Procurement and Contracting Services

Request for Proposals for Creative Services

Addendum #1

Please mark all proposal submission Envelopes with the following information

Sealed RFP #L132003
Due on Monday, August 13, 2019 no later than 2:00 PM, MST
The following were questions submitted along with the transcription of the Pre-Proposal Conference.

**Proposal Submission**

1. **We would like to submit proposals to work with U of A for all 5 of the core creative competencies. I see in your notes it states, "Bids will be evaluated separately for each Creative Competency that a vendor submits for." Do we submit our proposal as one complete with the submittals for all 5 components? We do not need separate proposals correct for each category correct?**

   Proposal can be submitted as one complete with all 5 components included. Please note which case studies relate to which competency. See below for more information.

2. **Should a separate complete proposal for each creative competency be submitted OR can one proposal covering multiple creative competencies be submitted?**

   One complete proposal can cover multiple creative competencies, as our RFP is similar to 5 small RFP’s in 1. Our review is separated into two components: half of the scoring will review information about the firm, and half of the scoring will review the competencies that are bid on (we will repeat the second half of the scoring for however many competencies are bid on). See below for additional information.

3. **If we are submitting for multiple competencies and capabilities, can we submit everything under one proposal?**

   Absolutely. Vendors are welcome to submit one proposal for all five competencies, or three of the five or one of the five, etc. Our RFP is similar to 5 small RFP’s in 1, and we will score each vendor separately for each of the competencies they bid on (and only against others that bid on that competency). If you submit all under one proposal, we just ask that the case studies provided represent whatever competencies you are bidding on, with a note indicating which competencies are exemplified by which case studies.

4. **Storytelling: Can you give us some examples of what is meant by “storytelling”?**

   By storytelling, we are seeking competency in the ability to craft a narrative that is medium-agnostic, i.e. the development of a theme, story or brand narrative that will carry through regardless of the execution, be it print, social, video, digital, OOH, etc. We are interested in the ability to carry a story arc consistently and creatively through a multimedia campaign in such a way that the narrative transcends the execution, makes clear sense, and is connected to other elements within the campaign (and/or tied back to a larger campaign). By narrative arc we mean humanizing and human-scaling our brand through deeper connections – as opposed to repeating a catchy tagline in multiple media.

   A good example would be the campaign built around the OSIRIS-REx’s launch in 2016. We could have simply stated that we are launching a space vehicle, but instead our creative partners helped us contextualize the launch and tell the very long-term story of the University as capable launchpad and leader of many missions, and a place from which many future missions will launch. This led to powerful copy in multiple formats, from digital ads, to video narrative, long-form interviews and portable copy for use by our partners.

   Another example would be the campaign around Women in STEM, which has room to grow and develop in the coming years, where internally we developed the overarching story arch that women in STEM, at every stage, are heroes. Instead of simple profiles, each interview was then framed to reach backward and forward to ensure we could tell the personal story of mentorship and responsibility to the next generation. This thread of uplifting the next generation is as significant as our research talent, and many academic institutions would prefer to be entirely neutral and mention only degrees earned and scientific results. The goal behind this story was to get to the why, in order to inspire our audiences. It was far more successful than simple
profiles, and led to more personal creative, excellent verbatims, and employee and student advocacy – organically grown from the story.

5. On page 27, the RFP lists contents to be included in the proposal. Does The University of Arizona require the contents of the RFP be organized in the same order as this list?
   No, as long as each of the items in the list is articulated clearly in some manner within the RFP response.

6. Since you can submit on one or more of the five competencies, will the university of work to more than one agency?
   Yes, this is a multi-award bid and we hope to award to one or multiple vendors in each of the five Creative Competencies.

7. Is there a limit on case studies to present?
   No, however the committee may have limited time and multiple proposals to review and would ask for a reasonable number of case study submissions to review.

8. Does the University of Arizona seek a listing of firm capabilities and/or a narrative of our overall capabilities? Can an executive summary and project overview section be provided to further explain our capabilities and understanding of this request?
   A project overview section detailing firm capabilities would be fine, and although listing is preferred for easier reading, either a narrative or listing would be fine as long as the information is articulated. The listing of capabilities is to help us get an overall picture of the firm, but we will primarily be looking to the case studies to exemplify competency in any of the 5 areas bid on.

9. Does the University of Arizona seek a description of our work flow and process in response to articulating the creative services areas we will bid on?
   Yes, this would be helpful as process and workflow may differ based on the each Creative Competency that is being bid on. This is especially useful if it has direct bearing on your interactions with University units as clients, and/or if your process provides a significant footprint in your creative deliverables.

10. Will a client list of the past three years be sufficient for the request to provide “current and past” client list?
    Yes, past three years will be sufficient.

11. Is it okay to lean on strategic partners as part of a broader team while remaining the contracting flesh lead agency?
    Please disclose typical partners in the RFP response. This scenario would be a sub-contract, with the awarded vendor as the lead agency. We understand that freelancer supplementary and/or complementary staffing is normal and would like to understand how your agency upscales when needed. We also would like to understand what percentage of workload and/or which specific skill sets are normally outsourced. It is important to us as a state agency to have transparency around who we are working with, even if the working relationship is one step removed.

