

I. Purpose and Objectives of the Request for Proposal

UC Davis Graduate School of Management (GSM) is seeking oversight and management of digital media buys and optimization for highly targeted, cost-effective, paid advertising such as search engine marketing, social media advertising, display and other forms of programmatic targeted digital advertising—all of which will extend GSM's brand within Northern California and nationally, drive inquiries from qualified graduate business students, increase started and submitted applications and raise the profile of the School.

Our top priority for the digital campaign is to generate "qualified" leads for all programs, while keeping Cost Per Lead (CPL) low.

The ideal partner will be an extension of our internal marketing team by sharing and driving our goals, while providing the rich industry knowledge/expertise needed to meet and exceed them. Our partner needs to thrive on demonstrating value through the use of analytics, rich reporting (real-time dashboards required), and the ability to test concepts to enable campaigns to deliver the right message, to the right audience, at the right time. The partner must have proven results working with higher education clients as well as other commercial and non-profit clients.

The estimated budget for 2021-22 digital advertising is \$425,000-\$500,000.

II. Background and Organization

The Graduate School of Management is an academic unit of UC Davis, within the University of California system. The School prepares the next generation of innovative and collaborative leaders who are committed to making a positive impact. GSM is consistently ranked among the premier business schools in the U.S. and internationally, and faculty are globally renowned for their teaching excellence and research impact. With prime locations in Northern California's economic hubs, the School offers Full-Time MBA and Master of Professional Accountancy programs in Davis, Part-Time MBA programs in Sacramento and the San Francisco Bay Area, a Master of Science in Business Analytics in San Francisco, and the first Online MBA in the UC system.

This RfX is for a long-term partner that can help the School meet and exceed its enrollment goals for the Full-Time MBA, Sacramento Part-Time MBA, Bay Area Part-Time MBA, Master of Science in Business Analytics and Master of Professional Accountancy degree programs beginning July 1, 2021 thru June 30, 2022.

Key markets include the San Francisco and Sacramento DMA, as well as other parts of California. Retargeting is nationwide. Markets and areas of focus will vary based on School priorities in response to environmental factors, strategic plans and available budget.

III. Project Scope and Program Requirements

The services required of the successful bidder are:

A. Media Planning and Production

- The Partner will preferably have proven results working with higher education clients as well as other commercial and non-profit clients.
- The Partner will provide a clear schedule for developing and launching new campaigns and digital ads.
- The Partner will work closely with the University staff on a regular strategic and tactical basis-centered around a mutual sharing of research, performance metrics and best practices.
- The Partner will participate in bi-weekly meetings with GSM Marketing and Communications to discuss the campaign progress and updates.
- The Partner will provide strategic counsel in media planning by analyzing search engine marketing, social media advertising and other forms of digital advertising.
- The Partner will develop digital media plans to maximize exposure for GSM with desired audiences.
- The Partner will plan all campaigns, ads and keywords with input and review from GSM Marketing and Communications and assist with creative development as needed.
- The Partner will consistently meet established project deadlines.
- The Partner will conduct and provide, on an annual basis, research of the University's competitors and the higher education category to understand the advertising strategies currently being leveraged in the marketplace.
- The Partner will, at the end of each academic year, analyze campaign goals and performance to identify opportunities and adjust strategy for the following year.

B. Digital Media Buying

- The Partner will assess advertising opportunities from a variety of digital media.
- The Partner will purchase digital media on behalf of the School and ensure budget is allocated accurately for all digital advertising campaigns.
- The Partner will provide adequate notice and invoice the School accordingly if funds need to be replenished for planned digital advertising campaigns to avoid unwanted stoppage.

C. Digital Media Optimization

- The Partner will monitor ad performance and make adjustments to leverage high performing ads, limit budget to low performing ads, update negative keywords, reallocate budget for seasonal trends, and maintain competitive bid limits and search rankings while monitoring and adjusting for industry changes, emerging trends and competition.
- The Partner must have a proven ability to deliver high-quality leads at or below regional and national cost per lead benchmarks.
- The Partner will provide recommendations for ads and landing pages to improve advertising results.

D. Reporting and Analysis

- The Partner will provide detailed plans, tracking and reports on the budget and advertising outcomes.
- The Partner must be able to quantify results from its digital advertising efforts in real-time.
- Provide tools necessary for campaign measurement and analysis, and create regular monthly and annual reporting and visuals detailing performance metrics and ROI for internal GSM stakeholders. A final, comprehensive report of campaign performance will be required no later than 30 days after the campaign closes.
- The Partner will manage conversion codes, retargeting codes and other digital ad tracking on University web pages with a thorough understanding of current privacy laws and the University web privacy policy. All tracking will be tested regularly to ensure accuracy.
- The Partner will provide real-time dashboard for campaign reporting and KPI's.

