Procurement and Contracting Services

Request for Proposals for Media Buying Services

Addendum #1

Please mark all proposal submission Envelopes with the following information

Sealed RFP # L131913
Due on April 17, 2019 Changed to April 25, 2019 no later than
5:00 PM changed to 2:00 PM MST

The following questions were received before the technical question/inquiry due date of 04/04/19.
What are the University’s target markets outside of Arizona (domestically and internationally)?
Southern California is a big market for enrollment, but other target markets are currently a topic of research. We are looking to be able to target individual zip codes and/or small regional markets outside of Arizona (i.e. a Park City, UT rather than a Salt Lake City, UT).

What is the approximate budget division between traditional and digital paid media efforts?
Although this division largely depends upon the source department and the nature of each campaign, the RFP committee understands campus needs to lean more heavily in the digital landscape, possibly around 60/40 or even 70/30. Please understand that this is merely an estimate and individual campaign and department needs could vary widely.

Is the current, total paid media budget mentioned in the RFP part of a comprehensive annual media plan? Or is that budget broken out across multiple units, each placing media at different points throughout the year?
The total budget is purely an estimate broken out across multiple University units over the course of a year, and we cannot guarantee accuracy due to the changeability of budgets and campaign focuses.

Can an interested vendor only bid on a portion of the project (e.g. digital media & SEO/SEM) or is the University looking for one vendor to handle all areas of media buying?
We are asking vendors to bid on the full project, but to note areas of expertise or areas that are not covered. Our goal is to maximize access to expertise across traditional, digital, and SEO/SEM, but we recognize that a single firm will likely not excel across all areas, and a firm strong in digital may not even handle traditional. We will award to multiple vendors as needed to connect campus to expertise that matches their diverse buying needs.

Is there currently a vendor(s) providing media buying services for the University? If so, would the new vendor have access to any previous media plans, analytics or performance reports from prior campaigns?
University media buying services are currently provided by Hilton & Myers, Barkley REI, and Arizona Republic, or are managed internally by departments (or, occasionally by other providers via smaller department-specific interactions). New vendors would have access to any media planning strategies and analytics that the departments have retained from prior campaigns and would be willing and able to share.

Do we have access to make SEO changes to websites?
Direct access to individual websites for SEO updates would be managed by each individual department and would depend upon their web management philosophies.

Can we create Landing Pages for Campaigns on our own servers?
Any University of Arizona content, including landing pages for individual campaigns, should be hosted on UA servers.

RE: CRM Integration - Does UofA have a CRM team, or work directly with SalesForce and Technolutions?
UA does have an emerging CRM team within our central IT unit that is tasked with the institution’s interests in and relationships with CRM tech solutions. UA recruitment works with Slate Technolutions.

RE: Evaluation criteria item 2a. Google Premier Partner – is this stating that being a Google Premier Partner is a requirement?

When a firm has the Google Premier Partner badge, it does not the quality or size of the agency. The “Premier Partner” badge can be awarded to a relatively small agency that demonstrates that they are growing the amount they spend with Google, but a large agency that manages much more Google spend may actually not have the Premier Partner badge because they are not “growing” their revenues. If your desire is to make sure that the agency manages substantial Google Ad spend, can you consider changing this question to something like “Demonstrate a track record of managing at least $5 million annually in Google Ad spend,” or something like that. Again, an agency may be managing only $50K a month and be a Premier Partner solely because they went from managing $40K last month to $50K the next month. Google Premier Partners have demonstrated their expertise in three areas: certification, ad spend, and performance, and being a Premier Partner means an agency is knowledgeable, experienced, and successful. Our reasoning behind requesting Google Premiere Partner designation is not necessarily to ensure that the agency knows how to manage substantial spend, but rather to ensure they are sufficiently connected to Google to receive training on its algorithm changes and have advanced experience in optimization. If a firm can demonstrate their knowledge, experience and performance in another way, the committee would be open to considering their bid.

