# ADDENDUM 1

**DATE:**  April 28, 2023

**RFP NUMBER:** UTA2023-020 Strategic Branding and Marketing Services

**RFP DUE DATE:**  03:00 p.m. on May 19, 2023

The following changes and/or clarifications are hereby incorporated into the RFP. Your proposal must reflect the following:

**QUESTIONS/ANSWERS SUBMITTED BY APRIL 26, 2023, DEADLINE (EXHIBIT A)**

## PLEASE SUBMIT WITH YOUR PROPOSAL

Charlie Brooks          Sr.  Contract Specialist          817-272-2140

**SIGNED**:  _____

**COMPANY NAME**:  _____

**EXHIBIT A**

**QUESTIONS/ANSWERS SUBMITTED BY APRIL 26, 2023, DEADLINE**

1. Why are you going out to tender? (Is there a dissatisfaction with the current agency, or is it based on the contract cycle?) The contracting cycle has expired, necessitating the RFP process.

2. Who is your incumbent agency? How many agencies do you work with? Recent agencies have included FuseIdeas and Imaginuity.

3. Do you have any preference for local suppliers? Or do you prefer suppliers with national / global experience? (Or like both?) The University is interested in identifying vendors with as many of the stated skills as possible. Familiarity with the local Dallas-Fort Worth and other major Texas markets will be helpful.

4. What is your process and timelines once all submissions are received? It generally takes about three weeks for the Evaluators to make their first pass/first round of scoring. The we will meet to discuss, determine the top scoring suppliers, set up demos and/or interviews – this adds another three to four weeks. Then add a week or two for requests for Best and Final Offers (BAFOs), rescoring, maybe another round of demos and/or interviews, etc. Could be two to three months overall. Ideally, we want to start no later than the September/October time frame.

5. What is your annual budget for the activity outlined in the RFP? Current projections range from $200K to $500K annually in services provided under this RFP. Some years may be more or may be less.

6. What CRM do you currently use to manage recruitment activity? The University uses Slate CRM to support student recruiting and retention. However, student recruiting and retention may not be exclusive to the anticipated activity under this RFP.

7. What are your priority DMAs? Are there are any specific geographies you've identified as opportunities? Priority DMAs will be developed in conjunction with branding and marketing strategy development.

8. Can you please divulge what your recruitment targets are for the next 1-3 years? Student recruiting is not exclusive to the anticipated activity under this RFP.

9. Is there any requirement for the vendor to be on site? While the preponderance of services under this RFP may be completed virtually and/or off-site, the nature of some of the requested services by their nature may require on-site presence.

10. Will this award be given to multiple vendors or only a single vendor? Multiple awardees may result.

11. For website development, can you specify the CMS that these pages will be deployed in? The University currently utilizes both Sitecore and Cascade CMS.

12. For website development, are you looking for backend development as well, that isn't specified in the section, only front-end development, strategy, and design. Under this RFP, the University is primarily seeking front-end development, strategy, and design capabilities.

13. Mostly for the sake of confirmation - is the intent of this RFP to create a pool of vendors for potential future projects across the disciplines outlined in the scope? If so, do you have a target number of vendors for inclusion? Multiple awards are likely; however, they are or will be limited (our last award for these services we only utilized two suppliers – could be one or two more).

14. Could you provide a little more information on how you'd like the Approach To Work section answered? The RFP lists several potential marketing activities broadly/generally but doesn't actually "outline" a specific project – the language in 3.2.3 feels specific to a yet-to-be identified, specific project. We can provide general information on our capabilities and/or case studies of relevant work relating to the types of work outlined in Section 5, but as written, it's unclear how we can effectively submit a General Work Plan with specific tasks, timing, etc., given that these would be custom to a specific project.

    3.2.3.1 What tasks do you foresee need to be done.
    3.2.3.2 How long will it take you to perform each of those tasks you've identified.
    3.2.3.3 Do you have a set of principles and practices to guide you in organizing this project to ensure optimum performance?
    3.2.3.4 What is your plan of action?
    3.2.3.5 How long will it take? What is your timeline? Is one thing impacted or contingent upon the another?

