



Request for Proposals

for

Digital & Non-Digital Marketing Services

Issued by:

Edinboro University of Pennsylvania

RFP # EU 10082020

Publication Date: September 11, 2020

Submission Date: October 8, 2020; 2:00 P.M. EST

USE EDT DURING SPRING/SUMMER
USE EST DURING AUTUMN/WINTER

(UPDATED: FEBRUARY 21, 2020)

RFP # EU 10082020
Digital & Non-Digital Marketing Services

Table of Contents

	Page
RFP Sections	
Section I General Information	1
Section II Post Award	10
Section III Work Statement	13
Section IV Information Required from Suppliers	18
Section V Criteria for Selection	21
 Appendices	
Appendix A Commonwealth Terms and Conditions Acknowledgement	
Appendix B Technical Proposal Form	
Appendix C Cost Proposal Form	

Section I General Information

I.I Purpose

- A. This Request for Proposals (RFP) provides interested Offerors with sufficient information to prepare and submit proposals for consideration by Edinboro University of Pennsylvania (hereinafter University) to satisfy a need for Digital Y Non-Digital Marketing Services.

All RFP documents are located at the State System's [eProcurement Exchange](#).

I.II Issuing Office

This RFP is being issued for Edinboro University by the Issuing Office listed below. The Issuing Office is the sole point of contact for this RFP. Please refer all inquiries to:

Darla Spaid
Director of Purchasing and Contracts
Edinboro University
220 McNerney Hall
300 Scotland Road
Edinboro PA 16444
V: 814-732-2704
Email: dspaid@edinboro.edu

From the Publication Date of this RFP until a determination is made regarding the selection of a proposal, all contacts concerning this RFP must be made through the Issuing Office. Only information supplied by the Issuing Office, including responses to questions regarding the RFP, should be used in preparing proposals. All other contacts or information received regarding the subject prior to the release of this RFP should be disregarded in preparing responses. Any violation of this condition is cause for the University to reject an Offeror's proposal. If it is later discovered that any violations have occurred, the University may reject the proposal and terminate the awarded contract.

I.III Calendar of Events

Description	Date
Publication Date	September 11, 2020
Deadline for Questions	September 24, 2020 @ 4:00PM EST
Amendment Issued (Questions/Answers)	October 1, 2020
Submission Date/Time	October 8; 2:00 P.M. EST
Services Start	Upon execution of contract

I.IV Description of the Organization

- A. The [State System of Higher Education](#) (State System) was established by statute on July 1, 1983 and comprises [14 universities](#).
- B. Information about the University can be found at <https://www.edinboro.edu/about>

C. Academic Programs

Edinboro University consists of two Colleges and three Schools: The College of Arts, Humanities and Social Sciences; College of Science and Health Professions; School of Business; School of Education and School of Graduate Studies and Research. As of summer 2020, EU total enrollment was 4,646 students, with 3,399 undergraduate and 1,247 graduate students. EU enjoys the reputation of being a high-quality, coeducational, public regional comprehensive university that focuses on student-centered learning. Today our students are enrolled in more than 100 undergraduate programs, 15 graduate programs, and 1 doctoral program. Students can also pursue a variety of minors, concentrations, and co-curricular experiences. Internships and other experiential learning opportunities are recommended in many academic programs. View Edinboro's comprehensive list of programs [here](#).

EU has many nationally accredited academic offerings, including Counseling, Speech-Language Pathology, Social Work, Education, Business Administration, Nursing, School Psychology, and Computer Science. Our top undergraduate programs by enrollment are, Business Administration, BFA Applied Media Arts, Early Childhood & Special Education, Nursing, Psychology, and Criminal Justice. Our top graduate programs are MSW in Social Work, MA in Counseling/Art Therapy and MEd in Reading.

The institution has been especially focused on placing a strong emphasis on growing programs in the following areas: Arts and Digital Entertainment; Mental, Social and Health Professions; STEM: Education and Business. EU also boasts Institutes for Forensic Science, Bioethics and Leadership.

Edinboro's Honors College provides unique opportunities for students inside and outside the classroom. All students can develop leadership skills through internships/externships, and minors in Leadership Studies or Adaptive Leadership & Military Studies. Co-curricular opportunities such as clubs, organizations, and athletics also help to prepare students to become leaders.

The University operates on a two-semester (fall, spring) system. The summer term is divided into a three-week session and two 5-week sessions. EU also offers online winter session courses.

D. Enrollment

Overall, University undergraduate headcount enrollment has declined significantly over the past decade due largely to a change in demographics and an increase in admission standards. The institution experienced enrollment growth from 2008 to 2010, as did many colleges and universities, but declining high school graduation rates in Pennsylvania, particularly in EU's top recruitment counties in western Pennsylvania, have led to enrollment declines. That being said, a new marketing

strategy, revised messaging, a branding campaign, and establishment of much needed systems in both Admissions and Marketing/Communications helped drive an 18 percent increase in first-year-student enrollment in fall 2019. The University was on track for further growth in fall 2020 primary to COVID-19. Even though our first-year enrollment is down compared with last year, it is still significantly higher than it was in fall 2018.

