



## Brand Development for Business School, CU Denver

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The CU Denver Business School is seeking an experienced brand agency to provide brand building services to help us articulate our business school brand.

<b>Open</b>	1/8/2021 2:30 PM MST	Type	Request for Documented Quote
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### Commodity Codes

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Commodity Code	Description
01	Advertising, Marketing & Print Services

## Description

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**All responses must be submitted via CU solicitation portal at [www.cu.edu/psc/solicitations](http://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 Documented Quote "DQ or Solicitation, hereinafter" must read this document in its entirety when planning to submit a response***

## SECTION I. BACKGROUND, OVERVIEW, AND GOALS

### A. BACKGROUND:

Located in Denver's central business district with access to major corporations and community agencies, the CU Denver Business School is known for excellence in teaching, research & community engagement. The Business School is accredited by the Association to Advance Collegiate Schools of Business (AACSB).

With over 2,800 students, the Business School has one of the most diverse student bodies with 39% BIPOC and 49% first generation college representation. The average age of our student is 25. Our students are serious, motivated and many hold part-time or full-time jobs while studying. We bring together and serve two key Colorado's constituents: Our unique student body and greater Denver's business community.

We have four interconnected pillars that captures who we are:

- Talented, Diverse, Motivated Working Students
- Strong External/Business Partners
- High Quality Faculty and Staff
- High Quality, Flexible Programs and Services

The Business School is part of the University of Colorado Denver, home to more than 40 research centers and institutes and receiving over \$25 million in sponsored research awards allowing us to fulfill our mission to generate knowledge and create solutions to benefit greater society. As Colorado's only public urban research university, CU Denver fills a singular niche as a vital contributor to the civic, cultural and economic success of the city, state and beyond.

CU Denver is a part of the overall CU System, with 4 campuses (Boulder, Denver, Colorado Springs, and Anschutz Medical). The overall CU system has 3 business schools, the Leeds School of Business at CU Boulder, the CU Colorado Springs Campus Business School, and the CU Denver Business School. The strategy of the 3 CU system business schools is to grow its enrollment by identifying unique market segmentation to reduce competition with one another

The CU Denver Business School primarily competes for students with the University of Denver Daniels Business School, Colorado State University Business School, and to some degree Metro State University Business School, and Regis University Business School.

The primary audience the business school serves is undergraduate and graduate business school students. This audience is diverse, and many are first generation college degree-seeking students. In addition, our students tend to hold part-time and full-time jobs. We have a mix of international students as well. The current COVID pandemic has reduced the number of international students, but we believe this will return as the pandemic subsides. We have expanded the number of degree programs offered completely online within the last year and have increased enrollment in this segment. Additionally, there are many stakeholders and groups that depend on the Business School. This includes alumni, employer partners, donors, faculty research collaborators, and more. The Business School also has a robust and active Advisory Board composed of business and community leaders.

The Denver business community and beyond continue to expect more from students with business degrees. In addition to being able to do their first job or advance in their careers, employers also expect employees to be able to assimilate into the culture, work in a highly collaborative environment and embrace tough, complex business challenges. The Business School's degree program is set up to deliver on these employer needs.

Today's Business School brand expression is woven into the brand platform of CU Denver overall, which provides a great foundation. The brand message is expressed in the messaging platform and tagline of "CU in the City". The current Business School specific messaging is laser focused on competing for, and growing applicants and in turn enrollment. The messaging platform is anchored with two primary messages:

- **The Power of Choice.** One size does NOT fit all. That is why we offer more degree choices than any other business school in Colorado.
- In the **heart of Denver**, we have the **pulse of today's business.**

These key messages highlight several key benefits and differentiators for the CU Business School experience: our location, our connections to the Denver business community, and our flexible, wide selection of degree options.

The challenge the Business School is facing, while building on the strong University of Colorado, Denver brand, is to have its own category brand identity (category: Business Schools) that excites, amplifies our internal pride and resonates with our targeted external customers, and critical stakeholders. This new brand positioning will provide clear competitive separation, and further strengthen our relationships to our alumni network, employer partners, donors, faculty research partners and more. Creating this new brand story will improve our image and reputation and lead to continued Business School growth in the coming years.

