GMU-1636-20, Branding and Marketing Services

Date: 1/24/20

Responses in red.

1. Can you clarify whether this branding exercise will inform the overarching brand for GMU, or will it solely be used to position the Innovation Campus? The branding exercise for Phase I is intended to develop a brand for our innovation district initiative in Arlington. The Phase I brand product should inform the development of a more comprehensive brand to be developed in Phase II, but should be able to stand on its own.

2. Do you have an established budget for this endeavor on which to work to build a proposed approach? If so, can you share what it is? Up to $240K has been allocated for Phase I.

3. In your opinion, which institutions of higher education are "getting it right" with respect to brand awareness, positioning, and marketing activities? Why? Arizona State. Virginia Tech.

4. What are the top markets from which GMU traditionally attracts students? Virginia (specifically NOVA,) Maryland, Pennsylvania, New York, New Jersey. Regional recruiters have recently been placed in Florida, North Carolina, Texas and California.

5. Can you share what percentage of your overall marketing efforts were dedicated to digital marketing initiatives in the last fiscal year? Traditional? Public Relations campaigns? See response to question 30.

6. Can you share the confirmed budget amount for the marketing and branding project? Previously answered (question 2)

7. For Phase 2, Should the budget reflect production and media costs? Yes. The exact budget for Phase II is still in development.

8. Can you share GMU’s annual media spending budgets for the last 3 years? Centrally, the university spent approximately $300,000 in brand and awareness media last year. Individual schools and colleges have their own budgets for media. Additional data unavailable at this time.

9. Attachment B - Small Business Subcontracting Plan, should Brllnt only complete Section A since our company is certified as a small business in Washington, DC and 100% women owned through the Women
Business Enterprise National Council (WBENC)? Per the RFP instructions if you are not a DSBSD-certified small business, complete Section B of this form.

10. Do you have an incumbent agency, and, if so, how long have they worked on the account?

   The university and its colleges and schools work with various agencies. The central Communications and Marketing office has worked with an agency for the past 18 months on a campaign.

11. Why are you looking to make a change now? What is affecting your timeline? Regarding Phase I—we will begin a $250 million transformation of our Arlington campus this year, creating an innovation district designed to enrich Arlington’s R-B corridor and fuel growth in the digital innovation economy. Mason produces more graduates in computing than any VA institution, our tech-based R&D portfolio has grown considerably, and we are working closely with many partners in the private and public sectors to advance inclusive economic development in the region. We want to make our many stakeholders aware that Mason is a major innovation player, preparing talent and ideas that ensure the GWR and beyond will flourish for many years to come. Our Arlington expansion initiative has already been launched, so we need Phase I deliverables as soon as possible. Phase I outcomes must inform the work on the more comprehensive brand in Phase II.

12. What is your fiscal year? July 1-June 30.

13. What are your pain points, if any, for GMU’s current brand?

   We are still ‘growing into’ our identity as Virginia’s largest and most diverse public research-intensive university. Overall we have a strong brand as an inclusive comprehensive undergraduate institution. However, because we are a relatively young research-intensive university, and because we have grown so fast in both enrollment and research productivity, most stakeholders don’t realize just how much we have changed, and just how critical our contributions are to the innovation economy.

   We also contend with alternate branding viewpoints created by certain realities, namely that the university has been one of the largest recipients of Koch Foundation dollars of any U.S. university. That combined with the well-known libertarian viewpoint of the Mercatus Center and the Antonin Scalia Law School, creates a bit of an uphill climb at times.

14. What are your pain points/challenges, if any, for GMU’s current marketing and advertising efforts?

   The lack of an appropriate budget.

   Perhaps we should devote more money to advertising. While have placed some ads on buses and have a brand awareness campaign, but there does not appear to be enough advertising within our local region.

