Thursday June 7th 2012

RE: International Facility Management Association (IFMA)
Headquarters Logo / Branding Project

To all interested vendors:

The International Facility Management Association (IFMA) is planning a major Logo / Branding project intended to re-position the visual footprint of the organization. Specifically: the creation of a new logo and review of its recently-adopted taglines for possible changes, as well as general IFMA font and color considerations. IFMA seeks to select and engage a firm (referenced in this RFP as “vendor” or “respondent”) that can provide a solution that meets the requirements specified in this RFP.

The selection of a logo / branding / positioning firm will be a two-step process. First, IFMA will evaluate each candidate’s qualifications, proposed execution plan, estimated timeline, project personnel/team, recent relevant experience and pricing in accordance with the requirements of the enclosed scope of work and terms outlined on this RFP.

Questions regarding the requirements and scope of this project will be accepted at this time (until June 19 EOB), prior to the RFP delivery deadline. Responses will be shared amongst all firms who explicitly acknowledge IFMA of their interest in participating on this project.

The completed proposal must be submitted no later than Thursday July 12th, 2012 at 5 PM CST.

The second phase, which will take place the week following the delivery deadline, will involve the selection of a short list of candidates who will be interviewed via a teleconference call.

Please provide one (1) PDF copy of your qualifications to each of the following email addresses (FILE EXCEEDING 3 MB MUST BE ZIPPED): stewart.dallas@ifma.org; jennifer.drai@ifma.org

If you have any questions, please do not hesitate to contact me directly at 281 974 5671. I look forward to working with you on this opportunity

Stewart Dallas
Director of Marketing
Branding Update
(Logo Design, Visual Appearance, Tagline Review/Creation)

Prepared June 2012

Proprietary and Confidential

REQUEST FOR PROPOSAL

1 E. Greenway Plaza, Suite 1100
Houston, Texas 77046 USA
Telephone 1-713-623-4362

www.ifma.org
## TABLE OF CONTENTS

- INTRODUCTION AND BACKGROUND ........................................... 4
- ADDITIONAL BACKGROUND INFORMATION ............................... 8
- PROJECT GOALS ...................................................................... 10
- DETAILED RESPONSE REQUIREMENTS .................................... 11
- ADMINISTRATIVE .................................................................... 13
- DUE DATES ............................................................................. 14
- SCHEDULE OF EVENTS ............................................................ 14
- EVALUATION FACTORS FOR AWARD ...................................... 15
INTRODUCTION AND BACKGROUND
This Request for Proposal (RFP) presents the International Facility Management Association (referenced in this RFP as “IFMA”) requirements for the creation of a new logo and review of its recently-adopted taglines for possible changes, as well as general IFMA font and color considerations. IFMA seeks to select and engage a firm (referenced in this RFP as “vendor” or “respondent”) that can provide a solution that meets the requirements specified in this RFP.

Retaining the existing name of the association, we plan to rollout a new logo representing IFMA of the future (with the existing taglines or new tagline) at the World Workplace 2013 Conference and Exposition, October 2-4 in Philadelphia. We will launch the campaign with all IFMA business segments already rebranded. Immediately after the initial launch, we plan to cascade new logos to all IFMA components within the following year (October 2013-October 2014), assist each component if necessary and enforce branding guidelines in the component recertification process.

IFMA’s current synopsis or “boilerplate” on press releases:

IFMA is the world’s largest and most widely recognized international association for professional facility managers, supporting more than 22,655 members in 78 countries. The association’s members, represented in 127 chapters and 16 councils worldwide, manage more than 37 billion square feet of property and annually purchase more than US$100 billion in products and services. Formed in 1980, IFMA certifies facility managers, conducts research, provides educational programs and produces World Workplace, the world’s largest facility management conference and exposition.

The National Facility Management Association (NFMA) was founded in 1980 and used the above image of three concentric circles in the logo. The circles represented people, place and process. Dead center of the image where the three circles converged was the domain of facility management. Early definitions of FM used the three concentric circles model to describe the facility manager’s role of coordinating people, place and process.