E. Billing and Budget Management

- The Partner will provide concise monthly billing statements and help ensure the University stays within the specified digital media budget.

F. Special Agency Capabilities desired:

- Creative development and A/B Testing
- Multi-channel attribution modeling to measure the value and contribution of specific marketing tactics within a larger marketing initiative.
- Google certified partner strongly recommended

IV. GENERAL QUESTIONS

a. **Supplier Capability:**

- i. Are you a certified small business? Woman Owned? Disabled? Veteran Owned? Check all that apply.
- ii. California locations from which the program will be administered if your business is awarded the contract.
- iii. Please furnish UC with your business' service standards. Include your business' Service Level Agreement(s) and Mission Statement.
- iv. What can your business offer the University that competing suppliers cannot?
- v. Please attach an Executive Summary highlighting why your business believes it is best qualified to provide the service(s) as described in this RFX. Limit the response to 2-3 pages.
- vi. Can your business absorb all UC needs and requirements for products and services as stated in this RFX and provide uniform services and service standards in every location that will be serving UC?
- vii. Does your business have experience with customers in Higher Education and customers with equivalent geographic distribution of operations as UC?
- viii. Does your business have systems in place to handle, in an efficient and timely manner, emergencies during business and non-business hours? If yes, please describe and provide fees, if any.
- ix. Does your business have a tested recovery or business resumption plan in place in the event of a natural disaster or act of war or civil disturbance? If yes, please describe.
- x. Please provide a statement describing your business' ability to supply all the products and services required by this RFX, including any plan to subcontract any portion of the work.

b. **Supplier's Service Capability: Activity Reports**

- i. Can you provide monthly/quarterly progress detail reports to the University?

c. **Supplier's Service Capability: Quality of Service Standards**

- i. Please describe your business' internal coordination and communication plan to assure consistency, quality and timeliness of services.
- ii. How do you track and what type of documentation will be provided to verify your performance for the service categories listed above?

- d. **Supplier's Sustainability:** The UC Sustainable Practices Policy can be found at: <http://sustainability.universityofcalifornia.edu/policy.html> Please address your business' capabilities as they relate to requirements in the above policy and also the following sustainability questions.
- i. Please attach your business' environmental/sustainability statement or policy.
 - ii. Describe how your company supports its employees by providing living wages and benefits.
 - iii. Describe your employee healthcare and other benefits provided to your employees.
 - iv. Does your company engage only contractors/business partners which adhere to all applicable local, state and federal labor and employment requirements relating to, e.g., wage payment, anti-discrimination/harassment, equal opportunity, family and medical leave, and other applicable provisions?
 - v. Does your company maintain clear diversity goals, such as with regard to women, veterans, and minorities, and engage in active diversity efforts toward recruitment and retention as well as development and advancement? Please provide at least two examples.
- e. **Supplier's Staffing and Qualifications**
- i. Indicate the name and title of the person who will have the overall account management responsibility as specified in this RFx. Provide a brief resume of the account manager's background, training, experience and length of time with the company. Specifically discuss the individual's experience in managing a program of similar size and scope of the program described in this RFx
 - ii. Please provide an organization chart, including functions and responsibilities of your business' recommended account management team for UC.

REFERENCES

Proposer should provide three (3) client references that are public and/or higher education institutions similar in size and scope to UC Davis and whose usage requirements are similar to those specified herein. At least one such institution shall have a profile similar to that of UC Davis. The information provided should, as a minimum, include:

Name and location of institution

Name and title of contact at institution

Telephone number of contact

Email address of contact

Furnishing incorrect or incomplete reference information may lead to Proposer's elimination from consideration for award. The decision to eliminate a Proposer from consideration for poor reference checks, or for incorrect and/or incomplete reference information shall be at the sole discretion of UC Davis and shall not be subject to appeal.

BID TIMELINE

Suppliers interested in bidding, should reference the following schedule. A supplier may be disqualified for failing to adhere to the performance dates and times specified below:

Electronic Request for Proposal Issued: June 11, 2021 5PM PT
Deadline for Submission of Questions: June 18, 2021 5PM PT
Deadline for Submission of Electronic Bid: June 25, 2021 5PM PT
Information Security Evaluation (if needed) TBD
Contract Negotiations and Award TBD
Planning and creative development: July 1-August 31, 2021
Digital campaign goes live: October 1, 2021

CLARIFICATION

The University reserves the right to request clarification on a Supplier's Bid submission. These requests will be made in writing and with a due date.

CONTRACT AWARD & TERM

The final contract will be governed by the University of California Terms and Conditions of Purchase dated April 5, 2021 and the University of California Appendix Data Security and Privacy, dated August 12 2019. It is anticipated that the initial term of any contract awarded pursuant to this RfX will be for a period of up to 1 year. UC may, at its option, extend or renew the contract for 4 additional years, one year at a time.

