Proposal
for

Communications Plan and Program

Presented to

MOBIUS

May 10, 1999

Prepared by:
Susan M. Bartel, APR

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George Rickerson
Executive Director
MOBIUS
1805 E. Walnut St.
Columbia, MO 65201

Dear Mr. Rickerson:

Thank you for giving me the opportunity to discuss the communication needs for MOBIUS. This is an exciting concept and a project with which I would enjoy being involved. I believe I can assist you with a well-orchestrated communications program and look forward to doing so.

Enclosed are several options for you to consider. I believe you will find that my fees are a great value for the service you will receive. I feel I can bring a level of professionalism, experience, knowledge and contacts as your partner in marketing. I am confident that together we can create a successful plan and communications program for you. It would be an honor to work with you in your marketing communication efforts.

I have also included a short bio, current reference list, statement of ethics and a sample letter of agreement.

I will contact you in a few days to see how you would like to proceed. Thank you again for your time and consideration.

Respectfully,

Susan M. Bartel, APR

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Summary

The Missouri Online Bibliographic Information User System, MOBIUS, is a library resource-sharing consortium. It uses technology to link academic libraries of accredited higher education member institutions providing access to more than 14 million resources. The concept provides effective and efficient direct patron. Currently, forty-nine accredited institutions of higher education in Missouri are divided into clusters that represent the structure of the consortium. Although the University of Missouri serves as the host institution, MOBIUS is an independent consortium with funding from state government and fees paid by the member institutions.

The leadership of MOBIUS is interested in consistent and ongoing communications with the various constituencies of and stakeholders in the consortium. These include presidents of the institutions, library staff and directors, students enrolled in the member institutions, legislators, community media, and business leaders. Effective and appropriate communication tools will aid in understanding of the role, function and benefits of MOBIUS.

Suggestions and Recommendations

A focused marketing communications plan, which can be updated and added to, is a critical step in building and maintaining positive relationships among all members of the consortium. In order to have the most effective effort with the best use of fiscal and human resources, expert guidance in the area of marketing communications is needed. A consultant can develop a plan that should provide the blueprint for the communications effort. Any plan should be consistent with the values and mission of the organization and reflect the identity of the organization and skills of its staff. The tools and activities used to implement the plan should be based on realistic goals, resources and outcomes.

In addition to the plan, basic procedures and systems should be put in place to help manage and implement the plan. Bartel Mar-Com can establish the framework and provide the materials but the leadership and staff of MOBIUS should have the ownership of any idea or system put in place.

Marketing communications is a strategic decision. Without a coordinated, consistent and intentional effort communication and understanding is left to chance.

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Proposal for

MOBIUS

Option 1: Communications Program Development

Phase one: ***Development and preparation of a communications plan*** including:

- Situation analysis
- Positioning statement
- Message points
- Objectives and target audiences
- Recommendations for public relations activities for a 12 month time period
- Recommendations for priorities
- Implementation time line

$2750.00
Phase one fees are all-inclusive and include meeting time with the client, telephone support, local travel time, printing and copy charges, telephone, and fax.

Phase two: ***Development of identity program*** including design and creation of logo, letterhead, and business cards.

$3200.00
Fee includes three logo design options and recommendations for design of letterhead and business cards. All creative work provided in computer file and camera ready format for commercial printing. Fee does not include printing of letterhead or business cards. Bartel Mar-Com can coordinate printing process, if desired

Development and production of newsletter.

$1850.00
Fee includes creating a design template, writing or editing copy and produce master for a four-page newsletter. Fee does not include printing, postage or distribution costs.

Development and production of communication pieces
Additional communication projects may be desired after preparation and review of the communications plan. The cost and timeline for creation and preparation of materials will depend on which options are selected and the decisions made after review of the plan. However, typical costs range between $1500-$5000 depending on the complexity and value of the project. Specific estimates will be provided before beginning any additional projects.

Option 2: Retainer

Retainer fee for consulting services and implementation to establish a communications plan and program. Fee assumes a minimum of twenty-five (25) hours a month.

6 month total = 9,750.00 (1625.00 month)
12 month total = 18,000.00 ($1200.00 a month)
Serves function of a communications director includes guaranteed and on-going availability for consulting services, development of communications plan, identity program, newsletter production, meeting time with client, telephone support, phone, fax and local travel charges. Additional hours would be billed at 60.00 an hour.

Option 3: Hourly

Consultation services- $75.00/hour; four hour minimum
Time billed in 15- minute increments for consulting services, production of materials, meeting time, phone support and travel time.

Proposal quote expires June 15, 1999

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Letter of Agreement for Consulting Services

This will serve as the agreement between MOBIUS and Bartel Mar-Com for consulting services as outlined below.

1. **Services.** Bartel Mar-Com will provide consulting services and marketing communications support as agreed upon in the proposal.

2. **Access.** MOBIUS shall designate a primary contact person to work with Bartel Mar-Com. It is assumed that the consultant will have access to information that is needed, in a timely and forthcoming manner.

