Listed below are vendor questions that were received prior to the requested deadline and their corresponding answers for RFP# AA17-RH-5118 – Contract: Marketing/Advertising Services for the Isenberg School of Management or approved equal.

The bid opening date was originally scheduled for June 14, 2016 @ 1:00 pm EST

**The bid opening date has been REVISED to open on Tuesday, June 21, 2016 @ 1:00 EST**

**Question # 1:** When is the institution embarking on its next fundraising campaign to construct the new building wing? What is the financial goal for the campaign?

**Answer # 1:**

Fundraising for the new building has been underway for some time. As the UMass Rising campaign ends officially on June 30, 2016, our building fundraising will pick up in earnest. Our financial goals are $25-35K.

**Question # 2:** What institutions does Isenberg consider as peer and aspirant competitors?

**Answer # 2:**

Isenberg considers different peer and aspirant competitors by program. However, our aspirant competitors overall are top public institutions that have iconic and/or strong national brand name awareness such as Kelley-Indiana, Ross-Michigan, McCombs-UT Austin, Darden/Mcintire-Virginia, Haas-Berkeley.

Undergraduate: We often compete for applicants with Boston-area business schools like BU, BC, Babson, Bentley and other undergraduate business programs that have similar rankings to ours. You can see the latest rankings from Bloomberg Businessweek [here](#).

Online MBA: we have a high yield for our program as we are one of the only 100% online format programs ranked in the top 10-20 by US News. We consider other top 15 programs are main competitors, you can see the latest rankings [here](#).

Part-time MBA: again, we enjoy a high yield for our program as we are the highest ranked part time program in the region. There is some regional competition from programs like Boston College.

Full-time MBA: we have a unique offering that fully funds all of our residential MBA students. As a result, we are attracting extremely high quality students who are also accepted to top schools including NYU-Stern, HBS, and more.

Sport MS: Oregon, Ohio State, Florida State

Masters of Science in Accounting: This is a new and maturing category, other schools that offer similar programs include Syracuse, Penn State, Villanova.
Question # 3: Which third-party partners has Isenberg previously partnered with prior to this engagement?

Answer # 3:

Isenberg has used local designers including Zoe Designworks for a great deal of our brand identity work and publication design. Buyer advertising placed our media for online MBA from 2013-2014. We have been working with Forge Worldwide on a project basis for advertising development since spring 2014.

Question # 4: Who developed the logo and web-site re-design for the Isenberg School of Management?

Answer # 4:

Logo: Zoe Designworks **  Web-site redesign: Shady Hill/Zoe Designworks

Question # 5: What does the “comprehensive brand study” entail? Please be as specific as possible. Thank you.

Answer # 5:

- Isenberg partnered with higher ed market research firm SimpsonScarborough, after an RFP process that reviewed 4 different consultants. Research was conducted through calendar year 2014 and the final report was delivered in early 2015.
- The objective of the research was to explore the School's image and reputation:
  - What level of awareness and familiarity with Isenberg exists among key external target audiences?
  - What is the School best known for?
  - What makes Isenberg distinctly Isenberg in the minds of internal audiences?
  - What influences deans of business school's perception of peer institutions and Isenberg?
  - How should Isenberg’s brand strategy evolve in order to respond to the interests of external audiences, create pride among alumni, and communicate authenticity to internal audiences?
- 105 qualitative participants and 3,040 quantitative survey respondents across several audiences:
  - Prospective undergraduate students
  - Prospective graduate students
  - Internal audiences
  - Alumni
  - Deans of top 130 business schools

Question # 6: Who conducted the research on the “comprehensive brand study”?

Answer # 6:

Isenberg partnered with higher ed market research firm SimpsonScarborough, after an RFP process that reviewed 4 different consultants.
Question # 7: When was the “comprehensive brand study” conducted?

Answer # 7:

Research was conducted through calendar year 2014 and the final report was delivered in early 2015.

Question # 8: How has the “We Drive the Driven” tagline been perceived among internal and external audiences?