The CU Business School is in the process of developing its multi-year strategic plan. The intent is for the developed brand architecture to inform and be informed by this strategic plan journey.

## **B. OVERVIEW:**

In September of 2020, we built our new Business School vision: **To build a stronger Denver and a better world**, and our new mission; **through instructional and research excellence we develop inclusive, ethical and innovative leaders who will advance economic and social vitality.**

We have now reached the right time to develop our new brand platform that builds upon our foundational Vision and Mission.

To achieve this objective, the CU Denver Business School is seeking an experienced brand agency to provide brand building services to help us articulate our business school brand, including our brand strategy, brand essence, brand promise, key brand pillars, compelling proof points to support each brand pillar, and our brand personality and voice. All coming together to help us execute our overall business school strategy and in progress strategic plan.

We need our new brand to speak both internally and externally. Our internal key audience is our Research and Instructional Faculty, Staff and administration team members, and the larger CU Denver Campus. Our key external audience is our undergraduate/graduate students and prospects, their parents or guardians, our alumni, employer partners, faculty research collaborators, the Business School Board of Advisors and advisory councils, and the greater Denver Business community and beyond.

Once completed, this brand strategy will be the true north for the business school as we shape our offerings, services, degree programs and further invests to advance our student experience, including support for job placement, enables career advancement continued learning, for its students and alumni.

The selected brand agency will be working with a small steering committee composed of members from the CU Denver Business School (Dean, Chief of Staff, Faculty Member, Marketing and Communications Director), Business School Student(s), a member from the CU Denver School Business School Board of Advisors and an external Special Advisor to the Dean of the Business School.

## **C. GOALS FOR THIS PROJECT:**

The CU Denver Business School's goal is to establish a clear brand identity to tell our story, strengthen our reputation, create competitive separation and excite our internal teams. The brand will provide us the direction to achieve the school's vision to become the leading business school in Colorado that builds a stronger Denver and a better world.

We are targeting this phase of the brand journey to start in February and end by, if not sooner, June 30, 2021 (4-6 months), and come in on budget.

## **SECTION II. STATEMENT OF WORK**

**The successful agency partner will bring to this project their unique approach, process and framework to develop the right brand strategy for the CU Denver Business School.**

**This brand strategy will deliver a brand architecture that excites our internal teams and aligns to the needs of our external audiences while creating a clear ownable market position.**

**Within the brand architecture and strategy, the project will deliver at a minimum:**

- Define and/or clarify the primary strategy drivers for the business school brand,
- Define the right ownable position in the competitive higher education business school marketplace that is sustainable for at least the next 5 years. “Separate us from the pack”.
- Deliver an articulated brand strategy that tells our story, builds upon the newly created Vision & Mission, while also demonstrating its natural fit with the overall brand strategy of CU Denver, and the CU system.
- Define our Brand Essence. Essentially, at our core “who we are”.
- Define our Brand Promise including tagline (if recommendation is to create a tagline separate from the brand promise).
- Define the 3-4 Key Brand Pillars and 3-4 supporting proof points for each Brand Pillar.
- Define our Brand personality & voice.
- Create the Market Ready Messaging, Toolkit & Go Forward Guidelines (*both for internal and external use if differences are required*).
- Create the key messaging that constitutes an elevator pitch to answer the question “Why the CU Denver Business School?”.
- Help the CU Denver Business School define how we will measure success of the new brand and deliver a scorecard to measure current state of key metrics and track their progress. “Brand Health Tracking Scorecard”
- Prepare a recommendation on tactics and content to possibly employ to bring brand to life, both internally and externally, while enabling CU Denver to continue to drive enrollment. Essentially, how can brand development can co-exist with strong call to action marketing.
- Prepare a recommendation on how our Brand Community Members know the role they can play to help us achieve and maintain our brand position.
- This phase is not anticipated to include creative or marketing tactic development.
- *All work produced will be the exclusive right and use of CU Denver Business School.*

**To achieve this outcome, we will implement your proven brand development framework that is highly collaborative, and data driven. We expect this framework to utilize the right research and discovery tactics that include primary and secondary, qualitative and quantitative research.**

### **Insights from the Brand Community Stakeholders**

- Create personas of our (1) undergraduate and (2) graduate prospective student.
- Develop insights into the needs and expectations of undergraduate and graduate current students and prospects,
- Uncover unique insights from the Business School Dean, faculty, staff and administration
- Uncover unique insights from the Business School Board of Advisors and select donors and business leaders in the Denver community as to what they expect of graduates of CU Denver Business School and the role of CU Denver Business School in the business community.

