

REQUEST FOR PROPOSALS #2021-010
Enterprise Marketing Firm
RESPONSE ADDENDUM # 1
March 17, 2021

#	Question	Answer
1	Can you confirm the proposed budget for this RFP?	<p>Annual historic combined budget for all campuses and system initiatives is approximately \$2.5-\$3.5, including agency media buys for several campuses. This does not include commercial print or non-agency media buys by individual campuses such as Facebook and google. A further breakdown by category is not available.</p> <p>There currently is no specific budget for research.</p> <p>Budget range provided for the Case study are a hybrid example of the types of projects that the University may want to conduct with the selected firm. These are for illustrative / evaluation purposes only and does not reflect an active / approved projects at this time.</p> <p>CRM systems vary by campus and include Salesforce and TargetX for Enrollment, and iModules for advancement. The System has a current RFP seeking proposals with the intention to migrate to an enterprise CRM solution</p> <p>This type of data does not yet exist for each campus or on a system-wide basis.</p> <p>This requirement will be removed from Rider A. An addendum to the RFP with a clarified SLA response request will be posted.</p> <p>The data provided for Use Case 1 is for Undergraduate. Budget was not provided. Costs should reflect effort required to provide the comprehensive strategic recommendations. This does not include associated creative content.</p>
2	Can you clarify your anticipated budget for the goals outlined?	
3	Appendix G: What does the \$2.5-3.5 million annual historical spend in Question 11 include?Fees?Print?Etc.	
4	Appendix G : Evaluation Questions : #11 Is the historic annual spend of \$2.5-3.5mm inclusive of media, agency fee and production? If so, what percentage of that spend has historically been focused on paid media?	
5	Another question, is there an earmark in the budget for research?	
6	The RFP states that "The budget range for this effort would be \$100,000 - \$250,000, and would include creative, production, media buys, and reporting." Does this budget represent the total investment across the University of Maine System, or is each university allocating a budget of \$100,000 - \$250,000 for this initiative?	
7	What is the University of Maine System's current budgets for each of these?	
8	Can you share what the University of Maine System's digital advertising spend was last year?	
9	Does the University of Maine System have an anticipated breakdown between paid search and paid social ad spend?	
10	As a platform agnostic company, we support a wide range of marketing CRMs. Are all of the campuses/schools utilizing the same CRM platform? If not, can you provide a list of which platforms are in use?	
11	The data provided in Use Case #1 is very helpful. Does this type of detailed data exist for each campus individually, or possibly for the system as a whole?	
12	Rider A:Please provide further clarification around:Toll-Free Access: The Contractor shall provide to the University, toll-free telephone access to technical support. The University prefers a unique toll-free telephone number just for the University. The Contractor shall provide an escalated support feature to ensure that unresolved support issues can be elevated to upper-level management.a. Please provide an example of unresolved support issues that may arise.b. What would you deem the urgency of the support issues?c. What is the expected usage and manned answering period? 24 hours? Work days? Holidays and Weekends?d. Would access to upper-level management, without a toll-free number, but with a direct service line suffice?	
13	Use Case 1: a. Are the competitive analysis reputation reports results of undergraduates only or undergraduates	

