



MONTCLAIR STATE UNIVERSITY

Montclair, NJ 07043

ADDENDUM NO. 1

Request for Proposal # 1402 Creative and Strategic Marketing Services

Date of Original Bidding Documents: April 1, 2019

Date of Addendum No. 1: April 12, 2019

INTENT: This Addendum forms a part of the Contract Documents and modifies the Original Bidding Documents and Prior Addenda, if any, as identified above. Acknowledge receipt of this Addendum in the space provided on the Bid Form. Failure to do so may subject Bidder to disqualification.

I. Points of Information:

1. Page 8 thru 9: Section 3.0, Do you have a total budget for the five key elements of this project?

Answer: We anticipate spending a range between \$400-500k per year. However, budgets have not been finalized and these figures may change.

2. What is the allocation of funds across the 5 key elements?

Answer: No specific allocation share/weighting has been predetermined

3. In Section 3.0.1 – Brand Development, Do you already have brand research completed?

Answer: In 2018, the University commissioned a comprehensive perception study which included some message testing and an Admitted Students Questionnaire. In addition, the university has other studies, including perceptions of graduating seniors and the NSSE engagement survey, as well as in-house market research for all new program offerings.

4. Are you looking for a company to utilize this research to craft and plan a strategy?

Answer: Our expectation is for the awarded bidder to draw on data from the University's research to help craft strategy recommendations. If the bidder believes additional research is needed, please state that in the bid and provide a cost. You may be interested in referencing our

currently in-market RFP #1403 for media buyer services, which includes a separate, standalone and periodic research requirement.

5. Are you open to additional research to guide the brand development initiatives?

Answer: Our expectation is for the awarded bidder to draw on data from the University's research to help craft strategy recommendations. If the bidder believes additional research is needed, please state that in the bid and provide a cost. You may be interested in referencing our currently in-market RFP #1403 for media buyer services, which includes a separate, standalone and periodic research requirement.

6 Can you provide the budget allocation amongst these 5 strategies?

Answer: No specific allocation share/weighting has been predetermined.

7. In Section 3.0.2: - Please confirm if you are looking for any paid digital advertising as part of this RFP? (EG: PPC, Display, Retargeting, etc.) Or, can you confirm if this focus is for social media platforms only?

Answer: Paid digital advertising is part of the creative strategy requirements for this RFP. Please note that media buying and media plan execution will be the responsibility of a separate vendor.

8. If you are looking for paid digital advertising, what are the Target Geographies you want to reach?

Answer: Generally speaking, Montclair State's recruitment footprint is within New Jersey, and more specifically—northern and central NJ. Certain graduate and undergraduate programs (e.g. online MBA, theatre) have had success recruiting out of state in PA, NY, CT, MD, DE and other territories. With the rise of Montclair State to national research doctoral university status, we are open to new and improved creative strategies that will help promote the institutional brand to out of state audiences.

9. Are there specific programs you are looking to promote? If so, what are they?

Answer: In priority order: revenue-generating master's programs, doctoral programs, undergraduate programs and certificate programs

10. Are there landing pages currently for all of these programs?

Answer: Programs with paid advertising allocated all have dedicated landing pages

11. Is there an opportunity have a call prior to creating/submitting our RFP to glean additional information?

Answer: The written Q&A will serve as this opportunity for all bidders

12. In Section 3.0.3, what is your current CMS?

Answer: WordPress

13. Are you looking for assistance with your current efforts or organic efforts only?

Answer: Creative strategy extends to all of our marketing channels – Paid, Earned, Shared and Owned

14. In Section, 3.0 Scope of Work, In order to better understand our involvement/work effort as it pertains to the execution and delivery of brand and marketing assets, can you further define what you envision the in-house staff to take on? I.e. copy writing, design, programming etc.

Answer: In-house staff capabilities include copywriting, design with Adobe Creative Cloud applications (primarily using InDesign and Photoshop), coding/programming where necessary (e.g. animation digital display banners), photography, videography, pre-press print collateral production, project management. Motion graphics would be a specific area where our capabilities would need external support (among others). This is not an exhaustive list, but one provided to illustrate the point that our in-house capabilities are varied and of a high quality, but limited around times of the year in which we are busier (e.g. Commencement).

