



FINANCE  
**PROCUREMENT SERVICES**  
UNIVERSITY OF MICHIGAN

**REQUEST FOR PROPOSAL**

**RFP P 051214-01 KW**

**Stephen M. Ross School of Business Brand Research**

**RFP Release Date: May 12, 2014**

**Proposal Due Date: Monday, June 16, 2014 at 4:00 p.m. EST**

**Submit Proposals To:**

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<u>RFP Attachments (Separate Files)</u>	<u>File Name</u>	<u>Input Required</u>
A	Supplier's Question Form	For completion
B	Intent to Respond	For completion
C	General and Professional Services Agreement	For review
D	Signature Page	For completion
E	Supplier Information & RFP Questionnaire	For completion

## 1.0 PROPOSAL INVITATION

The Stephen M. Ross School of Business at the University of Michigan seeks proposals from select suppliers that provide Brand Research Services. The Marketing and Communications department is looking to create a customized Ross Brand Tracking for the Business School that captures the brand associations that contribute the most to brand equity and the marketing activities supporting the brand. Our goal is to be able to identify the key drivers that make an impact on our target audience's brand choice and perception of the Ross School of Business.

The proposal must be comprehensive by including all services and costs to meet the business and technical requirements of the University as outlined in this RFP. In addition, the proposal must specify a detailed approach/methodology, supplier and University staffing requirements, and any other assumptions to complete the proposed work.

The initial term of the Agreement shall be for one (1) year. The anticipated Agreement period shall begin in July 2014 and continue through June 2015, or until all services ordered prior to the ending date have been satisfactorily delivered. For additional term provisions, please refer to the Agreement, included as Appendix D.

The University's standard terms and conditions will apply to the contract as a result of this RFP as listed in Appendix D to this RFP.

At no cost to the University of Michigan, the supplier finalist will be required to work with the University to develop a detailed Statement of Work that would become a key part of the contract and would take precedence over the proposal response.

Your response to this RFP indicates your understanding that this is *not* a contract or offer of business by the University of Michigan.

## 2.0 PLANNED PROCUREMENT SCHEDULE:

The planned procurement schedule is as follows:

Milestones	Dates / Details
RFP Issue Date	Monday, May 12, 2014
Submission of Written Questions to <a href="mailto:kwhitesr@umich.edu">kwhitesr@umich.edu</a>	Friday, May 23, 2014
Written Question Response	Friday, May 30, 2014
Submission of Intent to Respond Form	Friday, June 6, 2014
Proposal Due Date	Monday, June 16, 2014 4:00 p.m. EST
Supplier presentations	June, 2014
Anticipated Contract Date	July, 2014

Selected suppliers may be required to make oral presentations. Failure of a supplier to conduct a presentation on the date scheduled may result in rejection of the supplier's proposal.

The University reserves the right to change this schedule as needed.

### 3.0 BACKGROUND INFORMATION

The Stephen M. Ross School of Business at the University of Michigan is a vibrant and distinctive learning community grounded in the principle that business can be an extraordinary vehicle for positive change in today's dynamic global economy.

At the Ross School of Business, our mission is to develop leaders who make a positive difference in the world. Through thought and action, members of the Ross community drive change and innovation that improves business and society.

The Ross difference describes both how we lead and the kind of leaders we create. At Ross, we believe:

- Through **positive business** practices, the potential of people and firms will be realized and society's most pressing problems will be addressed.
- Solutions are not confined to one sector, function, or type of person, and that true innovation comes from a **boundary less approach** to problem solving.
- **Analytic rigor** must be the foundation for all business decision making in the 21st century.
- Business acumen consists of a set of knowledge and skills that can only be developed by bridging the gap between theory and practice and engaging in **action-based learning**.

Top-ranked programs at Ross include Full-time MBA, Part-time MBA, Executive MBA, Global MBA, Master of Accounting, Master of Supply Chain Management, Master of Entrepreneurship, BBA, and PhD degree programs, as well as non-degree Executive Education.