15. Section 3.1.9 states "Proposer will provide the name and Social Security Number for each person having at least 25% ownership interest in Proposer." – can you confirm this information will be secure/not subject to Freedom of Information Act release and/or that this information will be kept secure? Or is this something that would only be provided if we moved forward with a contract? Hoping for a little more info here. Yes, your information is protected. And yes, as an agency of the State of Texas, we are subject to the rules, regulations, and guidelines of the Freedom of Information Act. And, when you submit your Proposal, you can stimulate "will be provided upon award".

16. Please share the budget range you have in mind? Current projections range from $200K to $500K annually, possibly more, in marketing, advertising, and branding activity.

17. Who will be the decision maker at UTA on the path forward? On the research design? On the brand platform / concepts? While the work conducted under this RFP may support multiple university customers, the agreement(s) and preponderance of associated work will be managed by the UTA Office of Marketing, Messaging, and Engagement: https://www.uta.edu/administration/mme

18. Who will be the main point of contact for the firm? The preponderance of associated work will be managed by the UTA Office of Marketing, Messaging, and Engagement. POC will be determined in the agreement and with each project/statement of work undertaken under the agreement.

19. Is there a timeline that you can share for the different phases of work listed in the RFP, e.g., Discovery needs to wrap up by X date. This is a service, as-needed, project-based agreement. Timelines and details will be agreed upon for each project/statement of work undertaken.

20. Are all the projects listed in the SOW still in the potential/hypothetical phase? Do any take higher priority for the University than others? Are any specifically funded currently? This is a service, as-needed, project-based agreement.

21. Do you have an idea of how many agencies/partners you would like to work with on the listed capabilities? How granularly are you considering parsing the work? More than one awardee may be identified. This is a service, as-needed, project-based agreement, with projects being assigned to the contracted vendor with the best/better capability and capacity to accomplish the agreed upon work. Multiple vendors may be utilized in projects.

22. Has the institution migrated from Google Analytics 3 to Google Analytics 4 yet? The university is in the process of migrating to GA4.

    a. If not, can they quantify how many properties/views they currently use. (see answer to #7 and to part "b" below question).

    b. If yes, can they quantify how many GA4 properties they have set up. Information can be made available with contracted vendors. The university is in the process of migrating to GA4 – TBD when and if needed

23. Does the institution use any other tools for analytics? The UTA Office of Marketing, Messaging, and Engagement also uses Meltwater and Sprout Social for analytics.

24. What CRM system does the institution use, if any? Sitecore and Cascade

25. Does the institution have any dedicated analytics/data/web resources? Who on their team is responsible for reporting, Google Analytics, data, etc.? The UTA Office of Marketing, Messaging, and Engagement uses the aforementioned, analytical tools.

26. How often are they utilizing Google Analytics? What do they use it for? These details may be discussed with contracted vendors.

27. What is the budget range for advertising? Current projections range from $200K to $500K annually, possibly more, in marketing, advertising, and branding activity.

28. **5.2.1: Brand – Research and Discovery**

1. Can you quantify (or give a sense of) the number of entities within UTA that you would like to be reviewed or audited (re: brand architecture and creative assets)? Internal stakeholders potentially benefiting from work under this RFP may include all academic units, enrollment management, development and alumni relations, research, and university executive leadership. The number of entities to be reviewed will be determined on an as identified/requested basis in conjunction with agreed upon projects/statements of work.

2. For discovery, how many competitors are you looking to benchmark against? Can you share the names pls? TBD

3. If the competitor peer set differs by state, region or nationally, can you please name the competitors to be considered for each. TBD

4. Are there any existing benchmark or performance data/reports we can use for reference? Previous benchmarking and/or performance data will be determined as projects and campaigns are identified for work under the agreement.

