



South Orange County Community College District

RFQ&P 395D:

Marketing Consultant Services

Addendum No. One (1)

October 15, 2020

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Purchasing and Contracts Manager

Note:

All documents remain unchanged except section or parts added to, revised, deleted and/or clarified by this Addendum.

1. Proposal Form B: Personnel and Staffing Resources has been replaced in its entirety. The Revised Proposal Form B: Personnel and Staffing Resources is attached to this Addendum.
2. Proposal Form C: Related Experience and Methodology has been replaced in its entirety. The Revised Proposal Form C: Related Experience and Methodology is attached to this Addendum.
3. Proposal Form E: Fee and Rate Proposal has been replaced in its entirety through this Addendum. The Revised Proposal Form E: Fee and Rate Proposal is attached to this Addendum.
4. The District hereby waives the requirement for mandatory participation at the mandatory pre-proposal meeting held on October 14, 2020 at 10:00am.
5. The attendee list for the pre-proposal meeting held on October 14, 2020 at 10:00am is attached to this addendum.
6. The responses to the Request for Information submitted by the deadline of 5:00 PM on October 13, 2020, as well as the responses to the questions asked during the mandatory pre-proposal meeting at 10:00 AM on October 14, 2020 are shown below:

Q1: Are there budgets available for each activity required?

A1: There is no specific budget for each activity. The anticipated annual spend for all services (including media buys) is as follows:

- SC General Marketing: Approximately \$200,000 per year contingent to budget allocation
- SC Regional Marketing: Approximately \$1,000,000 per year contingent to budget allocation
- IVC General Marketing: Approximately \$175,000 per year contingent to budget allocation

Q2: Is there an incumbent(s) for the projects delineated in this RFQ&P?

A2: There is no specific incumbent for the general marketing services for Saddleback College and Irvine Valley College. The incumbent for the regional marketing campaign services is Interact Communications, Inc., which was awarded a 3 year agreement.

Q3: If there is an incumbent, who is it?

A3: See A2.

Q4: Is the sample professional service agreement only to showcase the expectations of the winning bidder(s) or does it need to be completed and submitted in our response?

A4: Firms shall only notate changed/exceptions to the Sample Agreement pursuant to the instructions highlighted and identified in Appendix D.

Q5: If the Professional Service Agreement only needs to be acknowledged, does Section 4 "Payment," where hourly labor is broken out, need to be included in our response?

A5: The hourly rates shall only be provided as part of Proposal Form D.

Q6: Are these labor-only based projects, based on hourly work?

A6: The District intends to award a Master Agreement to a pool of qualified firms. The Master Agreement shall establish the hourly rates for the project professionals typically engaged in providing the services contemplated in this RFQ&P. Assignment of Work Orders for each specific project may be by the issuance of a request for proposals sent only to the pool of qualified firms detailing the scope of services. The District at its discretion, upon evaluation of proposals will assign the Work Order to the firm providing the best approach/fit to the project identified in that work order with competitive pricing (based on the hourly rates identified in the Master Agreement) being a factor.

Q7: Who is responsible for payment with any media or other expenses needed to complete the work?

A7: Media buying is a scope of services requirement for this RFQ&P. Firms shall be required to purchase Media along with other associated services/expenses and pass-through such costs to the District with reasonable markups. Firms shall provide their fixed 3rd party media buying markup percentage as part of the Revised Proposal Form D that will be provided via an Addendum.

Q8: Is The District looking for subject-matter experts for each project or would you prefer to hire one agency that has expertise and experience in all of it?

A8: The District intends to award contracts to a pool of qualified firms. This pool will be a combination of firms that may be unique and specialized in their service offering along with qualified firms that may be able to provide the full gamut of services. Based on the proposal received, the District reserves the option to create qualified pools within each specialized service segment. However, should the District

receive proposals and deem only a single firm to be most responsive and the best fit, the District reserves the right to award a contract to only one firm.

Q9: Is it the District's intent to contract with individual subject-matter experts or multiple full-service agencies?