Also of note, the University decided to increase its academic standards for admission in recent years, which was successful in attracting better prepared students, but also caused a purposeful and predicted enrollment decline. The rationale for the increased standard was to raise both our academic profile and retention rate by bringing in students more likely to persist to degree completion, rather than leaving the university with loan debt but no degree. The results are telling, as first- to second-year retention has improved from an average of 70-71 percent to 74.65 percent in fall 2020. Edinboro has boasted an average high school GPA among incoming first-year students of 3.5 or higher for four consecutive years. We have also seen a large boost to our Honors College, as a higher percentage of incoming students are meeting that standard.

As noted, an upward trend in enrollment began last year as our Fall 2019 incoming, first-year class was 18% larger than the previous year, even with the increased admission criteria. In March 2020, our numbers were looking even better for Fall 2020: Up 26% in inquiries, up 11% in completed applications, up 13% in acceptances, and up nearly 12% in deposits. Then COVID-19 hit, and our numbers suffered a substantial decline. The positive we take from this is that our marketing strategy was working, and in a "normal" cycle without the pandemic, we projected a very solid Fall 2020 class, both by quantity and quality.

Enrolled for our School of Graduate Studies has remained relatively steady over the past several years, showing moderate growth within our popular online master's programs. COVID-19 has affected graduate enrollment as well (largely because of limited field-placement opportunities).

E. Student Demographics

Edinboro University can best be described as an institution enrolling a traditional college-aged population, with the majority of our students attending from public high schools. Although the majority of students who attend EU reside in Western Pennsylvania, we have students attending from 67 Pennsylvania counties. The enrollments for In-state residents make up 85.5%, Out-of-state equals 16.1%, and 1.4% are international students. EU enrolls students that are from 47 states and 25 countries. Student demographics of our total enrollment are:

- 64.7% women
- 35.3% men
- 83% White

- 5.5% African American
- 3.8% Hispanic
- 3.2% Multi-Race
- 1% Asian
- 3.5% Unknown or other

F. Student Life

EU offers more than 140 student clubs and organizations, including Greek Life, Student Government Association (SGA), Highland Ambassadors, and Campus Ministry to highlight a few. Our 17 Fighting Scots varsity teams compete mostly in NCAA Division II, with men's wrestling competing at the Division I level. Athletics opportunities also include wheelchair basketball and eSports, the first collegiate team of its kind in western Pennsylvania.

G. Marketing Strategies

Our traditional marketing efforts are focused largely on western Pennsylvania, specifically the I-79 corridor between southwestern and northwestern Pennsylvania. We have also allocated some traditional advertising dollars to eastern Ohio and western New York. Rather than diluting the impact of our advertising spend by spreading the dollars too far, we have focused our investment, which allows us to ensure frequency/consistency during key points in the Admissions cycle.

Our digital advertising is aimed at targeted audiences and is broader in its geographic reach. Its focus is both general awareness as well as academic program specific. In contrast, the objective of our traditional advertising is general awareness.

All of our marketing uses our "For Those Who Strive" brand line, which was developed and launched as part of a new, comprehensive marketing campaign in fall 2018. The brand line has resonated well with Edinboro's many constituencies, including prospective and current students, faculty, staff and alumni. Each year, our marketing strategy is refined based on Admissions data and Scarborough research.

H. Audience

Most efforts are targeted toward our primary audience of future students, 16-18 years old. Our secondary audiences include an older demographic comprised of the parents of future students, adult students and graduate students. We also target a transfer student audience with smaller campaigns. Without the budget to make an impact internationally, we have not been able to put forth a solid campaign specifically for international students.

I. Media

As noted, we employ a mix of traditional and digital media. Most traditional media is planned at specific times of the year and focuses on general brand awareness or event messaging. Our digital campaign is a year-round effort that includes both brand awareness and individual program marketing through paid search, paid social and retargeting.

Digital: Our goal over the past five years has been to significantly and steadily increase our digital footprint, which we have easily achieved. Our digital (desktop and mobile) footprint includes:

- Behavior retargeting
- Keyword contextual retargeting
- Geofencing
- Direct buys and media trade on specific online channels (GoErie.com, WJET Weather Cam, etc.)
- Google paid search SEM
- Paid and organic social (*see details on page 14*)

TV and Radio: A large portion of our TV and radio budget is used for brand awareness and to promote fall and spring Open House events. We realize that this most likely hits our secondary audience more than our primary, however since the events are for students and parents, parents can influence the decision to attend. Students are also seeing/hearing our ads in programming targeted toward them. Additional TV/radio buys occur throughout the year as programming is attractive to our audiences, such as the Olympics, NFL playoff games, etc. Our WJET Golden Apple contract does however provide us with a year-round TV presence in the Erie market. Our media strategy also includes OTT streaming TV (Hulu) and streaming radio (Pandora and Spotify).

Print Publications: Over the past few years, we have greatly reduced our spending on print advertising as part of our overall strategy. However, we review print opportunities as they arise on an individual basis, with each one carefully considered based on cost and potential ROI. Some of the cyclical opportunities we continue to participate in include the Pittsburgh Promise (IdeaPod), Nurses' Week publications and various college fair guides.

Outdoor: Our outdoor efforts for the past few years have been concentrated in the Erie and Pittsburgh markets, running two flights each in both fall and spring to complement our TV and radio schedules. Additionally, we have two territorial year-round bulletins on I-79: One northbound about two miles from the Edinboro exit, and one southbound about seven miles from the Edinboro exit.

