

Request for Proposals (RFP) 17138
Creative Development and Delivery of a Comprehensive Brand
Marketing Strategy

I. OVERVIEW

A. Schedule of Events

RFP Release Date:	May 22, 2017
Deadline for Vendor Questions:	June 2, 2017, 5:00 PM EDT
Release of Addendum (Response to Vendor Questions):	June 6, 2017
Proposal Opening Date and Time:	June 13, 2017, 3:00 PM, EDT
Projected Date for Vendor Interviews:	June 29, 2017 or June 30, 2017
Projected Effective Date of Contract:	July 3, 2017
Projected Project Completion Date:	August 1, 2017

The Council reserves the right to amend these times and dates at its sole discretion. Late proposals will not be accepted and will be returned to the Vendor. It is the Vendor's sole obligation to ensure delivery of a proposal by the date and time for receipt of proposals.

The RFP, attachments, exhibits and addenda will be posted to the following website:

<https://wvhepc.org/purchasing/>

It is the Vendor's responsibility to check this website to keep current about the latest information and modifications to the RFP.

B. Inquiries and Questions

All inquiries and questions must be in writing and emailed to:

Chief Procurement Officer
RFP 17138
Community and Technical College System of West Virginia
1018 Kanawha Boulevard, East, Suite 700
Charleston, WV 25301
Email: rich.donovan@wvhepc.edu

Vendors shall not make direct or indirect contact with anyone other than the Chief Procurement Officer to discuss or request information about any aspect of the procurement including the RFP or its associated evaluation process, except as authorized in the RFP. Violation of this clause may result in proposal/bid disqualification.

C. Proposal Submission

The Vendor must deliver proposals to the Chief Procurement Officer at the address identified above on or before the date and time of the proposal/bid opening.

II. GENERAL INFORMATION

A. Purpose

The WV Council for Community and Technical College Education (Council), the state-level coordinating body for the WV Community and Technical College System (System), is soliciting proposals for contract services to assist in the creative development and delivery of a comprehensive brand marketing strategy for the Council and nine public state-funded community and technical colleges within the System. Running on a parallel track to that project is reorganization of the marketing/communications functions at the Council /System office and an overhaul of the www.wvctcs.org core website. Integration and consistency with those projects and other existing creative units is essential.

In short, we need a partner who can quickly consume brand positioning work already done, develop the creative platform for that positioning, and follow with a comprehensive marketing action plan, including media plans and budgets, as well as a set of metrics that will allow us to measure our efforts.

The successful Vendor/firm shall work directly with the Vice Chancellor for Community and Technical College Education, and the rest of the staff of the Office of the Council, and is expected to lead a fully collaborative process that will successfully engage a wide variety of constituencies.

B. Project

The successful firm is expected to:

1. Assist us with the creation, production and execution of a comprehensive brand marketing strategy with the following goals in mind:
 - Strengthening the System's position in the higher education marketplace and increasing applications and enrollment;
 - Actively engaging a greater portion of business and industry;
 - Actively engaging current and future students in community college services and programs that will help ensure their academic and workplace success;
 - Building greater awareness among state and federal policymakers;
 - Differentiating the System from its primary competitors;
 - Promoting achievements of the Council and System, and aiding the recruitment and retention of faculty, staff and administrators;
 - Building on the positive perception of the Council and the System's

- momentum over the last decade; and
 - Increasing overall image and awareness, as well as name recognition and credibility, of the Council and System.
2. Supply a full range of "outside of the box" creative and marketing strategy services.
 3. Establish clearly defined benchmarks to measure the success of the effort.
 4. Exhibit depth, breadth and a history of expertise in creating, executing and measuring innovative, successful and effective higher education marketing campaigns that meet established goals.
 5. Demonstrate the successful completion of similar projects for public institutions of higher education comparable in scope and size to the Council.

We enter this process with high expectations and a determination to increase enrollment; student, business, and policymaker engagement, and overall image and awareness; as well as to differentiate ourselves from our primary competitors.

It is expected that a comprehensive marketing plan for the Council will include not only creative development and strategy, but also will feature tactics detailing how to deliver the strategy. For instance, how should we utilize the various advertising and communications components available? What does the necessary advertising mix include (e.g. billboards, TV/radio spots, social media, print, specialty placements, website retargeting/location-based mobile targeting, "guerilla" tactics, etc.)? What about earned media and video storytelling?

