



Online Learning Campaign

System administration, along with campus leadership through a campaign aims to significantly enhance the university's market share and visibility in the post-secondary online education space.

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Commodity Codes

Commodity Code	Description
01	Advertising, Marketing & Print Services

Description

All responses must be submitted via CU solicitation portal at www.cu.edu/psc/solicitations by date and time noted above. All questions or proposals must be submitted using the solicitation portal. Questions or proposals that are emailed to the Purchasing Agent will not be accepted.

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Bidders intending to submit a response to this Request for Proposal "RFP or Solicitation, hereinafter" must read this document in its entirety when planning to submit a response

SECTION I. BACKGROUND, OVERVIEW, AND GOALS

A. BACKGROUND:

CU's Online Learning Project (OLP) aims to significantly enhance the university's market share and visibility in the post-secondary online education space. Success and significant growth in online are key strategic imperatives. The university engaged in an extensive assessment of its capabilities (by program and campus) and an external market analysis to gauge opportunities. It was completed by EY-Parthenon in spring 2020.

The assessment showed the unmet marketing demand for online learning that CU can potentially serve is significant. That demand is diverse (by discipline, degree level and price), so a diverse set of offerings is required to meet it. Collectively, the four campuses in the CU system now offer or have the potential to offer online programs that align with market demand. CU now offers more than 50 fully online degree programs serving nearly 8000 students. Programs are developed and owned by faculty on each of CU's four campuses. Despite pockets of online excellence across the university, the CU system is lagging market leaders in online offerings and capabilities.

Recognizing this, university leadership took steps toward a more robust approach to online education that will live under the centralized working construct of CU Online (the name of the permanent initiative is open for discussion). This name previously was the brand of the combined online efforts of CU Denver and the CU Anschutz Medical Campus, which have a significant history in online education.

The Office of Digital Education (ODE), previously serving CU Denver and Anschutz Medical Campus, was redeployed in spring 2020 to become a centralized resource to serve all four campuses in the digital space. It will help facilitate the launch of 10 programs (representing all four campuses) in fall 2020 that will provide insight about market demand, recruitment and marketing efforts and scaling ODE up to serve four campuses instead of two.

Additionally, the president directed the establishment of an Online Accelerator Committee (OAC) to quickly prepare for a full-scale launch of CU Online in fall 2021. The committee has five working groups exploring details of the endeavor: academics, finance, student support, IT, and marketing/communication. The OAC will make recommendations for CU's online effort in October, with an eye on fall 2021 launch.

CU is looking to facilitate that launch with a branding/marketing effort that builds on the success of current, system-wide CU marketing to create a brand for CU Online that allows it to succeed in the marketplace. Program-specific marketing (e.g. recruiting for an MBA in finance or bachelor's degree in communications) is the purview of ODE.

Marketing for fall 2021 programs begins early in the calendar year, so the goal of the branding/marketing initiative is to be completed in January 2021, understanding that broad brand development may take longer than the imperatives of marketing programs for fall 2021. The successful firm will work with a team of marketing/communication/online education specialists from across the CU system.

B. OVERVIEW:

The University of Colorado is soliciting proposals to conduct a two-part project: **A)** Conduct research that drives development of a brand identity and attributes for the university's Online Learning initiative (now called CU Online). **B)** to create a marketing strategy/plan and the creative foundation of the marketing plan to convey to target audiences overall brand of CU Online. The brand and plan must build on the success of the broad university marketing effort of the past four years and complement program-specific marketing efforts by the Office of Digital Education (ODE) for fall 2021 (which will begin deployment in March 2021).

Firms must have the ability to work with existing research/marketing vendors CU and its campuses have in place. Research will drive an initiative to analyze, define and, if necessary, re-shape its brand among current and potential students, as well as with business/industry/government.

This survey should define perceptions of the current baseline image and reputation for the university's online efforts, and should be the framework for recurring surveys. Project costs are required only for the baseline research in this solicitation. Future research parameters and costs will be covered by separate solicitations.

C. GOALS FOR THIS PROJECT:

Core goals of the branding/marketing effort:

1. To determine and conduct research necessary to inform the establishment of a brand for CU Online, taking into account market analysis completed by Ernst&Young/Parthenon in spring 2020.
2. Establish a brand that will help CU reach its goal for increasing online students and capturing market share.
3. Create a marketing plan that supports brand and goals, and includes messaging and positioning.
4. Articulate metrics that will gauge success of marketing efforts.