Direct Mail: We have dramatically changed our messaging, strengthened design and photography, and greatly increased our direct mail strategy over the last few years. Currently, we have a very robust admissions mail flow that includes both print and digital communications aimed at prospective students. The flow includes 33 unique print mailers, many with a personalized letter. The pieces are either self-mailers or multiple pieces in an envelope, depending on the message. The overall mail flow is segmented and includes sophomore/junior prospects, inquiries, seniors, accepted students, etc. A handful of mailers also go to 500 local and regional high schools to provide current recruitment materials and promote visitation events. Everything is strategic and managed by the EU Marketing and Communications in partnership with our Admissions office.

Email: Email is used strategically throughout the year, and normally will complement other media efforts. We currently use Active Campaign as our email platform. These efforts are also very robust and include multiple touch points in a plan similar to direct mail.

Social media: Social media is a coordinated effort between the EU Marketing Communications Division and external partners. Internally, we use social media (Facebook, Instagram, Snapchat) heavily and strategically throughout the year to echo the messaging in the direct mail flow and promote key events. While many are posts are organic, will also put ad dollars behind certain posts to boost them in key markets. Through our external partners, we have a substantial paid social media strategy as well.

Venue advertising: We carefully review all opportunities for venue advertising in relation to our goals and budget. These could include high schools that offer ad opportunities, local sports arenas, etc. We currently have a sponsorship contract with the Erie Seawolves, Double-A affiliate of the Detroit Tigers.

J. Message

As noted, our brand message since 2018 has been “For Those Who Strive.”

**FOR THOSE WHO
STRIVESM**

We feel strongly that this brand line captures the hard work, determination and grit of an Edinboro student. It also works well within expanded copy:

“Edinboro University is the place for those who think... for those who create... for those who work harder, smarter and faster... for those who strive”

We are not intending to change this brand line any time soon. We have built solid momentum and want to continue that trend.

Goals for 2018 - 2020 were:

- Continue to build strong brand awareness in our key recruitment areas and to reposition Edinboro has a strong institution with a stable future.
- Continue a mix of both traditional and digital media, with a focus on a comprehensive digital footprint
- Increase our efforts in paid search to help promote individual programs
- Continue a strategic and cohesive use of social media between EU and external partners
- Create a separate, robust digital media plan to promote our School of Graduate Studies
- Increase marketing efforts aimed at adult and transfer students
- Create more consistent video content both internally and with external partners
- Increase direct mail and email touch points with personalized messaging
- Launch a redesign of our University website. Significant progress has been made on this project and the new site is set to launch early in the 2021 calendar year.

K. Additional Marketing and Enrollment Efforts

- Recently partnered with Niche.com to upgrade our profile in an effort to gather more qualified leads
- Partnered with EAB for awareness and lead generation campaigns for undergraduate, transfer/adult and graduate students
- Created a variety of additional on-campus and virtual visitation events
- Created walking and driving tours of campus
- Enhanced our YouVisit virtual tour
- Partnered with the Common Application so students have an optional method to apply
- Currently developing an all new Edinboro.edu website, scheduled to launch in January 2021
- School of Graduate Studies continues to partner with Education Dynamics for lead generation
- Recently partnered with Merit for reputation management and media monitoring
- Created additional virtual platforms as necessary during COVID-19, such as a New Student Orientation portal with Student Bridge
- Launched a strategic, proactive media relations campaign and strengthened our issues-management efforts to mitigate the damage of negative public relations.

I.V Instructions for Proposal Preparation

- A. **Economy of Preparation.** Proposals should be prepared simply and economically, providing a straightforward, concise description of the Offeror's ability to meet the requirements of this RFP.
- B. **Proposals.** Proposals must consist of a complete response to this RFP.
1. Proposals must be submitted online utilizing the State System's [eProcurement Exchange](#).
 2. Proposals must consist of a complete response to the requirements outlined herein and shall be submitted to the Issuing Office no later than the required proposal Submission Date/Time listed above. Late proposal submissions will not be permitted.
 3. Proposal contents may become contractual obligations if and when a contract is executed.
 4. The proposal, as submitted, must remain valid during the entire solicitation, award, and contract finalization process.
 5. All cost data must be submitted as a separate document (Appendix B, Cost Proposal Form) apart from the Technical Proposal. **Absolutely no pricing can appear anywhere in the Technical Proposal.** Failure to meet this requirement will result in automatic disqualification of the proposal.
- C. **Questions.** Offerors may submit questions surrounding the RFP at the State System's [eProcurement Exchange](#). Answers to all questions will be posted as an addendum to the RFP and will become part of this RFP. Note: Offerors' identities will not be disclosed.
- D. **Addenda.** If it becomes necessary to revise any part of the RFP, addenda will be posted at the State System's [eProcurement Exchange](#). The information contained at this website is current and accurate. It is the Offeror's responsibility to check this website periodically to obtain any changes to the solicitation. Offerors must acknowledge all addenda in their proposal response. Offerors who fail to submit a current copy of the solicitation may be deemed nonresponsive.
- E. **Preproposal Conference.** There is no preproposal conference currently scheduled. Should one become necessary, Offerors will be notified.
- F. **Best and Final Offers.**
1. While not required, the Issuing Office reserves the right to conduct discussions with Offerors for the purpose of obtaining Best and Final Offers (BAFOs). Negotiations may be pursued with a subset of responsible Offerors whose proposals best meet financial, contractual, technical, and support requirements for the University. Negotiations will be opened with firms of lower preference (one at a time, in order of preference) only if a fair and reasonable set of fees/billable rates and/or agreement of final contract terms and conditions cannot be established with the firm of higher preference.
 2. To obtain BAFOs from Offerors, the Issuing Office may do one or more of the following, in any order: (a) schedule oral presentations, (b) request revised proposals, or (c) enter into preselection negotiations.
 3. The following Offerors will not be invited by the Issuing Office to submit a BAFO: (a) those Offerors whom the Issuing Office has determined to be nonresponsive; or whose proposals the Issuing Office has determined to be nonresponsive, (b) those Offerors whom the Issuing Office has determined, from the submitted technical and cost proposals, not to possess the experience or qualifications to ensure good faith

performance of the contract, or (c) those Offerors who technical proposal score is less than 75 percent of the total amount of technical points allocated to the technical criterion.