15. Have you identified the areas of expertise the external service providers will be supporting?

Answer: These items have been identified in the five key actions (e.g. video capabilities). Please reference RFP Section 3.0, Scope of Work.

16. 3.0.1. Brand Development, Will the selected bidder work strictly off the assembled research or will there be an opportunity for additional research/discovery if we identify gaps in the research?

Answer: We will consider proposed supplemental research recommendations

17. Since this contract will extend over multiple years should we expect that additional brand research will be a part of the assignment?

Answer: We will consider proposed supplemental research recommendations that include specific ideas around frequency, scope, type and follow-ups

18. What are your key audiences (in order of priority) for your brand narrative(s)?

Answer: In order of priority, Prospective graduate students, prospective undergraduate students, current students, current faculty and staff, alumni, NJ state legislators

19. Are templates to be included as part of the development of the brand manual?

Answer: Yes

20. Which institutions do you consider to be your primary competitors? Your aspirational competitors?

Answer: NJ State University and Colleges of similar size and scope as Montclair State University are our main competitors.

21. What are the issues regarding the current athletic sub-brand and is the creation of a new identity a part of this assignment?

Answer: Bidder proposals should include strategic recommendations on how a new/updated athletics sub-brand might be conceptualized, designed and implemented. The proposal should include ability to provide strategic counsel for the Universities brand including the athletic sub-brand.

22. What is your current CRM? And are you using a marketing automation platform?

Answer: The current application portal and CRM is Slate. The University is not currently using a marketing automation platform (we are open to inclusion of automation tools in strategic recommendations)

23. Is the development of a lead nurturing/lead development strategy to be included in this effort?

Answer: This is not a requirement for this RFP response.

24. RFP Reference: 1.2 - Page 4, with the multiple projects and campaigns run in 2018, were they all externally focused or were there also internal brand efforts executed?

Answer: Generally externally focused, with the exception of graduate programs (e.g. they recruit from amongst our undergraduate population) and for the public unveiling of the new fundraising campaign for the University (entitled *Soar*).

25. Being that the university has doubled its enrollment in the last 20 years; what has the

enrollment growth been in recent history (last few years)?

Answer: Total University headcount

Fall 2014 (FY14) 20,022

Fall 2015 (FY15) 20,465

Fall 2016 (FY16) 20,987

Fall 2017 (FY17) 20,743

Fall 2018 (FY18) 21,115

26. Given that the university has launched 80 new graduate programs in the last 20 years, are any new programs in progress that should be accommodated for in this scope or are focused on the current programs getting more exposure?

Answer: No Fall 2019 programs are included in the immediate scope, but graduate programs launching in spring 2020 and fall 2020 programs may require agency support.

27. RFP Reference: 3.0 - Page 8, Outside of the scope identified in the RFP, are there any specific areas that the in-house Communications & Marketing team has been facing difficulties in?

Answer: Nothing outside of what has been outlined in the scope outlined in Section

28. RFP Reference: 3.0.1 - Page 8, In the RFP it is indicated that "The University has assembled a platform of research to support this effort (Brand development), and it wants the selected bidder to"... In the research already performed, has a discovery been done to understand how to accomplish the goals or is a discovery intended to be part of the scope?

Answer: We will consider proposed supplemental research recommendations.

29. RFP Reference: 3.0.2 - Page 8, In terms of Student and Recruiting Marketing, the RFP stated "The University seeks enrollment growth and larger numbers of qualified applicants in targeted programs". Outside of an assumed focus on general growth in all programs, are there particular programs where you are looking for targeted growth campaigns?

Answer: In priority order: revenue-generating master's programs, doctoral programs, undergraduate programs and certificate programs.

30. RFP Reference: 3.0.4 - Page 9, is there any anticipation of the volume of collateral work that may be encountered?

Answer: Print and digital collateral needs will be largely managed by the in-house MSU team. Strategy and recruitment brand development work will largely influence key undergraduate and Feliciano School of Business collateral pieces (e.g. Travel Piece, Viewbook, Undergraduate business viewbook, MBA viewbook).