   For the Arlington Innovation District, it will be essentially to build on the strengths of the existing brand but also perhaps go bigger/better without making claims we can’t support. If we’re going to lead, we need to show that through our marketing and advertising efforts.
15. Who are your largest competitors? Depends on the market. For freshmen, it’s Virginia Tech, James Madison University, American, University of Maryland. For graduate students, it’s the other 130 research-intensive institutions in the country (and specific institutional competitors vary by program/discipline). For federal R&D sponsors, it also varies by program/discipline, for GWR corporate sponsors and employers, it’s VT, UVA, UMD-CP, UMBC, for innovation district competitors, its Boston, Philly, NYC, St. Louis, Austin, for faculty, its VT, UMD-CP, GW, GT, UC-Davis, for philanthropy, its VT, UMD, etc., for high tech start-ups and VCs, it Boston, Philly, Austin, St Louis, etc.

16. Who do you view as comparators, i.e., aspirational universities or organizations? NC State, Purdue, UCF, Stonybrook, Arizona State. Mason has an official list of comparators but the two top are ASU and University of Central Florida.

17. Can you provide us with your primary and secondary target markets? Note above.

18. Do you have research that we could use during our strategic process? If so, what type of research, and how recent is it? We have research done by Blackboard Student Services as part of the Student Experience Redesign. Slightly older research on price elasticity comes from Ruffalo Noel Levitz. OCM also recently completed a brand survey. Our research is too one-dimensional and focused on undergraduate students, reflecting our past as a predominantly undergraduate student institution.

19. Do you have an email list with contacts we could use to source a survey? If so, how many email addresses would be available? We have hundreds of thousands of purchased leads – SAT/ACT test takers.

20. What do your public relations needs, if any, look like in your mind? We are fine in this area.

21. What do your social media needs, if any, look like in your mind? Are they paid, organic, or both? We are seeking recommendations and an action plan for both paid and organic social media for this project.

22. For Phase II, can you elaborate in greater detail the deliverables expected for the branding portion? Are you looking to refresh the GMU brand? Are you looking to create a stronger brand architecture for the university? Phase II will be informed by our experiences in and the outcomes of Phase I. Phase II is likely to include the creation of a stronger brand architecture, since our brand(s) must speak to different stakeholder groups/target audiences (e.g. corporate sponsors, corporate partners, employers, undergraduate students, graduate students, faculty recruits, philanthropists/donors, etc.).

23. As far as the current GMU brand goes, are you looking to make any changes to the identity (i.e., logo, color scheme, typeface, tagline, etc.)? This will be explored during Phase II.

24. How have you worked with partners in the past? Which agencies were they? Previously answered
25. What is your review and approval process with an agency? Who will be the decision-makers? See RFP. Decision is made by committee.

26. Will the agency have access to a main point of contact/day-to-day to filter requests, feedback, approvals, etc.? If so, who will that person be? Yes. Name not available at this time.

27. If we will have more than one point of contact, roughly how many clients would we be working with? There will be one main point of contact who will serve as interface with many Mason stakeholders.

28. What are you looking for in an agency partner besides the capabilities to handle the scope you’ve outlined? An agency with a strong background developing a brand and with some experience working with institutions of higher ed, innovation districts and advanced industry clients. Experience developing a subset of a brand helpful.

29. Are we required to use production partners local to Virginia only, or can we source from other locations as well? Other locations are acceptable.

30. Can you provide us with a percentage breakdown of your current media plan by mediums? Rough breakdown of University spend is 80% digital, 10% print, 5% events, 5% other.

31. What does success look like for the brand? For Phase I, immediate recognition that Mason is a major contributor to the digital innovation economy, both in terms of talent, ideas and new ventures, making the GWR a global hotspot for digital innovation. Additional, able to raise money, attract students, grow our R&D base, and grow and support more high-tech startups and our relationships with major players in the tech economy nationally and globally. Phase II scope is more comprehensive and will not focus only on the digital innovation economy.


33. What is the percentage breakdown of your overall marketing budget? Part of the funding will come from outside the university’s marketing budget.

34. How much do you spend in agency fees? For our current brand efforts we pay as low as 0%, capped at 8%.

35. How much money do you set aside for production costs? To be determined.

36. How much do you spend on research, analytics, and/or measurement? To be determined.

37. How much do you spend on your website? We spend approximately $190k per year for licensing, hosting and updates.
38. How much do you spend on media? The university spent approximately $300,000 in brand and awareness media last year. Individual schools and colleges have their own budgets for media.