Answer # 8:

“We Drive the Driven™” has been very well received among internal and external audiences. It is considered distinctive, memorable and a strong summation of the Isenberg brand DNA.

Question # 9: How will the tagline “We Drive the Driven” impact the scope of work outlined in this RFP?

Answer # 9:

“We Drive the Driven™” will be central to the scope of work outlined in this RFP. It is our brand signature and it is expected to be utilized across all communication channels.

Question # 10: How has the Isenberg School of Management reached all alumni audiences in the past?

Answer # 10:

Alumni has been targeted via email, direct mail (for select audiences), social media, Isenberg website as well as UMass alumni association site.

Question # 11: What are the Isenberg’s current alumni engagement initiatives?

Answer # 11:

Please see the request for bids section 1.3.3 Specific Tactics.

Question # 12: Who is developing the media plan for this initiative?

Answer # 12:

Prior to 6/30/16, Forge Worldwide planned media for the MBA programs. The media plan for August 2016-December 2016 planning is in progress and the successful vendor will be expected to place the media. The successful vendor will be expected to plan the media for the remaining fiscal year (January-June 2017) to allow the awarded vendor enough time to get up to speed on our business.

Question # 13: Who developed the current brand video?

Answer # 13:

Forge Worldwide.
Question # 14: Please supply the URL to view the current brand video.

Answer # 14: Isenberg.umass.edu

Question # 15: What is the timeline for this initiative? Please give as many details as possible.

Answer # 15:

Prior to 6/30/16, Forge Worldwide planned media for the MBA programs. The media plan for August 2016-December 2016 planning is in progress and the successful vendor will be expected to place the media. The successful vendor will be expected to plan the media for the remaining fiscal year (January-June 2017) to allow them enough time to get up to speed on our business. The awarded vendor will be expected to execute against this plan and have media to market on or before August 1, 2017. Other dates and deadlines will be determined in concert with the successful vendor. Please see section 1.1.9 for other key deadlines.

Question # 16: Outline the specific milestones or deadlines throughout this engagement.

Answer # 16:

Prior to 6/30/16, Forge Worldwide planned media for the MBA programs. The media plan for August 2016-December 2016 planning is in progress and the successful vendor will be expected to place the media. The successful vendor will be expected to plan the media for the remaining fiscal year (January-June 2017) to allow them enough time to get up to speed on our business. The awarded vendor will be expected to execute against this plan and have media to market on or before August 1, 2017. Other dates and deadlines will be determined in concert with the successful vendor. Please see section 1.1.9 for other key deadlines.

Question # 17: How is all undergraduate admissions branding and marketing handled internally at Isenberg School of Management and UMass Amherst at large respectively?

Answer # 17:

Undergraduate admissions marketing is primarily handled by UMass Amherst undergraduate admissions. For any in-person events such as student open houses that include Isenberg-specific programming, marketing & communications works in concert with the Isenberg undergraduate office.

Question # 18: Does the institution operate in a centralized or decentralized structure?

Answer # 18:

Isenberg specific marketing and communications are centralized. All advertising and external communications are approved through the CMO before being sent. Internal communications are monitored by marketing & communications in an audit basis.
Question # 19: Specify your target geographies for each program?

Answer # 19:

Online MBA: 100% online program, we draw students from all 50 states and throughout the world. Advertising focuses on New England/NY/CT, retargeting is national.

MSA: New England/CT

Online Undergrad completion: primarily MA, focusing on community colleges

Sport Grad Programs: New England + Ohio + Florida + NY

Question # 20: Are you looking for Search Engine Optimization as part of the project?

Answer # 20: No.

Question # 21: Where do you typically draw from?

Answer # 21:

Online MBA: 100% online program, we draw students from all 50 states and throughout the world. Advertising focuses on New England/NY/CT, retargeting is national.

MSA: New England/CT

Online Undergrad completion: primarily MA, focusing on community colleges

Sport Grad Programs: New England + Ohio + Florida + NY

Question # 22: Where are you seeking to draw from?

