



UNIVERSITY OF SOUTH CAROLINA

AMENDMENT NO.4 TO SOLICITATION

TO: ALL VENDORS
FROM: Michelle Robinson, CPPB, Procurement Manager
SUBJECT: SOLICITATION NUMBER: USC-RFP-2766-MR
Provide Marketing and Web Re-Development Services for USC Upstate.

DATE: May 19, 2015

This Amendment No.4 modifies the Request for Proposal only in the manner and to the extent as stated herein.

VENDOR QUESTIONS/ANSWERS

THE DEADLINE FOR RECEIPT OF PROPOSALS HAS BEEN EXTENDED TO JUNE 1, 2015 AT 2:30 PM

BIDDER SHALL ACKNOWLEDGE RECEIPT OF AMENDMENT NO.4 IN THE SPACE PROVIDED BELOW AND RETURN IT WITH THEIR BID RESPONSE. FAILURE TO DO SO MAY SUBJECT BID TO REJECTION.

Authorized Signature

Name of Offeror

Date

QUESTIONS RECEIVED FROM VENDOR A

QUESTION: – Can Companies outside of the USA apply for this RFP (From India or Canada)?

ANSWER: Yes

QUESTION: – Whether we need to come over there for meetings?

ANSWER: The Company who is awarded this contract will need to meet with several groups at USC Upstate in order to gain knowledge about the University to effectively create a marketing campaign.

QUESTION: – Can we perform the tasks (related to the RFP) outside USA (From India or Canada)?

ANSWER: Tasks can be performed off site but campus visit is necessary

QUESTION: – Can we submit our proposals via email?

ANSWER: No your proposal must be submitted in a sealed envelope via US mail, UPS, FedEx or other courier delivery.

QUESTIONS RECEIVED FROM VENDOR B

QUESTION: - Develop content pages, up to 500 words per page; no forms or lists
I am scoping at a total of 200 web pages total with 500 words per page; does that sound appropriate? Based on our initial count of the URLs on your website, we're talking an excess of 200 pages at present, some of which will be consolidated or removed.

ANSWER: Yes

QUESTION: - Select up to one image from Upstate's stock of photography and optimizing each image for web version
Do you mean one image per page selected and optimized? Should we assume we'll be choosing a new image for each page or working (at least some) with the image(s) already on the page?

ANSWER: One new image cropped and sized for each page.

QUESTION: - Provide up to two profile pages per ten pages of content
Can you clarify? Are you referring to landing pages, and can you give me a little more information on number and scope?

ANSWER: By profile pages, we mean example pages. For example, of ten pages of content in a given section of the website, we would like to see the landing page and another example content page.

QUESTION: Your current CMS not a technology preference is stated. Can you let me know what the current CMS is and whether there are preferences for another?

ANSWER: Our current CMS is Ektron. There are no preferences for another.

QUESTIONS FROM VENDOR C

QUESTION: Could you please share who prepared and wrote the RFP? Was it solely by University staff? Was a consultant involved and who she/he was? Was a marketing agency involved and which one?

ANSWER: The RFP was prepared by University Communications and Enrollment Services with review by Cabinet and Purchasing.

QUESTION: Which agency has been the Agency of Record for SC up until now?

ANSWER: Stamats

QUESTION: Which agencies is SC working with currently for branding, design, media planning and buying?

ANSWER: None

QUESTION: Will SC prioritize selection based on location?

ANSWER: No

QUESTION: SC is currently leveraging the power of OmniUpdate as the CMS for the website. Will the University consider alternative CMS to deliver on the University vision?

ANSWER: We are using Ektron as our CMS, which we will continue using.

QUESTION: How extensive is the University's understanding and knowledge of Marketing Cloud Technologies to assist in the delivery of the vision?

ANSWER: We are not using marketing cloud and have not invested efforts into using marketing cloud services.

QUESTION: Am I correct that the site design is for www.uscupstate.edu/ and not www.sc.edu/? (note – might be good to clearly identify the URL in the RFP)

ANSWER: Yes the site is www.uscupstate.edu

QUESTION: USC Upstate is currently on Ektron while SC is on OmniUpdate. Is the plan to keep Ektron, migrate to OmniUpdate, evaluate other CMSs?

ANSWER: We will continue using Ektron.