12. Is there any anticipated need for large scale 3D work, and given that that would be unspecified, how would we price it and essentially bid on that at this stage?
    Yes, there is an expectation of a need for large scale 3D work in the next year in particular as we do more experiential work on campus and in other locations for the University, and we recommend bidding in the Experience Design category. Please provide a range of pricing and past creative work.
Pricing & Budget

1. What is the budget proposed for the upcoming services?
   Due to the decentralized and federated nature of our organization, we cannot guarantee or even truly accurately estimate the amount of spend in each category. What we present below is an educated estimate based on our best understanding centrally of past activity across the organization. These numbers are estimated for overall project scale, not specific firm commission or invoices for creative work.

   - **Concepting**, project size ranges from $1,000–$150,000. Generally embedded in below projects. Total annual for conceping alone: $15,000.
   - **Storytelling**, project size ranges from $500–$150,000. Generally embedded in below projects. Total annual for storytelling alone: $30,000.
   - **Design Services**, project size ranges from $1,000–$20,000. Total annual approx. $300,000.
   - **Experience Design**, project size ranges from $4,000–$150,000 (including permanent exhibits). Total annual approx. $500,000
   - **Multimedia**, project size ranges from $2,500–$50,000. Total annual approx. $350,000.

   Total annual: $1.2M*
   * Merely a best guess based on past activity across decentralized organization, and not a guarantee of current or future work.

2. Historically, how has the budget been distributed by each competency?
   See above answer for details.

3. Are there specific programs you’ll be investing more resources against?
   The University will be increasing investment in digital, interface, and experience design more than in the past.

4. In Section 5.5, should pricing be provided in the format outlined in the RFP, or is the university open to reviewing another format?
   As long as the information that we requested is capture, we are open to seeing an alternate format of presenting the information. We just need to make sure that we are able to compare the information equitably across vendors. See below for additional information.

5. Is a pricing table acceptable for pricing structure to be provided as the scope of the core competencies is not specified? See below response.

6. Scope of work does not include numerical goals, exact number of depts, etc. - so is the U of A looking for a rate sheet for types of work or how would they like anticipated work to be quantified/costed? Would this be acceptable in the Commission/pricing structure?
   We are interested in understanding how you generally price your work, i.e. if you are on a project-by-project basis or if you have certain types of work on various hourly rates. We ask that you give us your standard way of pricing so we can understand how you price and what your overall general rate structure is. We understand that we are asking about a variety of work and our expectation is that there will be different pricing models.

   Note: The University of Arizona has a highly federated structure with many hundreds of departments divided into Schools and Colleges, and there is no direct reporting model in to central marketing & communications.
7. Is the scope of the submission to this part of this proposal more of a hypothetical scope to show how we would price out a project, and not necessarily something that we start work on immediately following the RFP process?
Correct. Our goal is to connect vendors with the decentralized marketing community across campus to enable them to work with you. There will be some buildup of immediate work that Arizona marketers have been waiting to implement, and then afterwards requests would be department-by-department and college-by-college over the duration of the RFP.

8. Section 5.5, would The University of Arizona like to see pricing for one or two concepts for “Campaign Discovery, Research, and Development Fees”? What types of “research” is the University of Arizona interested in as a part of this project? Do you seek recommendations?
Yes, pricing for one or two concepts would be very helpful. By research, we are referring to any type of creative (and sometimes market) research that aids in the development of effective creative concepts, for instance gaining insight into the lifestyles of our target audiences in order to craft a resonant campaign, or testing early drafts with key representative constituents to weed out issues or recognize creative misalignment.

   a. Is there a projected budget for one or all of the competencies?
   See Question 1 above, in this section, for very rough projected budget estimates. Please note that due to the decentralized and federated nature of our organization, we cannot guarantee or even truly accurately estimate the amount of spend in each category. What we present above is an educated estimate based on past activity across the organization.

University Structure & Goals

1. How important is the growth of online class offerings for the University of Arizona?
   Arizona Online is a significant growth target for the University and we are making major efforts to increase enrollment in our online class offerings.

2. How many agencies is your institution currently working with?
   Due to the decentralized nature of the University, this question is challenging to accurately answer. Each college, school and department is free to contract with any freelancer or agency for creative services, and this activity is not centrally managed or tracked. Our goal with this RFP is to identify a selection of strong agencies to connect with our campus community and encourage our decentralized departments to reach out with projects.

3. Can you share with us who your current agency partners are?
   See above for additional information. Many of our current agency partners may be bidding on this project and it would not be appropriate to name them during the RFP process.

4. On page 15, under Account Organizational Structure within the Account Management section, you detail that the vendor should describe their “escalation strategy”. Can you expand upon what you mean?
   By “escalation strategy” we are referring to the process for Arizona clients to reach additional points of contact at the vendor organization in the event of unresponsiveness or other issues at the account management level, as well as the process by which conflicts are addressed.

5. We noticed in the RFP document that you’re looking for the respondent agencies to not reinvent the brand but build upon the established brand. In these proposals are you looking for examples from
Creative agencies of how they could build upon a brand, or is this more of just a capabilities demonstration of how we have tackled these problems in the past?
It would be very helpful if, when you demonstrate your capabilities, you show some case studies that focus on the treatment of an existing brand framework. Work for established brands would be excellent, or at least not just work in which you are involved in creating a brand from scratch (such as for small businesses), because we do already have established brand elements.