31. RFP Reference: 4.4 - Page 12, Is there a maximum number of pages for the proposal?

Answer: No

32. Page 4: 1.2 Background, What would you like the percentage of minority students to be over the next 5 years? (Hispanic vs non-Hispanic)

Answer: No specific targets for minority student enrollment have been set over the next five years. We expect that the University will maintain its Hispanic Serving Institution (HSI) status over this time period.

33. Page 10: 3.1 Statement of Qualifications, Is media buying part of the qualifications or media research and planning?

Answer: Media buying functions are assigned to a separate media buyer agency relationship. An understanding of media research and planning on the part of the chosen creative strategy partner is welcomed.

34. Page 8: 3.0 Commodity Descriptions of work/Scope of work, Can you define “major brand development initiative.” Does this include a full logo, naming and tagline study, research, design and re-engineering?

Answer: Bidders will recommend components and sub-components of a proposed brand development initiative for the University, informed by their prior experiences working in higher education and their understanding of the industry, as well as the stated long-term strategic goals of the University.

35. Do you have current brand awareness/effectiveness research you can share? Or can you provide the overall findings from that “research to support this effort?” and,

Answer: No, current brand awareness/effectiveness will be provided to the awarded bidder.

36. If not, do you see a research component (pre- and/or post-campaign production) as part of the path to creating your new/refreshed brand?

Answer: We will consider proposed supplemental research recommendations.

37. Will there be a creative pitch/tactical assignment round in this RFP process? - If not, could it be added?

Answer: No creative pitch/tactical assignment round in this RFP process—agency’s prior work examples will be evaluated as part of committee evaluation criteria

38. Page 4, Section 1.1: Is the University considering awarding this contract to more than one agency, or is there a desire to contract one agency/joint ventures who can complete all tasks?

Answer: A contract will be issued to a single bidder for this effort. We are also open to joint ventures as indicated in section 1.4.7 in the RFP.

39. Page 4, Section 1.2: Please provide examples of marketing programs that the Office of Communication and Marketing admire in category or outside.

Answer: NJ State University and Colleges of similar size and scope as Montclair State University.

40. Page 8, Section 3.0.1, has the University researched defined key audiences for this brand narrative initiative? Do you anticipate that you would need targeted brand narratives for each audience group?

Answer: Key audiences have been defined, and it is likely that more targeted brand narratives will be required.

41. If key audience research was not part of the initial study, does the University anticipate requesting that service from the agency selected?

Answer: This is not part of the project/relationship scope at this time

42. Page 8, Section 3.0.1: What are the areas within your brand’s visual identity that you’d like for the awarded agency to explore?

Answer: Nothing outside of what has already been outlined in the scope of work

43. Page 8, Section 3.0.1: Do you have any key timeline/milestone considerations to consider when planning for the internal and external promotional strategy? Such as a need for a brand book to guide inspiration + visual and verbal expressions based on the new brand narratives?

Answer: The recruitment cycle starting in summer 2020 is a specific deadline to highlight—brand book/manual for graduate and undergraduate recruitment needs should be in place by that date, at a minimum.

44. Page 8, Section 3.0.2: Do you have any existing research around previous recruiting marketing campaigns or would you prefer the selected agency to field research for both seated + online grad/undergrad program?

Answer: prior recruitment marketing campaign KPIs and success examples will be shared with the selected agency

45. Page 8, Section 3.0.2: For recruitment efforts, how much of your activity is allocated to digital efforts vs on the ground traditional marketing?

Answer: Mix is roughly 70% to 30% in favor of digital efforts.

46. Page 9, Section 3.0.3: What level of budget (or a budget range) are you looking to allocate to this work?

Answer: No specific budget allocation share/weighting has been predetermined.

47. Page 9, Section 3.0.3: What current digital channels does the University utilize in its current marketing efforts?

Answer: Paid digital channels: LinkedIn, Instagram, Facebook, Twitter, SEM, Display, YouTube preroll

Shared digital channels: LinkedIn, Instagram, Facebook, Twitter, YouTube

Owned digital channels: Website, emails, chatbot,

48. Page 9, Section 3.0.3: What current KPIs (success metrics) do you have in place for your digital marketing activity?

Answer: Paid: Clicks, bounce rate, leads driven to landing page(s), started applications, applications completed

Shared: Likes, shares, overall sentiment

49. Page 9, Section 3.0.3: What is the current monthly media spend for the Universities paid media efforts?

Answer: Over the past (5) five years, Budget has not been finalized.