QUESTION: Who is the agency / partner that worked and assisted in the design of www.sc.edu? How much engagement has that agency had in formulating the USC Upstate RFP?

ANSWER: The websites for sc.edu and uscupstate.edu are not connected in any way. The USC Upstate RFP was not formulated by a partner or agency working with sc.edu

QUESTION: With USC Upstate and SC.edu procurement both involved in the decision making process how would the university qualify the importance of have a single vendor manage both web properties vs. multiple agency relationships?

ANSWER: The websites are separate entities. A single vendor will not be managing both websites simultaneously.

QUESTIONS FROM VENDOR D

QUESTION: Do you require a separate technical proposal for each Lot (three separate documents) along with three sets of references, samples, etc.?

ANSWER: Yes, please submit the technical proposal, references, samples, etc. for the lot you are bidding on.

QUESTION: What is the current or planned CMS for the new website?

ANSWER: Our current CMS is Ektron. This RFP does not include a web site migration into a new platform/CMS.

QUESTION: When will Q&A responses be released?

ANSWER: While we will make every effort to issue an amendment as soon after the deadline for receipt of questions regarding the solicitation (April 27, 2015 at 5:00 PM) as possible, when exactly we will issue an amendment to the solicitation that includes questions and answers is dependent upon the volume of questions we receive and the amount of research required to answer the questions.

QUESTION: Per page 12 file format requirements—can a pdf be submitted instead of a Word document?

ANSWER: A .pdf version of the offer's proposal is an acceptable electronic file copy of the offeror's proposal.

QUESTION: What is the anticipated budget (or alternatively, budget range or not to exceed amount) for this comprehensive project? If available/known, please provide figure by Lot.

ANSWER: The total anticipated budget is not known at this time. We will choose the proposal that best fits our needs. Budget will be a determining factor, but not the only determining factor.

QUESTIONS FROM VENDOR E

QUESTION: Does USC Upstate have a current relationship with an outside marketing communications agency? If so, can you cite the agency's name and the extent of the work that they've done for the University?

ANSWER: USC Upstate works with STAMATS for preparing recruitment publications. They create campaign, content and format.

QUESTION: Who are the University's top-three competitors from an admissions/enrollment standpoint?

ANSWER: USC Columbia, Clemson, Winthrop and Greenville Tech.

QUESTION: What is the University's current CMS? Do you have a preference for the one to be implemented as part of this project? Is an open source CMS such as Drupal an option here?

ANSWER: Please see response to Question 2 from Vendor D

QUESTIONS FROM VENDOR F

QUESTION: Lot 1: Has the university completed any brand research in the past 5 years? If so, will that data be shared with the selected agency?

ANSWER: Not available

QUESTION: Lot 1: If awarded separately, will the Lot 2 and/or Lot 3 agencies conduct separate research or utilize what is completed at the end of Lot 1?

ANSWER: The research from Lot 1 will be available to those who are awarded Lot 2 and Lot 3 if awarded separately.

QUESTION: Lot 3: Has the University selected a CMS to use in the upcoming redesign, or will this be open for recommendation by the selected agency?

ANSWER: We will continue to use Ektron

QUESTION: Lot 3: Will the selected agency be responsible for migrating all content?

ANSWER: We are not moving CMS, therefore content will not be migrated from one CMS to another.

QUESTION: How many committee members are included in the selection process for the University?

ANSWER: We don't choose to reveal the number of evaluation committee members for the RFP at this time.

QUESTION: We typically prefer one primary point of contact to ensure an engagement is moving efficiently. What type of team is in place at the University? How do they anticipate working with the selected agency?

ANSWER: Our communications department will be the point of contact for this project.

QUESTION: At this time can you share an overall budget or budget by Lot?

ANSWER: No, an overall budget is not available at this time. (See also last Q & A from Vendor D)

QUESTION: Is there an anticipated project deadline that you can share? Are there any firm deadlines or key deliverable dates (with all Lots)?

ANSWER: Deadlines to be finalized at a later date.

QUESTIONS FROM VENDOR G

Lot 1 Questions

QUESTION: Please explain “Up, For life.” What is it (brand, positioning, tagline, messaging)? How was this developed?

ANSWER: Up for Life was developed by Stamats and will be used for messaging, branding and taglines.