For the digital campaign management and optimization section, do you require that the vendor is a Google partner at the premier level? Google Premier Partners have demonstrated their expertise in three areas: certification, ad spend, and performance, and being a Premier Partner means an agency is knowledgeable, experienced, and successful. Our reasoning behind requesting Google Premiere Partner designation is not necessarily to ensure that the agency knows how to manage substantial spend, but rather to ensure they are sufficiently connected to Google to receive training on its algorithm changes and have advanced experience in optimization. If a firm can demonstrate their knowledge, experience and performance in another way, the committee would be open to considering their bid.

Given that the RFP requires international media buying experience, can you share more details on your international media buying needs? Are you looking for digital or traditional media buys? Do you have specific country targets? Market research around the institution’s global targets is an ongoing project and international advertising efforts are currently small-scale and/or experimental. The goal will be to attract international students to Tucson, as well as to promote enrollment at our distance and micro-campus locations: global.arizona.edu/micro-campus. These campaigns would most likely be predominantly digital, with the possibility of some on-ground traditional/OOH in markets where we have campuses or major feeder populations.
Question considering Traditional Media is outlined within the document. We are a digital marketing agency, however, we work in tandem with our clients’ traditional media firms and/or our Strategic Account Management team can specifically oversee and project manage this relationship. Knowing that we do not outsource traditional efforts and that we are solely digital - is this a deal breaker? Furthermore, if the above is OK with you, I noticed the budget was upwards of $5M annually. Do you have a sense of how this budget would be broken out amongst the services requested in the RFP? Please advise as these insights are ideal for us to put an appropriate scope of work together.

Digital-only (and/or traditional-only) firms are welcome to bid, as we are pursuing a multi-award RFP to fill our media buying needs across a spectrum of services, including digital, traditional, and SEO/SEM. We are interested in maximizing our strengths across various media buying/planning services and understand this expertise is likely not concentrated within a single firm. However, if any work is to be outsourced we would need to know to whom it would be outsourced.

Regarding the budget, the figure is merely an estimate based on understanding of past campus campaigns, but we would predict that activity is likely to be heavily biased toward digital media planning/buying (at a level of 60/40 or even 70/30), and less towards traditional or SEO/SEM. This may vary by campus sub-client and by campaign.

Is the RFP going out to all vendors, agencies or both? If agencies are submitting their RFPs then we want to make sure it is ok to provide them with our media and rates.

The RFP is open to all vendors and/or agencies that can address our media planning and buying needs in the traditional or digital spaces, or both.

What markets are you requesting? We have over 50 markets and thousands of media to propose.

Target markets are highly dependent upon the audience (students, donors, alumni, etc.), campaign focus (enrollment, advancement, etc.), and time of year. However, popular national enrollment markets for an example proposal could include Arizona (particularly Phoenix-area) and southern California.

Who are you trying to reach in each market? Young adults? Business professionals?

Again, target audience in each market varies depending on the focus of the campaign and the department of origin – for example, a traditional enrollment campaign may target 15-17 year old high school students/graduates, while our online enrollment team may target business professionals and learners of all ages nationwide, and our advancement teams may be targeting University alumni across all post-graduate age groups in pockets around the country. A good example target may be 15-17 y/o high school students in Arizona, and/or potential adult learners 24-34 y/o in and around Maricopa County, AZ.

What are the dates and duration of the campaign? Our rates are dependent on the market and timing. Highly dependent on the source department and individual campaign goals. A good target example may an enrollment campaign in the latter two weeks of May.

Do you have a budget per market? For example, $100K for LA, $100K for NY, and $50k for San Francisco- all for 4 weeks.
Dependent on source department budget and scope of individual campaigns. Past campaigns have resembled $50k for a local Arizona (Tucson) campaign, and $100k for a small campaign in southern California.

What is the initiative of the campaigns? Enrollment? Athletic recruitment?
Again, highly dependent on the source department and the individual campaign. Example initiatives include: enrollment (general, online, international, or to specific programs such as the business or medical school), advancement (targeting donors and alumni nationwide and/or internationally), and brand awareness (local sustaining, and opening new markets nationwide).

3.8.3 Please clarify - do you want 1 hard copy plus a copy on 3 separate electronic devices?
Please submit 1 original and 1 flash drive. I will share the responses to the committee via Box.