39. Are you currently paying a media commission? If so, what percentage? See answer to question 34.

40. On what else do you spend your budget? Not applicable.

41. Is there a budget for phase one of this project? Yes.

42. Can you please elaborate on what you are specifically requesting examples of for Section 2. Experience & Qualifications, a. Demonstrated ability to provide services for higher education institutions and/or organizations comparable in size, diversity, and breadth of academic offerings and/or industries to Mason, to also include; iv. Exhibited record for providing marketing counseling services and programs? We want ensure the examples we provide are in line with what you are requesting.
   As outlined in the RFP, proposals must address strategies to highlight academic quality of the university’s graduate and undergraduate programs, the rich diversity of Mason’s student populations, the prominence of the university’s research programs and their impact on the economy and on society, the stature of the institution’s world-class faculty, the advantages of the university’s location and other attributes listed.
   Arizona State is a good example of a university that we aspire to be like.

43. **Deliver a comprehensive brand strategy that includes brand positioning statement and a brand identity statements, along with recommended implementation.**
   Can you tell us more specifically what you mean by recommendation implementation? Does this mean a campaign? A tagline with a few ideas on how to execute? Do you expect a media plan?
   In addition to the deliverables outlined, we seek a strategy to build awareness about our contributions as Virginia’s largest and most diverse research-intensive institution to the region and to shared efforts to establish the GWR as a hotspot in the global innovation economy. with themes, messages, target audiences and a proposed media plan.

44. How robust are you expecting the identity guidelines? 10 pages? 50 pages? Somewhere in between?
   This needn’t be long since it will ladder up to an existing brand with robust identity guidelines.
45. **Messaging and architecture recommendations, including how the new brand operates within the Mason brand framework.** Will this be part of the recommended implementation above or a separate deliverable/document? The Arlington brand should be able to stand on its own, but will ladder up to the university’s brand and in some ways inform future conversations about the brand.

46. Can you share the George Mason master brand guidelines? Eric can provide the link.

47. Can you confirm primary and secondary targets audiences for Phase 1? Primary: philanthropists/donors, VCs, corporate partners, corporate tenants, high-tech start-ups, incubators and accelerators, R&D sponsors, graduate students, economic development agencies, developers, faculty (in no particular order). **Secondary: undergraduate students**

48. **Research methodology including market and competitor analysis.** How many markets and how many competitors do you expect for analysis?
   
   Half dozen.

49. Do you currently have an agency? Which agencies have you worked with in the past? The university works with multiple agencies because marketing is a distributed endeavor.

50. Can you confirm primary and secondary targets audiences for Phase 2? The primary target audiences will be prospective students, graduate and undergraduate, regional and national, and recruiting prospective faculty from a national audience. **Secondary target audiences are corporations, employers, donors, and research partners.**

51. **Provide future university branding and consulting on an as-needed basis.** Will the consulting be only for the work we create or will it extend into other GMU marketing efforts? It is likely to extend into other GMU marketing efforts.

52. **Templates and guidelines for print and electronic publications.** Approximately how many individual templates and guidelines do you expect? Not available.

53. Based on the goal of Phase 1 and the desire to develop a brand identity for the Innovation District that seamlessly aligns with and ladders up to the GMU “master brand”, is the assumption that the research would include an evaluation of the GMU brand that is asked in Phase 2 (identify and value proposition) as part of Phase 1’s review and research process? Yes, however, this is the first step in an overall enhancement of the university-wide brand, so we wouldn’t want to restrict the development of the Arlington brand with too much emphasis during Phase 1 on the broader brand.
54. Will the marketing and advertising campaign addressed in Phase 2 be focused on the 1) the DMV primarily 2) the DMV plus select, high-opportunity markets or 3) national footprint with increased investment in the DMV and/or DMV plus select markets? The marketing plan would be both regional and national.

55. Will the marketing campaign that’s developed promote both the GMU main campus (all audiences and stakeholders) as well as the Innovation District? Yes.