QUESTION: Do you want the contractor to create a look and feel or does one exist?

ANSWER: The contractor will need to utilize the existing look and feel of the “Up, For Life” brand.

QUESTION: Specific to journey mapping, is a specific digital platform required or do we just need to map/show the decision-making process for target audiences?

ANSWER: The contractor can utilize the platform they feel works best for journey mapping, provided that it is a platform that is accessible to University employees.

QUESTION: You refer to the University’s brand position – does one exist and/or are you looking for the contractor to help with positioning and/or create new positioning?

ANSWER: The contractor will work with the existing brand position and work to propel us to higher position within our market.

QUESTION: Please explain: “Produce and Institute Brand Book”

ANSWER: A compilation of documents that show examples of what the “Up, For Life” brand will look like, including an example of a billboard, print advertisement, webpage, etc.

QUESTION: Specific to the brand book, are you asking the contractor to create a brand book based on your existing brand or is the contractor going to rebrand USC Upstate and create a brand book based on a new brand? For example, is the contractor going to develop a new visual (such as primary and secondary color palletes, fonts, imagery, inconography, texture patterns, etc) for USC Upstate?

ANSWER: The contractor will develop materials for the “Up, For Life” campaign that coordinates with the USC Upstate brand.

QUESTION: Also related to the brand book, please be more specific about “up to five additional sample executions chosen by Upstate.”

ANSWER: The examples listed in the RFP are just suggestions for materials to be included within the brand book. If research determines that other materials would be a better fit (for example, a web advertisement), those materials may be included in place of the suggested materials.

Lot 1 or 2 Question

QUESTION: Will the contractor be responsible for placing media under this contract?

ANSWER: Our Communications Dept. handles the creation of University content, which includes events, news, and social media.

Lot 3 Questions

QUESTION: Will a new website result from the work in Lot 3?

ANSWER: A redesigned website on the existing platform will be developed.

QUESTION: What resources will USC Upstate dedicate and what are USC Upstate’s responsibilities?

ANSWER: USC Upstate will provide resources for the technical access and information for hosting and domain services as well as support for website content and other related items.

QUESTION: What are the technical specifications with regard to programming language, CMS (is there a preferred or required CMS), etc? For example, is .net required or can the site be written in php? Does USC Upstate have a CMS?

ANSWER: We use Ektron as our CMS platform in a .net and MSQl environment. Our CMS utilizes the Microsoft Active Directory services. We will continue using these with our existing CMS.

QUESTION: Is there any specific functionality the contractor will be responsible for?
Will the contractor be responsible for programming and/or third party integration?

ANSWER: The contractor will be responsible for ensuring the website is completely functional including any programming and third party integrations that are required.

QUESTION: Please explain “develop content pages, up to 500 words per page; no forms or lists.”

ANSWER: Web pages must be evaluated for editorial tone and content. Content should be developed on pages (up to 500 words). Please do not use forms or lists.

QUESTION: Please explain “provide up to two profile pages per ten (10) pages of content (e.g. 30 pages could include up to six profile pages).” Please specify what you mean by profile page.

ANSWER: By profile pages, we mean example pages. For example, of ten pages of content in a given section of the website, we would like to see the landing page and another example content page.

QUESTIONS FROM VENDOR H

QUESTION: What is the allocated budget?

ANSWER: The budget has yet to be determined.

QUESTION: What is the budget breakdown per each Lot? LOT 1. Brand Development, LOT 2. Implement Strategic Marketing and LOT 3. Web Development?

ANSWER: See answer to previous question.

QUESTION: Is there an incumbent agency?

ANSWER: We work with STAMATS for marketing and recruiting agent.

QUESTION: Are you considering a new .NET Content Management System (CMS) or is the plan to stay with Ektron?

ANSWER: It is our intent to stay with Ektron.

QUESTIONS FROM VENDOR I

QUESTION: Do you plan to stay with OmniUpdate CMS for the redesign / development or are you looking at other CMS options?

ANSWER: We do not use OmniUpdate for our CMS. We will continue to use Ektron as our CMS.

QUESTION: Is there a budget you can share for each of the 3 Lots?

ANSWER: The budget has yet to be determined.

QUESTION: Please confirm that Lot 3 includes website design and CMS implementation and development.