- G. **Response Date.** To be considered for selection, proposals must be submitted at the State System's [eProcurement Exchange](#) by the proposal Submission Date listed above.
- H. **Rejection of Proposals.** The University reserves the right to reject any and all responses received from Offerors as a result of this RFP, and to cancel this solicitation at any time prior to the execution of any contract.
- I. **RFP Protest Procedure.** The notice concerning Protest of Solicitation or Award is published at the State System's [website](#).
- J. **Incurring Costs.** The University is not liable for and will not reimburse any costs or expenses incurred by Offerors in the preparation or submission of their proposals or for attendance at any conferences or meetings related to this RFP.
- K. **News Releases.** News releases pertaining to this RFP or any resulting contract may not be made without the State System's prior written approval, and then only in coordination with the Issuing Office.
- L. **[Contractor Integrity Provisions](#).** It is essential that those who seek to contract with the Commonwealth of Pennsylvania (Commonwealth) observe high standards of honesty and integrity. They must conduct themselves in a manner that fosters public confidence in the integrity of the Commonwealth contracting and procurement process.
- M. **Contractor Responsibility Program.** Offerors must certify that they are not currently under suspension or debarment by the Commonwealth of Pennsylvania, any other state, or the federal government to the best of their knowledge. Additionally, Offerors must certify that they are not tax delinquent with either the Pennsylvania Department of Revenue or the Pennsylvania Department of Labor and Industry to the best of their knowledge. Offerors must acknowledge that if they are currently under suspension or debarment, or if they owe delinquent taxes, their proposal may not be accepted or considered. **[Optional:** Offerors can certify to all of the above upon submittal of their proposal at the State System's [eProcurement Exchange](#).]

Section II Post Award

II.I Contract Award

- A. Edinboro University reserves the right to (1) award a single contract for all services, (2) award multiple contracts, or (3) not award a contract. Negotiations will be pursued with a subset of responsible respondents whose proposals best meet the financial, contractual, technical, and support requirements for the University. Negotiations will be opened with firms of lower preference (one at a time, in order of preference) only if a fair and reasonable set of fees/billable rates and/or agreement of final contract terms and conditions cannot be established with the firm of higher preference.
- B. This RFP shall not result in an exclusive rights contract. The individual universities across the State System, and any other Commonwealth of Pennsylvania agency, may select an awarded Offeror resulting from this solicitation, or any Offeror.

II.II Contract Terms

- A. It is proposed that, if a contract is entered into as a result of successful negotiations, the selected supplier will be required to sign a Commonwealth of Pennsylvania Standard Contract [PASSHE-SPC-1.2](#) (Rev. July 2017). The University reserves the right to amend its Standard Contract Terms and Conditions.
- B. The initial term of the contract resulting from this solicitation will be through June 30, 2022. At that time the university shall evaluate the Contractor's performance to determine if a renewal of the contract is in its best interest. Depending on the Contractor's performance the university has the option of renewing the contract for an additional year. The university shall evaluate the Contractor's performance annually for renewal up to a maximum of five (5) years. This RFP will not result in an exclusive rights contract.
- C. Contract terms and conditions are negotiated upon issuance of an intent to award a contract. Certain contract terms are prohibited based on the State System's status as an agency of the Commonwealth of Pennsylvania. Prohibited contract clauses include those related to: arbitration, assignment, attorney's fees, court costs, entry of judgment, indemnity or hold-harmless provisions, law of the contract in a jurisdiction other than Pennsylvania, payment in advance, and payment of or requirement to carry insurance.

The following contract elements of the [Standard Contract for Services](#) are required, and the University reserves the right to refuse any and all requested changes to the following:

Section	Description
17	Limitation of University Liability
18	Hold Harmless
25	Nondiscrimination
26	Sexual Harassment
28	Background Checks for Minors
29	Mandatory Reporting Requirements

Section	Description
30	Contractor Responsibility
31	Contractor Integrity
34	Right of Offset
35	Right-to-Know Law
36	Applicable Law

- D. The Offeror will be deemed to have accepted the standard terms and conditions, except as expressly called out in its proposal. If exceptions are taken, the Offeror must submit a "redlined" version of the term or condition showing all proposed modifications, including an explanation as to why the modification is required. **The Offeror's willingness to accept the State System's contract terms and conditions, with minor clarifications, shall be an affirmative factor in evaluating the supplier's proposal.**
- E. Although the University will consider alternate language by an Offeror, the University will not be bound by contract language received as part of a prospective provider's response. If the Offeror requires that the University be bound by some or all of the Offeror's proposed contract language, the proposal may be considered nonresponsive and may be rejected.