6. What percentage of the RFP is focused on multicultural work, specifically the Hispanic market?
Our work in multicultural and Hispanic markets is building rapidly and we are looking to ramp up significantly, so we are looking for help in this area. In terms of the RFP scoring, this is included in the Additional Expertise section which is 10% of the RFP evaluation score (on the Firm Profile side).

7. Can you tell us a little more about your current brand, such as how long ago it was developed?
The current brand was developed by an external organization, Ologie, around the end of 2013 / beginning of 2014 (released in 2014). We are refocusing the brand at this moment and will be launching a more hyper-focused and energetic take on the brand platform on August 8th. Our current brand is about possibilities and is extremely photographically focused. The basic structure of the brand (logo, color palette, elements, etc.) will not necessarily change, but the narrative focus will shift to center more on storytelling, inclusion, and the ability to imagine what you can accomplish here. The graphical and narrative elements of our current brand were also tweaked internally within our federated structure with a lot of input from creative and marketing staff across campus.

8. Who are your current segment audiences?
Although our audiences vary depending on the college or division, a list of main University of Arizona audiences generally includes: prospective students, current students, parents (of prospective and current students), alumni, donors, general population (normally Tucson local, however this is expanding to other vital markets), business leaders and elected officials, research foundations, potential faculty, and many other niche audiences.

9. You mentioned that you have several out of state offices. Are there any markets that are particularly strategic?
Texas and California (and most of the west coast and Pac-12 area) are critical out-of-state markets for the University, as well as a Washington D.C. government focus. We do have feeder markets in other places such as Chicago however these markets are not our primary focus at this time.

10. Are there international markets that you are targeting as well?
The University is attempting to grow several of our global programs quite significantly, and we are currently working to figure out which of our locations are high potential growth markets. Some early prospects include England, China, and some South American countries. We have strong Middle Eastern partnerships and may be looking to grow our footprint in that region as well.

11. The RFP mentions annual brand immersion training sessions as part of the annual planning process. Is it possible to get a bit more context on how those work and how much time is typically spent on this?
The brand training sessions are designed to onboard our new creative partners to ensure clarity around the University of Arizona institutional brand, and would be a one-time event at the beginning of the contract with possible shorter annual refresh sessions. The training session is around two hours and no more than half a day, and can be delivered virtually.

12. Do you have details in the nature of the university code base? Is it a specific platform?
The University of Arizona uses Drupal 7 and a custom version of Bootstrap, and we want to make sure that any code that is being developed is contributed upstream into our community code base, as this is a very open and transparent component of our digital community. For any website being produced across the University, we want to make sure if at all possible that it uses the existing Bootstrap or Drupal code base. The critical point is that no web presence be considered a “one off”, and that all work goes back into the community (which ensures that whatever modules are built are made available to the entire campus).

13. What’s a primary barrier / threat to enrollment currently?
The primary threats and barriers to our enrollment are increased competition in the higher education landscape coupled with an anticipated decline in first-time full-time Freshman prospects following the 2029 fiscal year, triggered by demographic changes.

Miscellaneous

1. August 13 is a Tuesday but it says Monday on the cover. What is the actual deadline for the RFP?
The RFP submission deadline is Tuesday, August 13, 2019 at 2:00 PM MST.

2. The RFP says that a VPAT needs to be submitted or we could face disqualification. We did not see a proper form to fill out. From our understanding, VPAT is a checklist/template that should be followed during the design process to ensure accessibility options, is this correct?
The VPAT information can be found at https://itaccessibility.arizona.edu/guidelines/purchasing/vpat however for this RFP, it would be sufficient for the vendor to respond to section 5.4 since a VPAT isn’t really applicable.

3. Do we need a legal workers certification to be completed? The clause mentions "services", but then gets more into construction specifics, so we’re a bit unclear.
Yes for any services in excess of $100,000 for the term of the contract it is required.

4. The pre-proposal meeting looked like it was being recorded. Is a recording of the meeting available?
Yes, the transcription is attached to this Addendum.

5. Should we provide team and references as part of this response or will we be asked to provide those upon award request for work?
Please provide these as part of the RFP response as they will be needed for the Firm Profile component of the evaluation.

6. Please clarify whether the financial information / requirements outlined in Section 3.9.5 are required as part of the response or provided upon award.
Please include this information as part of the bid as it will form part of our initial evaluation.

7. In section 5.4, the RFP requests the vendor “address compliance with WCAG 2.0 AA and UA Rehabilitation Act Section 508, Discuss where and how accessibility is included in your product development process and if we are designing digital content… discuss your efforts to ensure accessibility.” Can these details be included in the overall capabilities section or do you prefer we address this in the articulation of creative services to be provided?
We would recommend including this information in the articulation of each of the creative services to be provided, as there may be different accessibility concerns and efforts associated with different services (such as multimedia vs. experience design).

