



Request for Proposals

MARKETING CONSULTING SERVICES

for Missouri University of Science and Technology (Missouri S&T)

MARCH 31, 2014

Missouri University of Science and Technology (Missouri S&T) seeks the assistance of a qualified marketing research and marketing development agency or agencies to conduct research and develop a marketing and visibility strategy to enhance the university's profile and reputation. In academic year 2020-2021, the university will celebrate its 150th anniversary, and the marketing and visibility assistance sought through this RFP should leverage the university's distinctive attributes to position Missouri S&T as a leading international technological university as it enters this sesquicentennial year.

Services sought include:

- **Part 1:** An analysis of the university's name recognition and levels of perception and awareness of Missouri S&T among specific audiences;
- **Part 2:** Assistance in developing a visibility plan to favorably influence those audiences and enhance Missouri S&T's reputation among those audiences;
- **Part 3:** An evaluation of current communications and marketing materials, communications and marketing organizational structure, and capability to execute the recommended visibility plan.

Respondents may bid on any or all of Parts 1, 2 and 3. Depending on projected costs, budgetary considerations and strength of proposals, Missouri S&T may choose to award portions of a contract (Part 1, Part 2, Part 3 or a combination thereof) to more than one respondent.

ABOUT MISSOURI UNIVERSITY OF SCIENCE AND TECHNOLOGY

Founded in 1870 as the University of Missouri School of Mines and Metallurgy, Missouri University of Science and Technology (Missouri S&T) is internationally recognized as a technological research university with strong academic offerings in engineering, the physical sciences, the liberal arts, humanities, and business. Established as one of the first technological schools west of the Mississippi, and one of the first in the nation, Missouri S&T was a product of the Morrill Act of 1862 and the land-grant movement of the late 19th century. The Missouri School of Mines – or MSM – was Missouri's response to the acute need for scientific and practical education in the developing nation.

In 1964, the school's name was changed to the University of Missouri at Rolla, soon to be altered to University of Missouri-Rolla. UMR, as it came to be called, was one of four campuses comprising the newly reorganized University of Missouri.

The transition from “school” to “university” involved three major changes in the campus programs: an expansion of degree offerings to encompass a broad range of engineering and scientific subjects; a widening of the curricula to include degrees in the liberal arts; and the development of graduate programs to strengthen the science and engineering disciplines.

Originally a mining school and subsequently an engineering school, the University of Missouri-Rolla evolved into a major technological university. In October 2006, the university began a broad conversation with students, alumni and other stakeholders to consider a name change to better reflect its standing as a technological research university. On Jan. 1, 2008, the university adopted its new name, Missouri University of Science and Technology, or Missouri S&T for short.

In 2013, Missouri S&T initiated a new strategic plan focused on providing an outstanding return on investment to the six key customer groups of undergraduate students, research-based graduate students, distance and online students, corporate partners, research partners, and donors. The strategic plan is built on a focused, concise strategy statement:

Missouri S&T will provide by 2020 a top return on investment among public research universities to students, employers, research partners and donors through extraordinary access to renowned expertise, services and experiential learning opportunities.

One of the new strategic plan’s four themes specifically addresses the university’s desire to increase visibility, and a specific initiative of that theme calls for the development and execution of a “communications and marketing plan to raise visibility and convey return on investment” to key customers (Strategic Plan Lever 2.4). More information about Missouri S&T’s strategic plan is available online at strategicplan.mst.edu.

During the 2020-21 academic year, Missouri S&T will celebrate its 150th anniversary. The visibility plan to be developed through the award of this RFP should position Missouri S&T as a leading technological research university as it enters that sesquicentennial year.

DELIVERABLES

Missouri S&T is seeking the following deliverables for each of these three areas. Firms may develop proposals for any or all of these three areas.

PART 1: NAME RECOGNITION/AWARENESS ANALYSIS

Consultant shall assess recognition and awareness levels of the university's name and reputation, and evaluate levels of awareness, perceptions and opinions of the university's academic reputation, among the following customer groups:

- High school guidance counselors from the top public high schools as identified by *U.S. News and World Report*.
- Higher education opinion leaders (presidents and chancellors, provosts, vice presidents for research, deans, chief enrollment management officers, deans of graduate studies) from the nation's best national universities and engineering schools, as identified by *U.S. News and World Report*.
- Corporate recruiters from Fortune 500 companies.
- Business leaders from the nation's top employers of science, technology and engineering professionals.
- University research liaisons of Fortune 500 companies.
- Program directors or liaisons from STEM-focused federal research agencies.
- Prospective undergraduate students from within Missouri, segmented by ethnicity, gender, academic preparedness, academic interest, age, and related demographic factors.
- Prospective undergraduate students, including international students, from outside Missouri, segmented by ethnicity, national origin, gender, academic preparedness, academic interest, age, and related demographic factors.
- University liaisons from pre-college outreach areas, such as the National Action Council for Minorities in Engineering, Project Lead the Way and the Kauffman Foundation.
- Prospective graduate students (research-based master's, non-thesis master's, and Ph.D.), including international students, from outside Missouri, segmented by ethnicity, national origin, gender, academic preparedness, academic interest, age, and related demographic factors.
- Prospective distance and online students (on-campus as well as working professionals and other off-campus students) from outside Missouri. These include national and international markets, segmented by ethnicity, national origin, gender, academic preparedness, academic interest, age, and related demographic factors.
- Prospective U.S. distance and online students (on-campus as well as working professionals and other off-campus students) from within Missouri, segmented by ethnicity, national origin, gender, academic preparedness, academic interest, age, and related demographic factors.
- Prospective donors, including prospective non-alumni donors and prospective corporate/foundation donors.

Consultant shall conduct the research between July 1, 2014, and Oct. 31, 2014. Consultant shall present the research results and deliver 15 copies of the research results to the Missouri S&T Marketing Leadership Team by Nov. 15, 2014.

PART 2: RECOMMENDATIONS FOR DEVELOPING A TARGETED NATIONAL VISIBILITY PROGRAM

Consultant shall develop three brand positioning and marketing strategy options, including positioning and messaging based on research findings of Part 1 and in consideration of existing brand identity.

Options shall focus on developing a program to enhance visibility and name recognition for Missouri S&T among the key customer groups identified in the Missouri S&T strategic plan, with the overall goal of enhancing visibility and reputation and conveying the university's return on investment to these customer groups and influential audiences such as academic peers. These recommendations should also be accompanied by an assessment of anticipated, measurable outcomes.

Consultant shall deliver 15 copies of the recommendations to the Missouri S&T Marketing Leadership Team by Dec. 31, 2014, and shall present the recommendations in person to the Marketing Leadership Team by Jan. 15, 2015.

PART 3: EVALUATION OF CURRENT COMMUNICATIONS AND MARKETING MATERIALS AND STRUCTURE

A thorough evaluation of the university's current communications and marketing organization and current communications materials is required. Materials to be audited include all print, online (web, email, social media), video and other university communications targeting prospective undergraduate, graduate and distance-education students, including international, traditional, non-traditional, and distance and online-only students; corporate recruiters; research agencies and corporate research partners; and donors.

Consultant shall conduct the communications audit and organizational review between July 1, 2014, and Dec. 31, 2014. Consultant shall present recommendations, to include an assessment of anticipated, measurable outcomes, and deliver 15 copies of the communications audit and organizational review report, with recommendations, to the Missouri S&T Marketing Leadership Team by Jan. 15, 2015.

CRITERIA FOR EVALUATING PROPOSALS

Proposals will be evaluated based on consultant's experience and demonstrated success in higher education marketing; experience and demonstrated success with developing institutional visibility campaigns, either in higher education or corporate, government or non-profit sectors; familiarity with Missouri S&T; experience and demonstrated success with developing marketing efforts for technological research universities or similar organizations; a specific timeline for conducting the initial research, developing recommendations and visibility strategy; and cost.

Proposals shall include:

- A one- to four-page summary stating the offeror's qualifications for conducting the scope of work, including demonstrated success in similar projects; a description of the approach for conducting the research; and an outline of how the offeror intends to complete the project.
- A one- to four-page section providing brief resumes of internal staff to be assigned to the project, including project leader.
- A one- to two-page outline of proposed staff assignments for this project.
- Identification of proposed subcontractors, description of their scope of work, and supporting information on qualifications (two pages maximum).
- Five professional references capable of attesting to relevant project experience areas. For each reference, provide contact name, contact phone, contact email, organization name and organization mailing address.
- Project cost as outlined in Appendix B of this RFP.

Straightforward, concise delineation of the offeror's capabilities to satisfy the requirements of this RFP, with an emphasis on completeness and clarity of content, will be given highest consideration. Interested firms should become familiar with Missouri S&T's current brand identity guidelines, in-house editorial style, graphic identity, etc., available online at communications.mst.edu.

