RFP # 742-22-209-2 Marketing & Creative Services

Questions and Answers

1. How many students are you targeting? - is there a number of students that you need to recruit/reach?

   ANSWER: No specific number available

2. Do you have any incentives to attract non-Texas students?

   ANSWER: no

3. For RFP No. 742-22-209-2, item 6.1 which date should we use as the beginning date of the agreement?

   ANSWER: This will be provided **after** a selection of awarded proposers has been made.

4. Will we provide any cloud computing services? Will we host an EIR?

   ANSWER: Yes

5. Can we email the proposal or do we need to deliver a physical USB? If email is permitted, do we email you? Are there any specific file sharing services you allow such as Google or Dropbox?
   a. In any regard, is there a page/file size limit?

   ANSWER: Proposal and HUB will either be sent through email in separate attachments or can be physically mailed with an electronic copy as well (thumb drive, disc) to:

   ATT: E. Montalvo

   742-22-209-2 Marketing & Creative Services
   Office of Purchasing
   4901 University Blvd
   Odessa, TX 79762

6. The RFP mentions driving enrollment for new, transfer, UG, and Graduate students. Can you share the current and desired state by student segment (Fr/Tr, Graduate)? What KPI's will define success in this relationship? Within graduate programs, are the enrollment targets specific to specific programs?
   If so, which programs?

   Can you share the current vs. desired state for those programs?

ANSWER: Undergrads: 4,088; Graduate: 765; 2021: FTF = 421, new transfers = 368, continuing students = 3,299; KPIs will be: completes RFIs, Applications, and new student enrollment; no specific targets for grad or undergrad programs.

7. Can you share more about what success would look like in "elevating the UTPB brand positioning within the market?" that is mentioned in the RFP?

   ANSWER: increased enrollment

8. What is the UTPB market for **graduate students**? Per the campus meeting on Tuesday with Vendors on the RFP, their market is within 150 miles from campus. They are blue-collar families, nontraditional mix, high percentage 1st Gen families, minority-serving with 50% Hispanic. Many of their marketing materials are provided in Spanish. Their students are looking for an affordable option. Casual environment. Students work hard but also want support services from the campus. They want to grow in UG, transfer, and Graduate.

   ANSWER: All of the above. recent grads, working professionals looking to elevate and promote in career

9. What has been the institution's historical approach to Grad marketing?
   a) Internal? **email, flyers, digital campus signage**
   b) Outside vendor? **Digital/display, social media, billboards**
   c) What has worked well? **Digital and social; specific program marketing**
   d) What has not worked? **General or generic program marketing**

   ANSWER: all of the above; varying degrees of success

10. Do we need to include a cost for printing services in our budget, and how would we go about estimating that?

    ANSWER: No. We use a local printer and will take care of that part of the strategy.

11. The RFP and pre-bid call mentioned the importance of knowledge of the local UTPB market. Is there a preference for a local agency or are you open to working with national agencies?

    ANSWER: We value an understanding of the local market, and we are open to working with national agencies.

12. What are the Target Geographies you want to reach?

    ANSWER: Primarily the larger Permian Basin region; secondarily Texas and other targeted markets with connections to key programs (engineering, geology, pre-med, criminal justice and others)

13. Are you looking for Search Engine Optimization as part of this project?

   ANSWER: Yes

14. What is your current CMS?

   ANSWER: CMS: Cascade; CRM: Slate

15. What are the specific programs you are looking to promote?

   ANSWER: Undergrad and grad; multiple academic programs
   https://www.utpb.edu/academics/programs/index; various programs will sometimes
   priority based on funding opportunities

16. Are there landing pages currently for all of these programs?

   ANSWER: We have unique landing page templates that can be crafted for specific
   campaigns

17. As part of this RFP, are you looking for Google Analytics dashboards as part of the
   reporting?

   ANSWER: no

18. What size is your current inquiry pool?

   ANSWER: N/A

19. What is your applicant pool list size?

   ANSWER: N/A

20. What are your top marketing challenges?

   ANSWER: competition within higher ed, budget

21. How do people currently find your organization online (search, social, etc.)?

ANSWER: all of the above: paid ads, search, image and branding campaigns, social (organic and paid), direct marketing

22. What aspects of digital marketing do you want to focus on (building brand awareness, increasing web traffic, generating leads, more followers, etc..)?