A9: See A8.

Q10: How many agencies does the District plan on contracting with?

A10: The District does not have a specific number of firms that it is looking to contract with. See A8 for additional information.

Q11: Is a digital signature acceptable for the cover letter and other pages requiring a signature?

A11: Yes.

Q12: For Proposal Form D, the hourly cost for each media service, is this solely for the cost of building out and placing the campaigns? Does the district and/or region have an amount it has earmarked for each type of media buy?

A12: See A1 and A6.

Q13: For Proposal Form G, is there a minimum and maximum number of references that should be included?

A13: Firms shall submit a minimum of five references within the last five years. References of higher education and community college clients are highly desirable, but not absolutely required. There is no maximum number of references. Firms that have experience with four-year higher education and community college districts shall submit all such references within the last five years.

Q14: For Proposal Form E, the services requested by the district do not include any products, only light website development. Numbers 7, 8, 9 and 10 do not seem relevant to this RFP. Considering that the Scope of Work does not call for product development, could you advise on how these are relevant so that we may adequately prepare our response?

A14: Based on the services proposed, firms may choose to respond "Not Applicable" to the relevant questions within Proposal Form E. Since Web Management and Updates to existing the Regional Marketing Website (www.futurebuilt.org) for Saddleback College's regional marketing campaign services are required as part of the services identified in the scope of this RFQ&P, Proposal Form E is required to ensure IT accessibility compliance.

Q15: For Proposal Form E, this RFP does not call for any web development work, however question #1 and #2 relate directly to those initiatives. What would the district like to see in response to these questions as it relates to the work proposed in this RFQ&P?

A15: See A14.

Q16: For Proposal Form C, could you explain the difference between questions 4 and 7?

A16: Proposal Form C has been revised to delete question 4.

Q17: For certain services we provide, focus groups and quantitative research, for example, we do not charge by the hour but charge by the project. How should this be listed in the Proposal Form D?

A17: See A6.

Q18: Is there an incumbent firm? If so, are you satisfied with their performance? Are you able to name the incumbent firm? How long was your relationship/contract period?

A18: See A2.

Q19: In the scope of work for "Saddleback College - Regional Marketing Campaign Services", under the "Administrative Services" bullet, a phone number is listed. Is it the expectation that the selected agency act as a helpline or call center for the college? If so, what are the college's expectations of that? If not, what does the phone number mean?

A19: The OC region maintains a phone contact number which is currently maintained by the regional fiscal agent. The region would like to delegate the coordination of the contact request to the awarded firm to act as a call center or an automated "phone tree" that would address the information needs of information requestors. Note that the information requestor may be routed to any of the ten community colleges in the OC region.

Q20: What is the total annual budget for this RFP?

A20: See A1.

Q21: What is the total media budget for this RFP?

A21: See A1.

Q22: For Career Education marketing, do you have past marketing results to use as a baseline for future projects? Is the District or the individual colleges using the Strong Workforce grant to measure success or report on the campaign(s)?

A22: Saddleback College is the lead college for the Orange County Regional Marketing project. As such, a significant focus of the RFQ&P statement of work will consider the ongoing branding and marketing of career education for all 10 Orange County community colleges. The regional marketing project has already invested in the development of the OC brand known as FutureBuilt. The measure of success will be based on the published SWP metrics including enrollment and full time equivalent student increases during the performance period.

Q23: Are there any current vendors the district uses that the selected agency should maintain relationships with?

A23: No.

Q24: Is the college seeking to run marketing in multiple languages? If so, will the college provide translation services? If not, which languages are the college seeking to run ads in?

A24: Yes, marketing in multiple languages will be required for certain campaigns. The selected firm for the specific marketing project would be required to provide the translation services themselves or have them provided by a subconsultant. Campaigns for SC & IVC General Marketing are currently provided in English and Spanish. Campaigns for Regional Marketing are currently provided in English, Spanish and Vietnamese. Other languages may be required in the future.