56. Is there available data to review and analyze prior to launching the research plan? For example, are there student surveys, annual brand trackers, etc? We have plenty of data available including surveys of students, alumni and a brand perception study. We have no data regarding surveys of VC investors, start-ups, corporate tenants, incubators/accelerators, etc.

57. Is the university structured and managed in a way that will allow consistent branding and the integration of new brand identity and messages to be implemented by all stakeholders? It is structured, but enforcing the guidelines is more problematic because different units have different goals. This is why establishment of a more flexible brand architecture is so important.

58. What is your anticipated budget for Phase 1 and Phase 2? The budget is still in development, but up to $240k has been allocated for Phase I.

59. Is there an incumbent firm bidding on this work? If so, who is the incumbent? No.

60. How many proposals does GMU expect to receive? Not able to determine but based on questions multiple proposals.

61. What is the advertising budget for Phase 2 of this project? The budget for Phase II is still in development.

62. Ideal Partner Qualities - what are the most important traits that you are looking for in a partner? Creative, collaborative, innovative, professional, responsive and patient.

63. Incumbent Partner - is there an incumbent creative partner with whom the university has worked with before on similar projects? No.

64. Timeline - Can you provide any key milestone dates and/or a timeline related to the university’s innovation campus? We have launched our Arlington expansion initiative already, and so time is of the essence for Phase I. Ideally Phase I will start asap with monthly deliverables and final deliverables within 6 months.

65. Partners - Are there any existing corporate, foundation or other partners for the innovation campus initiative? Or any aspirational partnerships that the university seeks to build over the life of the project? Yes. Major tech companies already here and interested in being here. Organizations like Cambridge Innovation Center, Venture Café, CIT, Co-working space providers, etc.
66. **Leadership** - Can you speak to how either Phase 1 or Phase 2 may be impacted by the university’s current search for a new president? Phase I will proceed immediately unaffected by the presidential search; Phase II is likely to be influenced by the new president.

67. Neither Phase 1 or Phase 2 have stated start dates. Are you able to share preferred start dates? Even if it is tentative? Spring 2020 start of Phase I. Phase II dependent on Phase I completion.

68. How long would you expect/prefer Phase 1 to run? No more than six months long.

69. Do you have a preferred completion date for Phase 1?

   Would like to see concepts by June, so we have something initial to roll out in July and be complete by August-September

70. How long do you expect/prefer for Phase 2 to run?

   It will be a longer process than Phase I.

71. It looks like the preferred work plan is to complete Phase 1 before starting Phase 2; can you please confirm? Yes.

72. Is there a stated yearly media budget for Phase 2? This will help us plan and scope the creative, media and optimization scope schedules. The budget for Phase II is still in development.

73. What company ran the advertising campaign for GMU before this RFP?

   There are several, but Advance 360 conducted the most recent campaign for the central communications and marketing office.

74. What media tactics worked in the past for (1) recruitment, (2) brand, (3) advancement marketing?

   1) A combination of print, digital, social and email
   2) Digital, some OOH
   3) Digital, social, traditional (including events)

75. How was the performance for #8 measured?

   Through number of impressions and a follow-up survey.

76. Do you have specific goals for #8? For example, increase awareness by 15% in-state, and 10% in MD? Increase undergraduate enrollment by 20% in five years? We are developing specific goals.
77. What CRM system does the University use? **SalesForce**

78. Does the University currently employ segmented nurture communications flows? How are they performing?

Yes, we employ segmented nurture communications. We are currently on track to meet or exceed our application goals for this year.

79. Does the University have a Public Relations firm on retainer? **No.**

80. By graduate program and undergraduate, what does the recruitment cycle look like for GMU from inquiry to enrollment?

Our application cycle runs from August 1 and ends on or near February 1. Most applications come in November.

81. What’s GMU’s undergraduate and graduate “ghost” applicant ratio (the first time the University learns about the candidate is when they apply, not via inquiry).

Our ghost applicant percentage is between 50-60% out of state.

82. What is the not to exceed budget for this RFP? **Previously answered above.**

83. Please clarify the scope intended for an "integrated and identifiable public brand." Do both phases include work on the master University brand as well as the innovation district?