	<p>and graduates?</p> <p>b. Has a budget been determined and associated to achieve market position in order make recommended strategies?</p> <p>c. When you state: Present strategies to create awareness of the affordability and quality of a Maine University degree (with an emphasis on scholarship programs for Mainers) to achieve higher application and enrollment rates. Include details for recommended campaign components. Can you confirm no creative needs to be included but rather strategic recommendation.</p>	
14	Do they have any image and perception research on the system and/or the individual colleges?	Nothing current at this time and not budgeted. Recommendations would be considered, but not in scope for this RFP.
15	<p>Appendix H : Evaluation Questions : #3</p> <p>Is there any recent demographic or psychographic research that UMS has conducted that can be shared with regards to the traditional and non-traditional student populations?</p>	The available system wide data was provided with a link Appendix H: 2020 enrollment Data
16	What institutions occupy the current competitive set for constituents of the system? Other state universities -- especially in New England (in the case of USM and UMaine?) The law school? The graduate schools?	This does exist for some Universities. An example from Umaine can be found here: https://umaine.edu/oira/wp-content/uploads/sites/502/2020/12/Unrequited-love-Fall-2020.pdf
17	Has any in-school attitudinal research been done with students, alumni, faculty?	Varies by Campus.
18	Has a follow up research study been performed on potential students of UMaine since (the year we did the last one? Which might have been 2015 or so?)	No
19	How does the system anticipate the 2020 COVID year will impact potential matriculation over the next three years?	Unknown at this time
20	Demographically, what does the available student pool for university matriculation look like in the next 4 years? How stiff will competition be for students?	Data is available thru sources such as the New England Board of Higher Education (NEBHE), Western Interstate Commission for Higher Education. (WICHE) Some of this data was included in Case Study 1.
21	Will we have access to the downstream data (application, enrollment, etc.) to optimize performance?	Contracted firm will have access to downstream data as it is available
22	Constituent institutions of the University have received substantial grants from the Harold Alfond Foundation. To what extent will the work of the enterprise agency be employed to support capital and other fundraising efforts?	
23	Can you please help us understand what you mean by: Develop strategic campaigns to elevate signature programs and enhance our ability to attract public and private investment. What do you specifically envision your marketing partner doing in this area. Please provide more insight.	
24	Considering fundraising for the university system and each constituent institution, what is the role of advancement within each institution and to what extent will the system be engaged in fundraising? Conceivably, even with a unified system brand, each institution, particularly the law school and graduate faculties will differ in audience, and message from UMaine and the undergraduate campuses. It's conceivable that each institution will want a branded, but separate approach to the articulation of its fundraising program. How will budget priorities be allocated to allow for equitable development of custom messages and materials?	Specific fund raising efforts not in scope for this initiative. However, marketing efforts should enhance the University's image to support fund raising activity as stated in section 1.1.3, "Develop strategic campaigns to elevate signature programs and enhance our ability to attract public and private investment"

25	Also, as re fundraising, to what extent will fundraising under the term of the contract being addressed in this RFP be in the form of a capital campaign? Will support of ongoing alumni as well as major gifts program support be included in the overall scope of work?	
26	Whether companies from Outside USA can apply for this (like, from India or Canada)?	All proposals will be considered based on respondents ability to meet requirements and applicable State and Federal laws.
27	Can we perform the tasks (related to RFP) outside USA (like, from India or Canada)?	
28	Master Agreement: Please provide further clarification around: The Community College System and Maine Maritime Academy, both public higher education institutions in the state, shall be permitted to piggyback off of the University's contract if they should so desire.	This allows those institutions to utilize the University of Maine System contract without additional public procurement.
29	Rider B: Please provide further clarification around: Marine General Liability. Can the purpose for this coverage be further outlined?	Not required where not applicable.
30	Is there an incumbent firm / vendor who will potentially be responding to this RFP as well?	There are numerous firms who have done work for the various Maine Universities. All qualified Marketing firms are encouraged to respond. The goals for the initiative are outlined throughout the RFP.
31	Is there an incumbent agency currently handling this work?	
32	What prompted the release of this RFP? Do you have an incumbent agency and/or specific goals for the firm you are looking to contract with now?	
33	How is the marketing organized now? Is there an incumbent partner?	
34	Is there an incumbent providing similar services to the University of Maine System ? If yes, then please name the incumbent. If yes, can you describe why you are proceeding with an RFP to procure services? Are there different / new services you'd like a new vendor to provide?	
35	Appendix G: What type of online system are you referring to in Question 10: Online Systems: Does your solution include any online system? If yes, please describe. Prior to award, the University may request detailed technical specifications of your online system.?	Any online system that your firm hosts that the University would access should be described. Examples might include on-line dashboard for campaign results.
36	Online Systems: Does your solution include online systems? Would this include our portal that we would sync for results reporting.	Yes, if this is an online system that University staff will access as part of your solution
37	How do you envision content generation happening under this proposal? What will the balance be between the enterprise marketing firm and the campus marketing teams? Do you see the enterprise marketing team helping to create a content strategy and then the campus marketing team generating content? Or do you see the enterprise marketing firm doing both? Or a Hybrid of the two?	Likely a hybrid. Looking for firms to propose organizational recommendations and provide examples of engagements with similar multi-tiered organizations.
38	How will the contracted agency work with internal marketing teams at the individual institutions?	Looking for recommendations for how your firm proposes working with both individual institutions and the system as a whole
39	Will the individual institutions be executing some of their own marketing programs?	Contract will consist a Master Agreement covering terms and conditions and scope for all Universities and the System (appendix D: Master Agreement). Specific projects for institutional campaigns will be added as budgets and campus requirements dictate using the provided form (appendix D: RIDER D: Services Engagement Form)
40	Is the University of Maine Graduate School of Business part of this RFP ?	Yes.
41	Will marketing departments at individual institutions retain some autonomy in terms of having separate marketing budgets?	Yes

