

RFP ADDENDUM #1

December 18, 2018

**To:
Prospective Bidders**

**Brand Refresh RFP
California State University Stanislaus
One University Circle, Turlock, CA 95382**

RFP Number: CSUSTRFP18101

Proposal Submission Date: January 3, 2019 2:00 P.M. (PST)

This Addendum forms a part of the contract documents and modifies the original bidding documents. Addendum shall be noted as received and acknowledged on the Bid Proposal Form when submitted as outlined in the Request for Proposal referenced above.

The following corrections, additions, deletions, and/or modifications to the above package, by this reference, shall be incorporated therein:

RFP Questions, Answers, and Exhibit A and Exhibit B:

Question 1. Please provide the names and titles of the Stanislaus State personnel who participated in the pre-bid meeting on December 4th.

Answer:

- Lisa McMullen, Senior Director of Alumni Engagement and Special Events
- Dr. Faimous Harrison, Dean, Stockton Campus
- Kellie Gratigny, Public Affairs/Communications Specialist, Athletics
- Mandeep Khaira, Senior Web Developer, Communications and Public Affairs
- Phyllis Crittendon, MBA, Buyer III, Procurement and Contract Services
- Corey Cardoza, Director of Information and Learning Services, OIT
- Dr. Rosalee Rush, Senior Assoc. VP, Marketing, Communications and Media Relations
- Dr. Diane Crayton, Associate Professor, School of Nursing

Question 2. What is the University's current tagline? Was the current tagline tested with Stanislaus State target audiences for final selection? If so, please describe the testing process.

Answer:

Engaging. Empowering. Transforming.

The current tagline was tested. Not sure of the methodology or who was involved.

Not many people on campus recognize or know it.

Question 3. Please describe the methodology(ies) associated with any recent (within the past five years) research activities conducted by/for Stanislaus State as part of the reaffirmation of accreditation process, visual identity work, strategic plan development, and the 5.2.1 mentioned “current brand and market research.”

Answer:

Strategic planning - <https://www.csustan.edu/strategic-planning>

WASC Accreditation self-study - <https://www.csustan.edu/accreditation/wasc-accreditation/2018-19-reaffirmation-accreditation>

Sr. AVP for Marketing, Communications and Media Relations has been conducting small focus groups to better understand student, faculty, staff and alumni perceptions of Stan State. Notes from these meetings will be transcribed and shared with the awarded vendor.

Question 4. With regard to Phase III potential deliverables, do you anticipate that admissions/recruitment materials would be included as part of the “summer/fall 2019” project timeline (and budget)?

Answer:

No

Question 5. Although mentioned during the pre-bid conference meeting, please provide clarification regarding the flexibility of the first-year budget of \$100,000. Is Stanislaus State open to the possibility of reallocating (or securing additional funds) to front-load the initial investment in the engagement for all activities? How much could be shifted?

Answer:

This is flexible in terms that funding for year 1 and 2 is currently available. There is also the opportunity to renew the contract annually for two (2) additional one-year periods.

Question 6. Per 5.2.1, please confirm:

Who comprises the “community” audience? And do you have an identified and sufficient email contact list for this audience? Please describe the status of the list and approximate number of contacts.

Answer:

County and City elected officials

Donors

Stanislaus State Foundation Board

College Advisory Boards

Friends of the University

Lists are up-to-date and maintained in a database. The number of contacts can be provided at a later date.

Question 7. Who comprises the “prospective student influencers” audience? And do you have an identified and sufficient email contact list for this audience? Please describe the status of the list and approximate number of contacts.

Answer:

Regional and local high school counselors.

The listed is managed by our Admissions & Outreach and maintained in the CRM. It is up-to-date.

Number of contacts can be provided at a later date.

Question 8. Do you have an identified and sufficient email contact list for parents/families of prospective students? Are prospective students and prospective student influencers the same? If they are different, why are prospective students (undergraduate and graduate) not included in the list of target audiences? Are prospective students a desired research target audience? Do you have identified and sufficient email contact lists available for prospective UG and graduate students? Please describe the status of the contact lists—and approximate numbers—for each.

Answer:

We do not have an email contact list for parents.

Prospective students and influencers are not the same.

Yes, we have a managed email list of prospective students within Admissions & Outreach.

This brand refresh seeks to increase name recognition and top of mind programs/experiences about Stan State in our six-county region (and beyond).

Enrollment has increased and we want to maintain gradual enrollment growth at our main campus and planned incremental growth at our Stockton Campus. Thus, prospective students are an audience, for increasing awareness of Stan State. For this purpose we have combined prospective and current students into one category.

Question 9. In 5.4 and 7.6.4, you reference media creation and media placement strategy. However, in the pre-bid conference, you indicated that the scope does not include media buying. Can you share a media buy budget that might be a parameter of the media strategy?

Answer:

We are currently preparing our budget request for media buys/advertising for Fiscal Year 2019-20.

Question 10. What are the six counties in the six-county region that the university serves?

