

WV HIGHER EDUCATION POLICY COMMISSION  
RFP #20115 ADVERTISING AND MARKETING SERVICES  
ADDENDUM #1 – JANUARY 29, 2020

QUESTIONS AND ANSWERS:

1. Is there an appointed project committee or central marketing team for the Council and/or Commission that vendors will be working with?

Answer: Vendor will work directly with the Director of Communications for the Council and Commission.

2. Are vendors required to submit with our response a license to do business in the state of West Virginia? If we do not have one, does that disqualify us from responding?

Answer: A West Virginia business license is required prior to issuance of a purchase order. You do not need a WV business license to bid.

3. Page 13 cites the need to include Exhibit G – Advertising and Marketing Services Requirement Checklist. However, Exhibit G on the bid website is the cost page. Further, that checklist seems to appear on Exhibit F in conjunction with the Creative Requirements Checklist. Is Exhibit F supposed to be a separate RFP form that we are not seeing on the bid site?

Answer: The Exhibit reference for 8.3.5 Advertising and Marketing Services as listed in the RFP is incorrect. The correct reference is Exhibit F.

The Exhibit reference for 8.3.7 Cost Sheet as listed in the RFP is incorrect. The correct reference is Exhibit G. The RFP has been updated with the correct references. (Replacement pages are attached.)

4. What is the budget range for this project? Does the budget include funds to purchase media?

Answer: Budget will be determined based upon available resources in any given budget year and will hinge on services provided by the vendor.

5. Is this a first-of-its-kind initiative between the Commission and Council, or will this project build upon past marketing efforts to promote an array of similar programs under a single integrated marketing strategy?

Answer: While marketing for individual programs has been done in the past, this represents the first time that the Commission and Council will jointly promote their initiatives.

6. Does the State envision a multitude of separate marketing campaigns for each of the four (4) priority programs and ten (10) additional programs listed in the RFP to drive participation and application for each, or a single statewide campaign that positions the various opportunities offered by the State and drives general awareness?

Answer: Since the programs have varying target audiences, separate marketing campaigns will likely be necessary; at the same time, it is the goal of the Commission and Council to market all programs under the umbrella of its broad college attainment goal (West Virginia's Climb initiative).

7. Please elaborate on what the State means by "promotional material production." Does this imply the need for print collateral such as brochures, direct mailers and the like? Or is this envisioned to be promotional items such as t-shirts and other branded giveaways for events?

Answer: "Promotional material production" refers to print collateral – brochures, rack cards, etc.

8. For the social media planning and execution component, does the State envision vendors to develop and implement an organic content strategy including content development and social media management for each of the Council and Commission's active social media channels? Or is this envisioned to be strictly paid social media advertising efforts?

Answer: The focus will be on paid social media advertising efforts; the Commission and Council social media pages will continue to be managed by internal staff.

9. Does the State envision public relations in the area of event planning to entail setting up press day events featuring interviews with Council and Commission leaders, dignitaries and other newsworthy figures to garner publicity coverage by local media outlets? Or are events envisioned to be more sponsorship opportunities and experiential activations at events that already garner media coverage? Please elaborate what the expectations are for PR events.

Answer: It is anticipated that need for support around events will be minimal; if and when needed, this would include event planning, securing media coverage, and day-of support.

10. Please elaborate on what the State needs for "website consultation and creative application". Is this envisioned to be the design and development of a campaign specific microsite to serve as a central engagement arena for all the programs as part of a single statewide awareness campaign? Or development of landing pages for each of the State's programs?

Answer: Landing pages for some of these programs already exist; the vision for this marketing campaign is to refresh and/or create landing pages for each program (to be linked from the Commission and/or Council websites) rather than a new, all-inclusive website.

11. Please elaborate on what is meant by “budget control and shared responsibility for cost control.”

Answer: This means shared responsibility for budget management between the Commission/Council and vendor to include cost containment around media purchases, printing costs, etc.

12. Does the Commission and/or Council have an in-house creative team that is expected to produce some of the creative assets? Or are the vendors expected to handle all creative production?

