

**THE CURATORS OF THE UNIVERSITY OF MISSOURI ON BEHALF OF  
UNIVERSITY OF MISSOURI-KANSAS CITY (UMKC) -  
REQUEST FOR PROPOSALS  
DETAILED SPECIFICATIONS AND SPECIAL CONDITIONS  
HENRY W. BLOCH SCHOOL OF MANAGEMENT REBRANDING: UMKC  
RFP# 31022**

**I. SCOPE OF CONTRACT:**

The University of Missouri-Kansas City's School of Management was founded in 1953 and renamed the Henry W. Bloch School of Management in 2010. It is one of UMKC's leading schools because of its current size, opportunity for growth and business ties within the Kansas City community. The quality of education, demonstrated by the dual accreditation, and strong connections in Kansas City help the school to stand out against local and regional competitors. However, the school needs to articulate and build a stronger Bloch brand that endures time and change.

UMKC desires the most thoroughly developed and highest quality professional services available. The following specifications outline the minimum requirements for the proposed service. They are provided to assist participants in understanding the objectives of UMKC and submitting a thorough response.

The purpose of this solicitation is to receive responses from highly qualified agencies to assist UMKC in developing and relaunching a refreshed brand for the Henry W. Bloch School of Management, which will elevate the Bloch brand among local, regional and national competitors; increase awareness of the school; refresh the Bloch brand and messaging; create a brand that fits well within the UMKC brand, and develops a unified family of brands for key programs within Bloch.

**Objective**

Develop and launch a revitalized Henry W. Bloch School of Management brand in FY 2017-2018 to:

- I. Elevate the stature of the Bloch School brand among local, regional and national competitors
- II. Increase awareness of the Bloch School, leveraging Henry's legacy
  - a. <http://bloch.umkc.edu/about-us/new-bloch-building.aspx>
  - b. <http://newsroom.hrblock.com/henry-w-bloch/>
  - c. <http://blochfamilyfoundation.org/foundation/founders/>
- III. Increase enrollment at the Bloch School, specifically within MBA programs
  - a. <http://bloch.umkc.edu/graduate-program/mba/default.aspx>
- IV. Refresh the Bloch School brand and messaging
  - a. <http://bloch.umkc.edu/>
  - b. <http://bloch.umkc.edu/about-us/default.aspx>
- V. Create a Bloch brand that fits and works well within the UMKC brand
- VI. Develop a unified family of brands for programs within Bloch

### **Background UMKC Information**

The University of Missouri-Kansas City is one of four campuses within the University of Missouri System. UMKC is a comprehensive research institution in the heart of an urban metropolitan area and strives to be the educator and workplace of choice. The main campus (Volker) is located at 5100 Rockhill Road and the health sciences campus (Hospital Hill) is located at 25th & Holmes. The University serves over 15,000 students on campus (of which 61% are undergraduate), employs nearly 4,000 people (of which 67% are full-time), and hosts over 200 constituent groups – including alumni, retirees, and community partners-in support of our mission. As part of a vibrant campus life experience, UMKC has over 300 student organizations, 1600 students living in our residential facilities, and Division 21 Intercollegiate Athletics in the Western Athletic Conference.

In support of the UMKC mission of developing a professional workforce, the UMKC Henry W. Bloch School of Management's mission is to develop purposeful, entrepreneurial and innovative leaders to meet changing global demands, and advance knowledge and practice through excellent teaching, scholarship, outreach and service. The school's vision is to be Kansas City's nationally and globally preeminent school of management focusing on entrepreneurial and innovative thinking as the foundation for transforming talent and achieving sustainable growth in for-profit, public and nonprofit enterprises. At this time, sights are set on becoming the region's preeminent school of management, with a future goal on a national and global level.

#### **II. FINANCIAL DISCLOSURE:**

All respondents must provide a complete disclosure of any and all financial relationships between Respondent and UMKC faculty and staff.

#### **III. PAYMENT:**

Payment in full will be made within thirty (30) days after receiving invoices for goods/services rendered as meeting all performance specifications.

Application for payment shall be made upon properly certified vendor's invoice rendered in duplicate. These invoices should be sent to the UM Accounts Payable Shared Services, 325 Jesse Hall, Columbia, MO 65211.

#### **IV. MISSOURI CONTRACT:**

This agreement shall be deemed to have been made in Missouri and the rights or liabilities of the parties determined in accordance with the laws of the State of Missouri.

#### **V. PERIOD OF CONTRACT:**

Contract shall be effective **November 15<sup>th</sup>, 2017** through **November 14<sup>th</sup>, 2019**, with the option by the University to renew for ( 3 ) additional annual terms.