42	How will the marketing firm work with the system PR teams and/or other PR contractors?	Coordination with system PR teams evolving within the University and will be part of the governance structure described.
43	To what extent will the system measure campaign impacts on faculty and staff and other "inside constituencies?"	Outside of the scope of the RFP but open to recommendations.
44	To whom will the selected agency report? What is the decision-making and approval chain?	The selected agency will meet quarterly with a Governance Team that will be created to manage the overall agency relationship. In addition, individual Universities will have ability to execute statement of works as budgets allow as described in the RFP (Appendix D, Master Agreement - Rider D: Services Engagement Form)
45	To what extent will the agency work with system and/or constituent university marketing and communications staff? What is the expectation of division of responsibilities between system and campus professionals and the external agency?	
46	How is it working now? Is each University responsible for their own budget and own marketing efforts?	Yes, currently each campus has an individual marketing budget and execute marketing independently of one another with some unifying message. In addition, the System increasingly generates unifying messaging.
47	Will we have individual contacts at each of the Universities and then the quarterly meeting with the contract administrator, or is there one point of contact with input from the various universities?	The selected agency will meet quarterly with a Governance Team that will be created to manage the agency relationship.
48	Is there a centralized admissions process or is that handled separately at each University?	Primarily separate by each University
49	Whether we need to come over there for meetings?	While we are in the midst of the Pandemic, all meetings will be virtual. Strategic meetings with the Governance Committee expected to be quarterly. Meetings with individual campus are likely to be weekly, depending on the planning cycle and campaign delivery.
50	Will in-person meetings be required? If so, what is the frequency?	
51	Can we submit the proposals via email?	Yes, as shown on the cover page of the RFP, please submit proposals via email UMSResponses@maine.edu
52	What is the contract length for this RFP?	The term of the contract is one year with option for four additional one-year renewals upon the parties mutual written agreement. See Appendix D- Master Agreement, 2. Term.
53	Our typical billing structure is project-based and/or relative to media spend. Are you open to alternative pricing structures or are we limited to hourly rates in the Cost Template?	Please submit rate based pricing as requested. Space is provided for alternative pricing structures and will be considered.
54	Appendix I requests creative, as well as campaign analytics samples. Our firm hosts a digital portfolio of up-to-date work online. Our campaign analytic are likewise hosted in live, online data studio format. Will the committee accept links to online examples, or do you require static imagery directly displayed in our bid PDF?	Links to on-line examples will be accepted
55	Do the individual colleges have their own agencies?	Individual universities currently work with a variety of agencies.
56	When is the last time you have undergone a system-wide process similar to this?	This is the first time that the University has done an Enterprise-wide Marketing RFP.
57	If an agency currently works with a university campus, are they able to list their campus representatives as references?	References should be outside of the University of Maine System
58	Can you confirm the start date of the contract is May 24, 2021? Are there existing contracts within the UMS system that will overlap and need to be coordinated?	May 24, 2021 is the Estimated Agreement Start date which is subject to change. See Section 1.3, 1.3.1 Timeline of key events. The University is currently working with various firms on specific campaigns. That work will be completed under contracted terms.
59	What are some examples of 'signature programs'?	"Signature Programs" are unique, celebrated programs of academic excellence as well as programs that are highly relevant to current workforce demand. Examples Includes programs on individual institutions (architecture, aviation, dental hygiene, writing) as well as unique multi-institutional initiatives (nursing, business, and cyber security).
60	Appendix C: Page 22	All proposals, including team approach, will be considered and points awarded for the response that best meets the requirements of the University