   ANSWER: generating leads; conversions to enrollment; expanded reach/awareness

23. What are the roles of your in-house marketing team?

   ANSWER: email marketing; graphics designer; web content manager, photographer/videographer; social media officer; academic recruiters

24. What technologies and systems do you currently use to track marketing efforts? Do you have Google Analytics set up? Do you use Google Tag Manager?

   ANSWER: yes, we have GA set up; Google tag manager, various other mechanisms to track SEO, Site Improve**,**

25. Are you in control of the access and integration of these systems? Is that expertise on staff? Or is that a 3rd party's responsibility? Can you provide access to these systems to your strategic marketing partners?

   ANSWER: We are in control and access can be granted to marketing partners for some platforms

26. Have you conducted any previous research related to your marketing goals/ Target audiences, Competitive analysis, Qualitative feedback, Quantitative analytics.
    a. If so, can you compile and share that existing research?
    b. If no research exists, do you plan on investing in research?

   ANSWER: we have not conducted research recently

27. What metrics do you currently track? Can you provide current metrics related to your marketing project? If there are no current metrics, how do you currently track (or plan to track) campaign success?

   ANSWER: we track RFI completions, exit to Go Apply Texas, registration for Falcon Days, enrollment, page views, SEO/key word ranking, web/page traffic

28. Have you run digital ad campaigns before? What was the outcome? Do you have any campaigns running currently?

   ANSWER: yes, we currently run digital ad campaigns; they have proven successful at growing top of funnel interest and conversions

29. In precious campaigns, what percentage of the budget was allocated to media spend vs. agency/creative spend?

ANSWER: 80% media spend 20% agency

30. Is there someone who could be considered an incumbent on this project? Is there another company that you've worked with before on marketing, or any other company that would receive preference for winning this project?

ANSWER: we have worked with multiple companies for support connected to web site optimization, paid media placement, creative support. We intend to identify multiple vendors who could be contracted to support specific campaigns/strategies.

Scope of Work – Creative Services

31. Is the vendor responsible for creating the advertising campaign assets, or just for providing an overall creative campaign direction for the UTPB design team to implement?

ANSWER: both are possible. While we have a strong internal team, idea generation and creative strategy and development is a plus.

32. The RFP states, "Provide recommendations and creative guidance on related collateral such as video production, photography, website design, print creation, etc." Is the implementation of such recommendations considered out of scope for this initial RFP response?

ANSWER: We will be responsible for photography/videography. If these services are needed, they can be added as out of scope, additional services.

Scope of Work – Solution and Approach

33. Does UTPB have a preferred project management process? Waterfall, agile, a hybrid of those, or something different?

ANSWER: Internally we use Microsoft Planner

34. Are there any critical due dates related to this project?

ANSWER: No

35. Once the project has started, what will the makeup of the decision-making committee be like? Will decisions be made by a large group, a small committee, or a single person?

ANSWER: small committee made up of members of the MarComm team; ultimate approval for high level campaigns from executive council

36. Will UTPB please consider extending the proposal due date a minimum of 2 weeks following the response to written questions to allow vendors sufficient time to respond?

    ANSWER: UTPB will extend the RFP due date for one week
    New due date will be July 28, 2022 @ 2:00 pm (cst)

37. Will proposals be evaluated digitally, or will they be printed for evaluation?

    ANSWER: Both

38. What is the timeline for making a decision on this project?

    ANSWER: This RFP is not for a specific project but rather for multiple projects on a "as needed basis"

39. Is there anything about your organization that might make this project difficult?

    ANSWER: No

40. How many vendors have submitted questions in response to this RFP?

    ANSWER: Thirteen (13)

41. Please confirm that an emailed proposal submission to Elsa Montalvo, Director of Purchasing, Montalvo_E@utpb.edu is acceptable.

    ANSWER: Yes

42. "Must provide a performance bond " Please consider removing this requirement; it's more appropriate for construction contracts than professional services. It also involves a very lengthy and possibly expensive process including establishing an Irrevocable Line of Credit.