Each respondent is required to state their maximum percent increase for items awarded for the successive annual renewal periods. This percent increase shall be a percentage change in the unit prices and shall not exceed that percent.

The University of Missouri-Kansas City (UMKC) shall not interpret the maximum percent change for the renewal periods to be in effect automatically at period of renewal. The successful respondent is required to submit in writing to the University of Missouri, Office of the Director of Supply Chain, 2910 LeMone Industrial Boulevard, Columbia, Missouri, 65201, ninety (90) days prior to the anniversary date of the contract the proposed price adjustment including justification for the proposed change for the next annual term of contract. If the University accepts the proposed price adjustment, an addendum to the contract will be prepared which will extend the contract and reflect the new unit prices. If the successful respondent does not submit this change to the Contract Services Department in the time and manner as above stated, the agreement may, at the option of the University, be renewed at the same unit prices from the previous annual contract period.

#### **NON-FUNDING CLAUSE:**

The Curators of the University of Missouri is a public corporation and, as such, cannot create an indebtedness in any one year (the fiscal year beginning July 1 to June 30) above what they can pay out of the annual income of said year as set forth in Section 172.250 RS MO. Therefore, if the University determines it has not received adequate appropriations, budget allocations or income to enable it to meet the terms of this contract, the University reserves the right to cancel this contract with thirty (30) days notice.

#### **VI. INSTRUCTIONS FOR PROPOSAL RESPONSE:**

Respondents are required to fully respond with compliance statements to each of the mandatory/limiting specifications/criteria. Respondents are required to fully respond with description of ability to meet (and how) desirable specifications/criteria.

Respondents must be clear and concise in responses in order to be fully credited in the evaluation. Attach and reference any relevant documentation that would ensure the evaluating committee that specifications are met. If “no response” or insufficient response to substantiate compliance is provided, the University reserves the sole right to reject vendor’s proposal from further consideration. Do not include responses that are superfluous or irrelevant to the specific question asked. These are not valuable in the volume of information the various evaluating teams must review.

Multiple copies of Proposals must be submitted in the number and manner as specified below:

**Volume I** – Functional Technical Section is to be submitted with one (1) original and, one (1) electronic copy via either jump drive or CD and must contain:

- Response to Information for Respondents and General Conditions, Mandatory Specifications and vendor responses, and Desirable Specifications and vendor responses. If there is any vendor related contract that must be signed as part of doing business, it should also be included in this section. **This section includes all response information, except pricing information.**

**Volume II** - Financial Response Section must be submitted in a separately sealed envelope in duplicate (one original and one electronic copy) and contain:

- Proposal Form with any supplemental pricing schedules, if applicable, and Financial Summary including additional costs, if any, for Desirable Specification Compliance, functional or technical. This section should also include the Supplier Diversity Participation Form. Financial statements that may be required are also to be included in this section.

**Vendor must complete and return the University Proposal Form with proposal response. Vendor quote sheets are not acceptable forms of bidding and could cause rejection of response.**

## **VII. EVALUATION AND CRITERIA FOR AWARD OF PROPOSAL:**

Proposals will be awarded based upon the pricing and functional/technical evaluation.

Respondents must meet the mandatory requirements to be “qualified” for scoring. If requirements are not met, the vendors are disqualified from further evaluation/award. Qualified remaining respondents will be scored on their ability to meet scored criteria/desirable specifications, which includes qualitatively, how specifications are met. A team of UMKC individuals will evaluate and assign points to vendor’s responses to desirables.

## **VIII. INSURANCE**

(Examples: Service Vendors; office lessee; travel agencies; photography; marketing consultants) Contractor agrees to maintain, on a primary basis and at its sole expense, at all times during the life of any resulting contract the following insurance coverages, limits, including endorsements described herein. The requirements contained herein, as well as the University’s review or acceptance of insurance maintained by Contractor is not intended to and shall not in any manner limit or qualify the liabilities or obligations assumed by Contractor under any resulting contract. Coverage to be provided as follows by a carrier with A.M. Best minimum rating of A- VIII.

**Commercial General Liability** Contractor agrees to maintain Commercial General Liability at a limit of not less than \$1,000,000 Each Occurrence, \$2,000,000 Annual Aggregate. Coverage shall not contain any endorsement(s) excluding nor limiting Product/Completed Operations, Contractual Liability or Cross Liability.