8. Are there any notices or recommendations for out of state vendors? No - see below.
9. Has the University of Arizona worked with an outstate agency in the past regarding these types of projects? Is the preference to work with an in-state agency?
   The University has worked with out-of-state agencies for creative projects before, and we do not have a preference for in-state agencies. Since this is a multi-award bid, we are interested in also enabling access to some local in-state resources, but we welcome out-of-stage agencies to bid. The University now has offices in several states, as well as an expanding footprint nationally and internationally, and we value out-of-state experience.

10. Please clarify whether agency responses should be submitted in binders, or can be submitted in another format.
    We require one copy on paper, but would prefer no binding. The other copy should be PDF on a flash drive.

11. Section 3.8.3 states “Vendors are to submit one (1) original, in hardcopy form, along with a copy in electronic form in either Microsoft Word or as an Adobe PDF file”. Then, section 3.8.4 states “Vendors shall ensure that the original and each copy are individually bound.” To confirm, is one printed and bound original and one electronic copy acceptable for submission?
    I found that being in a binder is difficult during the final storage of the document and not sustainable. I would like to have the original unbound and a flash drive of that document.

    a. Does the jump drive need to indicate that it contains a copy version on the label?
       If you can fit on the flash drive it would help but I would prefer to have your vendor name on it instead with the RFP # on it.

12. Section 3.8 indicates that the university shall not accept proposals received by fax or email. Can we not email a PDF of our proposal along with mailing a hard copy of our proposal?
    No, we cannot accept a bid via email. You must submit the response via sealed bid in the Procurement office via UPS or FedEx. If you try to submit via the Postal Service, it has to go to a central mailing facility before it arrives at Procurement, so there might be a 2-3 day delay. To provide the PDF, please do so on a flash drive with the paper copy of the bid.

13. For local applicants may we drop off the seal proposal at your office?
    Yes, please do so. The address is in the RFP, and is 20 W. Sixth St. (the corner of Main and Sixth St., just west of Stone in the old TEP building), on the 5th floor.

14. In reference to the instructions to mark the sealed envelope in Section 3.8.5, is it acceptable to mark the box with “sealed RFP#132003, 2:00PM, August 13, 2019, Lila Sorensen, Vendor Name”?
    Yes it would. We have vendors submit proposals but the document via Federal Express doesn’t reference the RFP # or the vendors name so its difficult to get it to the correct buyer and open it when the time comes.
Q: From: Joe O’Connell
Hi, this is Joe O’Connell from Creative Machines. One question we had is, we do large three-dimensional structures and interactive exhibits and pavilion-style things. Is there any anticipated need for large-scale 3D work, and given that that would be unspecified, how would we price it and essentially bid on that at this stage?

A: From: Stephanie A Cunningham and Misha Harrison
Stephanie A Cunningham:
And yes, there probably would be a need for that. I would recommend bidding in the experience design category for that. Misha, do you have any additional notes?

Misha Harrison:
Yeah, I would just give us sort of ranges of pricing. Joe, if you could, there is an expectation for that in this next year, in particular, and then forthcoming as we do more experiential work on campus and in other locations for the university. So that's part of the reason we send the bid out to you directly.

Q: From: Derene Allen
We also have a question in the chat “Scope of work does not include numerical goals, exact number of depts, etc. - so is the U of A looking for a rate sheet for types of work or how would they like anticipated work to be quantified/costed? Would this be acceptable in the Commission/pricing structure?”

A: From: Stephanie A Cunningham and Misha Harrison
Stephanie A Cunningham: Just to answer the note about exact number of departments. That's true. We have many hundreds of departments divided into scores of schools and colleges. One item that we probably do need to make clear to everyone on the call and we hope to try and make it clear in the RFP is we have a highly federated structure here at the university where by central marketing communications doesn't actually, there's no reporting model into Marketing/Communications. So all of our colleges and departments have very separate work environments and functions. They actually report up to their individual deans. So we kind of operate in a sense of we create a collaborative culture, where we advise, we make recommendations, and we do manage the institutional brand. But a lot of the decisions or project-based decisions are made at the level of the colleges and schools. So that's why we didn't give an exact number of departments, because we don't have an inside view into what their plans are for the coming year. And so it's kind of a wide range of potential outcomes. Misha, do you have any thoughts or anyone else in the committee, thoughts about the pricing component of that question.
Misha Harrison: I think what we would be interested in understanding is how you generally price your work. So if you are on a project-by-project basis or if you have certain types of work that have various hourly rates. I would just give us your standard way of pricing, so we can understand how you price and what your overall general rate structure is. And I think that's - we have an expectation that because the variety of work that we are asking about, I think we have an expectation of a couple of different pricing models and that's okay. You don't need to change your pricing model for us.

**Q: From: Landon Cowan**
Got it. So the idea is that, you know, the scope that there we’re submitting to this part of this proposal is more of a hypothetical scope to show how we would price out a project, not necessarily something that would be signed, that we start work on, immediately following the RFP process.

**A: From: Misha Harrison**
Correct. I assumed that what will be done with this is we will then let the list of, and Lila, correct me at any moment here, let the list of approved vendors who are on this RFP out to the marketing community, the MarCom community, across campus and they know now that they can work with you and there will be some buildup of work that people have been waiting for. So yes, my expectation is, there will be some immediate request afterwards. And then afterwards, it would just be department by department, college by college, what they need over the duration of the RFP.