As reported in the August 1982 issue of Facility Management News, NFMA did not incorporate as a non-profit organization with the state of Michigan until the fall of 1983, two years after its founding. The same issue of the newsletter also addressed a bigger step, “Association Seeks Name Change.” The brief alerted “direct members” that they
soon would receive a letter from NFMA about changing to the name International Facility Management Association (IFMA). "The change better reflects the composition of our membership – a significant number of association members are from Canada and Mexico. We’ve truly become international," according to the brief. Members were told if they approve, “do nothing.” If they object, there was a form in the news brief to express disapproval and an address to send it to. Based on this announcement, the brief stated, “If few or no negative responses are received, the name change will be considered approved by the membership.” Negative responses were minimal and the name was changed to IFMA. The rendering below with the concentric circles plus IFMA was used only for a short interim period:

At the same time of the new name announcement, the association’s office and bank accounts were moved from under the auspices of Herman Miller Research’s Facility Management Institute, to Ann Arbor, Michigan, “to provide permanent, ongoing administration in one location.” Communitec, Inc., of Ann Arbor, a professional advertising and marketing group, also was retained “to assist the association in developing its image, coordinating and preparing materials for the annual conference and trade show, and compiling and producing the association’s newsletter.” The marketing group designed or coordinated the design of IFMA’s reverse-image logo that departed from NFMA’s three concentric circles:

The image above was introduced to the members in the spring 1983 edition of Facility Management News and was used through 2011, until the addition of taglines or “sticky statements”:
However, changes to the I-F-M-A logo itself could not officially occur because the logo was embedded in IFMA’s Constitution. Changes to the Constitution required a balloting process whereby 25 percent of members needed to participate and two-thirds of the voting had to be in the affirmative. IFMA launched a campaign to amend the Constitution in October 2011 and successfully completed the process by end of December 2011. The association’s logo now resides in the Bylaws, a document that IFMA’s board of directors may amend as needed. IFMA is now positioned to change the IFMA logo through a board vote and, in the process, rebrand the association.

IFMA is seeking to reposition itself as the preeminent membership organization for both practicing facility management professionals and those individuals and organizations providing services or products utilized therein. IFMA also seeks to be recognized as the premiere global organization providing facility-related research, benchmarking, publications, peer-to-peer networking and career-advancement tools.

In the three decades since the founding of the organization and its renaming from “National” to “International” in 1983, there has been a proliferation of for-profit and non-profit entrants providing similar or substitute products and services to IFMA members and the profession. Companies that formerly only provided controlled-subscription (free) publications (trade magazines), began offering tradeshows, online forums and education products targeted at FMs. Non-profit organizations that once focused on a single area of the 11 IFMA-recognized core competencies of facility management, such as real estate, crossed over into the holistic realm of facility management. One organization rebranded facility management competencies as “corporate infrastructure resource management.” Associations formerly focused on one or two technical areas, also have rebranded themselves to branch out and cover the “built environment.” This has led to a tendency to think about IFMA as the organization representing mostly the maintenance and operations segment, with a heavy emphasis on managing tradesmen who wear “tool belts.” In reality, IFMA’s membership is diverse, ranging from vastly-experienced vice presidents of global facility operations, to middle-managers of facility departments, to newly-hired space planners.

Internationally, IFMA belongs to a federation of facility management-related national associations called Global FM (Global Facility Management Association) in Brussels, Belgium, and there is confusion in the marketplace as to each organization’s focus.
National facility-related organizations also are branching out with education and training to cover emerging parts of the world where IFMA also has expansion/development plans. IFMA needs to differentiate itself and break through the clutter.

IFMA wishes to receive proposals for updating of its current logo as well as review and possible recreation of its current taglines, fonts and colors that will:

- Increase general awareness of IFMA in the field of facility management and other associated audiences.
- Reintroduce IFMA as the place for young people, or career-changers, to learn about the dynamic and growing profession of facility management.
- Reintroduce IFMA to the world as an organization representing the profession beyond North America.
- Illustrate that IFMA is a dynamic association whose leadership, expertise and interests go well beyond maintenance and operations and are critical to the development of tomorrow’s high-performance buildings that promote efficient, healthy and productive work environments.
- Reinforce and elevate the level of Facility Management within an organization, and reflect the fact that Facility Management actions readily contributes to the triple bottom line of any organization, and that Facility Managers directly influence the 2 tops costs of an organization – People and O&M.
- Reflect that IFMA is the best and top resource for individuals in the facility management profession worldwide.
Some preliminary specifics regarding logo/tagline development have been created by IFMA’s in-house team communications and marketing team. They are:

Specific Recommendations – logo
The firm retained should keep the following elements regarding the IFMA logo in mind:
- The IFMA name needs to stay intact (International Facility management Association).

Color and shape:
- The current logo was designed using a reverse, popularized by IBM®, but is difficult to work with from a design standpoint.
- Are there elements of the current logo that could be preserved?
- The logo should connote a global organization and should have universal appeal a variety of geographic locations.
- IFMA has been using the same red Pantone 485 for decades, often as background to the reverse IFMA logo or as an accent color, so there is equity in use of red.
- IFMA also often uses the logo in gray Pantone 422.
- Should the color usage be monochromatic or should there be additional colors introduced in the pallet?
- There is no shape associated with the present IFMA logo other than its rectangular footprint, so should the association adapt a shape within or alongside its new logo?