5. Is the institution looking to benchmark against industry, themselves, or something else? TBD

29. **5.2.1.7: Develop and implement evaluation plan with identified metrics to measure success of rebranding/branding efforts after launch at milestones mutually selected by Contractor and Requesting Institution.**

1. How would the institution define success of this work, in plain words (without supporting metrics/KPIs)? This is a service, as-needed, project-based agreement. Performance parameters and measures of success will be determined each project/statement of work undertaken.

30. **5.2.2: Brand - Development & Implementation**

1. When you say "test brand approach" are you looking to evaluate how the new brand concept would resonating with key audiences? This is a service, as-needed, project-based agreement. This will be determined for each project/statement of work undertaken.

2. Which audiences are critical for this brand approach testing? Can you list the must haves and nice to have audiences, please? <span style="color:red">This is a service, as-needed, project-based agreement. This will be determined for each project/statement of work undertaken.</span>

31. **5.2.2.4.12: Landing Pages**

   1. Does the institution have an idea of how many landing pages they're looking to have created? <span style="color:red">This is a service, as-needed, project-based agreement. This will be determined for each project/statement of work undertaken.</span>

32. **5.2.3: Marketing Strategies and Campaigns – Development, Implementation and Assessment**

   1. For market research, are you looking to benchmark market perception against other competitors? If so, can you share their names pls? <span style="color:red">This is a service, as-needed, project-based agreement. This will be determined for each project/statement of work undertaken.</span>

      a. If the competitor peer set differs by state, region or nationally, can you please name the competitors to be considered for each. <span style="color:red">None currently</span>

   2. Which audiences are more critical (must haves) for market research than others? Which ones are nice to have? <span style="color:red">This is a service, as-needed, project-based agreement. This will be determined for each project/statement of work undertaken.</span>

   3. Are there particular DMAs of interest? Which ones? <span style="color:red">This is a service, as-needed, project-`based agreement. This will be determined for each project/statement of work undertaken.</span>

   4. Is there an interest in running quant online surveys in Spanish and English? <span style="color:red">Possibly. The University is designated as a Hispanic Serving Institution. This is a service, as-needed, project-based agreement. This will be determined for each project/statement of work undertaken.</span>

   5. Is there an interest in holding qualitative (focus group) sessions in Spanish for key audiences of interest? <span style="color:red">Possibly. The University is designated as a Hispanic Serving Institution. This is a service, as-needed, project-based agreement. This will be determined for each project/statement of work undertaken.</span>

   6. For audience identification and segmentation, are you looking for segmentation within a particular main audience of interest, e.g., alumni? If so, what are your main audiences of interest (i.e. please name the priority key audiences for the segmentation exercise)? <span style="color:red">This may be determined in conjunction with each project/statement of work undertaken.</span>

   7. Are their subgroups you are interested in analyzing, if feasible, e.g., underrepresented minority students <span style="color:red">TBD</span>

   8. Which audiences will you be able to provide lists for? Or on the flip side, which audiences will you NOT have lists for? <span style="color:red">TBD</span>

   9. What kind of response rates have you seen for the internal UTA audiences in recent research projects? E.g., Current UTA undergrad students, Current UTA grad students, UTA alumni, UTA donors, UTA faculty, UTA staff, Underrepresented populations e.g., URM students, faculty, staff, etc. <span style="color:red">The university has conducted a variety and scale of campaigns. Performance metrics will be shared as relevant to the agreed upon work/projects under the agreement.</span>

   10. Are you able to provide contacts or introductions to certain key audiences (that you have built relationships with), e.g., UTA donors, public officials at the state and federal level, government

agency and corporate and foundation grantors, leaders of relevant NGOs/civic organizations. This may be determined in conjunction with each project/statement of work undertaken.

11. Will UTA lead the charge on scheduling necessary conversations with executive leadership, professionals, and internal audiences at UTA based on proposed research design? The university may be interested in this type of facilitation and assistance, including conducting branding research and implementation workshops with internal and external stakeholders. This may be determined in conjunction with each project/statement of work undertaken.