Answer # 22:

Online MBA: 100% online program, we draw students from all 50 states and throughout the world. Advertising focuses on New England/NY/CT, retargeting is national.

MSA: New England/CT

Online Undergrad completion: primarily MA, focusing on community colleges

Sport Grad Programs: New England + Ohio + Florida + NY

Question # 23: Should we include the development and creation of landing pages in the scope of the project, or will the current pages for all the programs still be active?

Answer # 23:

Current pages will still be active, if there is a creative or strategic need to revise landing pages that may be revisited during the year and would need to be included within current budget.
Question # 24: For marketing priority # 2 (enhance awareness with academic peers) – what are the 130 business schools we are looking to target?

Answer # 24:

We generally use the top 130 business schools ranked by US News/Businessweek. This list is under review by school administration and faculty.

Question # 25: What size is your current inquiry pool?

Answer # 25:

37,000+

Question # 26: What is your application pool list size?

Answer # 26:

Varies by program and application period.

Question # 27: What is the traffic count to your site?

Answer # 27:

58,965 as of June 8, 2016

Question # 28: Were radio and print to be included for all of the marketing priorities or just the last two (Section 1.1.9 B & C)?

Answer # 28:

Radio and print will definitely be a part of marketing priority A. It may be considered for marketing priority C.

Question # 29: What digital strategies are you currently employing?

Answer # 29:

SEM, custom audience display, retargeting display, mobile banners, social advertising.

Question # 30: Clarify the timeline for this RFP.

Stated in Section 1.2.3, it says that the “successful vendor will execute a media plan .... Starting July 2016 through December 2016” and also that the successful vendor will be expected to plan and execute a complete communications plan for January 2017 through June 2017”.

We are unsure of the specific timeline as this information is vague. Please clarify what is exactly expected.

Answer # 30:

Prior to 6/30/16, Forge Worldwide planned media for the MBA programs. The media plan for August 2016-December 2016 planning is in progress and the successful vendor will be expected to place the media. The
successful vendor will be expected to plan the media for the remaining fiscal year (January-June 2017) to allow them enough time to get up to speed on our business. The successful vendor will be expected to execute against this plan and have media in market by August 1, 2017. Other dates and deadlines will be determined in concert with the successful vendor. Please see section 1.1.9 for other key deadlines.

Question # 31: Will you accept partial responses or responses for only certain parts of this RFP?

Answer # 31:

We are looking for a single vendor to address all needs outlined in this RFB.

Question # 32: Could you tell us the traffic counts (ie: monthly unique page views) to the individual pages/programs?

Answer # 32:

Topline report can be viewed here: https://drive.google.com/folderview?id=0B3xYRc7PQeyQN2Q3R19uUUE2dzQ&usp=sharing

Question # 33: My question is, can companies from outside USA apply for this RFP (like, from India or Canada)?

Answer # 33: Yes. The University of Massachusetts Amherst engages in the public bid process. If your agency meets or exceed the specifications set forth in the RFP, we would welcome a bid response from your company.

Question # 34: Does the awarded vendor need to come to the UMass Amherst campus for meetings?

Answer # 34:

It is expected that regular communications would be required with the team in Amherst, and it would be the vendor responsibility to determine the best and most efficient way to interact with marcom team.

Question # 35: Can the awarded vendor perform the tasks (related to the RFP) outside of the USA? (like from India or Canada)

Answer # 35:

Tasks may be performed outside of the USA. However, it is expected that regular communications would be required with the team in Amherst, and it would be the vendor responsibility to determine the best and most efficient way to interact with marcom.
Question # 36: Can we submit the proposals via e-Mail???

Answer # 36:  No. Please refer to page 2 of the request for bid for this answer.

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It can take up to five (5) business days to process your Digital ID and it is highly recommended that a Digital ID be enabled 48 hours in advance of submitting an electronic bid. Please plan accordingly.

Please plan accordingly.

