



Procurement and Contracting Services

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**Request for Proposals for Brand Strategy
Development**

**Please mark all proposal submission
Files with the following information**

**Sealed RFP # L192512
Due on January 28, 2025 no later than 2:00 PM, MST**

The following questions were received prior to the technical question period close of January 16, 2025 at 12:00PM MST.

1. We're interested in learning more about the team's research needs as part of this strategy work and scope. Can you share more about what additional research may be needed or desired in this process?

27. You note that market research was conducted in summer 2024 that can and should be used by your brand partner. Could you tell us more about the scale and focus of this research, as it may impact the qualitative discovery process we propose.

The research that was done in Summer 2024 was external in nature. We surveyed general market populations in legacy Pac-12 markets and our new Big 12 markets. This survey focused on brand awareness and reputation as well as how we are perceived across multiple key traits (including our current brand pillars) and strength areas.

Our assessment is that our current broad survey should be a sufficient baseline for this work, but that research (qualitative and quantitative) may be needed with our campus and community audiences.

If the awarded agency determines that additional research is needed, we are open to that discussion and do have an existing partner that can assist in data collection.

2. For non-higher ed case studies (for example -- will team experience be acceptable or must the work have been completed by the submitting agency at-large), and what may (or may not) be considered as limiting criteria here.

Team experience will not be sufficient for this requirement. We are really looking for a partnering agency that can demonstrate a diversity of work that extends beyond higher education.

3. Case studies: This RFP asks for 3 case studies. Separately, it mentioned that you want a case study that demonstrates how positioning was used to inform a campaign. Is this meant to be a separate (4th) case study? Or can it be one of the 3?

This can be done within one of the three. We are looking for a sense of how the brand strategy translated to creative work, even if that creative work was not done by your agency.

4. Does the 2024 market research plan encompass both qualitative and quantitative research?

This study was strictly quantitative research. As noted above, we may need to do some qualitative research with audiences that are a little more brand-familiar (i.e. alumni, staff, students, etc.).

5. Given that the project's goals involve measuring success across four factors, would it be beneficial for our proposal to include an estimate for testing and measurement?

This would be a good add-on item. Testing and measurement does not need to be included in the core brand strategy proposal.

6. How visible and well-known would you say the university's brand values are currently? Do you envision a key measure of success for this initiative being the ability to match or exceed that level of visibility and awareness?

Our institutional values (which were developed through a project separate from our brand pillars) are used in fairly passive ways (backs of business cards, email signatures, etc.). Those values are not part of the scope of this project. Our brand pillars, however, are part of the scope of this project. The brand pillars themselves are not that well-known but they are well reflected in the work we do. A good measure of success for this effort will be how well the brand pillars resonate with our internal audiences and how well they feel they can reflect them moving forward. While this is not a primary measure of success, We would want to build awareness of our pillars to the extent that it contributes to our overall brand perception and reputation.

7. What will make for an excellent agency partner?

19. What key qualities or strengths do you prioritize when evaluating potential agency partners?

We are looking for an agency partner that will emphasize the "partner" piece. We have a strong internal team that is highly motivated to develop a brand strategy we can all be proud of and work from for years to come. We want an agency partner that will help push us in the right direction and guide us through this process. We want someone who will challenge us to build the best brand we can.

8. As we think about engaging the community in the new brand strategy, do you want to use their engagement to drive buy in/adoption or to drive the direction of the strategy or both? Do you want to include the community in multiple stages of the project?

Definitely both. We will work with the awarded agency to identify key community members who may fit each role. There are distinct groups that will warrant engagement in the building process, and others who we will want to include as people who can drive buy-in.

9. You mention in the RFP that your chosen partner should identify how college and unit marketers can apply the brand framework to their marketing programs. Do you want messaging for the various schools, athletics, etc.? What is the ideal deliverable?

We are flexible as to what that actually looks like. In the past we have used messaging matrix templates, structured in-person workshops and prescriptive toolkits to support these efforts with varying levels of success. We hope the awarded agency can guide us in this effort, but we don't expect to receive deliverables customized to individual colleges or units as part of this scope. Rather we hope for a recommendation and demonstration of how this customization work could be approached.