What should the annual budget be for these activities? How will the messaging be incorporated into web development, across our various college campuses and in college/program-specific communications to targeted audiences? How will the work be shared between the Vendor and our internal staff of designers, writers, photographers, etc.?

III. PROCUREMENT SPECIFICATIONS

A. General Requirements

The Council requires professional creative and brand marketing services that will allow the CTC System to more strategically and effectively promote itself. The successful firm shall demonstrate evidence of significant experience and expertise in perception branding and marketing, ideally with a focus on public higher education. The firm's staff should have extensive experience in relevant areas, including creative development, branding, messaging and marketing strategy.

Our current creative and marketing and communications efforts vary widely in approach and effectiveness. The result is missed opportunities to reach potential students and increase enrollment. The current situation also keeps the Council community from mutually reinforcing the overall brand, and increasing awareness and understanding of the role the Council plays in the lives of its students and in the communities the CTC System serves.

B. Scope of Work

The Council seeks a creative marketing partner who can guide the Council in refining and implementing its brand in a distinctive and compelling manner across all aspects of its operations. **We are not looking for a "cookie cutter" approach, but rather creative, customized solutions** that tell our stories and reflect current competitive challenges.

The successful firm must have the ability overall to provide the following services and deliverables. The project includes four distinct pieces of work, outlined below.

Part 1: Development of a Creative Platform

Creation of a comprehensive creative platform for the Council, using existing research rooted in brand positioning work.

During the creative process, we would ultimately like to see two or three concepts for initial review. (NOTE: Spec creative is *not* required as part of this RFP process.) The concept ultimately selected will need to be flexible enough to meet the needs of the diverse Council community, with specific messaging, creative solutions and media plans that target the following key audiences:

- Dislocated workers, those looking to increase skills, and those wanting a new career;
- Business and Industry;
- Current students;
- National and local thought leaders, policymakers and higher education peers; and
- Prospective faculty, researchers, staff and administrators.

Part 1: Deliverables

- Creative brief;
- Creative campaign
- Refined comprehensive creative and messaging platform encompassing all outlined key audiences based on selected concept; and

Part 2: Marketing Strategy and Media Plan Development

- Development of a collaborative, comprehensive three-year brand marketing strategy and media plan for use across all the Council's colleges/departments, programs and campuses. Ideally, this first phase of the plan would be launched late Summer 2017 and would likely include the following:
 - Prospective Student Marketing: Tactics to raise awareness with attract and convert traditional and non-traditional students from West Virginia. This plan should also target prospective students' influencers and take into account the CTC System's various campus locations; and
 - Current Student Marketing: Tactics to actively engage current students in the Council's services and programs that will help ensure their academic success (i.e., academic and career planning, on-line course options, financial aid planning, campus life, community involvement and diversity).

Part 2: Deliverables

- High-level marketing strategy document for each key audience listed in Part 1;
- Specific marketing media plans (with budgets) for each key audience listed in Part 1, including traditional and non-traditional prospective students in West Virginia; and
- Brand rollout plan.

Part 3: Advertising Spot, Branding Guide and Campus Toolkit

- Development of Advertising Spot, as well as a Branding Guide and Toolkit for use by the CTC System.

Part 3: Deliverables

- Advertising Spot (:30 radio and television versions)
- Branding Guide for the campaign (i.e., tagline; editorial guidelines, photograph usage recommendations, messaging/storytelling framework; recommended visual elements, secondary palette, fonts, etc.)
- Campus Toolkit with sample collateral options (i.e., print ad templates for each key audience, interactive/social media ad templates, fact sheet templates, e - communications headers, letterhead/business card templates, video bumpers, presentation templates, etc.)

Part 4: Metrics and Measurement

- Formulation of a plan that will allow us to conduct baseline and follow - up measurement for the marketing strategy and media plan developed through this project.

Part 4: Deliverable

- Measurement plan that details the specific goals and metrics to be used to determine the success of implementation of the itemized requirements in the Scope of Work

IV. PROPOSAL FORMAT

A. Vendor's Proposal Format

This part of the RFP outlines the format the Vendor must follow in arranging information within the proposal.

Title Page: Should state the RFP subject and number, the name of the Vendor, Vendor's business address, telephone number, e-mail address and name of authorized contact person to speak on behalf of the Vendor, dated and signed.