**Q: From: Landon Cowan**
So just, just a really quick question. So we noticed in the RFP document that there's a that we're looking that you're looking for the respondent agencies to not reinvent the brand but build upon the established brand. In these proposals are you looking at for examples from creative agencies of how they could build upon that brand, or is this more of just a capabilities demonstration of how we how we tackle these problems in the past?

**A: From: Misha Harrison**
Misha: I think it would be very helpful when you demonstrate your capabilities, and if you show case studies, that what we are interested in, and can have available, work for established brands would be excellent and not just work where you are involved in creating a brand from scratch for small businesses because we do have an established brand.

**Q: From: joshuabelhumeur**
We also have a question in the chat “Do you have details in the nature of the university code base? Is it a specific platform?”

**A:** From Stephanie A Cunningham and Misha Harrison

Stephanie A Cunningham: Just to speak to that as best as I can, and Misha please chime in, because I know I don’t understand it as well as some, but we do use Drupal at the university and we have this University of Arizona version of Bootstrap and we would just want to make sure that any anything any code that's developed is brought upstream into that code base, and that it's very open and transparent to the university community. Misha, do you have any notes because I know you understand this better than I do.

Misha Harrison: Um, no, that's basically it, is any development that we do for any website across the university. We want to make sure if at all possible, is using either existing Bootstrap or existing Drupal code base. And then from there, and I believe we're in Drupal 7, but moving to 8. And what's really critical is that nothing be considered a one off and then it always goes back to the community. And so whatever module you build would then be made available to the entire campus. And I am confirming with our digital director right now that we are in fact Drupal 7. It might take me a second to get that confirmation.

**Q:** From heather

Another question from the chat, “If we are submitting for multiple competencies and capabilities, can we submit everything under one proposal?”

**A:** From Stephanie A Cunningham and Misha Harrison

Stephanie A Cunningham:

Absolutely. Yes. So I know that our methodology is a little complex for this RFP. It's almost like, kind of like, five mini RFP’s in one, but um, yeah, you’re absolutely welcome to submit one proposal for all five, or three of the five, or one of the five. Really, we're just kind of, we’re sort of, separating the review into kind of two components. One, information about the firm, which would be consistent for whatever competencies you bid for. And then kind of, the other half of it would consist of whatever competency you bid on. So, for instance, if you bid on two competencies, we kind of evaluate you twice, once for one competency and one for the other competency. And so it would just kind of be separate evaluations. I’m sorry, I think I’m just making it more complicated when I’m describing it, but yes, absolutely. You submit all under one proposal, we just ask that the case studies that you provide represent whatever competencies that you’re bidding for, and just maybe make a note saying, “hey, this example is exemplifying this competency and here's how.” If that answered the question, I'm sorry if that was confusing and off the rails.
Misha Harrison:
A note back, “we are in fact on Drupal 7, will be on it for another year, and we believe it'll take about a year to migrate over to 8.”

Q: From: mattrussell
Another question: “Has the University of Arizona worked with an outstate agency in the past regarding these types of projects? Is the preference to work with an in-state agency?”

A: From: Stephanie A Cunningham, lilas, and Misha Harrison
Stephanie A Cunningham:
So, Lila, are there any restrictions around the answer to this question? Just wanna check before I do answer. Lila are you still on the call?

lilas: No, there is no restriction. We can use in-state or out-of-state.

Stephanie A Cunningham: Okay. And then to answer the question more philosophically. We don’t have necessarily a preference. I mean, I think that we are interested in having some local and state agency options. But again, this is kind of a multi-award bid, so it's not that we’re kind of restricting our focus to in-state. We've definitely worked with out-of-state agencies and we welcome out-of-state agencies to bid as well.

Misha Harrison:
And that that becomes more and more true as our footprint expands. We now have offices in several states.

Q: From: Landon Cowan
The RFP you described, and these annual brand, you know, immersion training sessions, it sounds like that's that's part of the annual planning process. Is it possible to get a bit more context on how those work and, you know, how much time an agency typically spends, something like that?

A: From: Stephanie A Cunningham, Misha Harrison and Caliber Group
Stephanie A Cunningham: Do you mean the brand training or do you mean the...

Landon Cowan: Yes, the brand training sessions, yeah.
Stephanie A Cunningham: Yeah, I mean, I think what we're thinking for that was just a way to onboard our new agencies that we'd be working with, especially for the first time, and just make sure that there's clarity around what the University of Arizona brand is, kind of what our expectations are as the stewards of the institutional brand. And then we probably, I would think that would be kind of an annual thing, because the brand does refresh in various ways annually. Of course, if we did do something dramatic halfway through the year, we'd probably call everyone together again. But I think it's more just level setting, making sure we're all on the same page, especially since we would really be relying on you guys to kind of steward our brands in the same manner that we would, and especially because we're very decentralized here. So, sometimes there may be a department or a college that does something a certain way that maybe is in conflict with something that we've done with the brand. I mean, they just want to have a discussion about that and make sure that we're still all on the same page. So that's kind of what we're thinking. Misha, do you have any additional thoughts there?