10. We know this isn't a complete brand overhaul. What are the sacred pieces of your current brand strategy that we want to keep?

We will continue to be focused on student success and high-impact research. Our sense of place will continue to be a vital part of who we are. The Bear Down spirit is woven throughout our institution (and literally painted on the top of a building).

11. How will you measure the success of this project?

Success will be measured largely by having a final deliverable that resonates with our key audiences and provides a framework for us to build an effective marketing strategy from.

12. What makes you nervous about engaging in a brand strategy update?

Consensus-building. We want this to be a strategy that people understand and can grasp, but we are concerned that by focusing too much on consensus building we will end up with an overly broad and inclusive solution that does not help us differentiate from other institutions.

13. On page 32, it states that the Cover is not included in the page count. However, there is no further mention of a page count within the RFP. Could you please confirm if there is a page count or page limit associated with our response to this RFP?

There is no strict page limit on submissions, but we will favor responses that respect the reviewers' time and attention spans.

14. Page limit: In the RFP response we submitted summer 2023 (RFP L192329), there was a specific page limit (25). We didn't see one in this RFP, but wanted to confirm that there is no page limit.

There is no strict page limit on submissions, but we will favor responses that respect the reviewers' time and attention spans.

15. Could you outline your priority DMAs, ranked if possible? Additionally, are there specific geographic areas you've identified as growth opportunities?

Our key DMAs vary by initiative (i.e. Arizona Online, Foundation, main campus enrollment, etc.). Broadly speaking, Arizona, Southern California and Texas are vital across multiple audiences. We envision measuring success of our brand campaigns by repeating the research mentioned above, which would place high importance on legacy Pac-12 markets and the existing Big 12 markets, but these DMAs are not necessarily the number one priority for all initiatives.

16. You've mentioned Arizona State University and the University of Colorado as key competitors. Who else would you identify as your top five competitors both nationally and regionally?

Our senior leadership is currently undertaking an effort to redefine our current and aspirational peers. Our competitors in one category, such as enrollment, may be entirely different from competitors in another, such as research funding. In general we would compare ourselves to Public R1 institutions, often those within the AAU. We have identified ASU and Colorado as particularly important for differentiation because we compete with them for enrollment, athletics and general mindshare.

17. Which brands do you take inspiration from either in Higher Education or other industries?

As a team, we have not identified inspirational brands, although our individual team members would obviously have brands that they find inspiring. We seek a brand strategy that is clear, distinctive and emotionally compelling but not necessarily stuck in the vacuum of higher-ed brands.

18. Are visual examples required as part of the case studies or is this purely a written response?

We are flexible in how these case studies are presented. Visual examples are not required but they are acceptable.

20. You have stipulated only two files should be submitted, the RFP response and the redacted RFP response. Is it acceptable to include the case studies as an appendix within our response document and refer to the relevant pages in RFP response questions?

Yes, that is acceptable.

21. In what file format should the response be submitted (e.g., PDF, Word, etc.)?

Preferably a PDF.

22. Is there an incumbent for this service and if so, can you advise who that is?

This is a new RFP, there is no incumbent.

23. Are there any specific challenges or pain points you're currently facing that you hope the agency can address?

Our existing brand strategy was developed in lock-step with our national advertising campaign and as a result they have been intrinsically linked in the eyes of our marketing teams across campus. We would like to separate the concepts of brand strategy and advertising campaigns with our internal stakeholders. Our existing strategy is also very nuanced – we've had many conversations about people who do or do not "get it." We'd like a strategy that's easier for everyone to understand and embrace, without having to "get it." The strategy should also provide a greater understanding of core audiences and their attitudes relative to how the current brand serves their needs/emotional levers, that can be understood and utilized widely by campus partners.

24. How do you define "success" for your branding efforts?

We plan to measure success by repeating the market study mentioned above on a regular basis - likely every two years. On a shorter timeline, we are evaluating snapshot brand-lift studies and will also find success in brand adoption and engagement within our internal audiences.

