

# WESTERN CAROLINA UNIVERSITY IMPORTANT BID ADDENDUM

*Date: 09/27/2021*

**FAILURE TO RETURN THIS BID ADDENDUM IN ACCORDANCE WITH INSTRUCTIONS  
MAY SUBJECT YOUR BID TO REJECTION ON THE AFFECTED ITEM(S).**

Bid Number: 73-RFP00615  
Addendum Number: 2  
Agent: Rick Hooper

Commodity: Creative Brand Campaign  
Opening Date/Time: 10/08/2021 @ 2:00 PM ET

## **INSTRUCTIONS:**

### **1. The following concerns the above referenced bid:**

**Question:** Addenda A requests a Cost Proposal. Is there a budget range or maximum budget for this RFP?

**Answer:** No budget has been established at this time.

**Question:** Will priority be given to in-state agencies?

**Answer:** All proposals will be evaluated per criteria listed in bid

**Question:** Section 5, page 11 - Creative Team Meetups: can you please clarify how the UCM team members or the University Executive Director will be involved with the agency's Teams during the development of the initial mood boards (not the specific tactics later on, which we understand will be executed by the University's inhouse team); will members of the UCM team (and which functions) be designated to collaborate with the agency's teams for the mood boards?

**Answer:** The agency team will collaborate with the UCM team members on their assigned cross-functional team to concept and create the mood boards. The UCM designer can pull it together, but agency & UCM team members should be willing to pull concept ideas/elements used for the mood board.

**Question:** Section 4, Page 8 - Staffing: You've outlined staffing requirements/preferences from the vendor; can you please provide details on the composition of the UCM team--size and functions. Also, will you be assigning a project manager that will partner with the vendor's project manager to coordinate the various presentations and collaboration meetings and to ensure we keep the project on timeline?

**Answer:** The composition of each cross-functional team is outlined in the RFP – for the agency and UCM team plus titles. The Executive Creative Director will be acting as the in-house project manager for this campaign.

**Question:** Section 4, Page 8 - Staffing: Over the life of the project awarded vendor must provide an Agency Media Planner.

We do not have in-house media capabilities. We do have a partnership with a media only agency with whom we partner for our current clients; they will assign a media planner for this work; will such an arrangement work for you or would we be disqualified for not having an in-house media team.

**Answer:** That would work, as many agencies do not have media as part of their in-house team. However, the media planner that you designate from your partner should be available to work with our in-house media planner to collaborate throughout the project.

**Question:** Section 5, page 10 - Kickoff meeting: The University will go over who we are, including our recent research and known brand personality

Can you please provide details on the research conducted--when was it conducted, what was the purpose, which audiences did it cover, quantitative or qualitative or both?

Also, can you please expand on the known brand personality--has it been tested with audiences as the concepts will be based on the assumption that this brand personality resonates with your audiences.

**Answer:** We recently finished a comprehensive research study that included a brand personality solution, competitive analysis, perception study, and current market analysis. This included both qualitative and quantitative research. The brand personality was defined through a large research survey of our students, faculty, staff, and alumni. The campaign we will be creating with the agency will be tested in focus groups to ensure that our brand personality resonates with our audiences. It is part of this RFP.

**Question:** Section 5, Page 13 - Stakeholder Presentations: the last bullet mentions media plan--can you please expand what level of detail you are expecting for this as this--is this topline strategy or a tactical media plan that shows which platforms, how many spots/impressions, run dates, budget per line item, etc.

**Answer:** We would expect that the media planner who collaborates with our in-house media planner would work out a topline strategy that our in-house media planner can flesh out and execute into a tactical media plan.

**Question:** Section 5, Page 15 - For the creative deliverables listed under *Agency and Cross-Functional Team producing and delivering final assets*, specifically the ones that say collaboration with agency & in-house teams--can you please clarify who will be the lead; for example you've indicated in the previous section (stakeholder presentations) that the agency will take lead on certain deliverables like manifesto and the in-house team will take the lead on others with consultation from the agency. Who will be the lead for:

- 1-2 minute Campaign Video (collaboration with agency & in-house video teams)

**Answer:** We have an in-house team who is capable of creating this, but we are looking for an agency video team to bring ideas to the table, concept ideas with our team, and create the storyboard. Our team can produce it, but if we need additional resources, we would like for the agency to be available to produce if needed. For the quote, focus on the collaboration and storyboard production only. Additional needs would be set outside the scope of this RFP.