Q25: Is there a current campaign running for the District or its individual colleges? If so, how is it performing against predetermined metrics?

A25: Yes, there are multiple campaigns running for each of the colleges. Although there are not predetermined metrics for every campaign, success is typically measured through various data analytics including, but not limited to, click through rate, page visits, phone calls, clicks on predetermined goals, visits to campus, and increased enrollment.

Q26: How are you measuring the success of the selected agency?

A26: See A25.

Q27: How many stakeholders will be involved at the college level? District level? How would you describe the nature of their work and their responsibility to the project(s)?

A27: The number of stakeholders/working group members will vary based on the project, but the selected firm for a specific project will work only with the assigned project manager/s and/or their staff. The nature of the working groups and their responsibility to the project is to provide oversight and an opportunity to give input. The working groups typically consist of management, faculty, staff, and students.

Q28: For Proposal Form C, what does “methodology” refer to in the context of this proposal? Please provide an example if possible.

A28: All proposals submitted in response to this RFQ&P shall be based on the responding firms understanding and capabilities of all aspects including, but not limited to scope, services and questions covered in this RFQ&P.

Q29: Should the proposal include a scope of work, proposed services, marketing campaign strategy, or any such formal strategic planning documents OTHER than the “methodology” that is supposed to be included in Proposal Form C?

A29: See A28.

Q30: Is this proposal supposed to outline a budget and associated services, or simply provide hourly rates against which services can be charged?

A30: See A6.

Q31: What is the budget for Saddleback College Strong Workforce Marketing?

A31: See A1.

Q32: What is the budget for IVC/Saddleback marketing?

A32: See A1.

Q33: Since the methodology includes marketing for the Strong Workforce Program and two colleges, would you please give clarification on how you would like this organized in the proposal?

A33: If there is a differential response specific to the strong workforce and the general marketing services for each college, then firms shall delineate such response to each question.

Q34: What has prompted the release of this RFQ&P? Does the District regularly release this RFQ&P to pre-qualify firms?

A34: The District is subject to compliance, due diligence and competitive procurement. The combined cumulative spend for the services identified in this RFQ&P necessitated this process. Additionally, services in relation to the strong regional workforce have been competitively procured in the past and with the current contract expiring December 31st, the decision to combine all marketing related services into one procurement was deemed the most efficient and prudent approach.

Q35: Since this is called an RFQ&P, how many firms does the District intend to select? How many contracts will be awarded? What are the anticipated contract amounts for each?

A35: See A1 and A6.

Q36: How is the District currently accomplishing their marketing? Are they working with any marketing consultants or firms? Is the District satisfied with their work?

A36: See A2.

Q37: Has the District conducted Awareness and Equity Research? If so, when and what did the study(ies) entail?

A37: The District and colleges have not conducted formal Awareness and Equity Research studies.

Q38: The Scope of Services mentions Collateral for "identified market groups." Have these groups already been identified? If so, how were they identified and what are the groups?

A38: The identified markets would be determined by the specific campaign needs.

Q39: The RFQ&P mentioned the FutureBuilt website. However, the website serves several additional colleges, not just Saddleback. Can you further explain how this Saddleback Regional Marketing Campaign relates to FutureBuilt and if metrics measured will be specific to Saddleback only or if this marketing campaign will serve one, some or all of the FutureBuilt schools as well?

A39: See A22.

Q40: Have marketing campaigns already been performed for the Strong Workforce program? If so, please describe the effort and any new direction that's desired through this RFP?

A40: See A2.

Q41: What are the anticipated annual budgets for the General Marketing Services (Saddleback and Irvine Valley College) and Saddleback Regional Marketing Campaign Services portions of the Scope of Services?

A41: See A1.

Q42: What kind of metrics are currently used to assess or track marketing impacts on application completion/headcount, and to what frequency (daily/weekly/monthly)?

A42: See A22 and A25.

Q43: How does the district/individual colleges define marketing success – are there specific metrics or benchmarks they are seeking to achieve?

A43: See A22 and A25.