Size and adaptability:
- Needs to work well as a lapel pin including the various iterations of recognitions on various pins (.i.e. IFMA Fellows).
- Should be scalable (for sizes ranging from a lapel pin, to business card, to a large banner).
- Works with various types of print or electronic media.
- Should be adaptable for use by local chapters, alliances, councils, communities of practice, awards, websites, etc.
- Although a tagline should definitely be a part of the logo in some media, the logo should also be able to stand alone without one (i.e. lapel pins).

Tagline Selection
IFMA recently added two taglines to be used in conjunction with the IFMA logo: 1) Learn. Connect. Advance.; and 2) Empowering FM professionals worldwide. These taglines were developed internally and will need to be validated or changed.
these taglines or any tagline be a part of the IFMA logo, or should it or they be wholly separate and used to just deliver a side message?
The tagline or taglines should convey:

- IFMA is global
- IFMA is for facility management and related professionals
- IFMA is for those providing products and services to the FM profession
- IFMA has an impact on an organization’s triple bottom line
- IFMA has an impact on all aspects of life
- IFMA is more than just maintenance and operations
- IFMA will help elevate you and the FM Function within your organization

**IFMA’s Mission**
Advance the facility management profession.

**IFMA’s Vision**
Serve as the resource and representative for facility management.

**Four Themes Running Vertically Through IFMA**
- Global influence
- Community
- Sustainability
- Operational excellence
PROJECT GOALS

Specifically, IFMA is seeking a vendor to provide:

- Market research within IFMA, the facility management profession, the built environment industry and among key stakeholders to determine the current market perception of the association and its work.

- Depending on results of market research, development of five to eight draft logos meeting the requirements set above.

- Assessment of IFMA’s current taglines by whatever means necessary, and depending upon results, development of three to five draft taglines meeting the requirements set out above.

- Development or suggestion of new / validation of current typeface for use moving forward on all IFMA online and offline material.

- Development of new / validation of current IFMA color scheme

- Creation of full and complete final new logo documentation, standards and guidelines manuals, including details on when and how to use the new logo in all possible end uses, and how the new logo should be incorporated and rolled out into IFMA chapters and councils.
DETAILED RESPONSE REQUIREMENTS

SUMMARY
Vendors should provide a brief overview of the engagement and should identify the main features and benefits of the proposed work.

PROJECT MANAGEMENT APPROACH
Include the method and approach used to manage the overall project and client correspondence. Briefly describe how the engagement proceeds from beginning to end. A time-line for completion is of critical importance along with an estimate of the time involved for IFMA staff.

DETAILED AND ITEMIZED PRICING
IFMA desires to see an all-inclusive price/cost quote that covers any and all costs related to any needed market research, logo development, tagline evaluation/creation, font and other associated visuals. Include a fee breakdown by project phase. Costs should be broken out by professional services, travel, software, out-of-pockets, etc.

PROPOSAL PRESENTATION
In addition to vendors providing their response to the RFP in writing with all the documentation requested, IFMA will require finalists to make a formal presentation prior to vendor selection.

APPENDIX: REFERENCES
Provide three current corporate references for which you have performed work similar in size and scope. Branding work for organizations similar to IFMA is an advantage. For each reference, including the following information:
- Organization name
- Address
- Type of organization
- User contact(s) (two if possible)
- Title(s) of user contact(s)
- Telephone number(s) and email address(es) of user contact(s)
- Description of project
- Previous logo (if any) and final logo design

APPENDIX: PROJECT TEAM STAFFING
Include biographies and relevant experience of key staff and management personnel. Describe the qualifications and relevant experience of the types of staff that would be assigned to this project by providing biographies for those staff members.
APPENDIX: COMPANY OVERVIEW
Provide the following for your company:
Office registered name (corporate, DBA, partnership, etc.), Dun & Bradstreet number, primary and secondary SIC numbers, address, main telephone number, toll-free numbers, and facsimile numbers.
Key contact name, title, address (if different than above address), direct telephone, mobile and fax numbers.
Person authorized to contractually bind the organization for any proposal against this RFP.
Brief history, including year established and number of years your company and any joint proposal partner have been offering publications/graphics/advertising related services.