Contractor may satisfy the minimum liability limits required for Commercial General Liability or Business Auto Liability under an Umbrella or Excess Liability policy. There is no minimum per occurrence limit of liability under the Umbrella or Excess Liability; however, the Annual Aggregate limit shall not be less than the highest “Each Occurrence” limit for either Commercial General Liability or Business Auto Liability. Contractor agrees to endorse the University as an Additional Insured on the Umbrella or Excess Liability, unless the Certificate of Insurance state the Umbrella or Excess Liability provides coverage on a “Follow-Form” basis.

**Note:** Anyone who serves alcoholic beverages on a University of Missouri Campus must also provide liquor liability coverage. This should be written on an "occurrence basis" and have limits not less than \$1,000,000 each claim or each common cause and at least a \$1,000,000

aggregate. The insurance carrier, policy number, effective date and limits should be shown on an insurance certificate provided to the University of Missouri. The Curators of the University of Missouri should be named as an Additional Insured on such policy and a copy of the endorsement should be provided along with the certificate of insurance.

**Business Auto Liability (If required in service performance)** Contractor agrees to maintain Business Automobile Liability at a limit not less than \$1,000,000 Each Occurrence. Coverage shall include liability for Owned, Non-Owned & Hired automobiles. In the event Contractor does not own automobiles, Contractor agrees to maintain coverage for Hired & Non-Owned Auto Liability, which may be satisfied by way of endorsement to the Commercial General Liability policy or separate Business Auto Liability policy.

**Workers' Compensation & Employers Liability** Contractor agrees to maintain Workers' Compensation in accordance with Missouri State Statutes or provide evidence of monopolistic state coverage. Employers Liability with the following limits: \$500,000 each accident, disease each employee and disease policy limit.

### **Contract Language**

The Curators of the University of Missouri, its officers, employees and agents are to be Additional Insured with respect to the project to which these insurance requirements pertain. A certificate of insurance evidencing all coverage required is to be provided at least 10 days prior to the inception date of the contract between the contractor and the University. Contractor/Party is required to maintain coverages as stated and required to notify the University of a Carrier Change or cancellation within 2 business days. The University reserves the right to request a copy of the policy. The University reserves the right to require higher limits on any contract provided notice of such requirement is stated in the request for proposals for such contract.

### **Indemnification**

The Contractor agrees to defend, indemnify, and save harmless The Curators of the University of Missouri, their Officers, Agents, Employees and Volunteers, from and against all loss or expense from any cause of action arising from the Contractor's operations. The contractor agrees to investigate, handle, respond to and provide defense for and defend against any such liability, claims, and demands at the sole expense of the Contractor or at the option of the University, agrees to pay to or reimburse the University for the Defense Costs incurred by the University in connection with any such liability claims, or demands.

The parties hereto understand and agree that the University is relying on, and does not waive or intend to waive by any provision of this Contract, any monetary limitations or any other rights, immunities, and protections provided by the State of Missouri, as from time to time amended, or otherwise available to the University, or its officers, employees, agents or volunteers.

Failure to maintain the required insurance in force may be cause for contract termination. In the event the Agency/Service fails to maintain and keep in force the required insurance or to obtain coverage from its subcontractors, the University shall have the right to cancel and terminate the contract without notice.

The insurance required by the provisions of this article is required in the public interest and the University does not assume and liability for acts of the Agency/Service and/or their employees and/or their subcontractors in the performance of this contract.

## **IX. MANDATORY SPECIFICATIONS**

**\*\*\*The following questions are mandatory requirements that must be met in order for a proposal response to be considered.**