Exceptions to submitting thru Bid Express will only be made in extenuating circumstances as deemed appropriate by the Director of Procurement and Campus Services, John O. Martin. Note that failure of the vendor to allow enough time to register, get a digital I.D. or meet other required steps will NOT be considered an extenuating circumstance.

A fee of $25 will be incurred for those who wish to bid electronically on a pay-per solicitation basis; alternatively, you may subscribe for $50 per month to have access to bid on all solicitations and email notifications. Learn more in this vendor overview

For additional guidance, please contact the Bid Express team at toll free (888) 352-2439 (select option 1) or at support@bidexpress.com

Question # 37: Will out-of-state vendors be considered for this solicitation, or will preference be given to Massachusetts agencies?

Answer # 37:  Yes. The University of Massachusetts Amherst engages in the public bid process. If your agency meets or exceed the specifications set forth in the RFP, we would welcome a bid response from your company.

Question # 38:  Could you provide us with the current percent breakdown of the Isenberg School of Management’s media spend?

Answer # 38:

For Online MBA: we spend approximately $400K annually. The majority is in digital (SEO, display, social) with some print/magazines.
For Online MSA, Sport and Undergrad online, we spend a comparable budget as indicated in this RFB on SEM.

Question # 39: Can the potential vendors be granted access to current creative from the “We Drive the Driven” campaign?

Answer # 39:

Current creative can be viewed here: https://drive.google.com/folderview?id=0B3xYRc7PQeyQN2Q3R19uUUE2dzQ&usp=sharing
Question # 40: Is there an incumbent agency that has serviced the University of Massachusetts Amherst’s Isenberg School of Management in Marketing and Advertising Service before?

Answer # 40:

Prior to 6/30/16, Forge Worldwide planned media for the MBA programs. The media plan for August 2016-December 2016 planning is in progress and the successful vendor will be expected to place the media.

Question # 41: What keeps the Isenberg School of Management’s marketing team up at night in regards to the specifics of the task at hand?

Answer # 41:

One of our biggest challenges is to appropriately distill performance measures across a variety of channels and distill into actionable, meaningful revisions to our plans for student recruitment and alumni engagement. Specific to the online MBA business—we are focused on staying ahead of consumer interests and trends in an exceedingly crowded market.

Question # 42: When can we expect a decision to be made by the Isenberg School of Management regarding RFP # AA17-RH-5118?

Answer # 42:

By week of June 27, 2016.

Question # 43: Is this to be an agency of record or is this for media plan submissions?

Answer # 43:

We are looking for a single vendor to address all needs outlined in this RFB.

Question # 44: This RFP contains a broad scope of services. Can a vendor submit a proposal for part of the services proposed? Will this RFP be split awarded to multiple vendors?

Answer # 44:

We are looking for a single vendor to address all needs outlined in this RFB.

Question # 45: Who are the members of the evaluation committee for this proposal? Who are the final decision makers?

Answer # 45: The names of the members on the evaluation committee are not released until after the bid has been awarded. To obtain information regarding the award of this RFP your company can send in a Public Records Request. Refer to Section 2.8 on pages 12-13 for further details on the Massachusetts Public Records Law/Public Information.
Question # 46: Reference: Section 1.2.6 D – page 5, Sport Graduate Programs, $15,000 budget

Can you provide further detail on the scope of work for the specialty sport website? Is this to design and develop a landing page or site for Isenberg’s Sport Management Program? Or does it refer to the design/development of a direct publisher advertising placement?

Answer # 46:

It refers to the design/development of a direct publisher advertising placement.

Question # 47: Reference: Section 1.3 D – Page 6

How does Isenberg plan to measure success on awareness and perception brand performances measures?

Answer # 47:

A brand study will be repeated within next several years. We are exploring other ways to collect a response on how well the new brand idea is being received among alumni, current students and leads through our Director of Organizational Metrics.

Question # 48: Is there an incumbent, if so, who?

Answer # 48:

We have been working with Forge Worldwide on a project basis for advertising development since spring 2014. Forge Worldwide is planning media for the MBA programs for August 2016-December 2016 and the successful vendor will be expected to place the media

Question # 49: Do you have other creative – aside from the creative assets requested in the RFP?