It is the university's policy that minority business enterprises shall have a fair and equal opportunity to participate in the proposal submission process. The university also encourages minority-owned business enterprises to compete for, win and receive contracts for goods, services and construction. Also, the university encourages all companies to sub-contract portions of any university contract to minority-owned business enterprises.

Proposals will be evaluated by the Missouri S&T Marketing Leadership Team or a subset thereof, in consultation with the Missouri S&T Core Marketing Network. The Marketing Leadership Team consists of the chancellor; provost; vice chancellor for university advancement; assistant vice chancellor for university advancement; associate vice chancellor for human resources, affirmative action, diversity and inclusion; vice provost and dean of enrollment management; vice provost for global learning; vice provost for undergraduate studies; vice provost for graduate studies; vice provost for research; chief information officer; special assistant to the provost for online learning; director of career opportunities and employee relations; director of communications; and assistant director of communications. The Core Marketing Network is made up of individuals across campus who represent the six customer groups identified in the Missouri S&T strategic plan.

SUBMISSION OF PROPOSALS

Proposals must be submitted in two parts: a technical proposal and a cost proposal (Appendix B). An original and four copies of the technical proposal should be submitted by 5 p.m. CDT Wednesday, April 30, 2014, to:

Andrew Careaga
Director of Communications
Missouri University of Science and Technology
105 Campus Support Facility
1201 N. State St.
Rolla, MO 65409-0220

In addition, an original and four copies of the cost proposal (Appendix B) should be submitted in a sealed envelope labeled "COST PROPOSAL" by 5 p.m. CDT Wednesday, April 30, 2014, to:

Andrew Careaga
Director of Communications
Missouri University of Science and Technology
105 Campus Support Facility
1201 N. State St.
Rolla, MO 65409-0220

Both the technical proposal and the cost proposal may be packaged together, but the cost proposal must be submitted in a separate, sealed envelope labeled "COST PROPOSAL."

All proposals are due at the location specified no later than the date and time specified above. Proposals must be delivered in hard copy. Proposals may not be submitted electronically (via email) or by fax.

For additional information about the process, submit written question to Andrew Careaga via email only no later than 5 p.m. CDT Tuesday, April 15, 2014. Responses to questions will be provided by no later than 5 p.m. CDT the following Tuesday, April 22, 2014.

Email: acareaga@mst.edu

Include the words "Missouri S&T RFP" in subject line.

The university plans to award a contract for services by June 15, 2014, with work to begin July 1, 2014.

APPENDICES

APPENDIX A SCHEDULE OF EVENTS

APPENDIX B COST PROPOSAL

APPENDIX A

SCHEDULE OF EVENTS

Event	Date
Release of RFP	March 31, 2014
Deadline for written questions (submit by email only to acareaga@mst.edu)	April 15, 2014
Written response to questions	No later than April 22, 2014
Proposals due to: Andrew Careaga Director of Communications Missouri University of Science and Technology 105 Campus Support Facility 1201 N. State St. Rolla, MO 65409-0220	April 30, 2014
Contract award (on or about)	June 15, 2014
Contract work schedule	Date
Consultant meeting with university	Between July 1 and July 15, 2014
Part 1: Missouri S&T name recognition/awareness analysis report completed and submitted to university	No later than Nov. 15, 2014
Part 2: Visibility plan report and recommendations completed and submitted to university	No later than Jan. 15, 2014
Part 3: Communications audit and capabilities assessment and recommendations completed and submitted to university	No later than Jan. 15, 2014

APPENDIX B

COST PROPOSAL

Depending on projected costs, budgetary considerations and strength of proposals, Missouri S&T may choose to award portions of a contract (Part 1, Part 2, Part 3 or a combination thereof) to multiple respondents. Moreover, respondents may choose to bid on any or all sections of the RFP (Part 1, Part 2, Part 3 or a combination thereof).

Project cost: Part 1	_____
Project cost: Part 2	_____
Project cost: Part 3	_____
Core project cost (total of Parts 1, 2 and 3)	_____
G&A*	_____
Total contract cost for all requirements, including G&A	_____ **
Hourly rate (potential add-on services beyond the scope of work identified)	_____

* G&A = all General and Administrative costs, profits, travel, per diem, and all costs associated with this contract.

** This is the figure that will be used in the evaluation.

It is the responsibility of the offeror to read the entire RFP carefully and respond to, and price, all requirements to ensure that "Total contract cost for all requirements," above, includes all deliverables delineated in the RFP document.