25. Is a recording or notes from the pre-response conference available?

Yes, it is linked in the box folder.

<https://arizona.app.box.com/s/5707aaoa6umxzsp9nohm0pun24dysd>

26. We are a team of two creative agencies - one focused on visual brand and the other on messaging and content - coming together as a single, seamless partnership to submit a proposal for this engagement. Our two firms have partnered together for over 15 years and co-led projects for dozens of colleges and universities. It is a very successful model, but we want to be sure there is nothing about this approach that would disqualify us.

No, this is fine.

28. You noted during the call on Monday that you have a talented bench and that your team will want to be significantly involved. Can you provide more specifics around what level of involvement you imagine your team having? Some clients simply want regular checkpoints and updates, others are interested in being more actively involved in the creative process. Where does your team sit?

We definitely want to be hands-on throughout the process. You can see the specific roles that we have on our team (<https://marcom.arizona.edu/our-team/marketing>). We absolutely do not want to prescribe our process on your work, but I think it's important that we feel significant ownership over the work as the team that will be tasked with implementing it.

29. We imagine a qualitative discovery process that involves time on campus meeting with students, faculty, staff, attending admissions events, sitting in on classes, and getting a feel for the campus. We want to ensure that this aligns with your expectations and that we'd have access to these stakeholders for an April-May discovery blitz.

Yes, that absolutely aligns with our expectations. We are doing everything we can to prepare key stakeholders for this as well.

30. We heard loud and clear that this engagement is focused on foundational brand strategy, and not on execution. With that in mind we imagine that deliverables will encompass visual identity, guidelines, and standards, as well as a comprehensive messaging toolkit. Does this align with your expectations of deliverables for this engagement?

This is not a visual identity project – we are not seeking to refine our logo or other identity elements or refresh our visual guidelines. This is truly about the core brand

positioning. We see messaging as an expression of the strategy, but not the core deliverable.

31. Increasingly, clients ask us to help lead or co-lead brand socialization and training efforts across campus. Should we plan to include time for town halls, workshops, and Q&A sessions to support brand rollout efforts?

I think in some circumstances this would make sense. We would suggest including this as an add-on to the proposal as it is not a core requirement.

32. You note that the brand needs to support the efforts of key external-facing units. Does this project include any branding work for your Athletics brand? For example, a redraw of your Wildcat mascot, and/or a redesign of your Athletics Arizona logotype?

This is not a visual identity project – we are not seeking to refine any logo or other identity elements. This is truly about the core brand positioning and to the extent that our athletics programs significantly contribute to our brand perception, the brand strategy needs to be applicable in their context.

33. How would you characterize the state of your current brand architecture model? Do you see this project as an opportunity to revisit any brand architecture considerations?

Our brand architecture is a little bit of a mixed bag - from a visual identity standpoint we are quite consistent and look very “branded house”. (Almost) Everything starts with the block A and on the whole, design work, colors, typography, etc. are as consistent as one could expect. If the awarded agency sees opportunities to evaluate brand architecture, those recommendations would be considered outside the scope of this project.

34. Your note that you are seeking a “shared definition of brand terms” as a deliverable. Can you clarify what’s driving this request and who you’re hoping to build consensus with these future brand terms? In other words, is that among your marketing and communications team or more broadly across the institution’s stakeholders?

This is largely for our marcom teams across campus, but we also see value in educating other stakeholders (especially leadership) on these terms. This is driven partly by the struggle we had several years ago when our brand strategy and our brand campaign were launched in tandem. This led to a lack of understanding around the difference between “the brand” and “the campaign”.

35. Can you confirm what's driving the schedule and if there is any flexibility regarding the milestones noted in your RFP?

There is flexibility in the milestones. Our new president has high expectations and wants to see progress. We also have an annual campus-wide marketing summit that happens in August, so we want to leverage that event as best as possible.

So ultimately, the driving force is getting the work done in as expedited a manner as possible while not sacrificing quality of work.