Phase I is focused on our innovation district initiative. Phase II would broaden to the University brand.

84. Can you please provide clarity on the small business requirement on the Subcontracting Plan (reference page 13, section B)? Please confirm the prime contractor can satisfy the 42% small business requirement. **Yes**

85. Will you accept responses delivered via FedEx or UPS? **Yes. See RFP instructions.**

86. Is there a page limit for the response or any specific formatting limitations? **No**

87. Have you done research in preparation for the building; if yes, what were the topics studied and any outcomes/findings?

Yes, and if selected the university could make information available.

88. What will be university’s points of differentiation from other technology centers being developed by other universities in the geographic area?

We are not building a campus, we have a campus already. We are the largest producer of tech talent in the state, and our talent pool is diverse – which employers demand. We are established in
the region, with existing partnerships and relationships. We bring a multi-disciplinary approach to our innovation district, with computing, law school, public policy, business and other disciplines.

89. **Proposed pricing.** Our firm operates on a monthly retainer billing structure, not an hourly billing or time sheet system. All consulting monthly fees are inclusive of time spent and staff resources utilized. Other expenses, such as the use of outside vendors, travel, etc. will be estimated and billed in addition to the monthly retainer. Is there a way to represent our billing structure which conforms to the expectations set under the RFP? Does this billing structure disqualify our firm from competing for the RFP? No.

90. Are there any budget ranges or limits for Phases 1 and 2? **Previously answered.**

91. Who are the key decision makers for this project?

Five senior leaders: Vice President of Research, Innovation & Economic Impact; Vice President of Advancement; Senior Vice President of Finance and Administration; Vice President of Communications and Marketing; and Project Lead for Arlington Expansion.

92. What internal resources exist to support this project? **Staff and funding.**

93. Is there a preference for a local agency to conduct this work? **No.**

94. Are there any key milestones or dates that should be considered when building the project timeline?

We would like to have something to show our Board at our July 2020 summer meeting.

95. Is there a recent agency or incumbent agency that the University has been working with? **No, not a branding agency.**

96. When was the last time the University went through a brand refresh?

The University fielded a brand perception study that concluded in June, 2018. We developed our current awareness campaigns based on those survey results. Any relevant research will be shared as part of this engagement. The last substantive brand refresh was done in 2015.

97. What kind of research about perceptions or brand awareness has been done recently? Will this research be shared? **See answer to question 62.** Any relevant research will be shared as part of this engagement.

98. Is there a desire for quantitative research as part of this engagement? **Yes**

99. Regarding the competitive analysis - who would you consider competitors of the University’s innovation initiative?

Tech Square in Atlanta, Cornell Tech at Roosevelt Island, Science Center in Philadelphia, Kendall Square, Cortex Innovation Community in St. Louis, etc.
100. Has a name for the innovation initiative already been established? If not, will naming be a part of this initiative?

No final name is not established. Welcome input.

101. How closely should the identity align with the University’s master brand?

It should ladder up, but be able to stand on its own.

102. Do you have a media partner to assist with placing the media? Are you looking for these capabilities?

We do have a current campaign with a media partner.

103. How will cost be evaluated and awarded points? For instance, will the lowest cost bidder be awarded the most points? If so, how will low cost be calculated considering there are multiple cost proposal components? See RFP.

104. Will the current main campus GMU brand be updated or adjusted in any way as part of this project?

Yes

105. For Phase 2 implementation, can GMU either provide paid media budget ranges or more detailed objectives to help proposers provide paid media investment recommendations? Previously answered.

106. Is this a new effort for GMU or the continuation of an existing branding initiative? This is a new effort.

107. Is there a budget range or ceiling that has been established for this project (for Phase 1 and Phase 2)? Previously answered.

108. Does location of vendor factor into evaluation of proposals? i.e. are you looking for a local, DC area based vendor? Previously answered.

109. Has GMU worked with an outside branding or marketing agency over the past several years? Previously answered.

110. Is GMU currently working with any type of advertising agencies? Does the university currently have an advertising agency of record? If so, who are they? Advance 360 is the closest thing we have to an agency of record.