12. Are there any existing benchmark or performance data/reports we can use for reference? Performance metrics and/or previous research will be shared as relevant to the agreed upon work/projects under the agreement.

13. Is the institution looking to benchmark against industry, themselves, or something else? TBD

14. Does the institution have any specific branding or strategy goals that we need to be aware of when developing these workshops? This may be determined in conjunction with each project/statement of work undertaken.

33. **5.2.4: Media Buying Agency (5.2.4.2: Monitor performance of purchased media and provide regular updates and reports)**

   1. How often are they looking to have reports delivered? Do they have a specific format in mind? Do they have examples of what they've received in the past? This may be determined in conjunction with each project/statement of work undertaken.

   2. What other stakeholders do they share these results with (ie board, president, etc.)? (Helps us understand reporting format and cadence) Performance metrics and/or previous research will be shared as relevant to the agreed upon work/projects under the agreement.

34. **5.2.5: Social Media and Digital Marketing (5.2.5.3: Track and monitor ROI for campaigns and make analytics-informed recommendations)**

   1. How does the institution define ROI? The university would look to partner with vendor's expertise in defining and agreeing upon ROI in conjunction with each project/statement of work undertaken.

   2. 2. Has this been tracked and monitored in the past? The university would look to partner with vendor's expertise in defining and agreeing upon ROI in conjunction with each project/statement of work undertaken.

   3. What resources/staffing does the institution have in place to help track this over time? The university currently utilizes Meltwater and Sprout Social.

35. **5.2.6: Messaging Creation and Collateral Design and Development**
   1. Is the institution envisioning English/Spanish landing page variations? Possibly. The University is designated as a Hispanic Serving Institution. This is a service, as-needed, project-based agreement. This will be determined each project/statement of work undertaken.

36. **5.2.8: Website/Landing Page Design, Development and Content Strategy**

   1. Is this a one-time assessment or would this be ongoing? This may be determined in conjunction with each project/statement of work undertaken.

5.2.8.9: Analytics review, including conducting A/B multivariate testing <span style="color:red">This may be determined in conjunction with each project/statement of work undertaken.</span>

1. What does an analytics review include? Is this a performance evaluation using Google Analytics data? Is this conducting an audit of their Google Analytics setup? <span style="color:red">This may be determined in conjunction with each project/statement of work undertaken.</span>

2. Is the focus on landing pages or is there potential for full-site web design updates? <span style="color:red">This may be determined in conjunction with each project/statement of work undertaken.</span>

3. Could they define the role of their website and what audience(s) it was built for? <span style="color:red">This information can be provided if it identified as part of a an agreed upon project/statement of work.</span>

37. Can you please provide budget ranges or ranges of what was spent in previous years by the University, on similar scopes? <span style="color:red">Current projections range from $200K to $500K annually, possibly more, in marketing, advertising, and branding activity, including production.</span>

38. Can you provide us with the media and production budget for this project? This will help us understand quantities of assets to be developed/services to be provided/campaigns or assets to be created. <span style="color:red">Current projections range from $200K to $500K annually, possibly more, in marketing, advertising, and branding activity, including production.</span>

39. On page 11 of the Solicitation document, section 5.2 Specifications and Scope of Work, first paragraph, you mention "*The consideration for this RFP is to identify branding and marketing services for the University on __an as-needed, project-oriented basis__ for future University branding and marketing projects and campaigns*". **Does this apply to 5.2.1** (Brand – research and discovery) and all the subpoints, **through 5.2.8** (Website/Landing Page Design, Development and Content Strategy) and all the sub-topics below? <span style="color:red">Yes</span>

**If it does not apply,** can we assume we are doing every single deliverable in this section, for purposes of pricing the proposal? <span style="color:red">See opening paragraph in Section 5.2</span>