Answer:

Mariposa
Calaveras
Stanislaus
San Joaquin
Merced
Tuolumne

Question 11. When is the expected launch of the capital campaign?

Answer:

The silent phase is tentatively scheduled to launch during the Academic year 2019-20

Question 12. Is support for this campaign also covered by this RFP or will an additional RFP be sent out to partner for that work?

Answer:

No. Although marketing collateral developed during the branding campaign may be used during the campaign.

Question 13. If included in this RFP, what does that support look like?

Answer:

N/A

Question 14. Website Related Questions: Pg. 24: In the line "conversion of all content to a flat, responsive design" – What is meant by flat?

Answer:

Mobile, adaptive responsive design. Accessible from any platform.

Question 15. Beyond Cerkl and 25 Live are there any other integrations you anticipate?

Answer:

Possibly, but it will not be a priority.

Question 16. Regarding "Content migration/entry training and technical support - Onsite training and necessary phone and email support." – What level of content migration is anticipated? 100% vendor? 50/50 vendor/Stanislaus State? TBD?

Answer:

TBD

Question 17. With the web redesign, will you be reassessing current internal content management processes? Going from centralized to decentralize? Vice versa?

Answer:

Not at this time. TBD.

Question 18. Why is now the right time to undergo a brand refresh?

Answer:

New leadership and strategic plan approved and adopted in November 2017. Preparing for WASC reaccreditation and comprehensive campaign. <https://www.csustan.edu/strategic-planning>

Question 19. You shared that there is some existing research available. Are you able to share the objective and scope of this research?

Answer:

Refer to Engaging. Empowering. Transforming. The Development Process and Meaning Behind Stan State's Motto - Exhibit A.

Question 20. Are you able to provide names and contact information for a prospective student research sample?

Answer:

Yes

Question 21. What is the ideal student for CSUS?

Answer:

Students who are successful at Stanislaus State are generally well-balanced academically and socially. They have an ability to multi-task, are responsible, open to making connections and getting involved on campus. Many are first generation. Possess a strong work ethic.

Question 22. What are your goals for enrollment? Have there been any trends in your enrollment in recent Years?

Answer:

Enrollment at Stanislaus State has increased by 13% from 2014-15 to 2018-19, including 5-6% growth in new student headcount.

Our Stockton Campus enrollment has grown considerably over the last three academic years, with an 18 % increase in enrollment compared to the 2016-17 academic year.

<https://www.csustan.edu/stockton-campus>

We are looking to incrementally increase transfer enrollment at our Stockton Campus and overall awareness of Stanislaus State's visibility in the six counties we serve.

Question 23. What are the strongest markets for recruitment, and which markets do you hope to engage more strongly in the future?

Answer:

Stanislaus County, Merced County and San Joaquin County

Interactive Student enrollment map

<https://csustanislaus.maps.arcgis.com/apps/StoryMapBasic/index.html?appid=d2f33f3252b24687b344a32addb3ff41>

Markets to engage more = San Joaquin County

Question 24. Are there key milestones, board meetings, or decision-making dates we should consider when developing a timeline?

Answer:

Yes.

2020 – Stanislaus State's 60th Anniversary

April 2019 – WASC Reaccreditation Site Visit

Academic Year 2019-20 Comprehensive Campaign silent phase begins

Question 25. Who are your key competitors?

Answer:

Our peer comparison group includes:

CSU San Bernardino

CSU Bakersfield

CSU Fresno

CSU East Bay

CSU Monterey Bay

CSU San Francisco

More Enrollment Information <https://www.csustan.edu/spemi/book-trends>

Question 26. Which of those competitors would be considered a conflict of interest?

Answer:

None of them

Question 27. Has the team at CSUS worked with an agency in the past? What worked well, and what didn't?

Answer:

Yes. JSA.

It was a closed process. Internal communications team did not participate in the process.

Outcome was a redefined visual identity, i.e. logo, tagline, secondary identifiers, etc.

Question 28. Is there an incumbent firm being considered in this pool of respondents?

Answer:

No

Question 29. What is the structure of your internal team? What are their capabilities or roles for supporting this initiative?

Answer:

Communications and Public Affairs Team <https://www.csustan.edu/communications/contact-us>

We are in the process of hiring a digital communications specialist

Not listed are two staff writers

A staff graphic designer

Three intermittent photographers

Question 30. You shared that the budget for this contract includes \$100,000 per year, for three years. Can you confirm if this is flexible? If so, by how much?

Answer:

The budget is flexible in terms of funding for year 1 and 2 is currently available. There is also the opportunity to renew the contract for a year 4 or 5.

Question 31. Is there a possibility for us to do some "Man on the Street" interviews on campus in the next couple of weeks?

Answer:

Stanislaus State is a public university and you're free to stop by the campus anytime. If your visit includes interviewing students with photo or video, the student must complete an Activity Release of Liability Form – Exhibit B.

Question 32. What are the KPI for this project?