    ANSWER: This is per Texas Government Code 2252.064 and can be discussed/negotiated with the selected vendor(s)

43. "Include rough executions for traditional advertising, commercial or video development, print ads, web design and/or social media campaigns"

"Include a sample plan of proposed activities of the PR/brand awareness campaign."

Please consider removing this requirement and instead asking for a portfolio of previously produced work. Since you are seeking a pool of contractors, each of whom may actually receive fairly small projects, this creates an enormous commitment of agency time even though the agency may be awarded only minimal amounts of work.

ANSWER: a portfolio is acceptable

44. Since we don't know what tasks may be required, how should we answer these questions?
Schedule for completion of Tasks and Submittal of Deliverables Pricing for work and expenses

ANSWER: a general idea of your recommended best practices, and/or timeline for your creative/feedback/edits process is acceptable

45. You addresses the questions below briefly in the preproposal meeting; but please provide more formal answers. University will not recognize or accept any charges or fees to perform work that are not specifically stated in the Pricing and Delivery Schedule. What about unforeseen third-party expenses like printing?

ANSWER: we will be responsible for printing. If unforeseen expenses are proposed, the vendor and client can discuss and determine options.

46. Proposer will not delegate any of its duties or responsiblities …to any subcontractor except as expressly provided in this agreement?" Do you distinguish between a subcontractor and a vendor we may need on a one-time basis, for example, a printer? Does our fee schedule include our hours only and NO third-party costs like printing, photography, videography?

ANSWER: Vendor and client can discuss options when a subcontractor is necessary. Vendor can determine proposed pricing structure.

47. How should we devise a work plan if we don't know what projects we will be assigned?

ANSWER: projects will include traditional marketing strategies including digital, email, paid and display, print, social, and environmental as well as any emerging platforms that meet the characteristics of prospective students

48. "Proposer will describe the types of reports. Proposer will provide and the frequency if more than required in this RFP." Which reports are required? Didn't see any requirements.

ANSWER: vendor will propose reporting structure that best fits the strategies implemented. The reports should help the client understand the performance of various campaigns, and validate recommended changes.

49. "Contractor will not be released from any liability by reason of any approval by University." Would you consider rephrasing this to state that the University and agency share liability? This seems unfair to hold only the agency responsible.

    ANSWER: This language is standard from the UT Office of General Counsel, also see Section 5.3.1 of RFP: If Proposer takes exception to any terms or condition set forth in APPENDIX TWO, Proposer must submit a list of the exceptions.

50. EIR Accessibility -- Will we have no EIR Electronic and Information Resources? Will the Contractor have access to EIR? Student records, etc?

    ANSWER: Contractor will not have access to student records

51. Cyber Liability Insurance Please explain 11.1.9 in its entirety. If Contractor will have no access to UTPB's website or student records, will Cyber Liability insurance be necessary?

    ANSWER: Yes – to be discussed with awarded vendor(s) also see Section 5.3.1 of RFP: If Proposer takes exception to any terms or condition set forth in APPENDIX TWO, Proposer must submit a list of the exceptions.

52. Which programs would be a part of this engagement, either existing or planned (if known)?

    ANSWER: all academic programs could be include in marketing strategies

53. Can you provide program-specific enrollment goals across all programs?

    ANSWER: N/A

54. Is the brand campaign envisioned to be awareness-generating only, or can success measurement include capturing inquiry generation through brand terms on paid search?

    ANSWER: Yes, success measurement can include capturing inquiry generation through brand terms on paid search

55. What is the goal cost per start across all channels?

ANSWER: N/A

56. Can you share your past and expected future media budgets by year?

   ANSWER: between $300k - $400k per year

57. We understand the total annual budget is $300K with some flexibility; is the media budget fixed or flexible?

   ANSWER: flexible

58. What percentage of the marketing budget will be devoted to branding, undergraduate recruitment, graduate recruitment, and online programs? What are your priorities?