PROPOSAL SUBMISSION
Award of the contract resulting from this RFP will be based upon the most responsive vendor whose offer will be the most advantageous to IFMA in terms of brand awareness as specified in this RFP.
However, IFMA reserves the right in its sole discretion and at any time to:
- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential respondent;
- Accept other than the lowest price offered;
- Award a contract on the basis of initial offers received, without discussion or requests for best and final offers; and
- Award to more than one respondent.
ADMINISTRATIVE

CONTACT
Any questions concerning this Request for Proposal should be directed to:

Stewart Dallas
Director of Marketing
IFMA
1 E. Greenway Plaza, Suite 100
Houston, TX 77046-0194 USA
Telephone: 1-281-974-5671 direct
1-713-623-4362 switchboard
Email: stewart.dallas@ifma.org

DUE DATES

A written or electronic confirmation of the vendor’s intent to respond to this RFP is required by June 19, 2012. All proposals are due by 5 p.m. CDT on July 12, 2012. Any proposals received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. Any late proposals will not be evaluated for the award.
## SCHEDULE OF EVENTS

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. RFP Distribution to Vendors</td>
<td>June 7, 2012</td>
</tr>
<tr>
<td>2. Vendors acknowledge IFMA of their interest to participate</td>
<td>June 19, 2012</td>
</tr>
<tr>
<td>3. Vendors may submit questions to IFMA</td>
<td>June 19, 2012</td>
</tr>
<tr>
<td>4. IFMA emails all interested parties, the list of questions submitted with respective answers</td>
<td>June 24, 2012</td>
</tr>
<tr>
<td>5. Proposal Due Date</td>
<td>July 12, 2012</td>
</tr>
<tr>
<td>6. Target Date for Review of Proposals and determine short-list of finalists</td>
<td>July 23, 2012</td>
</tr>
<tr>
<td>7. Interviews with finalists (by phone or face to face) (weeks of)</td>
<td>July 23 and July 30, 2012</td>
</tr>
<tr>
<td>8. Anticipated Decision and Selection of Vendor(s)</td>
<td>August 13, 2012</td>
</tr>
<tr>
<td>9. Anticipated Commencement Date of Work</td>
<td>September 1, 2012</td>
</tr>
</tbody>
</table>
EVALUATION FACTORS FOR AWARD

CRITERIA
Any award to be made pursuant to this RFP will be based upon the proposal with appropriate consideration given to requirements. Evaluation offers will be based upon the vendor’s responsiveness to the RFP and the total price quoted for all items covered by the RFP.

The following elements will be the primary considerations in evaluating all submitted proposals and in the selection of a vendor or vendors:

1. Submission of all the requested information as identified in the Detailed Response Requirements section of this RFP.
2. The extent to which vendor’s proposed solution fulfills IFMA’s stated requirements as set out in this RFP.
3. An assessment of the vendor’s ability to deliver the indicated service in accordance with the specifications set out in this RFP.
4. The vendor’s stability, experience and record of past performance in delivering such services.
5. Availability of sufficient high quality vendor personnel with the required skills and experience for the specified approach proposed.
6. Overall cost of vendor’s proposal.

SUPPLEMENTAL INFORMATION
IFMA reserves the right, in its sole discretion and without incurring any liability to any Respondent, to modify or terminate this RFP at any time prior to the execution of a contract, and, at its sole option, to accept or reject any proposal for any reason. All expenses for Respondent’s preparation and participation in the RFP process, including, but not limited to, site visits, document preparation, communications, presentations and demonstrations, are entirely the responsibility of the Respondent and will not be chargeable to IFMA. The rejection of any or all proposals, or the termination of the RFP process at any time, will not render IFMA liable to any Respondent for any reason.

Omission(s) or errors in the RFP of any solution provision shall not be construed as to relieve Respondents of any responsibility or obligation required for the complete and satisfactory proposal that would insure adequate delivery, operation and support of any and all equipment, software or services proposed. Respondents are to define and include cost and schedule information for any requirements, such as hardware, software, services, licenses, fees, subscriptions, other support, 3rd party licenses and any and all prerequisites associated with implementing the fully functioning solution that Respondent believes are omitted from the RFP.

In the event multiple vendors submit a joint response to this RFP, a single vendor shall be identified as the prime vendor. If selected, prime vendor responsibilities shall include:
(i) performing overall project administration, (ii) serving as the coordinator of all secondary vendor activity, (iii) integrating and monitoring plans and schedules, (iv) managing changes as required, (v) presiding over other vendors participating in IFMA meetings and (vi) overseeing project reporting and presentations. Prime vendor shall be expected to prepare and present a consolidated, detailed invoice for products and services delivered by multiple vendors. IFMA shall issue only (1) check for each consolidated invoice.