II.III Proposer's Exceptions to Terms and Conditions

- A. Any exceptions, deviations, or contingencies an Offeror may have to the State System's contract terms and conditions must be documented.
- B. Exceptions, deviations, or contingencies stipulated in an Offeror's proposal, while possibly necessary in the view of the Offeror, may result in disqualification of a proposal.

II.IV Prime Offeror/Subcontracting

Eligible Offerors will be considered prime Offerors with respect to any work they are awarded. Any use of subcontractors must be approved in writing by the University. Prime Offerors are encouraged to solicit quotes from small diverse businesses when requiring subcontractors.

II.V Disclosure of Proposal Contents and Open Records

- A. Offerors' proposals may become part of the contract award resulting from this RFP and are not, therefore, confidential. The University has the right to use any other concepts presented in any reply to this RFP. Selection or rejection of a proposal does not affect this right.
- B. All responses to procurement opportunities are subject to Pennsylvania's Right-to-Know Law, 65 P.S. §67.101 et seq. (Act 3 of 2008). The Right-to-Know Law permits requestors to inspect and/or copy any record prepared, received, or retained in connection with a transaction, business, or activity of a public office or agency that is not subject to the enumerated exemptions under the law. If an Offeror's response to this procurement opportunity contains a trade secret or confidential proprietary information, the Offeror's response should include a separate signed written statement to that effect identifying any such information. Should the Offeror's response become the subject of a Pennsylvania Right-to-Know Law request, the procurement office will notify the Offeror to identify or confirm all trade secrets or confidential and proprietary information that is included in the

Offeror's proposal. The University will then determine whether the claimed trade secret or confidential and proprietary information is subject to disclosure under applicable law and grant or deny the request accordingly. Should the request be denied and the requestor appeal that denial, the University will notify the Offeror of the appeal and the Offeror's opportunity to request to participate in the appeal as a party of interest. The University will not represent the interests of the Offeror in any appeal nor will the University compensate or reimburse any expenses of the Offeror in connection with a request of information under the Right-to-Know Law.

II.VI Debriefing Conference

Offerors whose proposals are not selected will be notified of the name of the selected supplier(s) and will be given the opportunity to be debriefed. The purpose of a debrief conference is not to compare proposals, but to provide information that may assist individual Offerors in preparing future proposals. The Issuing Office will schedule the date, time, and location of the debrief conference.

Section III Work Statement

III.I Objective

General: Edinboro University of Pennsylvania, a member of the Pennsylvania State System of Higher Education (PASSHE), is soliciting sealed proposals for their integrated digital and traditional marketing and advertising initiatives.

Of our total marketing and advertising budget, currently about 17% is used for digital undergraduate and graduate marketing initiatives.

III.II Nature and Scope of the Project

The proposal should focus on the following distinct marketing and advertising applications:

- 1. Digital**
- 2. TV and Radio**
- 3. Outdoor / Venue**
- 4. Print**
- 5. Social Media**
- 6. Other as recommended by vendor**

Vendors must submit a proposal for all requested marketing and advertising services. These services should include, but are not limited to, strategic marketing, account management and planning, placement creative services, and media planning, buying, and assessment for both traditional and digital advertising.

EU does not intend to award to multiple marketing and advertising agencies. We are looking for one partner with the ability to service all needs of this RFP. We prefer to work with a partner with extensive experience in the higher education space and prefer a partner with knowledge of the Pennsylvania State System of Higher Education and the unique challenges it faces. EU reserves the right to award to one proposer or no award as deemed in its best interest.

The selected contractor(s) will work with Edinboro University Marketing and Communications to achieve the University's goals for brand awareness, growth, quality, and diversity. The contractor must have a successful record of assisting organizations achieve their goals through innovative, leading edge marketing activities. EU is looking for a strategic partner who is sophisticated, responsive, and highly integrated and engaged, with strong

subject matter expertise (preferably in higher education), creative and media capabilities in both traditional and digital media, and a proven, results-oriented background.

The university already has in place a Customer Relationship Management system (CRM) for, letter, e-mail, and text messaging campaigns to send communications to prospective undergraduate students.

III.III Deliverables

The agency will create and manage the University's annual media marketing plan as outlined in sections III-1 and III-2. The agency must supply detailed, in-depth summary reports to the Edinboro University Marketing Department on a monthly basis, or as requested. The reports will outline campaign performance and ROI based on click through rates, total impressions and other pre-determined metrics. Agency must also deliver proof of ad impressions as requested in the form of screenshots, reports of desktop/mobile channels on which the ads were served, etc.

III.IV Technical Requirements

The Contractor's proposal should show how they will be part of a team in assisting EU to achieve its strategic goals and objectives.

The proposal should support EU's ongoing institutional strategic planning (which includes the following student recruitment segments: first-year undergraduate, transfers, international, graduate, adult learners, and online students) and ongoing academic program planning.

EU and the contractor will ensure the objectives for each project are clear, the desired outcomes are defined, and the projects are set up in a way that is timely and effective to lead to successful outcomes.

Online marketing (including, but not limited to):

- Advertising and promotion through digital channels (desktop and mobile) including Google and/or other search engine paid search advertising, retargeting, display advertising, social media, geo-fencing, etc.
- Other digital marketing opportunities and techniques, which may be recommended by the Vendor and approved by EU.
- Enhancement to the institution's current social media communications with prospective students as applied to Facebook, Twitter, Instagram, YouTube, Snapchat, and other social media venues.
- Web site optimization consultation, SEO and related services, which maximize the results of digital marketing activities.
- Measurement, analysis, and optimization of digital advertisement initiatives.

