

**CLEVELAND PUBLIC LIBRARY**

**Finance Committee**

December 15, 2015

**RESOLUTION AMENDING AGREEMENT FOR CONSULTING SERVICES WITH  
SHARK & MINNOW, INC.**

WHEREAS, The Library executed an agreement (“Agreement”) with Shark & Minnow, Inc., effective September 2, 2014, and ending January 30, 2015, in an amount not to exceed \$24,900.00, to lead a process to further develop the concept of The People’s University; and

WHEREAS, On February 19, 2015, the Board of Trustees of the Cleveland Public Library authorized an amendment to the Agreement with Shark & Minnow in the amount of \$303,670.00 to launch The People’s University, the budget for which included subcontracts in the amount of \$100,000.00 for a technology platform and \$25,000 for course architecture and planning; and

WHEREAS, The Library has decided to enter into a direct contract with a vendor for the creation of a new Cleveland Public Library website and, therefore, desires to remove the line item for a technology platform and reduce Shark & Minnow’s Agreement by \$100,000.00. In addition, Shark & Minnow’s services for designing course architecture are no longer necessary, and the Library desires to further reduce Shark & Minnow’s Agreement by \$25,000.00; and

WHEREAS, In light of these changes and other changes the Library administration has made to the schedule and roll out of The People’s University (“TPU”), Shark & Minnow has submitted a modified Statement of Work which includes fees in the amount of \$57,510.00 for additional services through October 31, 2016, which fees include overseeing the vendor the Library will engage for the creation of new website, coordinating a two-phased launch of TPU, and additional services detailed in the attached proposal; and

WHEREAS, At the Library’s request, Shark & Minnow has also submitted a proposal for marketing and public relations of The People’s University in the amount of \$6,000.00 per month; and

WHEREAS, The Library would like to amend the Agreement to 1) reduce the fees by \$125,000.00 for services no longer to be provided, 2) extend the term of the Agreement through October 31, 2016 and commence marketing and public relations services January 4, 2016, and 3) increase the fees by \$117,510.00 for the additional services and marketing and public

relations, for a net decrease to the Agreement of \$7,490.00; now therefore be it

RESOLVED, That the Board of Library Trustees authorizes the Executive Director, CEO or his designees, to enter into and execute an amendment to the Agreement with Shark & Minnow, Inc. extending the term of the Agreement through October 31, 2016, reducing the fees by \$125,000.00, crediting the Founders Fund 203, Project 11110 People's University/Brody Trust, and increasing the fees by \$117,510.00, to be charged to the General Fund Account 11980053-53710 (Professional Services), for the reasons set forth in this Resolution, for a net decrease to the Agreement of \$7,490.00, which Amendment shall be subject to approval of the Chief Legal Officer.

# SHARK & MINNOW

CLEVELAND PUBLIC LIBRARY // STATEMENT OF WORK // OCTOBER 30, 2015



## **BACKGROUND & OVERVIEW**

shark&minnow has completed strategic work associated with the build out of The People's University (TPU). The Executive Leadership Team at Cleveland Public Library has asked shark&minnow to submit a proposal comprising work necessary to the final stages of launching this initiative/sustaining through the launch period (in a collaborative effort with Cleveland Public Library staff). Tasks have been itemized & include:

### **BRAND & GENERAL PROGRAM CONSULTING**

- shark&minnow to continue Strategic Thinking (based on the research completed in Phase I & II), provide creative direction to TPU campaign tactics & briefing documents to ensure that all branding efforts align with the overall philosophy of TPU.
- shark&minnow to communicate this Brand Strategy to all subcontractors (i.e. Designer, Video Production Team, etc.) to ensure that all creative assets are on-brand, streamlining the need for excessive rounds of revisions.
- Support to the Director/Knowledge Office on initiatives that dovetail in with TPU efforts/success metrics (as depicted in Project Outcome).

### **DIGITAL STRATEGY, NEW WEBSITE PROJECT MANAGEMENT & TECHNOLOGY SUPPORT**

- shark&minnow to create the Digital Strategy for how TPU's messaging will weave into overall digital communications (inclusive of the new CPL website [a change from initial approach with solely comprised a landing page]) during & post-launch.
- Management of development subcontractors on CPL's behalf.