INSTRUCTION FOR SUBMITTING PROPOSALS

Proposals must follow the process specified within this RfX with further detail provided below. Proposals must be signed by a company officer authorized to enter into agreements on behalf of the Bidder. The submission of a signed proposal will confirm understanding and acceptance of all requirements, terms and conditions of the RfX unless specific exceptions are taken and alternative language or provisions are offered and approved by the University. Bidders should proceed as follows.

1. Read and accept/acknowledge/complete and upload, as instructed within the Prerequisite section of the CalUSource Bid, or as included on the below documents:

Required Supplier Information ((Download, read and acknowledge) Supplier Bidding Guide (Download, read and acknowledge) UC Terms and Conditions (Download, read and acknowledge) Appendix Data Security and Protection (Download, read and acknowledge)

2. Read RfX –Description. Determine your ability and willingness to comply with ALL requirements.

3. Declare your Intent to Bid within the system

Proposal: Shall include the following:

- * Media Planning & Production
- * Digital Media Buying
- * Digital Media Optimization
- * Reporting and Analysis
- * Billing and Budget Management
- * Special Agency Capabilities
- * General Questions
- * RfX Questionnaire
- * References

METHOD OF AWARD

The University will award using Best Value. Unless stated otherwise in this RfX, the University reserves the right to make multiple awards or to award items separately or in the aggregate as the interests of University may appear. The University reserves the right to reject all proposals and to make no award. Responses that are incomplete in that there has been failure to respond in all of the requested areas may be disqualified.

QUESTIONS RECEIVED PRIOR TO THE DEADLINE FOR RECEIPT OF PROPOSALS

All questions must be directed in writing using the CalUsource system to University RfX Administrator, Wendy Kay, as per the instructions. **The last day to enter questions is Friday, June 18, 2021, 5:00pm PT.** Any written responses conveying material information shall be provided to all recipients of the original solicitation and those answers will be posted to the CalUsource system. Bidders who seek or receive information regarding this solicitation from any University official other than that listed above, may be declared non-responsive and removed from further consideration for award. Bidders' questions and any University answers will become public records.

RESOURCES FOR HELP – CALUSOURCE SYSTEM

Bidder is strongly encouraged to complete and submit its Proposal at least 24 hours prior to the deadline to allow for technical difficulties. Any extensions of time, will be at the sole discretion of UC Davis. If a supplier is experiencing issues with the CalUsource System, they may acquire assistance by emailing support@gep.com

UNIVERSITY RIGHT TO ACCEPT OR REJECT PROPOSALS OR WAIVE AMBIGUITIES

The University reserves the right to negotiate each and every aspect of any Proposal received in response to this RfX. In addition, the University may require additional cost and pricing data or documentation prior to award of any Contract in whole or in part which may result from this RfX. It also reserves the right to negotiate with the apparent Successful Bidder(s) (i.e., best value point score) all terms and conditions of a final Contract whether or not such terms and conditions are specified by this RfX. Such terms and conditions may include the proposed financial structure, quality standards, delivery, invoicing/billing administration and other administrative business issues. The University reserves the right to negotiate any elements of cost before awarding a Contract in response to this RfX. If the University and the apparent Successful Bidder(s) are unable to reach an agreement, the University may go to the bidder with the next highest next best value point score, but is not required to do so.

All Proposals shall be rejected when, in the opinion of University, an award would not be in the best interest of University. Any Proposal, which, in the opinion of University, is determined to be non-responsive or is made by a Bidder who is non-responsible shall be rejected. University reserves, at its sole discretion, the right to accept or reject any Proposal, in whole or in part, without comment; providing, no Bidders have been notified of University's intent to negotiate for the purpose of establishing an agreement; or, no award has been made.

University reserves the right to waive any irregularity in any offer providing such waiver does not afford an unfair advantage to one bidder over the others or providing the waiver of such irregularity does not materially alter the results of the standings. University reserves the right to award all, part, or none of the goods or services when, in University's sole opinion, it is in its best interest to do so.

SECURITY ASSESSMENT

Prior to any the issuing of an award, the top scoring Bidder will be required to complete a Vendor Risk Assessment (VRA) handled by the University's Information Security Office. The potential awardee will be contacted directly by the Information Security Office at the appropriate time in this process. If the apparent awardee cannot complete the VRA to the satisfaction of the University, the University may disqualify the Bidder and then may enter into negotiations with the Bidder with the second highest scoring proposal.

VALIDITY PERIOD

"Validity Period" as used in this provision, means the number of calendar days available to UC for awarding a contract. All proposals will remain available for UC acceptance for a minimum of 120 days following the RFx closing date.