Broadcast marketing (including, but not limited to):

- TV and radio creative development and media buying
- Commercial creative development, media planning and placement, effective media buying, research and measurement.
- Radio creative development, media planning and placement, effective media buying, research and measurement.

Print advertising (including, but not limited to)

- News and magazine educational and schools guides, creative development, and media placement and buying.
- Special interest advertising (including, but not limited to cultural district playbills, diversity venue advertising, and adult learning venue advertising).
- Community college and other university news venues for summer and winter session enrollment options; attracting transfer students; and recruiting graduate students.
- Direct mail opportunities.
- Comprehensive ROI analysis, input, and guidance for all other aspects of offline marketing.

Outdoor advertising (including, but not limited to):

- Billboards, mall sky banners, airport advertising boards, or other venues creative development, placement, and metrics.

Streaming media (including, but not limited to):

- Streaming radio and OTT television/video opportunities

The selected vendor will use the institution's current library of photography or make recommendations for additional types of photos or videos as needed.

The selected vendor will use the institution's current marketing, recruitment, and enrollment research to develop and implement institutional messaging and positioning.

The selected contractor(s) will agree to preserve and build upon the established brand messaging and quality while expanding the focus to incorporate current and future goals of the University.

Marketing and recruitment goals are focused specifically on recruiting high-quality students through increasing enrollment in the following student segments:

- traditional on-campus first-year students,
- transfer students,
- increasing adult learners (undergraduate and graduate programs, certificates, online degree completion)
- increasing on-site and online graduate student enrollment,
- increasing online enrollment (undergraduate, graduate programs and winter and summer sessions)
- increasing international student enrollment, and
- expanding our regional recruitment territory

The contractor will provide competent and experienced staff for the EU's account, as needed to develop and maintain a positive, productive relationship and to meet all agreed upon project timelines.

EU expects that personnel assigned to its account management team will serve diligently

throughout the term of the contract. Any changes to the account team must be discussed with and any proposed replacements must be approved in writing by EU via a contract amendment.

EU expects regular and timely planning meetings, e-communications and tele-conferencing, if needed. The session agendas should include media planning, placement, and assessment items, budget updates and reconciliation items, and other creative planning activities throughout the term of the contract.

All creative development including copy (slogans, taglines, or themes), imagery, photography, graphic designs, artwork, and audio-visual representations will become the sole property of EU.

The selected vendor will accept EU's logo, style guide, and any EU-provided theme lines/communication messaging.

Any marketing research and associate results will be the property of EU and cannot be shared without express prior written consent of an EU officer.

In addition to the technical proposal guidelines and cost proposal submittal guidelines, vendors who are shortlisted may be requested to make a presentation at the University or via Zoom.

The date and time for these sessions will be set upon completion of the initial technical evaluation. The outline for the material to be covered in the presentation will be provided to the vendors approximately one-two weeks in advance of the presentation date. All vendors will be given the same outline to ensure the presentations are consistent. All presentations will be held at the same location (or via the same digital platform) and each supplier shall be allowed the same amount of time for their presentation (Maximum 90 minutes). All costs associated by such presentations will be borne by the vendor. Promotional items shall not be provided at these presentations. At the time the oral presentations are scheduled, the university will confirm in writing with each proposer the specifics of these sessions inclusive of the topics, time periods, and EU personnel participating in the presentation.

III.V Assignment of Projects to the Contractor

A. Itemized cost estimate:

When EU desires to assign a project to the Contractor, the VP of Marketing and Communications and/or the Director of Marketing and Brand Identity will ask the Contractor to provide an itemized cost estimate for how services are rendered. This itemized cost estimate will indicate the estimated number of units of service to be provided, and the cost per unit as stated in the Contractor's proposal. EU may require the Contractor to provide this itemized cost estimate on an EU form.

Example 1: Digital Google advertising and Targeting: The expenditure should include estimated costs of actual advertising on Google, cost of creative ad development, and any agency fees.

Example 2: Broadcast – TV advertising: The expenditure should include estimated costs of commercial creative development, media placement, and any agency fees.

No work shall be started without Edinboro University authorization.

B. EU retains the right to obtain itemized cost estimates from more than one contractor, before assigning a project to a contractor. EU retains the right to negotiate number of units of service before assigning a project to a contractor.

C. Advertising and Media Services. If the itemized cost estimate is acceptable to EU, EU will assign the project to the Contractor and authorize the Contractor to proceed up to the dollar amount authorized in the cost estimate. The Contractor shall not proceed until the Contractor has received this authorization from the Director of University Marketing.

D. Amended Advertising and Media Services. If the dollar amount authorized on the cost estimate becomes insufficient due to changes in the project that have been authorized by the VP of Marketing and Communications and/or the Director of Marketing and Brand Identity, the Contractor shall notify the VP of Marketing and Communications and/or the Director of Marketing and Brand Identity. **The Contractor shall not exceed the dollar amount authorized on the cost estimate, unless the Contractor receives approval from the VP of Marketing and Communications and/or the Director of Marketing and Brand Identity.**

Section IV Information Required from Suppliers

IV.I Required Information

Technical Proposals are to be straightforward, clear, concise and specific to the information requested. While suppliers are encouraged to submit the most creative, cost effective proposal possible, the inclusion of extraneous commercial and/or sales literature as a substitute for responses to questions included in the proposal is strongly discouraged. Any supplemental information that you elect to provide should be attached as additional appendices.