   ANSWER: not determined; enrollment is priority

59. What CMS, CRM, and Application system do you currently utilize?

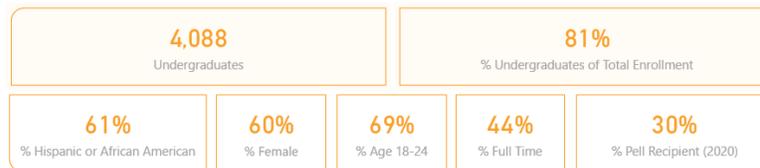   **ANSWER:** CMS: Cascade; CRM: Slate Application: Apply Texas

60. Is there any additional research or demographic information you can share about your existing student population?
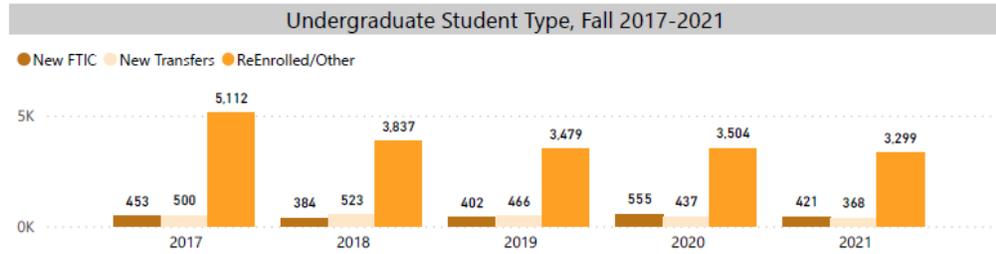
   ANSWER:

Undergraduate Enrollment Profile - UT Permian Basin

Source: Texas Higher Education Coordinating Board Accountability System

Fall 2021, Post-Baccalaureates are not included

4,088	81%
Undergraduates	% Undergraduates of Total Enrollment

61%	60%	69%	44%	30%
% Hispanic or African American	% Female	% Age 18-24	% Full Time	% Pell Recipient (2020)

Fall 2021 Undergraduate Enrollment Profile

African American		Asian		Hispanic		International		Other		White		**Total**			Female		Male		**Total**	
#	%	#	%	#	%	#	%	#	%	#	%	**#**	**%**		#	%	#	%	**#**	**%**
334	8%	110	3%	2,152	53%	99	2%	115	3%	1,278	31%	**4,088**	**100%**		2,444	60%	1,644	40%	**4,088**	**100%**

Undergraduate Student Type, Fall 2017-2021

● New FTIC　○ New Transfers　● ReEnrolled/Other

Year	New FTIC	New Transfers	ReEnrolled/Other
2017	453	500	5,112
2018	384	523	3,837
2019	402	466	3,479
2020	555	437	3,504
2021	421	368	3,299

Graduate Enrollment Profile - UT Permian Basin

Fall 2021

Source: Texas Higher Education Coordinating Board Accountability System

765
Graduate Students

53%
% Hispanic or African American

60%
Percent Female

Profile of All Graduate Students

	African American		Asian		Hispanic		International		Other		White		Total	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
	74	10%	28	4%	334	44%	33	4%	19	2%	277	36%	765	100%

Female		Male		Total	
#	%	#	%	#	%
459	60%	306	40%	765	100%

Profile of All Graduate Students

Type	#	% Female	% Hispanic or African American
Master's	765	60%	53%
Total	**765**	**60%**	**53%**

Total Graduate Enrollment, 2017-2021

Year	Enrollment
2017	628
2018	789
2019	704
2020	776
2021	765
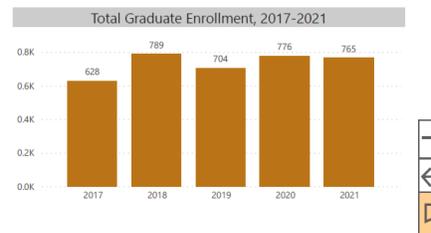
61. How many leads come through non-paid-media efforts, such as the school site and stealth applications?

ANSWER: N/A

62. How many students, not attributed to marketing efforts, typically enroll in a semester in your online programs?

ANSWER: N/A

63. Will the University be providing access to your Google Analytics to assist with tracking and optimizing the campaign?

