

UNIVERSITY OF MASSACHUSETTS

REQUEST FOR PROPOSAL

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UNIVERSITY OF MASSACHUSETTS  
MARKETING AND ADVERTISING SERVICES

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**RFP #CP16-DJ-0501**

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SUBMITTED BY

THE UNIVERSITY OF MASSACHUSETTS,  
PURCHASING DEPARTMENT, SHREWSBURY, MA 01545

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SPONSORED BY

THE UNIVERSITY OF MASSACHUSETTS PRESIDENT'S OFFICE

## 1.0 GENERAL INFORMATION

### 1.1 SUMMARY

The University of Massachusetts is seeking to engage the services of a firm that will assist the UMass system in the development and execution of a marketing and advertising communications plan. The UMass System/UMass President's Office seeks to build on the award-winning marketing and advertising campaign that it has presented over the past two years. The successful firm will help to chart the next phase of the communications course at the System-level, which is to say: What should the message be and how should that message be communicated?

The capabilities and attributes being sought include:

- A proven track record in developing and executing multi-media marketing campaigns, preferably including experience at the higher-education level.
- Experience in conducting marketing research and the ability to demonstrate how research shaped and informed subsequent campaigns.
- Media-buying expertise, including social and digital media.
- The ability to provide recommendations on social media, search-engine marketing, web and graphic design, advertising and other forms of marketing communications.

In addition, bidders will be asked to address topics of particular interest, including:

- How marketing and messaging at the university system level should differ from efforts initiated by individual campuses.
- Which audiences are best targeted by a system campaign?
- Which university systems are particularly effective at communicating "a system message" and why?
- What kind of impact has the UMass "Here for a reason" campaign had? What have been its strengths and weaknesses?

Bidders must have extensive experience in the higher education industry and a demonstrated record of accomplishment in the higher education field.

The term of the contract shall be for a period of two (2) years with the option to extend the contract for three (3) additional one-year terms. The awarded contractor must agree to the terms and conditions of the University Contract for services (see Appendix A). The University may negotiate with the candidate for bid award (but prior to the final award) in order to establish firm or fixed fee agreements which will prevail during the contract period.

### 1.2 UNIVERSITY SYSTEM

The University is composed of six (6) distinct operating units, and each of their associated entities and off-site affiliates including:

- Amherst Campus
- Boston Campus
- Dartmouth Campus
- Lowell Campus
- Medical School Campus
- President's Office – Central Administration

The University's five campuses and President's Office are geographically dispersed throughout the state. Each campus possesses a unique and complementary mission. A single Board of Trustees composed of 19

voting members and 3 non-voting members governs the University. The President of the University oversees the five-campus system, and each campus has its own Chancellor.

Additional information about the University of Massachusetts System is available through the University's web site at [www.massachusetts.edu](http://www.massachusetts.edu).

## 2.0 INSTRUCTIONS TO BIDDERS

### 2.1 RFP SCHEDULE

Event	Date and time
RFP Release Date	May 6, 2016
Bidder Questions Due	May 18, 2016, 3:00 pm EST
Respond to Bidder Questions	May 25, 2016, by end of day
RFP Due Date	June 3, 2016, 2:00 pm EST
Vendor Interviews (if required)	Week of June 20-24, 2016 (approximate)
Bid Award	July 8, 2016 (approximate)

**The University may change these dates at its sole discretion.**

### 2.2 BID RESPONSE DEADLINE

Proposals must be received via email only to [procurement@umassp.edu](mailto:procurement@umassp.edu) on or before 2:00pm EST, on **May 6, 2016**.

The email subject line must read: **"CP16-DJ-0501 Proposal"** and must have attached files, which contains the bidder's response including completed forms.

The University recommends sending the email with acknowledged receipt. It is the bidder's responsibility to insure that its proposal is received in its entirety and without exception by the proposal closing date and time. Any proposal received after the date and time specified will not be accepted, read, or evaluated.

The University will not be responsible for computer, server, internet or any technical problems, errors, delivery delays, or failures beyond its physical control. Bidders are advised to send their proposal responses prior to the proposal deadline to compensate for potential Internet routing delays in email transmission.

#### 2.2.1 EMAIL RESPONSE – FILE SIZE LIMITATIONS

The [procurement@umassp.edu](mailto:procurement@umassp.edu) mailbox is capable of receiving emails up to 25 MB in size. If your response is larger than 25 MB, please split your response and send in 2 or more separate emails and indicated in the subject line that you are sending multiple emails, e.g. **PROPOSAL, 1 of 2**. All emails containing your proposal response must be received prior to the proposal deadline.

### 2.3 QUESTIONS

Bidders may submit written questions via e-mail to [procurement@umassp.edu](mailto:procurement@umassp.edu) on or before 3pm EST, on **May 18, 2016**. The email subject line must read: **"CP16-DJ-0501 QUESTIONS"**. The University will compile all questions and email responses to all known bidders by end of day on **May 25, 2016**. Response to questions will also be posted on the University's website at the following location: [www.umassp.edu/procurement/bids](http://www.umassp.edu/procurement/bids).