SECTION II. STATEMENT OF WORK

While the CU System office is the responsible entity, the work on the project will be led by the marketing/communication committee of the Online Accelerator Committee. The successful vendor will work with the team to conceive and execute the creation of a brand for CU Online that allows it to succeed in the marketplace.

The branding/marketing initiative must be completed no later than the end February 2021. It will span CU's four campuses. The successful vendor will be responsible for collaborating with system leadership. Deliverable will include creative concept, related collateral material and recommended communication channels/vehicles. Project will begin upon contract execution and develop through the summer, fall and early winter, with launch of campaign coming in early 2021.

TERM OF CONTRACT AND PERIOD OF PERFORMANCE:

It is the intent of the University to award one (1) Firm Fixed Price contract under this solicitation. The contract period will begin upon execution of University Contract and terminate 12 months following execution date. The university may wish to extend this contract past 12 months should work under this campaign not be complete. Should this occur an amendment to the original contract will be executed.

It is expressly understood that the contract resulting from this solicitation shall not grant the Successful Bidder exclusive privilege to furnish the University any or all of the services, which are subject to this contract.

TIMING:

The University expects to begin work immediately upon completion of a fully executed contract.

DELIVERABLES:

The project's key deliverables should include:

- Market research that informs brand and marketing strategy
- Overall brand insights and marketing strategy
- Brand building
- Verbal and visual identity
- Audience messaging (including internal audiences)
- Design system, standards and assets development
- Marketing/advertising campaign strategy
- Creative concepts
- Creative execution and production that aligns with the university brand
- Communications plans, media strategy and plans, and the placement and trafficking of creative
- Regular reporting on measurable outcomes and tracking of services, including campaign progress and ROI
- Collaboration with research firm to assess year-over-year the effectiveness of campaigns with target audiences to inform ongoing work
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The research component shall gauge:

- Current market perceptions of CU Online (in Colorado and beyond).
- Market perceptions of identified competitor set (building on EY/Parthenon data)
- Awareness of CU as a four-campus system.
- Awareness of "All Four:One" marketing platform.
- Perceptions of value of a single online platform drawing offerings from four distinct campuses.
- Awareness of the term "CU," what it stands for and affinity for the university.
- Market viability for online programs in selected national markets (as determined by CU).
- Perceptions of value of national rankings (ie: US News and World Report).
- Current campus online offerings, their marketing and brand perception, and how they may inform the larger brand.

The statement of work for the research phase shall include the following:

- Estimated timeline for completion of research
- University interviews necessary to develop research
- Questionnaire/survey development and any revisions requested; recommendation of markets and demographics to be surveyed.
- Recommendation of valid sample sizes by market and demographic characteristics.
- Recommended methodology
- Fielding the survey

- Presenting top line data within two weeks of survey completion
- Presenting complete analysis within four weeks of survey completion
- Coordination with any research firms the university currently works with in related areas

Media buying and placement based on identified campaign priorities, target markets and conversions:

- Plan, execute media buying and placement, including day-to-day execution and coordination with media vendors.
- Assist internal teams with content and SEO (search engine optimization) strategies in connection with paid media campaigns.
- Provide a media calendar for the fiscal year that includes all scheduled/planned campaigns with advertising/paid media components.
- Provide billing information as requested.
- **NOTE: AT THIS TIME THE UNIVERSITY IS EVALUATING WHETHER MEDIA BUYING AND PLACEMENT WILL BE AWARDED UNDER THIS RFP. THE UNIVERSITY SEEKS TO UNDERSTAND THE STRATEGY AND THE COST.**

Analytics and reporting

- Provide expert analytical reporting and actionable conclusions via real-time data visualizations to refine strategy, execution and measurement of tactics.
- Provide regular reports on campaign/marketing progress and ROI.
- Participate and advise in strategic decision making and mid campaign adjustments based on analytics and reporting results.
- Provide relevant data/trends from other higher education institutions when necessary to evaluate the impact of media/marketing strategies.
- Conduct competitive spending analysis and provide annual reports.