A. General

1. State the Supplier's understanding of the services being requested by this RFP.
2. Include a narrative response that summarizes the key features and competitive advantages of the proposed solution that make it stand out from competing solutions.

B. Qualifications and Experience

1. Company Profile

- a. Include a brief history of the company, including the number of years in business and any ownership structure or management structure.
- b. Discuss how the firm's overall experience demonstrates its ability to successfully provide the services.
- c. Provide details if subcontractors are to be used to provide marketing services to the State System.

2. **Personnel.** Offerors are expected to provide an adequately sized team of experienced staff capable of providing marketing services to the university when requested. Provide a description of the executive and professional personnel who will be engaged in providing the services to the university. If applicable, provide a list of your firm's subcontractors, including a complete description of their role and involvement in providing the services.

3. **Experience.** Describe your organization's experience (including number of years in operation) as it pertains to providing marketing services for higher education institutions. Submit three detailed case histories that demonstrate the breadth, depth and creativity of services that your firm can provide to the university. At least one case history must be of a higher education institution (a state system is highly preferred). Provide a description of any industry best practices your firm utilizes. Include any industry awards your firm received. **Important: In order to be considered responsive, Offerors MUST provide evidence of previous higher education experience.**

4. **References.** Provide references from three of your clients from the past five years for services that are similar in scope, size and complexity to the services described in this RFP. At least one of these client references should preferably be from a higher education institution. Provide the following information for each client: client name and address; time period in which work was performed; and a short description of the work performed.

C. Technical Requirements

Provide a response to the requirements of Section III including detailed descriptions of the Supplier's ability and proven success and expertise to provide marketing services, its

understanding of higher education entities, partnering plans, etc. Technical proposals must include samples as requested in Section III.IV.I above.

D. Value-Added Services

Describe in detail any value-added services that the Supplier can provide. This includes but is not limited to competitive advantages, efficiencies, and optional services distinct from the main technical requirements.

IV.II Technical Proposal Format

- A. Proposals are to be straightforward, clear, concise, and specific to the information requested.
- B. While Offerors are encouraged to submit the most creative, cost-effective proposal possible, the inclusion of extraneous commercial and/or sales literature as a substitute for responses to questions included in the RFP is strongly discouraged. Attach any supplemental information as an appendix to the Technical Proposal.
- C. It is the responsibility of all Offerors to examine the entire RFP package, to seek clarification of any item or requirement that may not be clear, and to check all of their responses for accuracy prior to submitting a proposal.
- D. Offerors are responsible for ensuring receipt of, and acknowledging, all addenda to this RFP in all Technical Proposals.
- E. All proposals must be properly marked and submitted via the State System's [eProcurement Exchange](#) by the Submission Date/Time listed in Section I.III of this RFP.

IV.III Cost Proposal Format

- A. Complete and submit Appendix C, Cost Proposal Form.
- B. **All cost information must be kept separate and apart from the technical portion of the proposal.** Absolutely no pricing can appear anywhere in the Technical Proposal, including technical proposal appendices, SLAs, sample documents, etc.
- C. Prices proposed in the Offeror's response will be valid for a minimum of one year effective from the start of the contract.
- D. Offerors' proposals must describe how future price increases will be minimized and capped and how both increases and decreases will be passed on to the University.
- E. Offerors must explain the proposed process to implement price changes.
- F. The University requires that pricing be uniform for all universities. Any special discounts must be offered to all universities.

IV.IV How to Submit an Online Proposal

Log on to the State System's [eProcurement Exchange](#) and select the Bids tab. Click the link to the applicable solicitation and follow the directions at the Response tab.

IV.V What to Submit with the Proposal

Folder #1: Technical Proposal

1. Submit either an Adobe or a Word document.*
2. Include any relevant information as an appendix to the Technical Proposal as an Adobe or Word document.
3. Name the documents as *Company Name Technical Proposal RFP Number*.
4. If submitting multiple documents, create a zip file.
5. Upload the documents at the State System's [eProcurement Exchange](#) as shown at the Response tab.

Folder #2: Cost Proposal

1. Submit Appendix C, Cost Proposal Form. (Submit either an Adobe or an Excel document.*)
2. Name the document as *Company Name Cost Proposal RFP Number*.

NOTE The signed Appendix A must be uploaded with the Technical Proposal

*All documents must be renderable (able to browse, search, print, and edit). File names may not contain the following invalid characters: ,:~/><"|).

Section V Criteria for Selection

V.I Evaluation of Proposals

All proposals will be reviewed and evaluated by a committee of qualified University personnel (Proposal Evaluation Committee). The Proposal Evaluation Committee will recommend for selection the proposal(s) that most closely meets the requirements of this RFP and satisfy the University's needs.

- A. Responses will be evaluated first for responsiveness and thereafter for content. The Issuing Office will make award to the selected Offeror(s) based on the recommendation of the Proposal Evaluation Committee.
- B. If a response does not reasonably and substantially conform to all the terms and conditions in this solicitation, or if it requests unreasonable exceptions, it may be considered nonresponsive.
- C. While cost will be weighted heavily, it will not be the deciding factor in the selection process. The process of competitive negotiation (being used in this RFP) should not be confused with the different process of competitive sealed bidding. The latter process is used where goods/services being procured can be described precisely, and price is the determinative factor. With competitive negotiation (RFP), price is not required to be the determinative factor, although it may be, and the University has the flexibility it needs to negotiate with Offerors to arrive at a mutually agreeable relationship.
- D. Recommendation of award will be based on the proposal(s) that most closely meets the requirements of the RFP and satisfies the University's objectives. A responsive Technical Proposal must achieve a minimum of 75 percent of the available technical points.