1. It is mandatory that the respondent have experience in brand building as it pertains to higher education rebranding. **YES**\_\_\_ **or NO** \_\_\_
2. It is mandatory that the respondent provide a dedicated team for the Bloch School of Management Rebranding: UMKC project. **YES**\_\_\_ **or NO** \_\_\_
3. It is mandatory that the respondent adhere to all accessibility and information security requirements. **YES**\_\_\_ **or NO** \_\_\_
4. It is mandatory that the University of Missouri retain rights to all creative work produced by an agency or subcontracted agency. **YES**\_\_\_ **or NO** \_\_\_
5. It is mandatory that the chosen firm agree to adhere to all campus graphic and digital standards currently in place at the time of each project initiation. This includes campus standards related to: - Graphic identity standards per - Accessibility and ADA compliance, per [http://www.umkc.edu/mcom/documents/visual\\_identity\\_guidelines.pdf](http://www.umkc.edu/mcom/documents/visual_identity_guidelines.pdf) , [http://identity.missouri.edu/websites/Web\\_standards09202016.pdf](http://identity.missouri.edu/websites/Web_standards09202016.pdf) - Security requirements for web applications, content management systems, databases web forms or any other transactional systems, per <https://www.umsystem.edu/ums/is/infosec> - Consistency as it relates to user experience and interface, per [http://www.umkc.edu/mcom/resources/brand\\_toolkit.cfm](http://www.umkc.edu/mcom/resources/brand_toolkit.cfm) **YES**\_\_\_ **or NO** \_\_\_
6. It is mandatory that the agency will execute Phase 1 deliverables as listed below: **YES**\_\_\_ **or NO** \_\_\_
  - a. Research & Analysis
    - i. Review of UMKC provided research
    - ii. Research strategy – primary and secondary, qualitative and quantitative
    - iii. Conduct Brand Perception survey among students (prospective, current)
    - iv. Question development
    - v. Participant recruitment– current students, prospective students, faculty, staff, alumni, business and community leaders
    - vi. Primary focus of research needs to be on external audiences
    - vii. Facilitation of focus groups
    - viii. Interviews with university leadership and key administration
  - b. Brand Framework
    - i. Execute campaign positioning workshop on-campus for testing
    - ii. Brand promise testing with key audiences
    - iii. Presentation of brand positioning framework, including: brand promise, brand rationale, brand attributes (key messages, proof points), message segmentation strategies, elevator speech
  - c. Creative Development

- i. Presentation of 2-3 distinct concepts with strategic rationales, sample treatment
- ii. Testing and refinement via focus groups
- iii. Develop brand book/guidelines and tagline
- iv. Brand communication planning – one full day on campus to develop internal and external brand rollout strategies, tactics, metrics and timeline
- v. Brand standards/elements must include but are not limited to:
  - 1. Visual elements: logo work, typographic treatment, color palette, photographic style, etc.
  - 2. Sample treatments: publications, advertising, website, social media, video, to illustrate the brand in action
- d. Brand Launch – Does not include actual media spend
  - i. Develop advertising and media placement plan based on various spend plans
  - ii. Provide all elements to Marketing Team for implementation

\*\*\*Services and support as needed by Marketing Team regarding creation of elements, including but not limited to: website, signage, publications, collateral, events, e-communications, social media, etc.

7. It is mandatory that the agency will plan phase 2 deliverables to include development of media plan recommendations, placement, timing and budget for a spring 2018 launch as listed below: **YES** \_\_\_ **or NO** \_\_\_
- a. Develop media plan recommendations, placement and timing and budget for:
    - i. Spring 2018 launch
    - ii. Continue into Fall 2018
  - b. Complete media recommendations for all target markets including:
    - i. Community and influencers
    - ii. Undergraduate recruitment of high school and transfer students
    - iii. Graduate recruitment for all masters level programs
  - c. Develop advertising creative for all media buys
  - d. Share creative elements with UMKC to incorporate into all creative including but not limited to:
    - i. Websites
    - ii. Signage
    - iii. Publications
    - iv. E-newsletters
    - v. Events
    - vi. Social media
    - vii. Etc.

## **X. DESIRABLE SPECIFICATIONS**

1. Provide a brief history of your organization.
2. Provide resumes or bios of key account management personnel who that will be assigned to work with the University of Missouri-Kansas City, as well as an explanation of the person's role in servicing the account.
3. Provide three references, including one from a higher education client to include contact information.
4. It is desirable that the respondent have in-house capability or access to vendors to develop brand strategy and positioning and creative concept generation. If the agency intends to contract any portion of the work, provide the names of those vendors and the scope of contracted work.
5. It is desirable that the agency have expertise on developing a brand strategy to increase awareness, enrollment, and develop a unified family of brands for programs within Bloch. Describe this expertise.
6. Supply a portfolio of at least three examples (one of which should include higher education) that outlines the following:
  - a. Data that informed the brand strategy
  - b. Timeline, strategy and position based on research findings
  - c. Creative developed to address the strategy
  - d. Results from the initiative
7. Describe how your firm will meet the deliverables as listed in mandatory specification #6 & 7. Provide a timeline for this.

### **Onsite Presentations**

The UNIVERSITY may request respondents(s) to give onsite presentations. The onsite presentations will be scheduled for the week of October 16, 2017. After the opening of RFP and scoring of vendor responses, we will call to assign date and time.

## **SPECIAL INSTRUCTIONS—ELECTRONIC REQUESTS**

**If you have requested and/or otherwise received an electronic copy, and for any reason our specifications and general conditions are altered in the response, University will ignore the alteration, and our specifications and general conditions will be the prevailing document.**