Answer # 49:

No.

Question # 50: Do you have any international targets? If so, who.

Answer # 50:

International students are always welcome and University of Massachusetts and Isenberg are committed to building a diverse student population.
Question # 51: What is your current cost per lead?

Answer # 51:

We track cost per action (brochure download/RFI completion, event registration) and we are averaging $70 per action for the month of April 2016.

Question # 52: What media channels are performing the best for you right now?

Answer # 52:

Online display, social.

Question # 53: How will you measure success in the brand/alumni campaign?

Answer # 53:

Please see section 1.1.9

Question # 54: Has the Isenberg School of Management conducted research around awareness and reputation of the School? If so, please provide detail as to the type of research and name(s) of the research firm(s) hired to conduct the research?

Answer # 54:

- Isenberg partnered with higher ed market research firm SimpsonScarborough, after an RFP process that reviewed 4 different consultants. Research was conducted through calendar year 2014 and the final report was delivered in early 2015.
- The objective of the research was to explore the School's image and reputation:
  - What level of awareness and familiarity with Isenberg exists among key external target audiences?
  - What is the School best known for?
  - What makes Isenberg distinctly Isenberg in the minds of internal audiences?
  - What influences deans of business school's perception of peer institutions and Isenberg?
  - How should Isenberg’s brand strategy evolve in order to respond to the interests of external audiences, create pride among alumni, and communicate authenticity to internal audiences?

- 105 qualitative participants and 3,040 quantitative survey respondents across several audiences:
  - Prospective undergraduate students
  - Prospective graduate students
  - Internal audiences
  - Alumni
  - Deans of top 130 business schools
Question # 55: How was the tagline “We Drive the Driven” developed? Was an outside firm used? If so, is that agency participating in this process?

Answer # 55:

“We Drive the Driven™” was developed by Forge Worldwide following a brand study conducted by SimpsonScarborough.

Question # 56: Reference: Section 1.4.9 – “Examples: Please provide examples of content you’ve developed on behalf of a client, or in collaboration with a client.”

Please define what constitutes “content” in this section.

Answer # 56:

At Isenberg we define content as anything used to engage, educate or delight any of our key audiences. Please see https://www.isenberg.umass.edu/news/driven for further reference on what we have developed in the past, both internally and in concert with external vendors.

Question # 57: Share examples and guideline on “We Drive the Driven” advertising campaign you had in the past. This will help us understand better about this bid/proposal.

Answer # 57:

Current creative can be viewed here: https://drive.google.com/folderview?id=0B3xYRc7PQeyQN2Q3R19uUUE2dzQ&usp=sharing

Question # 58: Do you have any previous sample work you had on the following in the past:

a) Two (2) radio spots (concept and production)?

b) 30 and 15 video edit of the current brand video?

c) 2-3 print magazine executions?

d) Out of home: vertical and horizontal positions?

Answer # 58:

Current creative can be viewed here: https://drive.google.com/folderview?id=0B3xYRc7PQeyQN2Q3R19uUUE2dzQ&usp=sharing

We have not yet developed radio or out of home for this campaign. Brand video in its full length can be seen at Isenberg.umass.edu.
Question # 59: What does a media and communications plan include?

Answer # 59:

Proposed media channels such as search, display and proposed messaging to correspond with our key application deadlines and other important events.

Question # 60: For the budget breakdown:

   a) Are we to make recommendations on how to use those monies?
   
      - OR –
   
   b) Are we to be used those based on the outline above?

Answer # 60:

Participating vendors should assume the production of the materials outlined in 1.2.4 and provide costs and other resources required. Given our overall budgets allocated by different programs, vendors should provide what their associated agency fees would be for media management, general account service, and creative development/production costs for the materials indicated in 1.2.4 and the balance would be applied to media spend.

Question # 61: Is there any specific schedule on when we are to distribute all media production?

