

**University of Massachusetts Amherst
Outreach Marketing & Communications**

**Request for Proposals:
Continuing & Professional Education
Strategic Branding**

October 2007

RFB# AA08-RH-2564

Bid Closing Date: November 15, 2007 @ 2:00 P.M.

Background:

UMass Amherst Outreach Marketing & Communications seeks to contract with a consultant, consultants or consulting firm to develop a cohesive brand identity and design guidelines for the adult education programs of UMass Amherst comprised of Continuing & Professional Education, the University Without Walls and the Arts Extension Service.

Project Objectives:

- Develop a strategic brand message and image for UMass Amherst adult education program offerings to guide future promotion development.
- Shift to electronic promotion, and to printed promotional materials that drive prospects to electronic or human interaction
- Transition from a full course catalog to a simplified course listing and supplemental promotional items sending students to CPE websites
- Promote the UMass Amherst brand as well as specific programs for which there are specific audiences
- Update our design and copy so that it is relevant for today's current and prospective students

Project Approach:

- Hire an outside branding/design firm.
- Outside firm will perform research, recommend strategy, develop positioning statements, develop copy themes and design motifs and implement with copywriting and design for initial marketing materials
- Outreach Marketing & Communications will implement designs after the initial program and pieces are created, based on design standards outlined by the outside firm.

Deliverables:

- Work with Outreach Marketing & Communications and the three adult education units of UMass Outreach (Continuing & Professional Education, University Without Walls and Arts Extension Service), and conduct marketing research, to define the brand and to develop a plan to communicate meaningful distinctiveness.
- Carry out creative development/design of marketing materials
- Provide advice and guidance with media and marketing planning as needed (this may include reviewing media allocation, identification of marketing channels, advising on e-mail campaign strategies, etc.).
- Develop a plan and budget for leveraging the brand of UMass Amherst's adult education programs to sustain and grow enrollment in the programs.
- Frame a unique, cohesive message and style to guide future promotion to specific target markets.
- Document procedures for interaction between the branding firm and Outreach Marketing & Communication internal staff on design, copywriting, and marketing strategy issues.

Process:

Consultant(s) will report to Susan Cassidy, the Marketing Strategist within Outreach Marketing and Communications who is assigned to Continuing & Professional Education. Day-to-day operational contact will be with Susan Cassidy, Joanne Mackiewicz, the (Creative Director), and occasionally with Joe Shoenfeld, Associate Director of Outreach Marketing & Communications.

Services to be provided by the UMass Amherst Outreach Marketing & Communications office include supervision of the strategy and brand development process, coordination of review of design concepts, and execution of future marketing materials in accordance with design templates and guidelines established by the consultant(s).

Phase I: Orientation

- Introductory meetings held with key staff listed above.
- Review all recent marketing pieces and websites of the programs.
- Define specific research agendas.
- Conduct initial research to gain familiarity with programs, students, and issues
- Develop detailed work plan with specific goals, strategies and tactics.

Acceptance of work plan will constitute completion of Phase I.

Phase II: Marketing Planning:

Develop integrated marketing communications plan to include:

- Brand positioning statement for UMass Amherst's adult programs
- Plan for transition to printed promotional materials that drive prospects to electronic or human interaction
- Plan for transition from a full course catalog to a simplified course listing and supplemental promotional items sending students to CPE websites
- Media and marketing plan (addressing media allocation, identification of marketing channels, advice on marketing strategies, etc.)
- Copywriting as needed
- Photography as needed
- Presentation of proposed marketing strategy, brand statement, and marketing plan

Acceptance of brand positioning statement and marketing plan will constitute completion of Phase II.

Phase III: Creative Development

Consultants will deliver approved:

- Catalog design for general CPE catalogs
- Design templates for other marketing materials including brochures, postcards, posters, e-mail, etc. in support of the general CPE catalog
- Templates or standard formats for marketing materials promoting individual academic programs under the umbrellas of Continuing & Professional Education, University Without Walls and the Arts Extension Service.
- A style guide and/or detailed documentation to be used by Outreach Marketing & Communications to execute future designs consistent with the new brand identity

*All items must be approved by the Director of Outreach Marketing & Communications.
The University's logo usage standards will be used in all creative work.*

Timeline

Phase I (Orientation and Research): December 2007-January 2008

Phase II: Marketing Planning: February-March 2008

Phase III: Creative Development: April-May 2008

Proposals

Proposals should include:

- Brief description (1-2 pages) of qualifications for consultancy
- List of names, titles, addresses, phone numbers and e-mail addresses of 3-5 references who have direct experience with potential consultant's similar efforts
- Resumé or other summary of professional and educational experience
- A sample of at least one branding plan and program developed by potential consultant
- Samples of tactical implementation materials such as printed marketing materials, print or broadcast advertising, e-mail messages, etc.
- A preliminary estimate of hours deemed necessary for each phase.

Address questions to:

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