Table of Contents: Clearly identify the material by Section Title and Page Number as follows:

RFP Section I: Agency (Vendor) Capacity
 A. Experience
 B. Personnel
RFP Section II: Strategic/Creativity
 A. Methodology
 B. Client References
RFP Section III: Cost (sealed in a separate envelope)

Format – The proposal is to be organized in the above format and must address the requirements of the Scope of Work as requested.

Format and Length: The proposal shall be formatted as follows:

- Bound in a three ring binder, single sided
- Paper size – eight and one half inches by eleven inches (8 1/2 " x 11")
- Margins -not less than one inch (1")
- Text – single spaced
- Length - not to exceed 100 pages, inclusive of any addenda

The Council reserves the right to waive any minor errors and deviations from this proposal format.

B. Vendor's Proposal

Please provide the following in your proposal:

RFP Section I: Agency (Vendor) Capacity

A. Experience

1. Provide an Executive Summary as to your company's history, experience and services as they relate to the services proposed. Describe your company in detail as it relates to demonstrated success in creating brand messages and influencer campaigns for institutions similar in size and scope to the Council (public comprehensive colleges and universities) with the goal of enhancing the image, visibility, reputation and awareness of those institutions with prospective students and influencers.

Include size, number and type of all current accounts, length of time in business, in-house capabilities, location of your principal offices, and number of full and part-time employees. Summary should demonstrate you understand the Council's need for the services described in the Scope of Work.

2. Provide a corporate history/management summary showing that your company and/or its officers have been engaged for a minimum of five (5) years in providing similar services or products as requested in this RFP.
3. List all higher education institutions currently represented by your company. Also, list the number of years you have represented a sampling of clients of similar size and scope to the Council. List the length (timeframe) of the agreements you currently have in place with other higher education institutions.
4. Provide a description of your company's qualifications to meet specifications and provide the services/products requested in this RFP, including a history of your company's prior experience in this area.
5. Define the attributes that distinguish your company from the competition. Share in detail your new business development philosophy, including the types of clients you specialize in representing. Provide the total number of employees compared to the total number of clients you represent.
6. If your company partners with any other suppliers for the delivery of services/products requested by this proposal, explain each partner, the nature of the relationship and the services/products provided.
7. Describe any specific restructuring, mergers and/or downsizing with your firm that has occurred during the past three years or is anticipated in the next three years, noting potential impacts to the services contemplated by this

RFP. Provide information relating to company bankruptcies or reorganizations due to financial hardship. Describe any current lawsuits, legal actions or governmental investigations against your company including, but not limited to, parties of dispute, any equipment affected, cause of action, jurisdiction and date of legal complaint.

B. Personnel

Identify all personnel who will be assigned to this project as necessary to fulfill the requirements as detailed. Provide locations(s) in which the assigned account team is based. Provide a proposed project organization chart as well as resumes for the Project Manager and all proposed staff on the project organization chart. Indicate the portion of their time that each would be dedicated to this project. Be as specific as possible regarding their particular fields and qualifications. Each resume should not exceed two pages.

RFP Section II- Strategic/Creative

A. Methodology

1. Provide a clear and descriptive response as to how you will provide or meet the requirements of the Scope of Work. You must respond to each requirement in numerical order of the RFP and provide a narrative of your company's ability to provide the requirements of the proposal.
2. Provide a detailed description outlining the step-by-step approach/methodology and recommended timeline for realizing each phase of work. Describe in detail the technical and implementation management methodologies for the proposed solution. Include anticipated deliverables and benchmarks for measuring the success of the various elements of the project.
3. Describe any significant requirements, challenges and outcomes that should be met or completed to ensure success, as well as any other special conditions that will be required to complete this project.
4. Describe your company's expertise managing an inclusive process with clients and facilitating engagement/buy - in from key stakeholders.
5. Include three (3) case studies of your company's most creative campaigns that are comparable to this assignment. Each case study should include the creative brief or an abstract of the work that outlines the project objective, target audience, strategies/tactics, creative portfolio and an overview of how the project was evaluated for success.
6. Provide an example of a successful social media strategy implemented on behalf of a higher education client with the goal of influencing students or

prospective students.

7. Provide a detailed description of how you would coordinate and communicate with the Council personnel throughout the project.

B. Client References

Supply the contact information and client background for three (3) client references. Submit references for clients that are most similar to the services being proposed in this RFP using the reference form contained in Appendix B. At least two of the three references must be a higher education institution.

RFP Section III - Cost (sealed in a separate envelope)

Provide comprehensive cost information for the project as outlined in this RFP, including a thorough breakdown of the fees and payment schedule/options, and the cost to complete each phase of the project.