ANSWER: Lot 3 includes website design, it does not include implementation or development of a new CMS.

QUESTION: Under Lot #3 'Editorial tone establishment and Web Page Content Development' - what do you mean by 'profile page' the requirement asks for up to 2 profile pages per 10 pages of content.

ANSWER: By profile pages, we mean example pages. For example, of ten pages of content in a given section of the website, we would like to see the landing page and another example content page.

QUESTIONS FROM VENDOR J

QUESTION: Under Lot 3, page 16 you all mention Content Management System (CMS). What platform is the university currently using.

ANSWER: Ektron

QUESTION: Will the template development in the scope of this RFP only include the pages associated with the initial number (9) of templates, or the buildout of the entire site (page count to be determined)?

ANSWER: Build out the entire site.

QUESTIONS FROM VENDOR K

QUESTION: Please confirm that the website to be redesigned is www.uscupstate.edu and that it is currently on the Ektron platform.

ANSWER: Yes

QUESTION: Are you considering staying with Ektron? If so, what version are you on?

ANSWER: We are staying with Ektron and are running it on Version 9.

QUESTION: What are the pain points you are experiencing with your current CMS that you want to avoid or eliminate with this project?

ANSWER: We will need to reduce the amount of templates being used and consolidate navigation structure.

QUESTION: Is there an incumbent vendor providing website development? If so, is that vendor bidding on this contract?

ANSWER: There is no incumbent vendor/contractor.

QUESTION: Does your current IT / development staff have a technology preference (e.g. .NET, Java, etc.)?

ANSWER: We will continue to use .net

QUESTION: How many total users or content providers will the CMS have?

ANSWER: All existing users will continue to be CMS users. There are approximately 74 users; however this number may change slightly.

QUESTION: How many concurrent users or content providers will there be?

ANSWER: See answer above.

QUESTION: How many internal developers do you have to support this project, and what is their anticipated role in the initial development of the solution, ongoing maintenance, and feature enhancements to the website?

ANSWER: We have one website developer and one content manager. We also have a system administrator. The contractor will work directly with the web developer, content manager and system administrator on the development of the solution, ongoing maintenance and future enhancements.

QUESTION: What is your server architecture today (i.e. how many servers are being used to run your current website(s))? Please include staging, test or failover environments.

ANSWER: We run on a Windows environment .net. We have a server dedicated to the website and a development server that runs a separate version of the website. The website is built on Ektron CMS and uses Active Directory from the Windows server for user access.

QUESTION: Could you provide more detail on the level of interoperation with other software applications, databases, and platforms you desire?

ANSWER: See answer above.

QUESTION: What internal systems must the site be connected to and will you provide the technical details / programming languages / database for each?

ANSWER: See answer above.

QUESTION: What level of 508 compliance are you seeking?

ANSWER: Each page of the website should be 508 compliant.

QUESTIONS FROM VENDOR L

QUESTION: Is there a preferred or required server environment that the site will need to live in?

ANSWER: Yes, The University's server. Windows Server (.net) MSSQL

QUESTION: Assumption is hosting will be handled by USC Upstate. Please advise if this is not the case.

ANSWER: Hosting will be handled by USC Upstate.

QUESTION: Has a CMS been selected? Or is this the responsibility of the chosen vendor as part of the Lot 3 Web Development?

ANSWER: Ektron provides our CMS

QUESTION: Is a list of the third party systems that will integrate with the website available?

ANSWER: Ektron, Host Gator, Word Press, Google Analytics, Microsoft, Facebook, Twitter.

QUESTION: Has a budget been established for the overall project, or specifically Lots 1, 2 or 3?

ANSWER: No, the budget has yet to be determined.

QUESTION: Will the site require any password-protected areas?

ANSWER: Yes, we do have some pages that require passwords.

QUESTION: Please provide existing social channels and any required integration into the main website

ANSWER: Facebook, Twitter, Instagram

QUESTION: Should the site require more than nine (9) templates, is there opportunity to re-scope the project to accommodate this effort?

ANSWER: We will not exceed 9 templates.

QUESTION: Will keyword research and identification a requirement during the Discovery and Web Page Content Development, or will this be provided by USC Upstate?

ANSWER: USC Upstate will provide.

QUESTION: Who will be the selected firm(s) day-to-day contact, and who will be involved in major decisions?