Misha Harrison: In terms of time investment for something like that, in terms of face-to-face, we've boiled it down to under two hours at this moment. At most, I can't imagine more than a half a day, and it's, you know, it would be the agency's choice as to who attends and we've been able to do it, virtually as well. So it doesn't necessarily require any flights or hotels or anything like that, but at least will get us to a point to understand some of our decentralized... Because we were decentralized, some of the glitches and interesting pieces that we have, I won't call them glitches, some of our quirks, are a lot easier to explain and understand, face-to-face, and who you speak to for what, and we want to make sure that everybody gets to meet the people who are responsible for various things, so you know who to call, and who to talk to, when there are questions, because guaranteed, there will be.

Q: From: Derene Allen
Another question: “Is there a limit on case studies to present?”

A: From: Stephanie A Cunningham
Not really. I mean, I would ask you to be kind to the committee in terms of our review time, but...Was that was a second question? So no, say that there's a limit, just maybe just consider our time, I suppose.

Q: From: Derene Allen
You mentioned that you have several out-of-state offices. Are there any markets that are particularly strategic?

A: From: Stephanie A Cunningham and Misha Harrison
Stephanie A Cunningham: I'll pass it over to our creative strategist, Misha.

Misha Harrison:
Yes, Texas, frankly, is critical for us. We also have a DC government focus. So those are both critical for us. And then the other pieces would be for... Well, if we think about out-of-state, Texas is for undergrad recruitment, but also for business development. Washington D.C. was entirely government and funding agencies. And then if we think about all along the west coast, The whole Western PAC-12 area is important for us for multiple reasons. That's for brand as well as recruiting, but we have a couple of new foci, but definitely think PAC-12 area. And then some of our feeder markets are also in Chicago, but we're not focusing on that yet, but we would be interested in hearing about it.

Landon Cowan:
How many agencies is your team currently working with?

Stephanie A Cunningham: Are you talking about the institution or just our team specifically?

Landon Cowan: Let's do both.

Stephanie A Cunningham: Yeah, I mean, I mean, honestly, our team has worked with several agencies in synergy. As an institution, I mean, honestly, I don't even know if I could give you a number because we are so decentralized. Everyone kind of works with whoever they find whoever they, you know, other projects they put out to bid for other agencies so I mean, we probably do have a recruitment list somewhere of agencies we have worked with, but honestly, it's just so disparate it's really difficult to give an answer. But yeah, I mean, we typically, we've worked with about a know to for external agency that a time in the past, at one time, so we're hoping to kind of clean this up a little bit just to make sure that we have, like, a set of agencies. Okay, these are the folks who know our brand, who do it really well, who, you know, do these creative pieces really well. And so we want to encourage more synergy with the campus of the world kind of working with the same folks if possible.

**Q: From: Derene Allen** Another couple of questions: “Is it okay to lean on strategic partners as part of a broader team while remaining the contracting flesh lead agency?”

**A: From: Stephanie A Cunningham and Misha Harrison**
Stephanie A Cunningham: Lila. Is that, is that a question for you. Lila, is that a question for you do you think? Or is that question for us? I feel slightly in procurement territory, so I'd love to get Lila’s thoughts. Lila says, “not sure how to answer that.” Let me see... Do you mean, for
instance, if you're an agency and you need to outsource a task like video production, for instance, or experiential design and relying on those partners? Just a bit of clarification about the question, I think. Alright, so I'll come back to that. But if you're able to provide a bit of clarification about that question- Oh, “there is, for external capacities not internally.” Yeah, so that that would be fine. But we do ask that if you are going to be outsourcing anything, we'd love to know to whom, and probably see some case studies around that as well. And we do understand that, you know, not every agency can cover all case studies. So if that is something that is typically done, and as long as we're not working with that outsource agency directly, we're working with your agency, so that works within the contracting specifics, I think that should be okay. Misha, do you have any thoughts about that? Because we do want to know specifically to whom things are outsourced and contracted to.

Misha Harrison: Yeah, I think we mentioned, even in the RFP, that we'd really like to understand how you upscale when you need to. So I think it's really about transparency. Because we are a state agency, we have to be transparent and we want to be able to. We want to be able to talk to, you know, the agencies and the people with whom we worked for whatever reason, if there were an audit or any sort of PR issue. And so if you have typical partners, we'd love it if you would disclose that within the RFP. And otherwise, on a case-by-case basis. I think it's literally just about transparency and making sure that that we are aware of who you're bringing up. Like, we're aware that freelancers, you know, staffing up with freelancers is really normal, but we want to understand, sort of, what percentage that you are working with freelancers, but strategic partners that our other firms that you consistently work with, just make sure you disclose that with us.

Stephanie A Cunningham: nd Lila has a note as well regarding leaning on the strategic partners, “you can do that. It would be a subcontract of situation. You would be the lead agency.”

Q: From: maria
Stephanie A Cunningham: Another question from up here in the chat “are there international markets we are looking at targeting as well?”

A: From: Stephanie A Cunningham and Misha Harrison
Stephanie A Cunningham: There are. Misha?