	Does the Institution seek to work with a single organization or would a submitting entity be penalized for a team of multiple organizations?	
61	If a former member of agency leadership serves on the board of another university and/or if a member of agency leadership also serves on the board of one of constituent graduate institutions, would the system consider such service a conflict of interest?	Firm personnel who also have a relationship with the University in any other capacity, or another university should be identified and appropriate process steps will be put into place during response evaluation to mitigate any potential conflict of interest.
62	One of the Universities is a current customer. If selected for this effort, would it be possible to repurpose the same terms and conditions - previously negotiated between the vendor and the University - under this new agreement?	If selected, the Master Agreement provided in Appendix D would replace any current agreements. Respondents should review the included agreements and answer all relevant questions in appendix E - Evaluation Questions - Master Agreement.
63	Can respondents bid on a portion of this RFP or are respondents to bid on the entirety of this RFP? In other words, can RFP be broken out? Can respondents bid on some scopes of work but not others?	It's the Universities intent to have a single Enterprise agreement with the firm that best meets the requirements outlined in the RFP.
64	What additional details are you willing to provide, if any, beyond what is stated in bid documents concerning how you will identify the winning bid?	The evaluation criteria being used is outlined in the RFP.
65	Are you able to provide the names and titles of the team members who will be on the review/evaluation committee?	Not at this this time.
66	Does the University of Maine System anticipate extending the Proposal Due Date?	No - there have been no requests during the established Q&A period to extend the proposal due date.
67	Is the University of Maine System open to exploring additional services in addition to what is stated in 1.1.4 Specifications / Scope of Work?	Yes, additional or optional services will be considered. However, the evaluation is focused on the requirements outlined in the RFP.
68	Is the proposing firm required to have a presence in Maine?	All proposals will be considered based on Respondent's ability to meet requirements. Maine presence is not required.
69	From our direct knowledge of the University of Maine System, we've noted that UMaine Online is not included in the campus/school listing for this RFP. Is the goal of the proposal to focus exclusively on the physical campuses?	The RFP is not exclusive to the physical campus, but marketing efforts will need to be coordinated with existing marketing relationships for some on-line programs which are likely to continue.
70	Brand/Campaign Creative Platform: Are you ultimately looking for one cohesive brand/creative platform for the system overall that can be adapted and customized for each institution? Does UMS plan to run a brand campaign on behalf of the system/all institutions like it has in the past in addition to each university running its own campaigns to support brand-building and enrollment?	The University anticipates a mix of campaigns for individual institutions, multi-institutions and the System. The mix and strategy will be developed in collaboration with the selected firm.
71	What recruiting footprint do you hope for the campaigns to cover? We just want clarification around this since the RFP seems to lean to out of state populations? Will the campaign(s) ultimately be focused on in-state awareness and recruitment PLUS strategic markets out of state where there has been past success such as the Boston area and other emerging markets?	Recruiting footprint is both in-state and out-of-state markets.
72	Are you interested in research to establish the brand/understand perceptions of each of the system schools? or are you more interested in understanding prospective student demand? Or should a study ideally be designed to do both?	Recruiting footprint is both in-state and out-of-state markets.
73	What kind of website services will be needed (if any)?	Ideally, research would be designed to do both.
74	In terms of brand development and student recruitment, which markets does the system believe to be mission critical? In the past, budget constraints dictated concentration in Maine and New England. Will this be true going forward? Will any resources be dedicated to continued development of international students, for example?	Looking to partner with Marketing Firm to identify and prioritize market targets within budget limitations. And track and document campaign success to show return on investment.
75	What does the University of Maine System's current digital marketing strategy include? Does it include paid campaigns? On what platforms? (Google, Bing, Instagram, Facebook, etc.?)	Yes, varies by campus.

76	Is the University of Maine System currently remarking, geofencing, utilizing google adwords?	
77	Does the University of Maine System run Google Ads for both Undergraduate and Graduate Admissions? Will you be requiring ads for both audiences.	
78	Will the University of Maine System allow edit access to each university's Google Analytics in order to build custom dashboards for reporting?	
79	Will the University of Maine System allow pixeling on their website to measure conversion from digital ads?	Yes, varies by campus. Note that each University has its own website in addition to the University of Maine System.
80	Does the University of Maine System want to purchase Undergraduate, Transfer and/or Graduate School Prospects, in addition to respondent's digital marketing services? If yes, what are the search parameters/criteria for those prospects? (Ex: Markets (Zip Codes, Counties, Metros, States), Academic Achievement (GPA/Test Score), Ethnicity, Gender, International, Majors, Cross Application Schools, etc.)	List purchasing is outside of the scope of this RFP
81	If looking to purchase Undergraduate, Transfer and/or Graduate Inquiries/Prospects, does the University of Maine System expect lead nurturing (commflow, outreach, etc.) as part of this service?	
82	Have you undergone brand strategy work for your individual Universities and/or System recently? Are you looking for such work in this scope?	Brand strategy work varies by campus. Certainly, looking for strategic guidance, but currently no budget specific for research.