ANSWER: Admissions – Donette Stewart. Marketing/Communications – Tammy Whaley.

QUESTION: Please confirm that there are two sections to an agency response: 1. Qualifications, including submittal letter, and 2. Cost. We are not being asked to provide an approach to your stated scope of work, correct? If you are looking for an approach, please provide more information about the content you are looking for and where it should be placed within our proposal.

ANSWER: Please read Sections III, IV, and V of the solicitation carefully. In each of those sections of the solicitation, we tell you precise information to include in your proposal.

QUESTION: Regarding your question about knowledge of the market of the Upstate of South Carolina, what do you mean when you say, “prominence in the creative community in the region”?

ANSWER: Do you have satisfied customers from our region.

QUESTION: In order to scope all the touch points in the student journey that may be influenced by brand messaging for a USC prospect, we need to understand what happens post-inquiry for prospect audiences. Does USC have a marketing strategy/communication plan for converting students from inquiries to applicants, applicants to accepted and accepted to admitted that can be shared with our team? Additionally, what tools are currently in place to execute the strategy?

ANSWER: Upstate uses EMAS for our CRM. We use a mix of electronic, direct mail and phone.

QUESTIONS FROM VENDOR M

- **Regarding Lot 1. Brand Development, Evaluate the University’s current audiences**

QUESTION: Is the university willing to share at least 1,000 existing records of student data, specifically home street address, zip code with the vendor? (student names are not required). *Blackboard uses audience segmentation software to conduct this study and requires access to address/zip code data to be most thorough in our results.*

ANSWER: Yes we can share student profile info with no names.

QUESTION: Has any market research been previously conducted by the University or other third parties to understand the student mix? If so, will this research be shared or leveraged in some way during this project?

ANSWER: Data on students can be shared

QUESTION: How would you describe your most successful your current student profile (both demographic, psychographic attributes)?

ANSWER: Success with recruitment of new freshman and new transfer students. Most of our students are from South Carolina

QUESTION: What group(s) or niche markets of students are currently growing the most institution-wide? (ex. military, adult learners, minority students, etc)

ANSWER: Transfer student enrollment is growing, consistent freshman enrollment and non-traditional/adult students enrollment.

QUESTION: Are there particular programs that are growing in popularity and appeal to a certain niche market(s)?

ANSWER: Growth in several majors with anticipated growth in new some majors

QUESTION: Currently, how are programs selected for investment or prioritization in marketing efforts?

ANSWER: Market demand and strength of program

- **Regarding Lot 1. Brand Development, Product and Institute Brand Book:**

QUESTION: Will the contractor be creating brand styles and assets from scratch or will the vendor be working from existing assets, materials, and styles related to the current brand identity and structure?

ANSWER: The contractor will develop materials for the “Up, For Life” campaign that coordinate with the USC Upstate brand.

- **Regarding Lot 2. Implement Strategic Marketing and Communications Plan, Web Development**

QUESTION: What Content Management System will be used for the web development? Will vendor be expected to use Ektron via .Net?

ANSWER: Ektron CMS .net, with Active Directory services.

QUESTION: What CMS experience are you seeking in the contractor of choice? (ex. Experience working in Ektron or on .Net)

ANSWER: USC Upstate would prefer the contractor to have experience working in Ektron; however, the contractor must have a strong background in .Net.

QUESTION: Is the University willing to give the contractor access to web analytics and performance data related to the existing website?

ANSWER: The contractor will be given access to web analytics and performance data related to the existing website.

QUESTION: What third-party systems will need to be integrated with the new website design? (ex. course catalog, CRM, SIS)

ANSWER: Ektron, Host Gator, Word Press, google Analytics, Microsoft, Facebook, Twitter.

QUESTION: Related to website content, please confirm our understanding that the vendor selected is expected to write 5 sample web pages, up to 500 words each (no forms or lists). Will the University be writing and supplying content for all other pages on the completed website?

ANSWER: Content on the completed website is to be evaluated/rewritten. A unified editorial tone should be established throughout the site.

QUESTION: Will the University assist in finding and coordinating participants for the four focus group or will the vendor need to solicit participants and plan the administrative details for each session?

ANSWER: The University will assist in finding and coordinating participants for the four focus groups.