36. Add-ons: We're a little confused about the "add-ons" that were discussed. Is the idea that we can include "add-ons" to show additional work that could be accomplished within the \$250k limit? Or is the idea to give a set price for the brand work as laid out in the RFP, and then include "add-ons" (e.g., messaging framework, storytelling for the new president, etc.) that we believe would help drive the success of the brand strategy effort, but are outside/above RFP ask (and, potentially, the \$250k limit)?

It is the latter. The core proposal should address the work outlined within the RFP and may not exceed the \$250k limit. If you have additional work that you would recommend, you are able to outline that as "add-ons".

38. You're not looking for anything external facing which would have legal copyright considerations?

Not likely, but we would like to avoid a key idea (or key ideas) that are already owned by other organizations.

39. Are you keeping in place the current purpose, mission, values, instead this is just building on top of that?

We don't expect that this work will be redefining mission, vision and values. However, with a new president, there is always a chance that those do change in some way so those should not be the cornerstone of the brand strategy.

40. Are you looking for other research to inform the strategy or is this just strategy focused?

If your process requires additional research, please include that in the proposal. We expect that at a minimum, some level of internal qualitative research will be required.

41. Question: Page 12 of the RFP references a requirement for bidders to complete Attachment A, "Limiting Criteria" tab, however this Attachment is

not included in the RFP. Should we simply respond to the experience requirement within the body of our proposal?

Please disregard the reference to Attachment A. The limiting criteria and evaluation criteria are still applicable and will be used to score received proposals.

42. Question: Page 32 of the RFP requests a Brand Strategy Development Case Study involving a large R1 university client that was completed in the past five years. If we do not have a Brand Strategy Development case study that meets this exact criteria, may we submit an alternative higher education case study?

Yes, that is fine. We are looking for an agency that has experience with an institution similar to ours, so I would suggest you note similarities to our university.

43. For the Limiting Criteria, Brand Research Experience section, you request examples from the past five years of brand strategy projects outside of higher education. As an agency focused solely on higher education, would one of the following approaches fulfill this requirement: (a) if we were to reference the experience of a subcontractor/partner who we might involve in the execution of this scope of work, or (b) if we were to cite the personal experience of our key personnel's work outside of our before joining our agency?

Referencing the experience of a partnering agency would be sufficient for this requirement. Prior professional experience of team members would not fulfill the requirement.

44. We would like to clarify the requirements outlined in Section 5.4 Accessibility. Our firm typically provides a VPAT and accessibility compliance measures only for software or tools directly used in the course of the project's scope. As this project primarily involves brand strategy work, we do not anticipate needing or utilizing such software or tools. Please confirm if the requirements in Section 5.4 are still applicable to this project. If so, could you please elaborate on how UofA sees these requirements relating to the deliverables of brand strategy work?

The University will not require this for submission but reserves the right to request prior to or after award.

45. There are two key milestones in your proposed timeline that we wanted to ask about:

- **June 1: First draft to present to university leadership**
- **Do you intend to show options to leadership, or a single, proposed direction?**

- **Can you clarify how many people would be involved in this draft presentation?**
 - **Have you considered how the input from leadership will be synthesized and who will have the ultimate decision-making authority?**
- **August: Draft rolled out to the broader campus community for feedback**
 - **Do you have a preferred process for sharing the brand with the campus community and for soliciting feedback?**
 - **There is only a month between this community share-out and the brand strategy work being completed. Have you considered what might be necessary if you get pushback from the community?**

The initial draft to university leadership is largely intended to show progress. Our president has high expectations and expects to see things moving along as quickly as possible, so this is intended to give him a sense of where the project stands as of 6/1. Depending on the direction taken by the awarded agency, this may come in the form of options or a single recommendation. We would anticipate that a representative or two from the awarded agency would join two members of our team to present to the president and anyone he sees necessary (likely his chief of staff). Ultimately the president has final decision-making authority, but Christie Harper, our VP of Marketing, will have senior leader authority on this project.

We do not have a preferred strategy for sharing this with the campus community. We do want to avoid a big “ta-da” moment. We want this to be an engaged process. And as a result of it being an engaged process, we don’t anticipate complicated feedback that will take months to address.

End of Addendum, all else remains the same.