Misha Harrison: Yeah, yeah. Potentially. I mean, we are attempting to grow pretty significantly. Several of our global programs that would be literally across the globe, pretty much every continent you can think of. We are working to figure out which are the high potential growth markets. So right now, I don't have that list yet because I don't think they have it entirely
figured out, but we understand that England is one of them. That's a high potential growth market and South America, trying to remember exactly which country in South America, but one of our South American locations, and then China. And then we also have a pretty strong Middle Eastern partnership and we are looking to grow those footprints, those campuses. So in UAE in particular. But again, that's forming up. If you have case studies, they talk about international work, that would be to your advantage, that would be wonderful. But I don't know that we're, we will be ready sometime in this fiscal year to do to move forward with some of this international work and more so in the 2020-2021 fiscal year though.

Q: From: Matt Another question: “please clarify agency responses should be submitted in binders, or can be submitted in another format.”

A: From: Stephanie A Cunningham We would definitely like it to be submitted in PDF format. There needs to be a print copy for Lila, and I think that submitting a binder will be fine for that. But for committee-reviewed, PDF is definitely great. If you send that to Lila, and she can get that to us, that would be really helpful, and we can all save some trees in the process.

Q: From: Matt Next one, please clarify whether the financial information.

A: From: Stephanie A Cunningham I'm sorry. There's another one. Lila says, “I would prefer not to bind, but I do need one copy in paper.” Okay, so forget my binder thing, no binding. One copy in paper and then PDF is fine for the other copy.

Q: From: Matt The other question: “please clarify whether the financial information/requirements outlined are required as part of the response or provided upon award.”

A: From: Stephanie A Cunningham and lilas I think a bit more clarification on what that is. Is that the components of the RFP they're asking about, the financial information about the agency? Because I think that is a procurement question. Oh, Section 3.0? Sorry, the section’s right here, Section 3.9.5. Hey Lila, which section is that? Can you remind me, since you're the expert.

lilas: 3.95 is... Let me bring that up, hang on just a minute. I was just in there. My apologies for not being on the call today. And of course, my thing is flipping out, so... New computer. Sorry.

Stephanie A Cunningham: No worries. I'll pop on to the next question, and then we’ll pop back to that question.
**Q: From: Matt**  Section 5.0: Should agencies provide team and references as part of this response, or will they be asked to provide those upon award request for work?

**A: From: Stephanie A Cunningham** I’d say, include them as part of this response because that as part of our firm profile analysis, both of those will be really helpful.

**Q: From: Matt** And then, Section 5.5: “Should pricing be provided in the format outlined in the RFP, or is the university open to reviewing another format?”

**A: From: Stephanie A Cunningham** I’d say, like, as long as the information that we asked for is captured, we’re open to exploring another format. We just have to make sure that we are able to answer those questions from the format that you give us, because we need to evaluate firms apples to apples against one another. So, if it’s kind of a completely different, it may be very difficult for us to do that. We may need to come back to you and ask for a bit more clarification. But, yeah. I’d say, as long as that information is transmitted to us, we should be able to analyze it equitably.

Stephanie A Cunningham: And... okay, so I think I caught up on all the questions. We're just checking on Section 3.9.5 real fast.

lilas: And I am bringing that up. So... let's see. Do determination of information and concerning vendor qualifications.

**Q: From: 12157323200** Just chiming in here. We were the agency that asked that question. We were just wondering, the elements on that page that are bulleted. Do we have to include those in our proposal response? Or are those just indicated for when we’re selected for a particular scope of work?

**A: From: lilas** That’s when you're selected.

**Q: From: 12157323200** Quick other question, we had a hard time hearing you when you answered Section. 5.5.0. Essentially, we were just wondering if, as part of this response, do we also need to include the references, as well as team bios? Or is that, again, something that we would have to include when we were selected?
A: From: Stephanie A Cunningham I'd say, include them in the bid, because it's part of what we're evaluating in the firm profile part of the evaluation criteria. So it will be a component of our initial evaluation process. I would include them.

Q: From: jennifer Another question: Since you can submit on one or more of the five competencies, will the university of work to more than one agency?

A: From: Stephanie A Cunningham, lilas and Misha Harrison
Stephanie A Cunningham: Yes, it is a multi-award bid, and we hope to award in multiple, multiple categories. We may only want one in one of the categories, but our intent is to award to more than one agency, probably in more than one category.

Q: From: Zion&Zion August 13th is a Tuesday. On the cover you have monday. What is the actual deadline?

A: From: Stephanie A Cunningham and lilas
Stephanie A Cunningham: Oh, sorry. So August 13th is a Tuesday on the cover. We have Monday, what is the actual deadline.

lilas: It is the 13th. It is a Tuesday. Or whatever that day is. Sorry about that, I missed that part. I thought I caught 'em all.

Stephanie A Cunningham: Yeah, that was probably my typo that came to me last... Sorry about that.

Q: From: Maria Another question: “What percentage of the RFP is focused on multicultural work, specifically Hispanic markets?” Um, Misha?

A: From: Stephanie A Cunningham and Misha Harrison
Misha Harrison: I don't know if I can give you a percentage, all I can say is, it's building rapidly. I would say, at this point, it's probably less than 5%. By the end of this fiscal year, my expectation is, it would go up to maybe 15%. Barry's saying that we're looking to ramp that up significantly and are looking for help in that area specifically.