Answer: The vendor will be expected to handle all creative production.

13. Does the State require consumer research to include quantitative market studies?

Answer: While not required, this would be considered added value.

14. Please identify the designated location for any on-site collaboration between vendors and the Commission and Council. Is this envisioned to be at one of the State system’s universities or colleges?

Answer: On-site collaboration will primarily occur at the Commission and Council offices in Charleston, WV.

15. For Section 6.2.2, does the State expect vendors to submit the actual month-by-month media plan deliverable for the example campaign, or will a high-level overview of the approach to the media plan suffice?

Answer: A high-level overview is appropriate.

16. Please explain anticipated activities relating to the term “Direct Marketing Consultation” as it appears on page 6 of the RFP under “Contractor Responsibilities”.

Answer: We anticipate “Direct Marketing Consultation” to include discussions with the Commission/Council Director of Communications regarding activities around the programmatic marketing campaigns.

17. Please describe the scope of duties anticipated relating to the reference “Public relations expertise in the area of event planning” as it appears on page 6 of the RFP under “Contractor Responsibilities” and again as “Special event marketing and planning” at the term appears under Section 6.2 on page 12 of the RFP.

Answer: See Question 9.

18. Please provide examples of past public relations events that the Commission or Council have initiated/sponsored in the last three (3) years.

Answer: Past public relations events have included Higher Education Day at the Legislature that was tied to the 50<sup>th</sup> anniversary of the West Virginia Higher Education Grant Program (2019), as well as a visit from the U.S. Labor Secretary in conjunction with the announcement of a \$4 million grant to create the Apprenticeships in Motion program (2019).

19. Please name the organization(s) or persons (s) who have provided advertising, marketing or public relations services to the Commission or Council in the past three (3) years.

Answer: See Question 38.

20. Regarding item 5.9 on page 10 of the RFP, " Vendor's media buy markup must not exceed 3% of the price paid for the media buy". Advertising agencies typically receive a 15% discount on the gross cost of broadcast media. Net cost is defined as the gross cost of the media less the 15% agency discount. Is the markup to be based on the net or gross cost of the media?

Answer: The markup is to be based on the net cost.

21. What was the Commission/Council advertising/marketing budget for each of the last three (3) years?

Answer: The Commission and Council do not have set advertising/marketing budgets; the availability of marketing-related dollars depends on state-level investments and grants that are tied to specific programs. While we don't have set marketing budgets, the allotment we have for these services comes from allowable administrative costs as part of our overall agency budget and state student financial aid programs. We work to keep our administrative costs lower than what is permitted, but our immediate need through this RFP is to prudently use these funds to drive student interest and enrollment in programs that will benefit them.

22. What is the anticipated advertising/marketing budget for the three (3) year term of this contract?

Answer: See Question 4.

23. Is the Vendor proposal expected to provide narrative in the response that specifically and separately addresses the requirements of Sections 5.1, 5.2, 5.3, 5.4, 5.5, 5.6, 5.7, 5.8, 5.9 and 5.10?

Answer: For Mandatory Requirement Sections 5.1 – 5.10, the vendor is to complete Exhibit E and mark each requirement as either "Met" or "Not Met". Vendor may reference pages that contain information relevant to these requirements on Exhibit E as well.

24. Stated another way, must the Vendor Proposal contain a point-by-point narrative response to Sections 5.1 – 5.10, or does the Vendor just need to reference the appropriate page number(s) within responses to Section 6 and Section 7 where relevant information can be found to address each of the areas Section 5.1 – 5.10?

Answer: See Question 23.

25. Exhibit E – are the columns marked “MET” and “NOT MET” for the vendor to fill in or are those reserved for the use of the evaluators.

Answer: See Question 23.

26. Exhibit E and Exhibit F – is it acceptable to provide multiple page numbers (i.e. pages 3,7,13) or a range of page numbers (i.e. pages 7-10) in the “PAGE REFERENCE” column of these checklists or must it be only one (1) page number listed there? In some cases, we anticipate having relevant content addressing those broad topics in multiple sections of our response.