Q44: Was responding to the RFI a requirement to respond to this RFP?

A44: No.

Q45: Will you accept fixed fees for services that are not billed hourly?

A45: See A6.

Q46: On Proposal Form D: If the proposal includes a subcontractor, does the subcontractor's staff and hourly rates have to be included as well? Per Proposal Form B, firms shall include resumes for each team member including sub-consultants proposed to provide service to the District and colleges.

A46: Yes.

Q47: Is it a requirement of bidding firms to be able to provide all of the services listed in Proposal Form D?

A47: No. See A8 for additional information.

Q48: Will agencies not based in California be considered for these services?

A48: Yes.

Q49: Will you be providing a list of vendors who attended this meeting

A49: Yes.

Q50: PROPOSAL FORM B: PERSONNEL AND STAFFING RESOURCES: Can you confirm you want both resumes and Bio's for all personnel written into the proposal (#2 asks for resumes, #5 asks for bio's)?

A50: A Revised Proposal Form B is included with this Addendum.

Q51: Can you go over the revised media labor, how that work will be conducted and will the District or the agency pay the media bills? I heard you say pass through, but could you elaborate? Assume reconciliations would be required.

A51: Firms shall conduct media buys on behalf of the District and pass-through such costs as incurred. Firms may charge the District a fixed markup percentage for all media buys and shall identify such fixed markup percentage amount on the Revised Proposal Form D included with this Addendum. All invoices for Media Buying related services shall include the cost of buying the service plus the markup percentage. Firms will be required to include the actual invoice paid and/or Media Buying proposal as a supplemental attachment.

Q52: Will the enrollment marketing campaigns for fall, spring, and summer all be bid out separately? Or will 1 firm be awarded all three campaigns?

A52: See A6.

Q53: Should we submit ODC - other direct costs - that are not labor categories. Example focus group facility or incentives?

A53: All direct costs associated with the services identified in the RFQ&P should be clearly delineated in Proposal Form D.

Q54: After the pool has been selected, when do you expect the first project proposals to start being issued?

A54: The District anticipates issuing its first request for proposal for Work Order #1 to the selected pool for the Regional Marketing Campaign immediately upon contract award.

Q55: If selected for the pool how does payment to the selected firm issued? is it once a month, upon completions etc...

A55: Each project will be assigned a separate Work Order issued to a firm within the selected pool providing the best proposal. Each Work Order will be paid pursuant to the completion of project milestones and/or upon completion of services pursuant to the project requirements.

Q56: Is the existing incumbent bidding on this RFP?

A56: This is an open public solicitation and the District has no knowledge of any firm's intent to submit a proposal response to this RFQ&P.

Q57: Are there any certifications that might not have been mentioned that are required?

A57: There are no additional certification requirements other than those already identified in the RFQ&P.

Q58: You have mentioned who the incumbent is but you never said whether you have been satisfied with their work.

A58. Please see A34 for information regarding the need to issue this RFQ&P.

Q59: Media buying direct costs need to be paid up front- do payment terms include the possibility of invoicing for those direct costs before they are incurred or is the winning firm expected to float those costs?

A59: See A51. The District is open to the option of upfront payment for high dollar Media Buying.

Q60: Community college experience is mentioned a lot, but what about other education experience, for profit, primary school etc?

A60: Any education experience is highly preferred.

Q61: Will multiple submissions be acceptable?

A61: Each firm shall only submit one proposal response to this RFQ&P.