Stephanie A Cunningham: And in terms of actual numbers and RFP, we included that in the additional expertise section which is 10% of the RFP, so it is something that we are very much
looking at. But in terms of actual quantifying the RFP, it is rolled into that kind of 10% of our evaluation score.

Q: From: Beatrice Szalas Can you tell us a little more about your current brand? How long ago was it developed?

A: From: Misha Harrison That's a fun one. The current brand was developed by an external organization. In fact, a partnership with us of biology. In 2014 (end of 2013), released in 2014, we are refocusing it at this moment, and will be launching a, I would say, a more hyper-focused and energetic brand platform. August 8th, as a matter of fact. Stay tuned, everyone. And what I would say is the biggest takeaway with our current brand is that it is about possibilities and it's extremely photographically focused. I don't see that changing. I do see us focusing more on storytelling, inclusion, and the ability to kind of, imagine what you can accomplish here. So, note on that. And we have found that it seems to play quite well externally with potential incoming students with some tweaks. Internally, it was a bit of a challenge to wrangle it into something useful. And I think this new iteration is intended to handle both quite well. I can't say a whole lot more about that until after our brand launch. But a note that the current one was tweaked within our federated structure with a lot of input from creative and marketing folks from all across campus who have weighed in. And so this new focus-targeted one will also be in conjunction with our capital campaign that will be launching another in about a year.

Q: From: Zion&Zion Another question: “Section 3.8.2: The university shall not accept proposals received by fax or email. Can we not email a PDF of our proposal along with mailing a hard copy of our proposal?

A: From: Stephanie A Cunningham and lilas lilas: No, the question is, or, the answer is: no. You must submit it via sealed bid here in our office via UPS or FedEx. If you try to do via the Postal Service, it's got to go to a central mail facility, and then it comes to us. So there might be a 2-3 day delay for that. So don't use the Postal Service.

Stephanie A Cunningham: So you're recommending that they send it on a flash drive, Mila? The PDF?

lilas: They would do that. Yeah, the PDF should be on a flash drive.

Q: From: Joe O'Connell For local applicants, may we drop off the sealed proposal at your office?
Yes, please do so. Yes. And I believe that address is in the RFP, but it is 220 W 6th St. We're at the corner of Main and 6th St., just to the west of Stone in the old TEP building for your local vendors here. And we're on the fifth floor.

Chat messages

01:07:49 Derene Allen: Scope of work does not include numerical goals, exact number of depts, etc. - so is the U of A looking for a rate sheet for types of work or how would they like anticipated work to be quantified/costed? Would this be acceptable in the Commission/pricing structure?

01:12:00 joshuabelhumeur: Do you have details on the nature of the University “code base”? Is it a specific platform?

01:14:17 heather: If we are submitting for multiple competencies and capabilities, can we submit everything under one proposal?

01:15:40 heather: Yes! That was perfect.

01:16:08 mattrussell: Has the University of Arizona worked with an outstate agency in the past regarding these types of projects? Is the preference to work with an in-state agency?

01:19:56 Derene Allen: Is there a limit on case studies to present?

01:20:39 Derene Allen: You mentioned that you have several out of state offices. Are there any markets that are particularly strategic?

01:22:25 Derene Allen: Is it ok to lean on strategic partners as part of a broader team, while remaining the contracting/lead agency?

01:23:10 maria: Are there international markets we are looking at targeting as well?

01:23:52 lilas: Not sure how to answer that

01:24:06 Matt: Some detailed questions:

Page 11, section 3.8.4 - Please clarify if agency responses should be submitted in binders, or can be submitted in another format?

Page 12, section 3.9.5 - Please clarify whether the financial information/requirements outlined are required as part of the response, or provided upon award?

Page 27, section 5.0 - should agencies provide team and references as part of this response, or will they be asked to provide those upon award/request for work?
Page 29, section 5.5 - should pricing be provided in the format outlined in the RFP, or is the university open to reviewing another format?

01:24:30 Derene Allen: Yes, for external capacities not internally
01:25:05 Derene Allen: Thank you!
01:26:04 lilas: Regarding leaning on the strategic partners you can do that it would be a subcontractor situation you would be the lead agency.
01:28:18 lilas: I would prefer not to bind but I do need 1 copy in paper
01:33:28 jennifer: since you can submit on one or more of the 5 competencies, will the University award to more than one agency
01:33:55 jennifer: thank you
01:33:58 Zion&Zion: august 13th is a tuesday
01:34:04 Zion&Zion: on the cover you have monday
01:34:07 Zion&Zion: what is the actual deadline?
01:34:23 maria: what percentage of the RFP is focused on multicultural work specifically Hispanic market?
01:34:24 Zion&Zion: thank you
01:35:20 Beatrice Szalas: Can you tell us a little more about your current brand? How long ago was it developed?
01:35:20 maria: thanks!!
01:37:30 Beatrice Szalas: Great - thank you!
01:37:31 Zion&Zion: section 3.8.2 the university shall not accept proposals received by fax or email, can we not email a PDF of our proposal along with mailing a hard copy of our proposal?
01:38:22 Zion&Zion: thank you
01:38:25 joeoconnell: For local applicants, may we drop off the sealed proposal at your office.