### **INFORMATION ARCHITECTURE, USER EXPERIENCE & TESTING**

- shark&minnow to create Information Architecture/User Experience for the full website.
- shark&minnow to manage user testing for the full website.
- shark&minnow to create Information Architecture/User Experience for the full website in conjunction with technology partner.
- shark&minnow to oversee User Testing for the full website in conjunction with technology partner.

### **PARTNERSHIP SUPPORT, PROJECT MANAGEMENT & TEAM COORDINATION**

- shark&minnow to create and/or support partnerships critical to TPU's success (i.e. track/course related, organizational, etc.)
- shark&minnow to provide communication to marquee programmatic TPU partners (i.e. documentation, timelines, etc.).
- shark&minnow to plan/conduct Meetings with all TPU potential/secured Partners (organizations/individuals) to present the concept & solicit support/participation where appropriate.



## **LAUNCH COORDINATION**

- shark&minnow to lead planning for public launch.
- shark&minnow to act as liaison to any outside vendors necessary to launch (i.e. audio/visual teams, launch partners, etc.).
- shark&minnow to assist in the planning/content creation/swag development for Staff Development Day (internal kickoff for TPU).

## **SUBCONTRACTORS: DESIGN - CAMPAIGN ELEMENTS**

shark&minnow to provide designers for consideration & upon approval will manage the design process to ensure it supports the established strategy & aligns with the overall brand and goals of Cleveland Public Library (an extension of the branding/design work conducted thus far).

## **SUBCONTRACTORS: TECHNOLOGY PLATFORM THE PEOPLE'S UNIVERSITY DIGITAL EXPERIENCE**

shark&minnow will continue work with the Cleveland Public Library to confirm the technology partner and that the technology partner will deliver the web-based TPU experience in accordance with the specifications developed by Cleveland Public Library and shark&minnow.

## **PROJECT ASSUMPTIONS**

In order for this project to be completed on time and on budget it is assumed that:


- An authorized and available member of the CPL team will be designated to be the shark&minnow point of contact/decision maker.
- Detailed information on the organization, product/service offering and any additional information required to complete project will be made available to shark&minnow.
- All photos, images, resources, graphics, materials, data and other content to assist tactical development will be provided (upon request) to shark&minnow.
- Final creative assets will be the property of CPL.
- Creative source files will be the property of shark&minnow.
- Content delivery and feedback will occur in a timely manner, as clearly defined on the timeline (to be developed) for completion.
- Third Party Fees: All out of pocket costs (i.e. media buying, printing, audio/visual) are additional unless noted.

## **PROJECT COSTS & CONTRACT LENGTH**

- This proposal is valid for 30 days upon date of being issued.
- A 20% deposit is due upon contract initiation with subsequent payments issued in equal installments on a monthly basis.
- This contract comprises a time frame commencing upon approval & concluding on October 31, 2016.
- The offices of shark&minnow are closed:
  - Holiday Break: December 24, 2015 – January 1, 2016
  - Memorial Day: May 30, 2016
  - Independence Day: July 4, 2016
  - Labor Day: September 5, 2016



## ESTIMATE: SHARK&MINNOW

Phase	Service	Subtotal	Non-Profit Discount	Total	Notes
Launch	Brand/General Program Consulting	\$6,500	10%	<b>\$5,850</b>	*Reflects current contract/supplements work following the conclusion EO February & ending with the launch phase II tactics in September 2016.
Launch	Digital Strategy, New Website Project Management & Technology Support	\$23,000	10%	<b>\$20,700</b>	*Reflects current contract/supplements work & costs originally earmarked for the creation of a Microsite/App (now that this has been updated to a full website, hours have been utilized to support). Assumes a June 2016 launch. Additional support will be quoted if necessary.
Launch	Information Architecture, User Experience & User Testing	\$9,600	10%	<b>\$8,640</b>	*Testing to be completed with development partner.
Launch	Partnership Support, Project Management & Team Coordination	\$6,800	10%	<b>\$6,120</b>	*Reflects current contract/supplements work following the conclusion EO February.
Launch	Launch Coordination	\$18,000	10%	<b>\$16,200</b>	*Reflects current contract/supplements work following the conclusion EO February.
<b>Total</b>		<b>\$63,900</b>		<b>\$57,510</b>	

\*Subcontractor costs to be provided as available (web management maint.  
 \*Web development costs have been reflected in separate budgeting.