**Question:** Section 5, Page 15 - :30 TV spot (collaboration with agency & in-house video teams)

**Answer:** Same as above.

**Question:** Section 5, Page 15 - Print Ad (collaboration with agency & in-house designers/art directors and agency copywriter)

**Answer:** The idea of the cross-functional team is that anyone who has the idea/vision would be able to execute, no matter whether they are agency or in-house. However, our team is fully capable to execute the design. The agency copywriter will need to be involved throughout as we currently do not have a marketing copywriter. The expectation would be that the brainstorming would be fully collaborative. Execution can be done by our team.

**Question:** Section 5, Page 15 - Social Media Plan and initial launch deliverables for Facebook, Instagram, TikTok, Snapchat, LinkedIn, YouTube, Twitter, Spotify and/or Pandora, and others as determined (collaboration with agency and in-house social media and media planners and agency/in-house designers and agency copywriter)

**Answer:** Same idea as above – collaboration from ideation to execution. Our team can build deliverables, but will need the cross-functional team to come up with creative ideas that are curated per platform to specific audiences.

**Question:** Section 5, Page 13 - Please clarify agency expectations regarding the 10 focus groups outlined in the scope of work. What is meant by “in-house”?

**Answer:** We can hold the focus groups here on campus but are looking for the agency strategic planner to guide us in the questions we will be asking each group, as well as a professional moderator.

**Question:** Section 5, Page 13 - Would agency be responsible for screening and recruiting participants or would University partners do that as part the “in-house” responsibilities?

**Answer:** University will do this.

**Question:** Section 5, Page 13 - Is the University willing and able to pay incentives to focus group participants?

**Answer:** Yes

**Question:** Section 5, Page 13 - Does the University expect to hold these focus groups in-person or online (or is the University looking for a recommendation)?

**Answer:** Looking for a recommendation, but for the students/faculty/staff, it’s easy to do in-person. Alumni would be harder to do in-person. So, it’s an open discussion.

**Question:** Section 5, Page 13 - If in-person, does the University have a suitable location or will they be held at a professional focus group facility?

**Answer:** We have a suitable location

**Question:** Section 5, Page 13 - Does the University want/need the agency to provide professional focus group moderation?

**Answer:** We would like to have professional moderation, so please include that in your RFP response. We can be in charge of recruitment, facility, and creative work prep, but would like for the agency to provide a moderator and questions.

**Question:** Section 5, Page 13 - Does the University want/need the agency to develop the focus group moderator guides? Prepare a report with recommendations?

**Answer:** Yes, we would like a report with recommendations after all of the focus groups are completed.

**Question:** Section 4.5, page 11 - In addition to the requested references, can we also provide case studies of similar work?

**Answer:** Yes

**Question:** Section 5.0, pages 12-13 - Are the kickoff, 3-5 meetings and final presentations to be in-person or can they be virtual?

**Answer:** They can be virtual. Ideally in-person for the initial meeting, but can be virtual.

**Question:** Section 5.0, pages 12-13 - For the two separate quotes, is this correct?

Quote #1 - Agency acts more as a consultant with tasks as detailed on page 12. No creative deliverables developed by the agency. Agency copywriter and strategist work with WNC in-house team.

Quote #2 - Agency works as an integrated part of the in-house team to create deliverables as listed on page 13.

**Answer:** Yes, correct.

**Question:** Section 5.0, pages 12-13 - For Quote #1 - are two distinct agency teams required?

**Answer:** The strategic planner can be shared, but the Art Director and Copywriter

**Question:** Section 5.0, pages 12-13 - For Quote #1 - does the agency attend both the stakeholder presentations and the Leadership Decision meeting?

**Answer:** The strategic planner can present with the university to the stakeholder presentations and the agency should be present (via Zoom) for the Leadership Decision meeting.

**Question:** Section 5.0, pages 13 - Will the UMC team recruit and manage the focus groups or is that an expectation for the agency?

**Answer:** UCM will recruit and incentivize focus groups. Agency brand planner should moderate.

**Question:** Section 5.0, pages 12 - Are you open to a monthly retainer as the form of compensation?

**Answer:** Yes as long as there is an agreed-to timeline.

**Question:** Section 5.0, pages 13 - For the Stakeholder presentation, are we to deliver both a Manifesto video and a scrap-o-matic? How would you describe the difference between those two deliverables?

**Answer:** The scapomatic is for a different phase. It's for the initial stakeholder meeting. The manifesto video will be for the rollout.