Answer: It is acceptable to provide multiple page numbers or a range of page numbers.

27. Referencing Section 6.2.1 – Provide a written description (suggestion maximum of two pages for each section, not including samples) outlining your experiences and how you will provide full-service capabilities in each of the areas listed above – the following question is presented:

Is Section 6.2.1 referencing above as meaning the 13 services outlined in Section 6.2 or does it mean all sections after Section 6.1, or some other set of sections?

Answer: This is referencing the services outlined in Section 6.2.

28. Referencing the Media Sections 6.1.1 and 6.1.2 - Do you have federal grant funded media buys that require reach and frequency data as well as ratings information? If so, do you require the successful bidder to purchase Nielsen rating data and a media placement software such as Smart Plus to run the reports that the grants require? Is proof of Nielsen subscription a mandatory requirement?

Answer: No.

29. What is the budget for this piece of work?

Answer: See Question 4.

30. Does each program have its own advertising budget, or will this draw from one large advertising budget?

Answer: Each program has its own budget.

31. Will preference go to local/West Virginia firms?

Answer: No. As per WV State Code §5A-3-37, preference for West Virginia vendors is for the purchase of commodities or printing. The WV resident vendor preference is not applicable for services.

32. Do you use a CRM and if so which one?

Answer: The Division of Financial Aid, through which all of the financial aid programs are administered, does not currently have a CRM. The Division is in the process of procuring one.



33. What is your current inquiry to enrollment timeframe for current students?

Answer: For the majority of financial aid programs, students can begin applying October 1<sup>st</sup> for the following academic year.

34. Do you currently know your inquiry to enrollment percentage for each program?

Answer: Each program is going to have a different application to award percentage. We do not measure inquiry to enrollment but application to award for each individual program.

35. What is the current attribution model for enrollments?

Answer: This does not pertain to us for financial aid.

36. What are your KPIs or goals around enrollments and inquiries? Any marketing-specific goals?

Answer: Specific goals have not been set.

37. What are the top characteristics you are looking for in an agency partner?

Answer: Key characteristics include experienced staff who are experts in their fields; dedication to an open line of communication with the Commission and Council; a basic understanding of the programs and initiatives outlined in the RFP; and, transparency in creating value for the Commission and Council.

38. Is there currently an agency or agencies doing this work and if so what are your dislikes and likes of working with that partner?

Answer: The Council is working with National CineMedia LLC and RNS Communications Inc. for marketing West Virginia Invests in movie theaters and at DMV locations, respectively; the Commission recently worked with Auge+Gray+Drake on logo design and mailer services for the Underwood Smith Teaching Scholars program; and, the Council has worked with the Asher Agency on website updates and design services.

39. Where is your current website hosted and do you have a CMS?

Answer: The Commission's website is [wvhepc.edu](http://wvhepc.edu); the Council's website is [wvctcs.org](http://wvctcs.org); and most of these programs are promoted through our free college- and career-planning website, [cfwv.com](http://cfwv.com). In addition, West Virginia's Climb initiative can be found at [wvclimb.com](http://wvclimb.com); West Virginia Invests is detailed at [wvinvests.org](http://wvinvests.org); and the Underwood Smith Teacher Scholars Program is located at [teachinwv.com](http://teachinwv.com). The Division of Financial Aid, through which all of the financial aid programs are administered, does not currently have a CRM. The Division is in the process of procuring one.

40. How many other current agency partners do you have and what are their responsibilities?

Answer: We are currently working with Auge+Gray+Drake to update the logos of various Commission and Council programs. In addition, see Question 38.

41. Are you currently using any measurement/analytics tools and if so what are they?

Answer: Beyond website hits and social media reach, we are not currently utilizing measurement/analytics tools.

42. What are you expecting in regard to the special events piece?

Answer: See Question 9.

43. Do you have any standing requirements on the scope or size of the PR service, in terms of required releases or processes?

Answer: No.

44. Reference page 2, Section 1.6 “the bid opening date/time” I see the release date was January 16, 2020. What is the opening time or where is that located?

Answer: The bid opening date/time can be found in Section 1.2.