No telephone calls will be entertained. Prospective bidders are prohibited from obtaining information about this proposal from any University personnel. Inquiries received after the specified date and time will not be accepted.

## **2.4 AMENDMENTS TO REQUEST FOR PROPOSAL**

Answers to bidder questions and other changes to the RFP document will be emailed to all known bidders and posted on the University's website at the following location: [www.umassp.edu/procurement/bids](http://www.umassp.edu/procurement/bids).

## **2.5 CONTACT INFORMATION**

Except as may be noted otherwise herein, the issuing office and sole contact for the coordination and dissemination of all information regarding this RFP is:

**Don Joubert, Director of Procurement**  
University of Massachusetts President's Office  
333 South Street, Suite 450  
Shrewsbury, MA 01545  
Email: [djoubert@umassp.edu](mailto:djoubert@umassp.edu)

## **2.6 ACCEPT/REJECT PROPOSAL**

The University reserves the right to reject any or all proposals, wholly or in part; to waive technicalities, irregularities, and omissions; to make the award in a manner deemed to be in the best interest of the University; and to correct any award erroneously made as a result of a clerical error on the part of the University.

## **2.7 WITHDRAWAL OF PROPOSAL**

Proposal offers may be withdrawn at any time prior to the proposal receipt deadline date and time. Once the proposal receipt deadline has passed all proposals become the property of the University.

## **2.8 PROPOSAL RESULTS**

Complete records of all proposals and awards are maintained in the University of Massachusetts President's Office Purchasing Department. All proposal documents will be made available for public examination after the bid evaluation committee has completed its bid review, selection and award.

## **2.9 NO UNIVERSITY OBLIGATION**

The RFP in no manner obligates the University to the eventual purchase of any products or services described, implied, or which may be proposed, until confirmed by written agreement, and may be terminated by the University without penalty or obligation at any time prior to the signing of an agreement.

## **2.10 AUTHORIZED SIGNATURE**

The proposal offer shall be signed by an officer who is authorized to make such commitments for the bidder. **Please complete bidder information in Section 8.0 – BIDDER INFORMATION AND SIGNATURE.**

## **2.11 EXPENSES**

Expenses for developing and presenting proposals shall be the entire responsibility of the Bidder and shall not be chargeable to the University. All supporting documentation and manuals submitted with this proposal will become the property of the University unless requested by the Bidder, in writing, at the time of the submission, and agreed to, in writing, by the University.

## **3.0 UNIVERSITY TERMS AND CONDITIONS**

The terms and conditions that will apply to the submission of proposals, to the University's evaluation of the proposal offers, and to the award of the contract should be reviewed carefully to ensure full responsiveness to the RFP.

### **3.1 PROPOSAL FORMAT**

All proposals shall be submitted as *Best and Final Offers*. Bidders will not be allowed to make material alterations to their proposal offers after the proposal opening. Each bidder shall include in their written offer all requirements, terms and conditions they may have, and shall not assume that an opportunity will exist to add such requirements, terms or conditions after the proposal opening. Bidder's terms or conditions that are deemed unacceptable by the University may be the basis for the University's rejection of the proposal.

### **3.2 PROPOSAL MATERIALS**

All materials submitted in response to the RFP shall become the property of the University upon submission and will be considered as part of this RFP.

### **3.3 MASSACHUSETTS PUBLIC RECORDS LAW**

Access to University records is made in accordance with the Massachusetts Public Records Law, M.G.L. c. 66, s. 10. All Bid Responses received are subject to M.G.L. c. 4, s. 7, ss. 26, and M.G.L. c. 66, s. 10 regarding public access to such documents. Statements or endorsements inconsistent with those statutes will be disregarded. The University will withhold the Responses or sections of Responses until such time that they have been opened. The University will make available the documents within those Responses only upon the finalization of those records.

### **3.4 RFP INTERPRETATION**

Interpretation of the wording of this document shall be the responsibility of the University and that interpretation shall be final.

### **3.5 ADDENDUM**

Any addendum issued to Bidders prior to the proposal opening date shall include an addendum acknowledgement section. Since all addenda shall become a part of the proposal, all addenda must be signed by an authorized Bidder representative and returned with the proposal. Failure to sign and return any and all addendum acknowledgements will be grounds for rejection of the proposal response.

### **3.6 PROPOSAL MODIFICATION**

Any exceptions/ additions/ alterations to the terms and conditions contained herein must be included in the bidder's response. Failure to provide the required data to allow for evaluation of the bidder's response to the RFP, or failure to follow and complete the RFP proposal format and accompanying documents will be grounds for rejecting the proposal offer. The University reserves the right to reject any proposals that alter the terms specified in the RFP.