This cost proposal must be tied to a timeframe and include service milestones or deliverables related to payments. The proposal must also include all travel and other expenses.

The Total Project Cost must be clearly identified.

The Council may reject any fees not identified as part of the supplier's proposal.

VI. PROPOSAL SUBMITTAL INSTRUCTIONS

Technical proposal (RFP Sections II and II) is to be submitted as one (1) original, signed in full in ink, as described in Section V, Proposal Format. Provide a PDF copy of the technical proposal on a flash drive.

Cost proposal (RFP Section III) is to be submitted in a sealed envelope marked "COST." Cost proposal is not to be included on the flash drive.

The outside of the envelope or packages should be clearly marked:

RFP#: 17138

Opening Date/Time: June 13, 2017, at 3:00 PM

VII. EVALUATION PROCESS

Proposals will be evaluated by a committee of three (3) or more individuals in accordance with the criteria stated. The firm (Vendor) that meets all the mandatory specifications and attains the final highest point score [maximum] may be awarded the contract.

The recommendation of the successful firm will be made by a consensus of the evaluation committee. Proposals will be evaluated and scored as follows:

Technical Score

- I. Agency Capacity 30 Points Possible
- II. Strategic/Creative 45 Points Possible

Cost Proposal Score 25 Points Possible

Each cost proposal will be scored by use of the following formula:

$$\frac{\text{Technical Score of this Proposal}}{\text{Highest Technical Score of All Proposals}} \times 75 = \text{Technical Score}$$

$$\frac{\text{Cost Score of this Proposal}}{\text{Lowest Cost Proposal}} \times 25 = \text{Cost Proposal Score}$$

$$\text{Technical Score} + \text{Cost Proposal Score} = \text{Total Score}$$

VIII. OTHER PROVISIONS

- A. The Council reserves the right to add additional related services based on the original offer upon mutual consent of the Council and the successful Vendor on pricing, performance, etc.
- B. Only written information, interpretations and instructions issued by the Chief Procurement Officer will be considered official. Vendors shall not rely on any oral interpretations, information and instructions.
- C. Only requests for information received by the Council’s Chief Procurement Officer in writing from Vendors will be considered official.
- D. All expenses associated with preparing and submitting proposals are the exclusive responsibility of the Vendor. Proposals will become a matter of public record and open for inspection following the announcement of contract award.
- E. Vendors submitting proposals may be asked to provide a demonstration of their

product/service in person or via videoconference or webinar.

- F. Evaluations will be based on overall service, qualifications and costs presented in the proposal. An award will be made based on the evaluation committee's determination of the proposal that gives the Council, the Community and Technical Colleges and students the best value. An award will not necessarily be made to the Vendor submitting the lowest cost.
- G. Payment for services will be made monthly in arrears upon completion of the required services, submission of an uncontested invoice and the acceptance of the required reports. Advance payments are not allowed.
- H. The Council is exempt from federal and state taxes and will not pay or reimburse such taxes. The Vendor may request a tax exemption certificate.
- I. The proposal of the Vendor shall provide complete and total compensation for the scope of work identified herein. The Chief Procurement Officer must approve additional service and additional compensation, if deemed appropriate, and an approved change order to the contract is required before payment can be made.
- J. Discussions and interviews may be held with Vendors under final consideration prior to making a selection for award; however, a proposal may be accepted without such discussions or interviews. In the event that mutually acceptable terms cannot be reached within a reasonable period of time, the Council Office reserves the right to undertake negotiations with the next most advantageous firm without undertaking a new procurement process.
- K. The State of West Virginia Agreement Addendum (WV96) is attached to demonstrate the State law which must be adhered to in any contracts presented to the Council for execution. The successful firm must be a registered Vendor with the WV Department of Administration prior to any award, pay the annual registration fee, and have a valid Vendor number.
- L. The successful Vendor must be a registered Vendor with the West Virginia Department of Administration, Purchasing Division, and pay the required Vendor registration fee prior to receiving a contract/purchase order. Vendor Registration information is available at the following URL:

<http://www.state.wv.us/admin/purchase/vrc/wv1.pdf>
- M. The following are incorporated into this RFP and made a part here of:
 - Exhibit A, Instructions to Bidders
 - Exhibit B, Purchase Order Terms and Conditions
 - Exhibit C, Agreement Addendum (WV-96)
 - Exhibit D, Purchasing Affidavit