45. Reference page 2, Section 1.6 “a digital copy of the proposal should be submitted.” Is the “Pricing Information” referenced on page 10, Section 5.10 to be included or excluded from this digital copy.

Answer: Pricing information should be excluded from this digital copy.

46. Reference page 14, Section 8.4 “proposal will be evaluated on a 100-point scale...Vendor must score a minimum of 70% (49 points)...Is it 49 points or 70 points?”

Answer: It is 49 points exclusive of the points for cost.

47. The only mention of outsourced services and other related expenses in the proposal is in Section 5.8. Is a mark-up allowed on purchased items and Subcontracted Services?

Answer: Yes.

48. Does the Cost Sheet need to include a place for the percent being charged as well as the cost of the added service/expense? As background, most RFP's have a basic cost, say \$25,000, and allow a mark-up up to 5%, so someone bidding 2.5% would have an added cost of  $\$25,000 * .025 = \$625.00$ .

Answer: See updated Exhibit G (Cost Sheet) which is attached.

49. Section 5.9 says that media mark-up can be as much as 3%, however the cost sheet does not have a line for media mark-up. Most RFP's have a line something like  $\$250,000 \times 1.5\% = \$3,750.00$ . Will mark-up be added to the cost sheet? If not, are we required to list it there as a percentage?

Answer: See Question 47.

50. Section 6.1 starts off talking about Creative Services as they are typically described as being graphic design oriented, everything after that is a Media Services description. The checklist for 6.1 Creative Services Desirable Requirements does not have a check-off for Basic Creative Services as described in 6.1. Is this an oversight? If not, are we not required to answer for 6.1 because no points are assigned to it?

Answer: Section 6.1 is a descriptive paragraph; Sections 6.1.1-6.1.6 are where the information is requested.

51. Section 6.1.1 to Section 6.1.6 describe Media Services of various types, however there are no media buying services explicitly detailed on the Cost Sheet. Are Media Buying Services billed under Ad Executive Hours, Graphic Artist Hours or Administrative Hours?

Answer: Yes.

direct responsibility for the services.

7.2 Describe the experience that key personnel have, their length of service with the firm, as well as other relevant skills.

7.3 Describe the Firm's size and financial stability, illustrating its ability to fulfill the terms of the RFP.

7.4 Describe any related experience that has been provided in the last five (5) years.

7.5 Provide the names, telephone numbers and mailing addresses of at least three (3) clients and the contact person from whom references may be obtained for both the firm and the key personnel assigned to the engagement. References should be from clients comparable to the type and scope of services solicited in this RFP. Preference may be given to vendors with Higher Education experience.

## **SECTION 8: VENDOR RESPONSE AND EVALUATION CRITERIA**

8.1 Economy of Preparation: Proposals should be prepared simply and economically, providing a straightforward, concise description of the vendor's ability to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.

8.2 Proposals should be limited to one hundred (100) pages. Additional material may be presented as attachments to the main proposal.

8.3 Proposal Format: Vendors should provide responses in the format listed below:

8.3.1 A Title Page (Exhibit D) should be provided. The Title Page is the preferred method of providing the vendor's information. If the vendor does not utilize the Title Page, the bid must provide a cover letter with, at a minimum, the signature of an individual authorized to obligate the company and a date.

8.3.2 Table of Contents. Clearly identify the material by section and page number.

8.3.3 Mandatory Requirement Checklist (Exhibit E). Clearly identify if the Mandatory Requirement is met and include a page reference as to where it is addressed in the bid.

8.3.4 Creative Requirement Checklist (Exhibit F). Clearly identify, by page reference, where the information relating to each Creative Services Requirement is addressed in the bid.

8.3.5 Advertising and Marketing Services Requirement Checklist (Exhibit F). Clearly identify, by page reference, where the information relating to each Advertising and Marketing Services Requirement is addressed in the bid.