The marketing plan shall provide:

- Recommendations for the name of the online initiative (considering the value of retaining “CU Online.”)
- Recommendations for an integrated multimedia approach.
- Identification of unique selling propositions of online effort and how they will be leveraged.
- Identification of competitive advantage attributes and how they will be leveraged.
- Optimal pathway for user experience in journey from interest to enrollment.
- Recommendation for seamless hand-off from student entering CU Online portal to campus-delivered program.
- Recommendations on how to address difference between CU Online programs and individual programs on each campus that aren’t part of the centralized effort.
- Recommendations for internal messaging to each campus audience.

SERVICE LEVEL EXPECTATIONS:

Overall

- Commit to our business including senior management engagement
- Thoroughly understand our brand/brand equity, strategic priorities, business objectives and audiences
- Assign experienced personnel to execute services with clearly defined roles
- Ensure continuity of qualified staff on account
- Understand higher education institutions and their processes

Strategy

- Deliver genuine insights regarding our CU online programs
- Advise on improved positioning
- Ensure strategy is met during creative development

Account management

- Assign staff with expertise to handle business
- Build strong relationship with team led by System Leadership
- Keep internal teams on strategy
- Build good plans, deliver on time and on budget
- Anticipate needs
- Able to mobilize vendor resources
- Sense of urgency and good follow-through
- Good communicators and presenters
- Status update meetings, frequency to be determined.
- Participate in meetings with university leadership as needed

Creative

- Understand and comply with university brand standards
- Translate strategy into original, compelling concepts and assets
- Excellent copywriting for all forms of media and across audiences
- Use research to inform recommendations
- Present ideas which can be achieved within our budget
- Open to constructive feedback
- Participate in meetings with university leadership as needed

Production

- Negotiate good cost/value
- Provide competitive bids
- Prepare workable schedules
- Handle setbacks resourcefully
- Deliver agreed to creative concepts and assets on time
- Limit cost overruns

Budget and Financial

- Good budget control and cost-saving measures
- Timely, accurate and well-supported invoices
- Provide billing information as requested
- Proactively apprise client of any potential budget overages in advance of overage occurring

Mandatory Service Requirements

- CU System must maintain consistent and meaningful contact with senior agency leadership and account principal. This could include quarterly business reviews and service/relationship evaluation. To be mutually agreed upon.
- Key strategic, account, media, creative and interactive personnel assigned to our business must each have a minimum of seven years' advertising/marketing/communications experience. Any junior team members assigned to our account must be closely monitored by senior team.

- Agency has staffing and resources available to commence work immediately upon award and devote time and resources to the university at the appropriate times throughout the year and be available for regular video and future on-campus meetings.
- Weekly status calls, reports or meetings will be expected with account team.
- Agency must respond to the university in a timely and consistent manner within 24 hours of inquiry (call or email) receipt, adhering to all timeline expectations and quality expectations as set out at the commencement of the contract.

Invoicing:

All out-of-pocket expenses such as production, subcontractor, messenger and shipping charges will be billed at direct cost with no mark up. The university must approve any other expenses in advance.

If the pre-agreed upon deliverables are not 100% satisfactory to the university the university reserves the right to contest the invoice. Notice will be given within five 5 calendar days of receipt of invoice. The university will provide a written explanation as to what deliverables were not met and both parties will agree to seek resolution and full payment. During this period the university may release partial payment for invoiced deliverables that were satisfied. Should partial payment be required a revised invoice based on deliverables met will be supplied by contractor.

Audit:

The University reserves the right to conduct a price verification review and/or contract compliance audit of the agency at any time if deemed necessary. The agency shall be willing to provide information on cost without reservation. The purpose in conducting routine price verification review is to confirm that amounts invoiced are in accordance with the terms of the agreement. Under normal circumstances the University will give a lead-time of approximately one month for routine price verification review for a period not exceeding six months prior to the audit date.

The documentation needed would include, but not be limited to, an original copy of invoices for media vendors and any applicable support documentation. If during a price verification review sufficient irregularities are detected to cause concern on the part of the University, additional information may be requested including any history during the life of the contract.

If at any other time the University identifies any irregularities in the administration of the contract, or the agency as acted in such a way as to give just cause to suspect a violation of the agreement, the a price verification review and/or audit may be conducted with a minimum notice in order to investigate and correct a problem.