- Create insights from alumni

#### **Competitive Landscape:**

- Complete an assessment of the competitive landscape including, peers and aspirant schools, as well as all business schools in the CU System (Denver, Boulder, and Colorado Springs).

#### **Other Critical Assessments**

- Conduct a high-level current assessment of the existing CU Denver Business School marketing plan, including areas such as audience targeting, go-to-market messaging, message pillars, proof points and marketing mix.

#### **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 6 months following execution date.

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.

#### **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 brand development
- Advise on improved positioning
- Ensure strategy is met during creative development

##### **Account management**

- Assign staff with expertise to handle business
- Build strong relationship with the designated CU Denver team
- 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
- Weekly status calls, reports or meetings will be expected with account team and working core team from the CU Denver Business School.
- 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.

## **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

## **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

## **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:**

If at any 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, a business 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 university's 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.

## **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. **Offerors shall electronically submit proposal in attachments in the Question section of this DQ:**

- Technical Proposal/Financial Proposal

#### TECHNICAL AND FINANCIAL PROPOSAL COMPONENTS:

- Specific details on your agency's approach to brand development, including an overview of your unique brand development framework.
- At least 1 case study demonstrating application of your brand framework in developing a new brand's positioning and architecture.
- At least 1 case study demonstrating your higher education plus business school brand strategy and development project experience, or a comparable experience.
- An overview of your recommended research techniques for this project that fit into the proposed budget, and detail if this research execution is done in-house or with a 3<sup>rd</sup> party, and whom that 3<sup>rd</sup> party is if employed.
- Details on the team that will be assigned to the project, including (Names, Titles, Years of Experience and years of Brand Development Experience)
- An overview of your agency, including total years in business, total number of full-time employees. Include detail on how your firm is financially sound.
- Projected timeline for completing the project
- Submitted bid is a fixed price for the completed project, not hourly pricing.
- Specify any and all costs that are in addition to bid costs, including hourly rates for specific activities as applicable.
- Details on change order process.
- Any specific dependencies or requirements of CU Denver Business School to execute the project on time and on budget.

Confirmation the agency understands the deliverables and any additional deliverables that they recommend that will be included in their proposal (timeline and price)

### SECTION IV. EVALUATION AND AWARD

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:**

- Agency is able to demonstrate a successful track record at building brand strategies, brand strategies for higher education and business schools specifically (or a comparable industry).
- Experience and capability of firm including account manager, project manager, and senior member of the team to provide leadership and oversight.
- Agency is able to demonstrate their understanding of the deliverables.

- Agency is financially sound, has been in business for at least five (5) years, and has more than ten (10) full-time employees.
- Is able to execute the necessary primary research (including the use of external partners).
- Demonstrates a clear understanding of the project and the projects demarcation points from future work,
- Successfully demonstrate they can deliver a differentiated brand for CU Denver Business School.
- Financial proposal.

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.

### **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 bidders only. The University reserves the right to make its bidder responsibility determination at any time in this solicitation process and does not make a responsibility determination for every bidder.

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

1. availability of the appropriate financial, material, equipment, facility, and personnel resources and expertise, or the ability to obtain the necessary to indicate the capability to meet all contractual requirements;
2. a 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 bidder shall supply information requested by the University in the Questions section concerning the bidder's responsibility. The University reserves the right to request further information as it deems necessary to determine the bidder's responsibility. If the bidder fails to supply the requested information, the University shall base the determination of responsibility upon any available information or may find the bidder non-responsible if such failure is unreasonable.



## Prerequisites

- ★ 1. Please review and accept
- ★ 2. Please review and accept
- ★ 3. Please review and accept
- ★ 4. Please review and accept
- ★ 5. Please review and accept
- ★ 6. Please review and accept