3.8.3 Does the 20-page limit include the count for the cover page, table of contents and forms required to be submitted?
No just your response is counted. The other is just for administrative purposes.

3.9.8 Should we include page 12 of 30 of the RFP with the Limiting Criteria response circled or can we address that question within our response?
Yes but again please do not count this towards your 20 pages.

For the digital campaign management and optimization section, do you require that the vendor is a Google partner at the premier level?
See the response further up in the addendum.

4.3.1 Is a completed VPAT required as part of the submission?
No we will ask for this is you awarded the RFP.

5.0 Does the University plan to select one vendor or multiple vendors under this award?
Multiple vendors based off expertise.

Given that the RFP requires international media buying experience, can you share more details on your international media buying needs? Are you looking for digital or traditional media buys? Do you have specific country targets?
Market research around the institution’s global targets is an ongoing project and international advertising efforts are currently small-scale and/or experimental. The goal will be to attract international students to Tucson, as well as to promote enrollment at our distance and micro-campus locations: global.arizona.edu/micro-campus. These campaigns would most likely be predominantly digital, with the possibility of some on-ground traditional/OOH in markets where we have campuses or major feeder populations.

Will the acceptance or non-acceptance of credit card weigh into the evaluation of vendors?
No

Section 4.41 – What is meant by offset? Offset based upon what?
It states that we can use money that were going to pay vendor to offset any non-conforming performance or failure to perform or any expenses related to termination.
Section 4.42.1 – Need time frame for written notice.
This clause states that we can cancel at any time without notice so there is no time frame.

Section 4.42.2 – Need categories for default and cure period for each category.
Failure of the successful vendor to comply with any term or condition of the Agreement, to acquire and maintain all required insurance policies, bonds, licenses and permits, or to make satisfactory progress in performing the Agreement. A cure period can be negotiated upon award.

Section 4.42.3 – How much written notice will it be provided?
Can be negotiated upon award.

Section 4.42.4 – Provide 60 days for dismissal of petition filed against Outfront.
Can be negotiated upon award.

Section 4.42.6 – Need clarification on the reasons for a stop work order. If materials have been ordered, etc., the University will be responsible for paying for them.
The University of Arizona will pay for any expenses incurred by vendor before stop work order was issued.

Are you taking bids from out of state? Do you require registration with the State of Arizona for the RFP submission?
Yes, we are accepting out-of-state bids and we do not require registration with the State of Arizona for the RFP submission.

We are a media buying firm, the section for “Ad Creation & Management” on page 14 is worth 10% of the evaluation, We are able to perform this task through our creative partners…How should we proceed to answer the question? Please disclose/list any third parties that would be need to be contracted in order to serve the need.

In regards to SEM, Is it necessary to run the campaigns in the clients (UA) account?
Yes.

Does the university have a budget for the market research and strategic consulting work? And if so, how would you like firms to price these services?
Should we provide a short “menu” of offerings with prices and/or a price range?
A menu of offerings would be fine – how to represent the pricing of these services may depend on how a firm is able to offer them (in-house expertise, third party contractors, etc.).

How many sub-clients are there in the RFP offering?
The University consists of hundreds of departments, however it is most likely that media buying services would be contracted through our higher-level Colleges and Divisions, of which there are around 20-25. Budgets, support staff, and appetite for media buying vary widely across institutional sub-clients.

Is this for a specific set of projects or more to find an agency of record that can partner with multiple needs/challenges across campus on an as needed basis?
The RFP is to help the institution connect with media planning and buying
expertise to address multiple needs, projects and campaigns on an as-needed basis.

Can you share current enrollment by campus and modality and what the 3-5 year goal is by area.... Is goal to grow by 10 or by 10,000.... Similarly for alumni involvement and enhanced donations – what is current state and desired future state, can they quantify this for us.