# SHARK & MINNOW

CLEVELAND PUBLIC LIBRARY // PROPOSAL // MARQUEE EVENTS // DEC. 15, 2015



## **BACKGROUND & OVERVIEW**

The Executive Leadership Team at Cleveland Public Library has asked shark&minnow to submit a proposal comprising efforts necessary to creating a strategy around 4-6 marquee events, promoting to the media & the community in order to drive interest & engagement. Tasks have been itemized & include:

### **EVENT STRATEGY**

- Work with designated members of the CPL leadership/departamental team to define a strategy for these events.
- Work with designated members of the CPL leadership/departamental team to define a schedule for these events.

### **PROMOTIONAL PLANNING & SUPPORT**

- Create Content Strategy & Editorial Calendar for these 4-6 events in conjunction with CPL programming/knowledge office/marketing departments.
- Support promotional material needs for these 4-6 events (i.e. t-shirts, sweatshirts, journals, etc.) & see projects through production.
- Regular/as needed on-site time.

### **BRANDED STORYTELLING & CONTENT INTEGRATION**

- Craft written content for these 4-6 events (pre/during/post events identified in the Content Strategy & Calendar) as well as any content necessary for third party sites/editorial as available.
- Work with CPL photographer to collect photographic content for these 4-6 events to use on-site/throughout Social Channels/in Media Kits/etc. (or, where unavailable, shark&minnow to source outside photographer or capture imagery internally).
- Direct CPL videographer (where applicable) or source outside production support should video content be needed to support these 4-6 events.
- Create content related to these 4-6 events for the new website (once live. Prior to this point, shark&minnow will work with the CPL Digital Team to support content uploading. This content can be in the form of Blog posts or other “editorial” style content).

### **SOCIAL INFLUENCE - EVENT SPECIFIC**

- shark&minnow to craft content specific to these 4-6 events for social media & supply to current firm, Strategy Design Partners (who will be responsible for optimizing through tagging, reviewing search terms, driving performance/results, boosted/paid posts closer to event times, etc.).
- Content will be delivered to CPL marketing to discuss/delegate to SDP (shark&minnow will not be responsible for coordinating efforts with SDP under proposed contract).
- Construct Press Releases/press editorial (inclusive of quote obtainment/CPL feedback).
- Deploy Press Releases/press editorial.





- SDP to handle monitoring/reporting - shark&minnow to monitor using their paid social media monitoring program (for agency use, not reporting - costs for this tool have not been included as such).
- Perform Media/Organizational Outreach & field inquiries on CPL's behalf related to these 4-6 events, involving appropriate CPL staff where necessary.

### **EMAIL MARKETING - CONTENT AMPLIFICATION**

- Develop content according with these 4-6 events for Monthly eNewsletters (public).

### **TIMELINE**

Work will commence January 1, 2016 & conclude October 31, 2016.

### **PROJECT ASSUMPTIONS**

In order for this project to be completed on time and on budget it is assumed that:

- An authorized and available member of the CPL team will be designated to be the shark&minnow point of contact, making decisions & granting approvals in a timely fashion.
- Current agency (SDP) to provide insight into previous campaigns & supply assets as requested.
- Detailed information on the organization, product/service offering and any additional information required to complete project will be made available to shark&minnow.
- All photos, images, resources, graphics, materials, data and other content to assist tactical development will be provided (upon request) to shark&minnow.
- Final creative assets will be the property of CPL.
- Creative source files will be the property of shark&minnow.
- Content delivery and feedback will occur in accordance with shark&minnow defined/client approved deadlines.
- Third Party Fees: All out of pocket costs (i.e. media buying, swag production) are additional unless noted.

### **PROJECT INVESTMENT & CONTRACT LENGTH**

- This proposal is valid for 30 days upon date of being issued.
- Payment Terms: Invoices will be issued on the first day of each month and payment will be due on the last day of each month.
- This contract comprises an 10-month engagement period, which will commence January 1, 2016.
- The offices of shark&minnow are closed the weeks 12/21 and 12/28 as well as on major holidays.

### **ESTIMATE**

Costs have been calculated assuming a volume discount (available given the comprehensive nature of the proposed program) & have benefitted from a -10% non-profit discount as well.

For efforts performed as outlined, shark&minnow will bill 10 installments of \$6,000/month with the first installment due at signing.