ANSWER: yes

64. Will this effort include the University staff being readily available to make on-demand and timely revisions to your web properties and landing pages to accommodate enhanced performance of the digital marketing?

ANSWER: yes

65. Will these digital marketing services co-exist and be coordinated with your existing OPM-driven marketing efforts?

   ANSWER: yes

66. Are there target profiles for the type of prospective student (by category of offering) that the university can share?

   ANSWER: N/A

67. What reporting tools do you already have in place for your current activities?

   ANSWER: we have GA set up; Google tag manager, various other mechanisms to track SEO, Site Improve,

68. What metrics will you use to measure success for these services?

   ANSWER: KPIs will be: completes RFIs, Applications, and new student enrollment; no specific targets for grad or undergrad programs

69. Can you please provide historical conversion metrics, including paid click to inquiry, inquiry to app, app to enrollment?

   ANSWER: N/A

70. Is there a specific HUB requirement for this RFP beyond the 23.7% for professional services contracts list in the HSP form?

   ANSWER: See the State of Texas HUB goals below and Section 1.9.6 Submission requirements

HUB Goals

The statewide HUB Annual Utilization Goals are often referred to as "HUB Goals" and are based on expenditures by procurement categories for the state agencies and state universities. Statewide HUB has set the following goals for total statewide expenditures with HUBs:

- 11.2% for heavy construction other than building contracts;
- 21.1% for all building construction, including general contractors and operative builders' contracts;
- 32.9% for all special trade construction contracts;
- 23.7% for professional services contracts;
- 26.0% for all other services contracts; and
- 21.1% for commodities contracts.

71. To help identify advertising and geotargeting parameters, please list target market geographies (e.g., specific counties, state(s), MSAs, cities, businesses, other specific locations, etc.).

    ANSWER: Permian Basin region; counties include Andrews, Borden, Crane, Dawson, Ector, Gaines, Glasscock, Howard, Loving, Martin, Midland, Pecos, Reeves, Terrell, Upton, Ward, Winkler; state of Texas, southeastern New Mexico; targeted population centers to coincide with specific academic program marketing

72. Should we anticipate all new photo/images, video, and audio assets for the comprehensive efforts/channels of the campaign or does UTPB have available and up-to-date assets to tap into? Please describe your current stock of these types of assets.

    ANSWER: UTPB has a robust offering of photos and videos with a dedicated professional for these services, photos and videos can be captured upon request

73. Must proposer respond to Appendices 5, 6 and 7 if we have no access to EIR?

    ANSWER: Yes

74. Can you please share what prompted this RFP? Are you currently working with another partner or doing everything in-house?

    ANSWER: as we are experiencing a growing demand for marketing services, we need additional support. We do much work in-house, but depend on other sources for paid placement; strategy support, modernization and efficiency.

75. Can you please share your annual budget for this initiative?

    ANSWER: $300k - $400k

76. Can you please share enrollment goals?

ANSWER: Our Strategic Plan calls for the doubling of the number of degrees and awards by 2030

77. What CRM are you currently using?

ANSWER: Slate

78. I could not find the solicitation on the ESBD this morning. I wanted to check to see if you had posted an attendance list for the 7/5 pre-proposal conference. I am interested in HUB subcontracting opportunities and have found that to be a way to reach primes who may be looking for one. Can you help?

ANSWER: See addendum attachment

79. Is this a new requirement or an existing requirement?

ANSWER: This is not new.

80. How many incumbents are there performing this work?

ANSWER: three

81. What are the incumbent names, contract #s, and revenues received under the incumbent contract?

ANSWER: Annual estimated costs: Stamats $50,000, Red Pixel: $200,000, Copy Craft: $75,000

82. How many FTEs were on the previous contract? Has the PWS Changed?

ANSWER: N/A

83. What did you like about the previous contract? Dislikes?

ANSWER: We appreciated the flexibility and broad opportunities that existed within previous contracts.

84. If we have a teaming agreement with a subcontractor, does the subcontractor's experience count as experience for the prime?

ANSWER: That is up to the proposing firm to use them to count towards their experience

85. Has the effort been funded?

ANSWER: Yes