50. Page 9, Section 3.0.3: Does the University have a defined and documented understanding of the key external audiences that the new digital strategy should be curated towards?

Answer: Yes—but our awarded bidder will be expected to provide strategy and insights to refine and improve this understanding of our key external audiences

51. Page 9, Section 3.0.3: Would the University like research (specific to digital activity and behavior) to be scoped if the current data and insights from within the University will not allow an effective digital strategy to be delivered and actioned upon?

Answer: Yes

52. Page 9, Section 3.0.3: Does the University look at other institutions and competitors as benchmarks? If so, who would be the top 3?

Answer: NJ State University and Colleges of similar size and scope as Montclair State University. No specific universities have been identified as top three (3).

53. Page 9, Section 3.0.3: What does success look like for the University in a new digital strategy?

Answer: The intent of this RFP is to award a contract to that responsible bidder whose bid proposal, conforming to this RFP is most advantageous to the University, price and other factors considered.

54. Page 9, Section 3.0.3: Is there a timeframe in which the new digital strategy should be delivered?

Answer: Yes, before the start of the recruitment cycle kicking off in summer 2020

55. Page 9, Section 3.0.3: As part of this scope, would the University require presentation and training of the new digital strategy to the wider organization?

Answer: Yes, with the understanding that the in-house MSU team will pick up the ongoing responsibility for these training and presentation efforts. This involvement will be up-front and limited in timeframe.

56. Page 9, Section 3.0.3: Who would be the key stakeholders involved in reviews and sign offs for this digital workstream?

Answer: Montclair State University Communications and Marketing, internal college/school/area unit(s)

57. Page 9, Section 3.0.3: Can you provide an overview of the current digital marketing process and activity that the University has implemented? This will allow us to understand the level of digital maturity within the teams.

Answer: Digital advertising lead attribution and the utilization of multiple paid digital platforms (e.g. LinkedIn, Facebook, Twitter, Instagram, Display, SEM, YouTube pre-roll) – if marketing planning requires a paid component, the University’s media buyer will be tasked with the responsibility of planning and deploying related digital assets under the supervision of the in-

house team. Creative agency is expected to work closely with media buyer around the strategy and KPIs for digital campaigns.

58. Page 9, Section 3.0.3: Does the University have any tools or systems setup to measure and optimize its digital marketing activity?

Answer: Reporting dashboard built in Tableau – this is managed and owned by the current media buyer partner for the University. Media buyer partner will be expected to propose tools or systems that will replicate this reporting functionality—collaboration with a creative strategy partner is welcomed

59. Page 9, Section 3.0.3: Does the University have any automated marketing tools and operations setup? If so, what are they?

Answer: No

60. Page 9, Section 3.0.3: What is the size of the team with the University that looks after and activates all digital marketing activity (campaign, ongoing contents, etc...), and can you provide a high-level overview of the team?

Answer: The primary day-to-day responsibility for digital marketing activity lies with the Director of Marketing and Analysis, the Assistant Director for Communications and Marketing and the Coordinator for Communications and Marketing

61. Page 9, Section 3.0.3: In relation to needing support in the creation of digital media components or marketing campaigns – would you be looking for the agency to carry out end to end campaign messaging creation, activation planning and launch management/optimization across channels in line with the new strategy?

Answer: Messaging strategy will be set by the selected agency closely collaborating with the in-house MSU team. Winning bidder will be expected to collaborate closely with the University's media buyer (this is a concurrently posted RFP #1403, available on the Procurement website) on all planning, management and optimizations needs.

62. Page 9, Section 3.0.4: What level of budget (or a budget range) are you looking to allocate to this work?

Answer: No specific budget allocation share/weighting has been predetermined.

63. Page 9, Section 3.0.4: Are you able to provide a high-level estimation on the volume of assets that might be required on a monthly basis?

Answer: No specific high level estimation on the volume of assets has been established.

64. Page 9, Section 3.0.5: What level of budget (or a budget range) are you looking to allocate to this work?

Answer: No specific budget allocation share/weighting has been predetermined.