**RFP 20115 COST SHEET**

*(to be included in separate sealed envelope)*

Vendor Name: \_\_\_\_\_

For evaluation purposes, price out the Cost of Services Bid as discussed below. There is no guarantee that the Commission and/or Council will use a set amount of services, or that the Commission and/or Council will use all of the services. This scenario is for Evaluation Purposes ONLY.

Amounts quoted must be all-inclusive. No additional amounts, such as for travel or overhead, will be paid to the vendor.

**Sample Breakdown of Potential Services:**

- Planning/Research Analysis: 5%
- Content Creation/Copy Writing: 15%
- Design Work: 15%
- Media Planning and Buying: 25%
- Social Media Planning and Execution: 20%
- Public Relations/Events: 10%
- Client Consultation: 5%
- Campaign Evaluation: 5%

Vendor must provide hourly rates by employee classification and identify the mark-up rate that will be used:

Senior Ad Executive \$ \_\_\_\_\_  
Ad Executive \$ \_\_\_\_\_  
Graphic Artist \$ \_\_\_\_\_  
Administrative \$ \_\_\_\_\_  
Mark-up Rate: \_\_\_\_\_%

Vendor should determine its own fair rate and quote the price it will charge. This hourly rate will be the maximum rate allowed for conducting work for the Commission and/or Council under a contract resulting from this RFP.

**Total Cost of Services Bid**

Insert the amounts you bid for the hourly rate, and then perform the calculation shown.

1. 500 Senior Ad Executive Hours x \$ \_\_\_\_\_ (hourly rate bid) = \$ \_\_\_\_\_
2. 800 Ad Executive Hours x \$ \_\_\_\_\_ (hourly rate bid) = \$ \_\_\_\_\_
3. 800 Graphic Artist Hours x \$ \_\_\_\_\_ (hourly rate bid) = \$ \_\_\_\_\_
4. 300 Administrative Hours x \$ \_\_\_\_\_ (hourly rate bid) = \$ \_\_\_\_\_
5. Total Cost of Services (sum of lines 1-4) = \$ \_\_\_\_\_

8.3.6 Vendor Response to the RFP illustrating your understanding of the RFP and the services being requested.

8.3.7 Cost for services should be provided on the Cost Sheet provided in Exhibit G.

**NOTE: ALL PRICING INFORMATION IS TO BE PROVIDED IN A SEPARATE SEALED ENVELOPE LABELED AS PRICING INFORMATION (SEE SECTION 5.9.10).**

8.4 Proposal Evaluation. The proposal will be evaluated on a one hundred (100) point scale with points assigned as outlined below. **Vendor must score a minimum of 70% (49 points) to be considered a qualifying proposal.**

8.4.1 Qualifications, Experience and Company Background – 30 points

Responses to Section 7 will be reviewed and evaluated here.

8.4.2 Services – 40 points

Responses to Section 6 will be reviewed and evaluated here.

8.4.3 Price – 30 points

The low bid will receive the full 30 points. Each higher bid will receive a percentage of the 30 points on a ratio basis compared to the low bid cost.

8.5 Award will be made to the vendor receiving the highest point total.

8.6 In the event that mutually acceptable terms cannot be reached within a reasonable period of time, with the highest ranked vendor, the Commission/Council reserves the right to undertake negotiations with the next highest ranked vendor and so on until mutually acceptable terms can be reached.

**SECTION 9: ADDITIONAL INFORMATION**

9.1 By submitting a proposal in response to this RFP, a firm shall be deemed to have accepted all the terms, conditions, and requirements set forth in herein unless otherwise clearly noted and explained in writing. Any exception(s) or additional terms and conditions a firm wishes to offer for consideration must be clearly itemized and explained. Otherwise, the RFP in total shall be incorporated into the contract by reference. The Systems may accept or reject the Firm's proposed exceptions as it deems appropriate and in the best interests of the Systems.

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9.2 The State's Agreement Addendum (WV-96) is attached to demonstrate the State law and guidelines which must be adhered to in any contracts presented to the Systems for execution (See Exhibit H). A copy of additional terms and conditions that a firm wishes to offer for consideration should be enclosed with the proposal. The West Virginia Attorney General's Office must accept or reject proposed modifications to the WV-96.