Enrollment for First Time, Full Time Freshmen is expected to stay fairly flat over the coming years, with growth expected to come from increased retention of current students as well as increased transfer enrollment. Arizona Online undergraduate enrollment has a goal to increase by 50% next year and 20% every year after that, with graduate college enrollment to increase by 10% every year. Specific goals for donations to be outlined within the context of our Foundation’s upcoming campaign. The institution will also be establishing brand awareness benchmarks in key metro areas and will measure progress against these benchmarks on likely a biennial basis.

Is the $5M budget inclusive of ad spend and how is this spread over the different areas?
Budget is purely an estimate based on past activity and cannot be guaranteed, but it is inclusive of ad spend and would likely be most heavily used by 3-5 larger UA sub-clients, with smaller campaign projects run by smaller departmental sub-clients on an as-needed basis.

Page 10, Section 3.8.3: The RFP states that proposals must be no longer than 20 pages – does this include any addendum pages we might want to include (reporting examples, etc.?)
Optional addendum pages may exceed the 20 pages, but please clearly mark them as addenda and restrict to no more than 5 pages if possible.

Page 13: #5: What, if anything, was missing from previous reporting that UA would like to see moving forward from their digital/traditional media buying services vendor?
Quality control and reliability during a campaign launch, particularly relating to data and dashboards, and clear reports confirming all the final details for every campaign. We are seeking audience/demographic insights (i.e. strong performance with 25-year-old females in Southwest) and actionable takeaways to help us make decisions, better understand our audience(s), or adjust other marketing efforts beyond the campaigns.

Page 13: #5: Has UA used any proprietary dashboard software outside of Google Data Studio?
No (at least not UA’s main accounts).

Page 13: #6: Is SEO currently being done? If so, is it being managed by individual departments, or is UA managing one SEO campaign for the entire site?
SEO, when it is being done, is being managed separately by individual departments through their own Google accounts.

Page 14: #1 under Ad Creation and Management. Can you clarify “content marketing development”? Does that include both copywriting and layout/design? Content marketing mainly refers to copywriting, although layout/design is an additional service that may be needed.
Example past added-value services have included strategic consulting, market research connections (reports, white papers), and ability to bring speakers and experts to campus for special professional development sessions.

The University needs to better connect the dots/data between leads that come in through campaigns and people who eventually show up in Slate (or other enterprise CRM systems that may be adopted) as inquiries and applicants, without having to manually download records and upload them into CRM databases. We need to see how ad performance impacts the enrollment funnel and track the customer journey, with much smoother hand-offs among systems.

Is the intent to award a contract to one agency for this work, or to identify and vet several agencies from which individual units can select based on their specific needs?
Intent is to identify and vet one or more agencies for individual units to select based on their needs.

Is media planning and buying for Central Marketing Communications included within the scope of this RFP, or does it cover solely the University’s sub-units?
Yes, RFP covers media planning/buying for central Marketing/Communications as well as institutional sub-units.

Does “all campuses and modalities” include Arizona Online (https://online.arizona.edu) and UA South (https://uas.arizona.edu)? Yes.

Do you have an existing performance measurement strategy for the University that helps individual units track performance against stated goals? Or do you anticipate that this type of service may be needed for individual units on an as-needed basis?
Performance tracking for marketing is currently not centralized, and this service may be useful on an as-needed basis for individual units.

Related to this, do you currently track the University’s brand awareness on a regular basis?
Brand awareness tracking has not been consistent or large-scale enough to provide actionable data. The institution intends to establish brand awareness benchmarks in key metro areas and will measure progress against these benchmarks on likely a biennial basis.

How is the University image/reputation enhancement and knowledge broadening/deepening currently measured?
Measurement tactics have not been sufficiently consistent or centralized to provide useful enterprise data, although smaller-scale assessments are performed at a departmental and sometimes divisional level.

Are there specific business goals? By business unit, by target audience, by stage in the admissions funnel?
Business goals will vary by sub-client, but just about every unit will have established goals around enrollment, mostly focusing on generating quality top-
of-funnel leads that will eventually convert into applications. Some units will focus media efforts on yield activities (convincing admitted students to enroll), particularly at the undergraduate level.