111. What are the measurable goals of the campaign? Are there any quantifiable outcomes i.e. awareness, interest, increased enrollment? Previously answered.

112. What are the intended flight dates for the paid media component of Phase 2 (when do you want to campaign to be in market?) Not available.
113. When is the planned launch/opening date of the innovation district? Initiative was announced in 2018; new building will open in Fall 2025

114. What is the target date for the new brand identity to be out in the marketplace? Fall 2020

115. For PHASE I, as specifically as possible please identify the audiences/constituent groups/cohorts you expect to be included in the required primary and/or secondary research? Previously answered.
   
   a. How would you prioritize the audiences you’ve identified above? Can you list them from most important to least important in the context of Mason’s strategic planning?
   b. For EACH audience identified above, how many records do you have that include email addresses?
   c. For EACH audience identified above, how many records do you have that include telephone numbers?
   d. Will Mason supply names and contact information for the opinion leaders, civic leaders, elected officials, foundations, and non-profits? Approximately how many records are available?

116. For PHASE I, as specifically as possible please identify the competitor institutions and/or innovation initiatives of districts in major metropolitan areas you expect to be included in the required competitor analysis? Our fees will be calculated on the basis of both the NUMBER of competitors you identify, and the NATURE of the competitors you identify. Previously answered.

117. How many agency partners will be awarded these two projects? Ideally one, but still to be determined.

118. Is there an incumbent working on this project? No

119. Do you currently have an agency of record? If so, what role will it play in this RFP? Previously answered.

120. Will local or in-state agencies be given preference? No.

121. Are there any agencies that may be given advantage by virtue of a recent business relationship? No

122. Who (i.e., what teams and roles) will be involved in proposal evaluations and decision-making? Previously answered.

123. What qualities do you seek in a new agency partner? Which qualities are most important? Previously answered.

124. What is your estimated budget for this work? Alternatively, what is the anticipated not-to-exceed amount and/or budget range? Previously answered.

125. What is your annual budget for this contract? Previously answered.

126. What are your budget allocations for agency and for media/digital? To be determined.

127. Do you have specific research dates in mind to conduct these surveys? This spring.
128. Are there key dates by which you need to report results to your institutional board, president, regents, etc.? July 2020 for Phase I.

129. Many key audiences (prospective undergraduate students and parents) are difficult to reach during summer months. To effectively engage these groups, this research may be best conducted in the fall. Is this timeline something you are willing to consider? No, not for Phase I.

130. Will this study replicate another study you’ve conducted in the past? No.

131. What other research (informal or formal) have you conducted in the past 5 years that will inform this effort (e.g., NSSE – National Survey of Student Engagement, focus groups, internal web surveys, Admitted Student Questionnaire from the College Board, alumni surveys, past vendor or brand surveys)? To be determined.

132. Do you have National Clearinghouse data to inform your selection of competitors in order to determine where students have applied? To be determined.

133. You’ve requested an analysis of competitors for this brand campaign. How many competitors are you including for this initiative? Previously answered.

134. Will Mason implement a central point of contact to coordinate target audience lists, survey instrument approvals, campus visits, and feedback? Yes

135. Will Mason supply names and emails for the prospective students and parents/families of prospective students? How many records are available for the inquiring or prospective undergraduate students? Not applicable.

136. On a scale of 1-10 (with 10 being most aggressive), how much does your institution want to be pushed creatively and strategically? We want to be creative and strategic, but the level is more appropriate for a discussion.

137. Have you established a set of user personas for your primary target audiences? No

138. Are you open to new photography and/or videography that will best reach your target audiences? Yes

139. This is an RFP that very much interests the brand team at West Cary Group. However, before we put in the 40 or 50 man-hours it normally takes to build an RFP response, could you advise me if you will be hosting a pre-proposal conference so that we can see who else might be responding? Without an in-person meeting, we normally find that institutions like George Mason have already selected an agency in advance – and are just going through the motion of putting out an RFP. I also see that George Mason seems to do “single-source” awards, which underscores our concern that this might be the case. There will not be a preproposal conference. We have not already selected an agency. Mason will review, score and award contracts in accordance with the RFP.