3. **Ownership.** MOBIUS receives ownership of the materials and ideas after payment. Until that time, all ideas and original copy belong to the consultant.

4. **Modifications.** MOBIUS shall pay fees or expenses that were orally authorized in order to progress promptly with changes or new assignments.

5. **Compensation and expenses.** MOBIUS will pay Bartel Mar-Com a total fee of _____for all work outlined in the proposal. Any other expenses must be authorized in advance by the designated contact person at MOBIUS.

6. **Terms.** The work will commence immediately upon signing of this agreement. A deposit of 25% of the total fee is due at the time of signing this letter of agreement. Monthly invoices will be sent due upon receipt.

7. **Independent Contractor.** As an independent contractor serving as a consultant and not an employee, Bartel Mar-Com will exercise control over the means and manner in which the work is performed.

8. **Confidential.** Bartel Mar-Com agrees not to disclose any confidential or proprietary information regarding MOBIUS.

9. **Cancellation.** Either party can cancel the agreement with thirty days written notice. In the event of cancellation of this assignment, the consultant shall retain ownership of original design ideas and concept.

Accepted and agreed to this _____day of_____1999.

_____ _____

Bartel Mar-Com MOBIUS Representative

Susan M. Bartel, APR

Susan is the owner of Bartel Mar-Com, a marketing communications consulting firm. She combines her consulting and communication skills with more than 18 years of experience to provide her clients with solid expertise. Her clients include those in technology, financial services, insurance products, retail, non-profit and education. In addition to consulting, she teaches evening courses at Columbia College in public relations and advertising.

Prior to starting her own company, Susan served as director of public relations and communications at Columbia College for five years. Before returning to the city of Columbia, she held the position of dean at the Center for Applied and Professional Education at Franklin University in Columbus, Ohio. She spent ten years at Ohio Wesleyan University in a variety of positions including associate dean of student services, director of the career and counseling center and chair of the personnel consulting committee. She began her career at the University of Rhode Island where she established a satellite program for adult education and received the national award for Outstanding Young Career Woman.

Susan is active in the community and in her profession. She has held the position of president for the Mid-MO Public Relations Society of America, is a graduate of Leadership Columbia and served on the Board of the Salvation Army, Promote Columbia and the Mid-MO Tourism Council.
Currently, she is the chairperson of the Accreditation Committee for the Mid-MO chapter of the Public Relations Society of America and is a member of Metro Rotary, the Development Advisory committee for Comprehensive Human Services, Junior Leadership Steering Committee and is active in her church.

Susan received a bachelor's degree in education and business and a master's degree in counseling psychology from the University of Missouri-Columbia. She was chosen for inclusion in *Who's Who among Higher Education* in 1995. One of only 5000 in the nation, she was awarded universal accreditation in public relations in February 1998.

She has earned several awards for her work in marketing communications including the National Communicator Award for logo and identity program, CASE Award for video and three ADDY Awards.

She has one daughter, Kate, a freshman at Jefferson Junior High School. They live in a log home on family-owned land in southern Boone County.

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Statement of Ethics and Professional responsibility

As an Accredited public relations professional, Susan M. Bartel adheres to the principles, practices and code of ethics established by the Public Relations Society of America. These articles of the Code of Professional Standards attempt to promulgate high standards of public service and ethical conduct.

As part of that code, it must be recognized that marketing and public relations professionals can not promise or guarantee successful outcomes based on their services. However, a promise can be made that all advice, recommendations and materials will be provided with the highest level of professional ability and judgment known to the consultant.

Susan M. Bartel, APR shall not, during the term of this agreement or afterward, use or disclose to the client's detriment any confidential or proprietary information whatsoever obtained from or through the client as a result of work done pursuant to this agreement.

Bartel Mar-Com
Reference List

1. Chris Miller, President
   LANIT Consulting, Inc.
   817-1431
   Conducted informal research; developed plan; direct marketing effort.

2. Mike Randerson, Dean, Extended Studies
   Columbia College
   875-7661
   Conducted marketing analysis of various locations; developed plan

3. Ken Flood, President
   Baltoro Mountain Outfitters
   817-2955
   Develop plan; serve as media buyer for advertising

4. Dr. Gerald Brouder, President
   Columbia College
   875-7200
   Develop identity plan; directed comprehensive office; converted research results into plan

5. Barbara Hodges, Interim Executive Director
   Comprehensive Human Services
   874-8686
   Serve as a member of the development advisory board

6. Roland Hausman, Registered Representative
   Lincoln Financial Group
   443-1654
   Provide consulting and direct marketing effort

7. J.R. Constance, President
   Constance Consulting, Inc. (web development and technology)
   441-8975
   Provide marketing consulting and new business development

8. Dan Diedriech, APR, Vice President of Institutional Advancement
   Westminster College
   Fulton, MO
   573-592-5312
   Managed media relations; served as communications consultant

Revised April 1999