65. Page 9, Section 3.0.5: Are you able to estimate the quantity of videos and edits you may want produced?

Answer: No

66. Page 9, Section 3.0.5: What channels does the University use to promote and show this type of recruitment content?

Answer: YouTube and on campus events

67. Page 9, Section 3.0.5: What elements of this scope would you expect your internal team or external vendors to undertake?

Answer: The selected vendor will be expected to take on each element of the Scope provided in this RFP. The internal team is capable of performing each of the key tasks provided in the Scope of work. However the awarded vendor will be expected to provide supplemental support and strategic counsel.

68. Page 16, Section 4.4.6: Please provide the budget allocated for the agency services across the five years or per year period.

Answer: No specific budget allocation share/weighting has been predetermined.

69. Page 8, Section 3.01, Brand Development, references a "platform of research." Can this information be shared with prospective vendors prior to bid submission or will it be shared only at a later date with the successful bidder?

Answer: Shared with the successful vendor.

70. Page 9, Section 3.02, Digital Strategy and Production and page 18, Section 6.1, Evaluation Criteria, references marketing channels/channel plans. Does MSU have other defined channels (beyond the identified social channel) that the agency must leverage as part of its proposal to MSU or is the channel plan completely open to the successful vendor's recommendations?

Answer: Proposal should include recommendation.

71. Page 9, Section 3.03, Digital Strategy and Production, as well as other sections of the RFP, makes reference to return on investment. Given that MSU is requesting help with measuring success against goals and/or help in meeting goals, is there a defined enrollment or ROI goal the university is hoping to achieve?

Answer: Enrollment prioritization is focused upon revenue-generating master's programs, doctoral programs, undergraduate programs and certificate programs

72. Page 9, Section 3.04, Collateral Production, and page 45, Price Sheet, references supplemental assistance for collateral production. Can MSU offer a specific definition (beyond the "200 hours") around this RFP requirement in terms of the number of separate projects per year that the vendor should anticipate to assist with producing print, video, and/or digital collateral materials?

Answer: Requested work beyond the stated 200 hour cap prediction cannot be anticipated at this time—it is our expectation that the majority of the design and production efforts will be handled by the in-house team at Montclair State.

73. Is there a defined 2020 media/creative budget that MSU is working with to leverage for its marketing plan?

Answer: No specific budget allocation share/weighting has been predetermined.

74. Can we get some insight into your high school junior and senior search strategies for on-ground and online students? How does MSU generate leads? If MSU purchases leads/lists, what is the approximate annual volume?

Answer: Undergraduate examples: NRCCUA name buys, RFI forms, articulation agreements with community colleges. Graduate examples: GRE names, current MSU undergraduate data, RFI forms

75. Can companies from Outside USA can apply for this? (Like, from India or Canada)

Answer: Companies from outside the United States are able to submit proposals in response to this RFP. However, foreign vendors will be subject to the applicable laws and regulations as provided within the RFP and outlined in the University's Standard Terms and Conditions.

76. Do we need to come over there for meetings?

Answer: In accordance to the Section 3.0 in the RFP, the selected bidder will be expected to meet in person with the University staff at least twice a year at the vendor's expense.

77. Can we perform the tasks (related to RFP) outside USA? (Like, from India or Canada)

Answer: Foreign vendors are not required to perform tasks within the USA however are subject to laws and regulations outlined in the Universities Standard Terms and Conditions.

78. Can we submit the proposals via email?

Answer: No. Proposals must be submitted in the formats outlined in Section 1.3.3 "SUBMISSION OF BID PROPOSAL" of RFP #1402."

II. Special Notice of Bid Extension:

NOT USED

III. Changes to Prior Addenda:

NOT USED

IV. Changes to Bidding Requirements:

NOT USED

V. Changes to Agreement and Other Contract Forms:

NOT USED

VI. Changes to Conditions of the Contract:

NOT USED

VII. Changes to Specifications:

NOT USED

VIII. Changes to Drawings:

NOT USED

Please acknowledge receipt of this Addendum No. 1 via email: bobetl@montclair.edu or fax. The fax number is 973-655-5468.

Company Name (please print)

Date

Signature

Title

Contact Name (please print)

Attachments:

None

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