Answer:

Key Performance Indicators

1. Detailed Intel Report
 - a. Outcomes of research
 - b. Detailed outline of brand attributes
2. Tagline/motto
 - a. ≥ 3 options provided
 - b. Mechanism for testing tagline effectiveness (i.e. surveys, focus groups, forums)

3. Message platform
 - a. Brand promises
 - b. Segmented by audience with proof points
 - i. Alumni
 - ii. Faculty and staff
 - iii. Current and prospective students
 - iv. External Friends and community
 - v. Non-traditional and adult students
 - vi. Sub-Messages specific to:
 1. Stockton Campus
 2. Athletics
 - c. Mechanism for testing messages
 - d. Brand manual
4. Campus engagement plan
5. On-site campus presentations
 - a. Turlock
 - b. Stockton
6. Creative platform/toolkit
7. Increases name recognition and awareness
 - a. Mechanism for how this will be assessed

End of Addendum No. 1

Engaging. Empowering. Transforming. The Development Process and Meaning Behind Stan State's Motto

During his annual fall address in 2015, Stanislaus State President Joseph F. Sheley issued a set of marching orders for the purpose of rebranding the University. Tired of hearing the variants and multiple names by which the University was referenced, Sheley sought to create a standard hierarchy of acceptable names. He equally was dismayed at how the formal University seal routinely was used as a logo, on everything from shirts to beer can cozies, so he called for the creation of a new University logo. Finally, knowing that Stanislaus State never adopted a formal motto, he called for one to be created.

"There is real value in forcing ourselves to distill our purpose to fewer than 10 words, or to attempt to capture the University's essence in a single image or design," Sheley said. "Clarity and focus naturally translate into better storytelling, and that means more effective advocacy, support and respect."

Over the following months, committees were assembled from students, faculty, staff and administration, 18 wider-based focus groups were convened and a consulting firm (the Fresno-based Jeffrey Scott Agency) was hired to make sure all input was gathered and handled by someone without a stake in the outcome. It was understood that the president would have the final word regarding the selection of branding elements.

The committee approached the branding process in three sections — naming convention, logo and motto. During the motto-forming process, guided in part by the input of the focus group, the committee brainstormed for many hours to come up with words, phrases and concepts with the aim of capturing the spirit of Stan State's position, impact and unique identity within the region.

Having collected more than 75 words and phrases, the agency returned to the focus groups to test the positive and negative resonance of the motto's building blocks.

"Universities have mottos that capture the spirit and essence of who they are, and what they are trying to do now and in the future," Sheley said. "The themes and values that stood out as focus groups talked about us consistently were **personal attention, engagement, providing opportunity, and connection to the region.**"

One of the more difficult decisions was whether all of those attributes could be conveyed in a single statement, or whether the motto needed to be a collection of two or three words or short phrases. The latter approach was chosen, with the agreement that the motto needed to convey attributes unique to Stan State plus an inspirational element.

Among the final motto constructions were the following:

- *Your home. Your voice. Your Opportunity.*
- *Discover Your Voice. Discover What's Next.*

- *Engaging Students. Changing Lives.*
- *Personal. Inclusive. Limitless.*
- *Engaging. Empowering. Transforming.*

President Sheley reviewed the naming convention, logo and motto, and about the last motto on the above list he said: “When I saw this, I was pleased ... and proud. That is who we are.”

But how does the motto capture and express the essence of the University?

Focus group members agreed on three attributes applicable to the University they believed should be reflected in the motto:

1. That Stan State is a friendly and personable campus offering accessible and student-centered education.
2. That the aesthetics of the campus help Stan State’s overall attraction.
3. That Stan State increases the opportunities for the students’ self-discovery and ultimate success.

Here’s how the motto was seen to project the attributes it was charged with encompassing, according to descriptions developed by the Jeffrey Scott Agency:

Engaging: “Stanislaus State engages students by fostering personal connections among peers, faculty, staff and alumni – providing students with more opportunities and a true collegial experience.” (This explanation attaches the broader first and third attributes to the word. It wasn’t mentioned by JSA, but “engaging” also could be applied in a narrow definition to the campus aesthetics as mentioned in the second attribute.)

Empowering: “At Stanislaus State, students are empowered by the knowledge, skills and guidance that can take them anywhere, help them accomplish anything, and be more successful in their individual communities, careers and lives.” (This explanation appears to appeal to the “student-centered” phrase of the first attribute as well as the idea of success as mentioned in the third attribute.)

Transforming: “Stanislaus State is a safe and secure place where students transform as they discover their voice and work toward achieving life goals and aspiring to greatness. This is evidenced by the fact that 75 to 80 percent of our graduates are the first in their families to earn a college degree.” (This explanation appears to expand on the third attribute.)

The three-tiered brand was unveiled by President Sheley during his 2015 fall address. The rollout, executed by Communication and Public Affairs, initially consisted of branding guidebooks released in early September and late October 2015, and continues through ongoing one-on-one sessions with various campus groups regarding the proper and respectful use of the brand. The guidebook, which continues to evolve as the brand gains traction on campus and throughout the region, resides on the University website at

<https://www.csustan.edu/communications/branding>.



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Signature

Date

Signature of parent/guardian if under 18 years of age

Date