Answer # 61:

Prior to 6/30/16, Forge Worldwide planned media for the MBA programs. The media plan for August 2016-December 2016 planning is in progress and the successful vendor will be expected to place the media. The remaining fiscal year would then be planned by the successful vendor for the time period from January 1 2017-June 30, 2017.

Question # 62: For any distribution, will the University of Massachusetts Amherst be responsible for the cost, not us as a vendor?

Answer # 62:

Please see 1.2.8

Question # 63: Explain the responsibility for advertising cost. As we would like to understand the difference on what should be included in our budget for the RFP.

Answer # 63:

Participating vendors should assume the production of the materials outlined in 1.2.4 and provide costs and other resources required. Given our overall budgets allocated by different programs, vendors should provide what their associated agency fees would be for media management, general account service, and creative development/production costs for the materials indicated in 1.2.4 and the balance would be applied to media spend.
Question # 64: What kind of communications have been developed in the past in order to enhance the reputation amongst academic peers?

Answer # 64:

Email, direct mail and select sponsorships of events such as the Academy of Management annual meeting (14,000 attendees).

Question # 65: Have you ever tried to gauge peer perception or measure effectiveness of these efforts?

Answer # 65:

The effectiveness of these efforts will be anecdotal at best, and will be ultimately evaluated based upon our position in peer assessments of rankings such as U.S. News & World Report.

Question # 66: Which tactics have been most effective in terms of recruitment for online programs?

Answer # 66:

We are currently reevaluating our most effective channels. Information sessions, website chat with advisors, print ads and online advertising have stood out as most effective in previous analysis.

Question # 67: Reference: Section 3.2.6 of RFP# AA17-RH-5118. The RFP asks for vendors to respond to all sections of the RFP. Is that saying we have to respond to section like 1.1 “Isenberg School of Management/Campus Information and Background”, etc. or is the RFP asking for bidders to respond to section under “Request for Proposal Instructions and Information”?

Answer # 67: Each bidder is expected to have read and understand all sections of this RFP. If a bidder takes exception to any section they must note it in their bid response. Otherwise it is understood that the bidder agrees with all sections of the RFP.

Question # 68: Do agencies have to pay to bid on AA17-RH-5118?

Answer # 68: Yes. Please refer to page 2 of the request for bid for this answer.

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**Question # 69:** Referencing: Section 1.4.4 and 1.4.11 – Could you please clarify any difference between the pricing structure requested in 1.4.4 and the costs requested in 1.4.11?

**Answer # 69:**

Difference between the two sections is agency fees versus how total marketing budget would be applied to other areas such as media spend or other possible tactics.

**Question # 70:** Reference: Section 1.4.6 – Please clarify this question?

**Answer # 70:**

If additional resources are required, please specify what they may be.

**Question # 71:** Is the University currently working with an incumbent agency and if so, what is the name of the agency?

**Answer # 71:**

Forge Worldwide has been working with us on a contract basis since 2014 and is currently planning the MBA media to begin in August 2016.

**Question # 72:** Reference: Section 1.2.6 A. Is the MBA Online and Part-Time Program one or two different programs?

**Answer # 72:**

Part-Time program refers to classes taken in our three satellite locations. Many of our part time students also take online classes. From a student perspective, these can be considered the same program. We classify these students differently for resource allocation purposes.
Question # 73: Reference: Section 1.2.7 and 1.2.9 – Both categories request detailed information for this proposal as part of the Scope of work, however, they are not included in Section 1.4 Request for Proposal Instructions & Information. Please advise whether this information should be included in our proposal. Thank you.

Answer # 73: Yes the information requested should be included in request for proposal instructions—see 1.4.3, 1.4.4, 1.4.5, 1.4.7, 1.4.8, 1.4.9, 1.4.11.

Question # 74: The bid notes a range of really interesting research around the student population and outreach tactics that the school has explored and is currently undertaking. In an effort to ensure that our proposal speaks to the core marketing goals of the RFP, we are requesting to see the topline data.

Answer # 74: “We Drive the Driven(TM)” has been well received across a range of audiences and is considered memorable and differentiating.