V.II Evaluation Criteria

The following areas of consideration will be used in determining award:

- A. **Demonstrated Understanding of the University's Requirements.** Refers to the Offeror's understanding of the University's needs that generated the RFP, of the University's objectives in asking for the services, and of the nature and scope of the work involved.
- B. **Company Qualifications/Experience.** Includes demonstrated competence and experience of the firm and its proposed resources. This includes the experience, expertise, and resources of the company and its personnel to meet the University's objectives. Includes references where similar services have been provided; especially to other higher education institutions.
- C. **Work Plan.** Refers to whether or not the Offeror's approach for assisting the University responds to the written specifications and requirements of the RFP, and meets the University's objectives. Of equal importance is whether the approach is completely responsive to all written specifications and requirements contained in the RFP.
- D. **References.** Refers to the references where similar services have been provided; especially to other higher education institutions.
- E. **Value-Added Services Attributes.** Includes but is not limited to competitive advantages, efficiencies, and optional services distinct from the main technical requirements.

- F. **Cost.** The University desires the best pricing offered for the services being requested. While this area will be weighted, it will not necessarily be the deciding factor in the selection process.



Conflict of Interest Statement

(To be completed by the Supplier)

Please complete the fields below, print and sign the form, and return it to the Strategic Sourcing Department.

Full Legal Business Name	
Business Address	
Name	
Official Position	
Telephone	
Email	

Check Yes or No:

- Yes No Does any State System employee serve as an officer or director of the above-referenced business?
- Yes No Is any State System employee a partner or sole proprietor of the above-referenced business?
- Yes No Does any State System employee hold any paid position in the above-referenced business?
- Yes No Is any immediate family member (spouse or dependent child) of a State System employee a partner or sole proprietor of the above-referenced business?
- Yes No Does any member of a State System employee's immediate family (spouse or dependent child) have an ownership interest of ten percent or more in the above-referenced business?
- Yes No Does any State System Board or university council of trustees member serve as an officer or director of the above-referenced business?
- Yes No Does any member of a university's council of trustees' immediate family (spouse or dependent child) have an ownership interest of ten percent or more in this company?

If you answered **Yes** to any of the above questions, please identify the pertinent individual(s) and their relationship to the above-referenced business.

Signature

Date

APPENDIX A

Digital and Non-Digital Marketing Services ***RFP# EU 10082020***

Issue Date: 9.11.2020

COMMONWEALTH OF PENNSYLVANIA Contract Terms and Conditions

Signature Page

The selected Contractor will be expected to enter into an agreement containing the Specifications/Contractor's Duties and the Commonwealth of Pennsylvania Terms and Conditions, PASSHE-SPC-1.2 available at:

<http://www.passhe.edu/inside/anf/strategicsourcing/Documents/PASSHE-SPC-1.2.pdf>

Contractor must sign below to indicate acceptance of the Commonwealth of Pennsylvania Standard Terms and Conditions. This signature page must be included with bid response. If a corporation; a signature of the President or Vice-President. If an officer cannot sign, a certified resolution giving an individual the ability to sign on behalf of the officer and bind the corporation to the contract is required for the signature below.

Contractor's Official Signature

Contractor's Federal ID. Number

APPENDIX B

Digital & Non-Digital Marketing Services **RFP # EU 10082020**

Issue Date: 9.11.2020

TECHNICAL RESPONSE – May present a separate document as “Appendix B” incorporating the following elements:

Technical Requirements

Provide a response to the requirements of Section III including detailed descriptions of the Supplier’s ability and proven success and expertise to provide marketing services, its understanding of higher education entities, partnering plans, etc.

Value-Added Services

Describe in detail any value-added services that the Supplier can provide. This includes but is not limited to competitive advantages, efficiencies, and optional services distinct from the main technical requirements.

Technical Proposal Format

- A. Proposals are to be straightforward, clear, concise, and specific to the information requested.
- B. While Offerors are encouraged to submit the most creative, cost-effective proposal possible, the inclusion of extraneous commercial and/or sales literature as a substitute for responses to questions included in the RFP is strongly discouraged. Attach any supplemental information as an appendix to the Technical Proposal.
- C. It is the responsibility of all Offerors to examine the entire RFP package, to seek clarification of any item or requirement that may not be clear, and to check all of their responses for accuracy prior to submitting a proposal.
- D. Offerors are responsible for ensuring receipt of, and acknowledging, all addenda to this RFP in all Technical Proposals.
- E. All proposals must be properly marked and submitted via the State System’s [eProcurement Exchange by the Submission Date/Time listed in Section I.III of this RFP.](#)

APPENDIX C

Digital and Non-Digital Marketing Services

RFP # EU 10082020

Issue Date: 9.11.2020

COST / PRICE PROPOSAL – Upload Separate from Technical Response, Appendix B

Bidders to submit a Cost Proposal based on the requirements in RFP # 10082020 Section III, Work Statement:

It is recommended that the costs be presented in a spreadsheet format as either an Excel or Adobe file.

Disclose any associated costs that may be incurred by the University to carry out the work needed to deliver strategic planning, media strategy and buying for both traditional and digital channels and creative development services for all channels.