Does the stated budget of “upwards of $5 million” include both media planning & buying dollars and services dollars to cover things like ad creation, strategic consulting, etc?
This figure is inclusive of ad/media spend only (not services), however it is merely a baseline estimated from past activities. It is not necessarily inclusive of value-added services such as consulting and market research.

How is the current budget prioritized across undergraduate, graduate, online and (if applicable) UA South locations?
The budget split would probably be along the lines of 80% online, 12% undergraduate and 8% graduate (with the undergrad/grad dollars split around 5% general freshmen/transfer and 15% at the college level).

Will it be possible to modify pages within www.arizona.edu to improve the lead generation / enrollment process?
If a firm is engaged by central Marketing and Communications for a project related to www.arizona.edu, this is possible, although actual modifications would likely be performed by in-house developers. Institutional sub-clients seeking updates to www.arizona.edu as a component of their own lead generation projects would need to contact central Marketing and Communications to discuss.

Will the Marketing and Communications office be the primary point of contact for the selected agency for all media planning, buying and creative services across the various University Marketing units?
Marketing and Communications central office will be the primary point of contact in regards to the institutional client account and any brand management enquiries, and will seek to remain informed about any sub-client campaigns and marketing activities, however the various University marketing units would operate as individual sub-clients and would not go through central to procure or pay for services.

Section 3.8.3 regarding the number of copies I'm to send is a bit confusing based on how it's written. I intend to provide 1 bound original version, 3 bound copies of the original, and 1 flash drive with an Adobe PDF version. Is this what is expected given the verbiage in the RFP? If not, can you clarify?
1 bound original and 1 digital copy (to be shared with 3-5 committee members) is fine.

Also in section 3.8.3, you state that the proposal can be no longer than 20 pages. Is this 20 pages, front and back (so the page numbers could go up to 40) or a maximum of 20 page numbers? Also, would the completed VPAT need to be included within this 20-page limit or is it viewed as a separate document?
Proposal should be a maximum of 20 page numbers, although additional optional addendum pages may be included up to 5 page numbers as long as these are clearly marked. The VPAT can be submitted only if you are awarded the RFP. We do not expect the vendors to submit those prior to review of RFP.

In section 3.9.8 under "Number 2. Full service account support," you indicate a requirement for our ability to support approximately 25-30 units across the
university's organizational structure. You include some examples, but can you elaborate on the estimated bandwidth expected, either per unit or as a whole (~25-30 units combined)? Hours per month would be the easiest way for me to analyze our ability to comply with this requirement, but if there's another way you prefer to provide this information, I'm open to other options.

Bandwidth requirements will vary by unit and time of year (and whether or not a campaign is active). Some examples:

- Arizona Online has a steady digital/SEM campaign rhythm that requires an estimated 40-60 hours per week, every week, for maintenance and optimization.
- Freshman and transfer recruitment has more sporadic needs, with around 2-3 campaigns built and executed each semester, with variable hours.
- Central Marketing may require upwards of 30-40+ hours per week during active campaign traffic periods for major brand campaigns.
- An example College client might estimate hours along the lines of the following: campaign build/launch work (10-40 hrs), campaign management and reporting (20-60 hrs), and monthly status calls (15-25 hrs). This is just an example potential estimate based on past activity.

You mention in section 5.0 that the total estimated budget across all units is upwards of $5 million annually. Does this include media or is that budget for the services outline in the scope? If this doesn't include media, do you have an overall budget you are looking at spending for media specifically (not services) during this 12-month period?

This figure is inclusive of ad/media spend only (not services), however it is merely a baseline estimated from past activities. A budget inclusive of campaign management and other services would be substantially higher.

Does the university have a preference or requirement for the number of on-site, in-person visits they'd expect or want and how frequently they would want them? No preference or requirement here.

Is the RFP for all segments (SEO/SEM, creative services, traditional media, etc) or can we pick and choose areas to bid on?

The RFP is technically for all segments and we would prefer complete bids, however we understand that many firms do not specialize in all these areas and may in fact not serve one or more areas – we just ask that this is noted, and expertise around one or more of the segments declared. Our goal is to maximize access to expertise and we will award to multiple vendors as needed to cover all segments, based on vendors' specific expertise.