**Question:** Section 5.0, pages 13 - For the Leadership Decision meeting, do you expect that the :30 TV, :15 TV/social and :06 pre-roll be the final produced, ready to run spots, or is it still conceptual?

**Answer:** It's still conceptual at that point. After the decision is made, the deliverables will be produced.

**Questions:** Section 3.4 / Page 6 of 34 - States "Each vendor submission must be in the form of a PowerPoint (or similar) presentation or by a regular video link." Is a PDF file acceptable, with embedded links to videos, and are standalone links to other files, including video(s), acceptable?

**Answer:** Yes

**Questions:** Section 4.0 / Page 8 of 34 - States "Proposals must be submitted electronically", yet on Page 2 of Attachment A, item #10 references copies being printed double-sided and goes on to provide additional requirements, suggesting that hard copies of the proposal are required. Please clarify.

**Answer:** Hard copies of proposal are not required. Proposal is to be uploaded to Bonfire.

**Questions:** Section 4.3 / Page 8 of 34 - Will Vendor be able to invoice progressively, as key milestones are accomplished? If not, at what point will Vendor be allowed to submit an invoice?

**Answer:** Progressive invoicing will be allowed, however Western Carolina University will determine what milestones must be met and what percentage will be paid upon completion of each milestone.

**Questions:** Section 5.0 / Page 10 of 34 (Kickoff Meeting) - Based on the timing for the Brand Campaign launch, when do you anticipate you will be awarding the contract and work will begin?

**Answer:** Work is expected to begin within 2 weeks of the award (late Oct) but it is TBD based on schedules.

**Questions:** Section 5.0 / Page 11 of 34 (Internal Presentation to UCM) - Will one of the two cross-functional teams flesh out one of the two final ideas, even if the two ideas came from the other cross-functional team?

**Answer:** I would expect that the team who came up with the winning concepts would flesh them out. I don't know how there would be a scenario that would exist above. If the two ideas came from the other cross-functional team, then the other team would continue to work on it. Once a final campaign is chosen, the team who produced the winning campaign would flesh it out.

**Questions:** Section 5.0 / Page 11 of 34 (Focus Groups) - Is the Vendor to include all the cost for ten focus groups, including all recruitment costs and incentives?

**Answer:** The university will recruit and cover incentives. We would like the agency brand planner to moderate the groups.

**Questions:** Section 5.0 / Page 11 of 34 (Focus Groups) - Will the focus groups need to be videotaped?

**Answer:** University will take care of this.

**Questions:** Section 5.0 / Page 11 of 34 (Focus Groups) - Will a formal report be required?

**Answer:** Yes

**Questions:** Section 5.0 / Page 13 of 34 (University Stakeholder Presentations) - Please explain what a "Manifesto video" means to you? And shall the cost for this be itemized in the cost proposal?

**Answer:** Yes, the cost should be itemize.

You can also call it a brand video. It brings the idea to life while telling the world who we are. Examples of manifesto videos are:

<https://www.youtube.com/watch?v=WYP9AGtLvRg>

<https://www.youtube.com/watch?v=M-fSHRt9xtA>

<https://www.youtube.com/watch?v=hKx0IDRNfhQ>

**Questions:** Section 5.0 / Page 13 of 34 (University Stakeholder Presentations) - Will the three 1-hour presentations to stakeholders take place on the same day/consecutive days, or should we assume multiple trips for pricing purposes, if travel is required?

**Answer:** Travel will not be required. It can be done via Zoom. They will be on different days.

**Questions:** Section 4.0 / Page 8 of 34 (Agency Specifics) – States "the agency cannot subcontract any part of this project. It must be in-house." Can we include an independent contractor(s) where we have long-standing relationships for services like video editing?

**Answer:** We are looking for a full-service agency. Media planning and video editing can be outsourced, but it must be an existing relationship.

2. Check **ONLY** one of the following categories and return one properly executed copy of this addendum prior to bid opening time and date.

- Bid has already been mailed. Changes resulting from this addendum are as follows:
- Bid has already been mailed. **NO CHANGES** resulted from this addendum.
- Bid has **NOT** been mailed and **ANY CHANGES** resulting from this addendum are included in our bid.

Execute Addendum:

BIDDER: \_\_\_\_\_

ADDRESS (CITY & STATE): \_\_\_\_\_

AUTHORIZED SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

NAME and TITLE: \_\_\_\_\_

BID NO. \_\_\_\_\_  
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