COHESIVE BRAND IDENTITY AND DESIGN GUIDELINES FOR THE ADULT EDUCATION PROGRAMS WHICH INCLUDE: THE UNIVERSITY WITHOUT WALLS, THE ARTS EXTENSION SERVICE AND CONTINUING & PROFESSIONAL EDUCATION PROGRAMS PER THE ATTACHED SPECIFICATIONS FOR A BID OPENING ON NOVEMBER 15, 2007 @ 2:00 P.M.

Total Bid Price>>>>>>>>>

PLEASE DIRECT ANY QUESTIONS REGARDING THIS RFB TO: ROSEMARY A. HASSAY @ 413-545-1094

IMPORTANT INFORMATION

• It is the bidder’s responsibility to insure that their bid is received in its entirety by the University of Massachusetts, Procurement Department, 407 Goodell Building, 140 Hicks Way, Amherst, MA 01003-9334 by 2:00 PM on the bid opening date specified above. Bids received after the specified date/time or at a location other than what is listed in the RFB will be rejected and placed unopened in the bid file.

• Bids may be faxed provided that they are followed up by a hard copy with written signature within 5 days of the bid date. All faxed bids must be received by the Procurement fax by the date and time of the bid above.

• All prices are FOB Destination, delivery free of all charges to: University of Massachusetts Amherst at a location specified on a purchase order.

• Bidders must list their Taxpayer’s Identification Number here: ________________________________

• Bid may not be materially altered after the bids have been opened. Only the Director of Procurement can determine what a material alteration is.

• All prices must be submitted on a Net Basis. Unit price shall prevail in case of mathematical error.

• Bids on items that differ from specifications will be rejected at the discretion of the Director of Procurement. Proprietary names are quoted for informational purposes only and are not meant to limit competition. The right is reserved to accept the bid deemed best for the University.

• Exceptions to any terms and conditions contained herein or in the bid specifications, must be noted by bidder in bid. The Director of Procurement reserves the right to reject any bid that does not conform to the specifications.

Vendor Name: ________________________________ Telephone: __________________ Fax: __________________

Name of Person Submitting Bid: ________________________________ Authorized Signature: __________________

Address: ________________________________________________

Rev. 09/04
Background:

UMass Amherst Outreach Marketing & Communications seeks to contract with a consultant, consultants or consulting firm to develop a cohesive brand identity and design guidelines for the adult education programs of UMass Amherst comprised of Continuing & Professional Education, the University Without Walls and the Arts Extension Service.

Project Objectives:

- Develop a strategic brand message and image for UMass Amherst adult education program offerings to guide future promotion development.
- Shift to electronic promotion, and to printed promotional materials that drive prospects to electronic or human interaction
- Transition from a full course catalog to a simplified course listing and supplemental promotional items sending students to CPE websites
- Promote the UMass Amherst brand as well as specific programs for which there are specific audiences
- Update our design and copy so that it is relevant for today’s current and prospective students

Project Approach:

- Hire an outside branding/design firm.
- Outside firm will perform research, recommend strategy, develop positioning statements, develop copy themes and design motifs and implement with copywriting and design for initial marketing materials
- Outreach Marketing & Communications will implement designs after the initial program and pieces are created, based on design standards outlined by the outside firm.
Deliverables:

- Work with Outreach Marketing & Communications and the three adult education units of UMass Outreach (Continuing & Professional Education, University Without Walls and Arts Extension Service), and conduct marketing research, to define the brand and to develop a plan to communicate meaningful distinctiveness.

- Carry out creative development/design of marketing materials

- Provide advice and guidance with media and marketing planning as needed (this may include reviewing media allocation, identification of marketing channels, advising on e-mail campaign strategies, etc.).

- Develop a plan and budget for leveraging the brand of UMass Amherst’s adult education programs to sustain and grow enrollment in the programs.

- Frame a unique, cohesive message and style to guide future promotion to specific target markets.

- Document procedures for interaction between the branding firm and Outreach Marketing & Communication internal staff on design, copywriting, and marketing strategy issues.

Process:

Consultant(s) will report to Susan Cassidy, the Marketing Strategist within Outreach Marketing and Communications who is assigned to Continuing & Professional Education. Day-to-day operational contact will be with Susan Cassidy, Joanne Mackiewicz, the (Creative Director), and occasionally with Joe Shoenfeld, Associate Director of Outreach Marketing & Communications.

Services to be provided by the UMass Amherst Outreach Marketing & Communications office include supervision of the strategy and brand development process, coordination of review of design concepts, and execution of future marketing materials in accordance with design templates and guidelines established by the consultant(s).

Phase I: Orientation

- Introductory meetings held with key staff listed above.
- Review all recent marketing pieces and websites of the programs.
- Define specific research agendas.
- Conduct initial research to gain familiarity with programs, students, and issues
- Develop detailed work plan with specific goals, strategies and tactics.

Acceptance of work plan will constitute completion of Phase I.
Phase II: Marketing Planning:

Develop integrated marketing communications plan to include:

- Brand positioning statement for UMass Amherst’s adult programs
- Plan for transition to printed promotional materials that drive prospects to electronic or human interaction
- Plan for transition from a full course catalog to a simplified course listing and supplemental promotional items sending students to CPE websites
- Media and marketing plan (addressing media allocation, identification of marketing channels, advice on marketing strategies, etc.)
- Copywriting as needed
- Photography as needed
- Presentation of proposed marketing strategy, brand statement, and marketing plan

Acceptance of brand positioning statement and marketing plan will constitute completion of Phase II.

Phase III: Creative Development

Consultants will deliver approved:

- Catalog design for general CPE catalogs
- Design templates for other marketing materials including brochures, postcards, posters, e-mail, etc. in support of the general CPE catalog
- Templates or standard formats for marketing materials promoting individual academic programs under the umbrellas of Continuing & Professional Education, University Without Walls and the Arts Extension Service.
- A style guide and/or detailed documentation to be used by Outreach Marketing & Communications to execute future designs consistent with the new brand identity

All items must be approved by the Director of Outreach Marketing & Communications. The University’s logo usage standards will be used in all creative work.

Timeline

Phase II: Marketing Planning: February-March 2008
Phase III: Creative Development: April-May 2008

Proposals

Proposals should include:

- Brief description (1-2 pages) of qualifications for consultancy
- List of names, titles, addresses, phone numbers and e-mail addresses of 3-5 references who have direct experience with potential consultant’s similar efforts
- Resumé or other summary of professional and educational experience
- A sample of at least one branding plan and program developed by potential consultant
- Samples of tactical implementation materials such as printed marketing materials, print or broadcast advertising, e-mail messages, etc.
- A preliminary estimate of hours deemed necessary for each phase.
Address questions to:

Susan Cassidy
Marketing Strategist
UMass Amherst Outreach Marketing & Communications
413-577-0847
scassidy@outreach.umass.edu