Slate - How many colleges use it? Technical requirements for API connection? If there are set-up fees for implementation, who absorbs those costs?

All undergraduate and graduate recruitment utilizes Slate Technolutions. Slate does not have the ability to create an API connection.

Will we have access to data as to where the current students come from at the zip code level?

Central research around zip code level student markets is currently ongoing and in progress.
Will we have access to Google Analytics?
Yes.

Scope of Services
The RFP appears to be limited to paid media marketing yet it also references SEO services. Can you clarify if you are seeking organic SEO services and the scope of those organic (i.e. non-media) services? For example, are you interested in a comprehensive SEO engagement that would include an organic content marketing strategy, as well as a technical website audit and ongoing on and offsite recommendations to improve your visibility in search results? Some UA sub-clients need a website audit and ongoing recommendations (ideally in concert with paid campaigns), although some sub-clients handle content marketing internally.

Can you indicate if there are any plans to redo the website and if that should be taken into account if SEO services are within the scope of this RFP. Although College/Divisional and smaller department sub-clients may be interested in updating their websites, there are currently no plans to redo www.arizona.edu in the immediate future.

The RFP states that the total marketing budget for the University sub departments is upwards of $5 million. Can you clarify whether this is just the media budget or includes all marketing related expenses (e.g. staff, etc.). If the latter, can you provide just the estimated total media budget for the University? $5 million is purely an estimate based on past activity and cannot be guaranteed, but this figure is inclusive of media budget and marketing expenses.

Can you provide any further breakdown between the portion of media budget that is spent on traditional media sources vs. digital media sources? Although highly dependent upon individual sub-clients, their campaigns, and the focus of those campaigns, the committee estimates a much higher degree of focus on digital media buying over traditional, possibly around 60/40 or even 70/30.

Can you provide any further information regarding the past or projected level of market research budget expenditures? Although market research at the enterprise level has not been consistently performed, the institution has plans to establish brand awareness benchmarks in key metro areas and will measure progress against these benchmarks on likely a biennial basis.

Can you outline the (estimated) timeline for the award of the contract and any other steps that may be required subsequent to submission of the RFP responses? The timeline is difficult to determine. The RFP due date is April 25, 2019. Once this time elapses the responses are given to the requesting department for review and scoring. At this time we have no idea how many vendors will be submitting proposals. If it is a large amount then this process may take longer than usual. My hope is that we can award the RFP within 30 days of close but depending on contracts could take a bit longer.

Does the University use one CRM system or does it vary by school? Can you indicate which CRM is used and if there are any plans to change the CRM in the near future?
The institution is leaning heavily towards the use of Salesforce as an enterprise CRM system, however currently there is no centralized CRM formally in place at an institutional level. All undergraduate and graduate recruitment offices use Slate Technolutions as a CRM. There may be pockets of small-scale alternate departmental CRM usage around campus.

What type of down the funnel enrollment data is the University able to provide for enrollment attribution and campaign optimization purposes and at what frequency?

Some larger sub-client units can pull manual reports from the Slate CRM that include prospective student status and campaign UTMs, provide access to GA and GTM, and apply appropriate conversion pixels throughout the site. Some of this can be done for freshman and transfer recruitment as well, although not all the way to enrollment (rather to specific conversion actions that a campaign is anticipated to create). Most smaller units do not have the ability to share student funnel information.

Are there any other internal University data analysis or BI systems or tools that the vendor would be expected to be familiar with and interface with?

No, not as an evaluation criteria for this RFP.

Can you clarify what you mean by holistic campaigns in this question from the preferred capabilities section: “Expertise in designing and developing holistic campaigns through Facebook and/or LinkedIn”

By holistic campaigns, we are referring to social campaigns that use owned, earned, and paid social opportunities and tie back to master campaigns that may be ongoing with parallel digital, OOH, and TV advertising.

Will the University consider proposed clarifications in the contract terms as part of the proposal submission?

Yes if you take exception to any of the contract terms then please note them separately from your 20 page proposal. At time of award we will the negotiation process of such proposed changes.