### **3.7 CONFIDENTIALITY**

From the date of issuance of the RFP until the opening date, the Bidder must not make available or discuss its proposal, or any part thereof, with any employee or agent of the University. The Bidder is hereby warned that any part of its proposal or any other material marked as confidential, proprietary, or trade secret, can only be protected to the extent permitted by Commonwealth of Massachusetts laws.

### **3.8 PERIOD OF FIRM PROPOSAL**

All proposal offers must remain in effect for a minimum period of 180 days following the Proposal due date in order to allow for sufficient time for evaluation, approval, and issuance of award notice. The successful bidder's offer will remain firm for the duration of any resulting award and extensions.

### **3.9 PRE-AWARD NEGOTIATIONS**

After the proposals are opened, but prior to award, the University may elect to conduct negotiations with the highest ranked proposal respondents for purposes of:

- Resolving minor differences and information
- Clarifying necessary details and responsibilities
- Emphasizing important issues and points
- Receiving assurances from respondents

Selection may be made without further discussion, negotiations or bidder's presentations; therefore, bidder shall offer the most favorable terms in response to this RFP. Bidder must demonstrate an understanding of the scope of service to be provided and the ability to accomplish the tasks set forth. Bidder shall include information that will enable the University to determine the bidder's overall qualifications. The University reserves the right to request additional information or clarification on any matter included in the proposal response, to enable the University to arrive at the final award decision.

### **3.10 VENDOR INTERVIEW/PRESENTATIONS**

Some vendors may be invited to the University's Boston MA location for interviews and/or oral presentation of their services.

The presentations are tentatively scheduled for the week of June 20 – 24, 2016 at the following location:

**University of Massachusetts  
1 Beacon Street, 31<sup>st</sup> Floor  
Boston, MA 02108  
Conference Room: TBD**

If special accommodations are required in order to attend a site visit, please contact Don Joubert at [djoubert@umassp.edu](mailto:djoubert@umassp.edu) no later than three (3) days before the event.

## **4.0 CONTRACT**

### **4.1 CONTRACT TERM**

The contract will become effective on or about August 1, 2016. The term of the contract shall be for a period of two (2) years with the option to extend the contract for three (3) additional one-year terms. The awarded contractor must agree to the terms and conditions of the University Contract for services (see Appendix A). The University may negotiate with the candidate for bid award (but prior to the final award) in order to establish firm or fixed fee agreements which will prevail during the contract period.

### **4.2 CONTRACT FORMAT**

The resulting University Award will incorporate the University of Massachusetts Contract Terms and Conditions, a sample copy of which is enclosed as **Appendix A**. This RFP, any addendum, and bidder's response thereto, all additional agreements and stipulations, and the results of any final negotiations will constitute the final contract. The terms and conditions as contained in the Contract for Services shall take precedence over any conflicting terms.

### **4.3 CONTRACT MODIFICATIONS**

Any changes to the contract must be agreed to, in writing, by both parties prior to their execution.

### **4.4 CONTRACTOR ASSIGNMENT OF SUB-CONTRACT**

The Contractor shall not assign or in any way transfer in the Contract without prior written consent of the University, nor there be any subcontract of services without the prior written approval of the University. If subcontractors are used, delineate who the material subcontractors are and the nature of the relationship (e.g., security, courier, and system design).

### **4.5 CONFLICT OF INTEREST**

No officer or employee of the Commonwealth shall participate in any decision relating to the Contract which affects his/her personal interest or the interest of any corporation, partnership or association in which he/she is directly or indirectly interested.

## **5.0 EVALUATION CRITERIA**

Firms offering proposals must demonstrate considerable expertise and creativity in higher education marketing and advertising services.

Proposals will be evaluated based on the following:

- The firm's experience
- Quality of previous work and/or campaigns
- Cost Proposal

## 6.0 PROPOSAL REQUIREMENTS

### 6.1 QUALIFICATIONS/EXPERIENCE

- Please provide a detailed description of your firm detailing your qualification to develop a comprehensive marketing and advertising plan for the University.
- Please provide a complete list of other universities, similar in size and complexity to the University of Massachusetts, where you have completed similar projects.
- Please provide an overview that demonstrates your understanding of the University's current institutional position and the challenges it faces in the marketplace.
- A brief description of your firm detailing your qualification to provide broadcast media services, digital services and general marketing support to the University.
- Please provide a brief bio of the project lead and other staff members who will be assigned to this project.

## 7.0 REFERENCES

Please provide three client references below (please type or print clearly):

	Customer Name	Contact Name and Title	Telephone Number	Email Address
1				
2				
3				



## 8.0 BIDDER INFORMATION AND SIGNATURE

Please complete the information below (type or print clearly).

BIDDER (BUSINESS) NAME	
BIDDER CONTACT PERSON	
ADDRESS 1	
ADDRESS 2	
CITY	
STATE	
ZIP	
TELEPHONE	
FAX	
EMAIL	
Web Address	

Authorized Signature: \_\_\_\_\_

END OF RFP CP16-DJ-0501