**If it does apply**, and the list reflects all the services we could be called for, on an as-needed bases, at this point of the procurement process, **can you provide guidance as to how to price services that cannot be quantified at this stage?** <span style="color:red">See Section 6.1 – Seeking Hourly Rates</span>

40. Considering that the services and budgets to be provided by vendor to the University will be on an as-needed basis and could increase depending on University needs, how could we assume percentages or amounts of subcontracting, when the type of subcontractors needed would vary depending on budgets. <span style="color:red">Each project will require its own HSP.</span>

41. How much consumer data (from the University) is expected to be managed by the vendor? <span style="color:red">TBD. This may be determined in conjunction with each project/statement of work undertaken.</span>

42. Are the assets produced by contractor to be placed in foreign countries media as well as local? <span style="color:red">TBD. This may be determined in conjunction with each project/statement of work undertaken.</span>

43. Are there projects that approved vendors can bid on that do *not* have to adhere to the HUB requirement? If so, please confirm which parts of the scope that would apply. <span style="color:red">No</span>

44. How is the work in this RFP currently being accomplished?
<span style="color:red">Some of the work outlined in the RFP has or is being accomplished with in-house talent and utilization of agencies on an as-need/project basis.</span>

45. Is there an incumbent agency, and are they being considered?
FuseIdeas and Imaginuity were utilized under the terms of expired agreements. The University will evaluate and consider all qualified submissions.

46. How many firms are submitting responses to this RFP?
We won't know until they submittal deadline (could be zero, could be a few, could be a lot)

47. Do you require local onsite talent, or are you open to remote workers? If you require local talent, which markets do you prefer?
Some tasks identified in the RFP and agreed upon for each project pursued under an agreement may require vendor work on-campus, but much can be accomplished remotely.

48. What are your top priorities or qualities in an agency partner?
Refer to the RFP.

49. What are your top pain points when it comes to managing this type of work?
These depend on the nature of the work and the specific projects.

50. Can you provide an org chart of your current team / the team associated with the scope of work in this RFP?
While the work conducted under this RFP may support multiple university customers, the agreement(s) and preponderance of associated work will be managed by the UTA Office of Marketing, Messaging, and Engagement: https://www.uta.edu/administration/mme

52. Who are your primary internal stakeholders related to this RFP / scope of work? What will our level of interaction be with them?
Internal stakeholders potentially benefiting from work under this RFP may include all academic units, enrollment management, development and alumni relations, research, and university executive leadership.

53. Would our creative team for this scope of work integrate with your team for concepting, production, and/or execution? If so, please elaborate on your vision for that.
The degree of integration will be determined by each project and scope of work agreed upon.

54. What is the budget for the scope of work outlined in this RFP? If current budget cannot be shared, what is the historical spend?
Current projections range from $200K to $500K annually, possibly more, in marketing, advertising and branding activity.

55. What statistics and metrics can you share about the success of your recent campaigns?
The university has conducted a variety and scale of campaigns. Performance metrics will be shared as relevant to the agreed upon work/projects under the agreement.

56. What are your goals for campaign metrics moving forward?
Performance metrics will be determined as projects and campaigns are identified for work under the agreement.

57. What program are you currently using for creative project management? Will we be using this platform along with your team to manage the projects within the scope of this RFP?
The UTA Office of Marketing, Messaging, and Engagement currently uses Smartsheet for project management. Any integration may be considered in conjunction with agreed upon projects and statements of work under the agreement.

58. Is this nationwide, or is this a Texas-based initiative? The University is interested in identifying

vendors with as many of the stated skills as possible. Familiarity with the local Dallas-Fort Worth and other major Texas markets will be helpful.

59. How long will the campaigns last? The award could be for 10 years if all renewals are exercised.

60. Are the creative assets only in English, or must they be translated into other languages? This may be determined in conjunction with each project/statement of work undertaken.

61. Amount of creative assets expected to be delivered. For example, twelve social media advertising, three landing pages, etc. Unknown currently. Please refer to the opening paragraph under Section 5.2.

62. Do we include the production of the creative assets? Yes