The University expects full restitution of any mistakes found to be in the Universities favor during an audit, and that full action is taken to correct any procedures that allowed the mistake to happen.

Continued discrepancies could result in termination of the contract.

Use of Subcontractors/Partners:

There may be areas for limited use of subcontractors or partners in this project. The University encourages use of small businesses wherever viable. If you are utilizing this approach, your proposal must list the subcontractors/partners, their area(s) of expertise, and include all other applicable information herein requested for each subcontractor/partner. Please keep in mind that the University will contract solely with your company, therefore subcontractors/partners remain your sole responsibility.

Sample Contract:

The Successful Bidder will be required to sign the University contract. A Sample of the University contract can be located under the "Buyer Attachments" section of this solicitation. Bidders must indicate any variances to the Universities contract under the "Questions" section of this solicitation.

Bidders must agree and understand the University does not indemnify.

Variations/Exceptions:

For purposes of bid evaluation, Bidders must indicate any variances to the specifications, terms and conditions; no matter how slight. If variations are not stated in the Bidder's proposal, it shall be construed that the bid fully complies with the specifications, terms and conditions. Notwithstanding the above, it is hereby agreed and understood that the University reserves the right to reject these variations if they individually, or as a whole, do not meet the standards established in the specifications.

Bidder Costs:

The University of Colorado is not liable for any costs incurred by any Bidder prior to signing of the contract by all parties. Bidder will be responsible for all costs related to in-person interviews.

SECTION III. PROPOSAL SUBMISSION

All specific response items represent the minimum information to be submitted. Deletions or incomplete responses in terms of content or aberrations in form may, at the University's discretion, render the response non-responsive.

Late proposals will not be accepted. It is the responsibility of the supplier to ensure that the proposal is submitted on or before the proposal opening date and time.

Bidders shall electronically submit two separate attachments in the Question section of this Documented Quote:

- Technical Proposal
- Financial Proposal (Media Buy/Placement shall be included separately for evaluation)

Technical Proposal Components:

Length of response:

Not to exceed 15 pages in total. The 15 pages of technical proposal components response do not include the cover letter, general offer or information, responsibility information (financial information and references) or the subcontractors/partners list.

Bidders are responsible to ensure that all information requested herein is submitted with the proposal. All information provided should be verifiable by documentation requested by the University. Failure to provide all information, inaccuracy or misstatement may be sufficient cause for rejection of the proposal or rescission of an award. Conversely, the University reserves the right to ask for specific information from a vendor, where a vendor did not provide requested information. This format is strongly desired by the University but should not limit the creativity, ingenuity or uniqueness of each response.

In your technical proposal response, please provide a detailed narrative description of how you will fulfill the requirements of the DQ per the sections requested below. Responses to each requirement should be provided in the order given and clearly marked.

1. Experience and Capability of Firm

- a. Describe why is this opportunity of interest to you and your company's and your experience over the past five year delivering successful campaigns, include campaigns that have focused on online education
- b. Describe your case history success with two (2) recent (within the last three years) accounts, one (1) successfully augmenting an online education campaign.
 - i. Overview of client's challenges or goals and a recap of what you accomplished on the client's behalf.
 - ii. Campaign/Brand strategy
 - iii. Creative executions
 - iv. Media strategy
 - v. How you used data and analytics to determine KPI's and report on reusults

2. Experience, Capability and Depth of Personnel

- a. Describe your company's philosophy and what you stand for.
- b. Describe the qualifications and provide biographical data of management and staff who will be assigned to this account. Demonstrate the relationship between account, strategy, creative, interactive/digital and media.
- c. Describe what it is like to work with you and how you work collaboratively with a client's internal team.

3. Service Expectations, Strategic, Branding, Creative Media Processing

- a. Overview of how you will meet our objectives
- b. Demonstrate your strategic process or approach and how you will deliver on the services listed in Section II, Statement of Work.

Financial Proposal Components

1. Provide a description of rates, deliverables and services along with an outline of general fee policy of how you charge for the services listed in Section II, Statement of Work.
2. Provide a schedule of costs for planning services and all other costs associated with the planning process. Proposal should include estimates of time and work effort required, hourly billing rates, travel costs and estimated reimbursable expenses not covered by fees.
3. SEPARATELY provide media placement feeds
4. Provide a measurable performance infrastructure – specifically tools and processes – to regularly track progress and ensure the right pace of delivery of plans with the bid response.