REVISED PROPOSAL FORM B
PERSONNEL AND STAFFING RESOURCES
(One Page Limit Per Resume)
***Revised per Addendum No. 1 on 10/15/20**

Submit resumes for each team member including sub-consultants proposed to provide service to the District including specific qualifications and recent related experience providing similar services. **List the proposed staff's current and anticipated availability during the contract period.** Include the following data and any other relevant information for the District to evaluate:

1. Provide total number of professional staff currently employed by the firm.
2. Resumes should include the Project Executive or person(s) providing oversight of the project team, if applicable.
3. Identify person/s who will be principally responsible for working with the District. Indicate the role and responsibility of each person/s, and how many years of experience with a focus on community college district qualifications relative to the proposed role. If the Proposer is chosen as a finalist, the proposed individual/s must attend the interview and in-person presentation.
4. Indicate whether or not individual is currently a direct employee of the firm. If a direct employee, indicate how many years with the firm.
5. Link each named person with the specific tasks, responsibilities, and deliverables.
6. If more than one person is named as a candidate for a specific role, include above information for all listed persons.

PROPOSAL FORM C
RELATED EXPERIENCE AND METHODOLOGY
(Five Page Limit)
***Revised per Addendum No. 1 on 10/15/20**

1. Provide a summary of the Firm's experience in relation to the services contemplated in this RFQ&P.
2. Describe how the firm will provide services and fulfill the requirements and expectations of the District.
3. Provide a summary of your Firm's experience working with Community Colleges and the experience of the staff assigned to this project.
4. Name and state the number of public entity clients served within the past 5 years.
5. Do you provide weekly status reports? If so, describe the type of information the status report contains.
6. Identify any special services typically provided by the firm that are not listed in the Scope of Services. Ensure that pricing for these services are included in Proposal Form D.
7. List projects in chronological order in which team members were involved. Indicate whether project was completed by firm or by a team member when employed by another firm.
8. Submit a full list of links to similar marketing campaigns designed for California Community Colleges or higher education institutions within the last five (5) years.

PROPOSAL FORM D
FEE AND RATE PROPOSAL
***Revised per Addendum No. 1 on 10/15/20**

The proposed fee schedule shall include fully burdened hourly rates for each title/individual proposed for the work. It is the proposer’s responsibility to understand the complexity of the District as well as the complexity of the proposed work and to submit a not-to-exceed fee accordingly using the form below.

Fees shall be firm, fixed and on a Not to Exceed (NTE) hourly billable hourly rate. Such rates shall include all labor, materials, overhead and profit (OH&P), and other direct and indirect costs including incidental travel. Actual contract rates will be subject to negotiation prior to issuance of any agreement. For each service description listed below, identify the roles/high level titles of the individuals responsible for engaging and completing each such service. **Duplicate for each service as necessary.**

| Service Description | Role/Team Member Title | Not Exceed Hourly Billable Rate |
|---|------------------------|---------------------------------|
| Geofencing and Geotargeting Efforts | | \$ |
| Mobile Advertising | | \$ |
| Over-the-Top Advertising | | \$ |
| Social Media | | \$ |
| Google AdWords | | \$ |
| Search Retargeting | | \$ |
| Display Advertising | | \$ |
| Email Advertising | | \$ |
| Radio and TV Advertising | | \$ |
| Geofencing and Geotargeting Efforts | | \$ |
| Mobile Advertising | | \$ |
| Copy Writing | | \$ |
| Graphic Design | | \$ |
| Photography | | \$ |
| Multimedia Production | | \$ |
| Analytics and Reporting Services | | \$ |
| Additional Services Not Identified Above – Describe Services and Duplicate as Necessary | | \$ |

| | |
|--|---|
| Fixed 3rd Party Media Buying Markup Percentage | % |
|--|---|

RFQ&P No. 395D Marketing Consultant Services**Attendance at Pre-Proposal Meeting Conducted Via Zoom Conference Call on October 14, 2020 at 10:00am****Company Name**

3fold Communications

A Bright Idea Advertising & PR

Applied Research-West, Inc.

Beacon Technologies, Inc.

Civilian

Collier.Simon

DB&M Media

Echo Media

Entercom

FM3 Research

Glacier

Graduate Communications

Insight Marketing Design

Interact Communications

James Thomas Media

MBI Media

MIG

Mob Media

Probolsky Research

RNL

Semgeeks

Spectrum Reach

Star Bee Global LLC

ThinkNow

Traffik

Twenty Fifth Hour Communications

Zero1 Agency