SECTION IV. EVALUATION AND AWARD

A. PROPOSAL EVALUATION

All responses to this solicitation will be reviewed by the Purchasing Agent prior to referral for final evaluation. All responsive quotes will be evaluated in accordance with the criteria described below. Any resulting contract from this solicitation will be awarded to the bidder whose quote is deemed to be the most advantageous to the University.

In preparing responses, suppliers should describe in sufficient detail how they propose to develop and implement the solution specified. Specific factors will be applied to proposal information to assist the University in selecting the most qualified candidate for this contract. Evaluation criteria that will be used are as follows, listed in no particular order. No single criteria will be weighted at less than 10% of the overall evaluation.:

- **Technical Proposal- Overall Approach to Goals, Deliverables, and Services Expectations**
- **Experience and Capability of Firm Including Experience Working in Higher Ed**
- **Experience, Capability and Depth of Personnel Assigned**
- **Mandatory Requirements (see buyer attachments and prerequisites)**
- **Financial Proposal to include overall budget and value**

While not the most important part of the proposal, overall cost will be considered as part of the evaluation of your proposal. The University of Colorado reserves sole right to determine responsiveness and qualifications of bidders.

Presentation Information

A presentation and/or demonstration may be requested by “short-listed” suppliers prior to award, regardless complete information should be submitted with your proposal. **IMPORTANT: You will be notified if you have been selected to participate in a presentation. We are aiming to hold presentations the week of Tuesday, July 14th 2020 – Friday, July 17th 2020 (subject to change); presentations will be via a Video Conferencing tool. Presentations will not occur in person.** We will provide more specifics as we move through this process.

Best and Final Offer (BAFO)

The University, at its discretion, may utilize a Best and Final Offer (BAFO) stage. If this phase is utilized, the Purchasing Agent shall submit to the supplier(s) most likely to receive the award, requests for specific clarification and allow supplier(s) to enhance their pricing. The Purchasing Agent shall coordinate the supplier(s) responses for review by the evaluation team. **The Purchasing Agent shall be the SOLE point of contact throughout the process for all suppliers.** Please note that the date for the BAFO stage has not yet been set. If the University requests Best and Final Offers by short-listed supplier(s), evaluation team members may revise their initial scores based upon additional information and clarification received in this phase. In lieu of revising scoring, the University reserves the right to evaluate BAFOs by use of a narrative.

Any resulting contract from this solicitation will be awarded to the supplier whose overall offer is deemed to be the most advantageous to the University as determined by the evaluation team. The PSC purchasing office, after review and approval of the evaluation team's written recommendation, will notify all supplier(s) via a posting on the University of Colorado's Sourcing website of the results of the solicitation evaluation. The posting will be an announcement of award.

B. DETERMINATION OF RESPONSIBILITY OF THE BIDDER

The University of Colorado Procurement Rules state a Purchasing Agent shall make purchases from, and award Contracts to, Responsible suppliers only. The University reserves the right to make its supplier responsibility determination at any time in this solicitation process and may not make a responsibility determination for every supplier.

Factors to be considered in determining whether the standard of responsibility has been met include whether an supplier has:

1. availability of the appropriate financial, material, equipment, facility, and personnel resources and expertise, or the ability to obtain them necessary to indicate the capability to meet all contractual requirements
2. satisfactory record of performance;
3. a satisfactory record of integrity;
4. the legal authority to contract with the University; and
5. supplied all necessary information in connection with the inquiry concerning responsibility.

The supplier shall provide information requested by the University in the Questions section concerning the supplier's responsibility. The University reserves the right to request further information as it deems necessary to determine the supplier's responsibility. If the supplier fails to supply the requested information, the University shall base the determination of responsibility upon any available information or may find the supplier non-responsible if such failure is unreasonable.

Prerequisites

- ★ 1. Please review and accept
- ★ 2. By submitting a response of "yes", you certify that your company meets all of the MANDATORY requirements referenced in the "requirements file" found under the Buyer Attachment tab.
- ★ 3. Please review and accept.
- ★ 4. Please review and accept
- ★ 5. Please review and accept