Ross' world-class faculty drive concepts and innovation that shape both business and policy across a wide variety of disciplines. The collaborative thinking and pioneering research across the University of Michigan campus define the institution as one of the world's greatest public universities. Ninety-five graduate programs at U-M are ranked in the top ten nationally, and U-M receives more research funding than any other public university in the U.S.

Ross has locations in Ann Arbor, Los Angeles, and Hong Kong, as well as partnerships with institutions throughout the world.

The Block M is a symbol that is recognized across cultures, continents, and economies. More than 45,000 Ross alumni live and work in more than 88 countries, and more than 500,000 U-M alumni reside around the globe.

### 4.0 PROJECT OBJECTIVES – Ross is looking to provide a brand tracking study that can measure the overall “health” of the Ross brand and its components (the various degree programs and Executive Education). The objective is to have a tool that will be used to measure the success of Ross, programs, and marketing campaigns as they launch and are in market.

The scope will include 5 main areas of study:

- **Brand Awareness & Image:** What is the overall brand awareness for Ross and our programs? What is the image of our brand?
- **Brand Performance:** How does our brand perform against our competitive set? How does our image compare with the image of our competitive set?

- **Brand Attitude & Perception:** What is the target audiences attitude and perception of the Ross brand? What are the target audience's beliefs about Ross? What is the target audiences brand association with Ross – weak or strong?
- **Key Messaging Effectiveness and Resonance:** How do the Ross key messages (Ross mission statement and pillars) resonate with the target audience? Do the messages have a positive (or negative) effect on the target audience? Do the key messages align with the target audiences brand attitude and perception of Ross?
- **Advertising & Public Relations effectiveness:** What is the effectiveness of our advertising and public relations tactics? Does advertising and public relations drive/aid awareness, consideration, and positive perception in the marketplace?

**Methodology and Measure:**

For the purposes of this RFP we will outline specifications for the brand tracker, although we are open to agency recommendations for specifications and methodology, as well. These specifications are to provide each agency with criteria in which to base their proposal.

Specifications:

Audiences (5 total):

- Current students, prospective students, alumni, executives, hiring managers/recruiters

Locations (3 total):

- US, Hong Kong, Germany

Frequency(2 waves per year, would like pricing broken out for each wave individually):

- 2 waves per year

Sample size:

- 3,000 per wave: 200 per audience, per market

Survey length:

- No more than 15 minutes

Final product:

- Presentation and executive reporting for each wave
- Online dashboards throughout the project lifespan

Methodology should allow for the study to provide the information & insight that is needed to measure the focus areas above and identify the key drivers that make an impact on our target audience's brand choice and perception of the Ross School of Business. We are also looking to partner with the agency to define what constitutes a desirable level of success for each specific metric/focus area.

Ross is open to each agency's philosophy and development of brand tracking studies, providing options for how best to roll-out this type of large-scale tracking study and how best to refine as we go forward.

Agency requirements:

- Experience in higher education market research a plus.
- Is knowledgeable and experienced in measuring and creating brand.
- Will have a project manager or point person dedicated to this project for the entire scope of the research project.
- Is able to deliver research results against tight deadlines.

- Will deliver a complete final in-person presentation of findings, conclusions, and recommendations on-site at the Ross School for the first report
- Will deliver final report via electronic file, including all raw data
- Looking for the agency to recommend the intervals to do research and best categories to focus on for the research

## 5.0 RFP REQUIREMENTS

The following requirements must be met when responding to this RFP:

- 5.1 A comprehensive solution to achieve the objectives listed above.
- 5.2 A statement acknowledging the supplier's understanding of the scope of this RFP.
- 5.3 The supplier must provide a comprehensive price proposal that outlines costs of products or services, rates by individual, travel expenses and any other costs incurred as well as all assumptions.
- 5.4 The supplier must warrant its products and services to the requirements and objectives in this RFP.
- 5.5 The supplier is expected to complete all content and documents in the format described in Section 9.0 of this document, "Proposal Submission Format".
- 5.6 The supplier must comply with University invoicing and payment terms as highlighted in Exhibit B ("Financial Arrangement") of Attachment C – General and Professional Services Agreement.
- 5.7 Suppliers submitting a proposal agree to work with the University to develop a detailed Statement of Work that will be part of the contract at no cost to the University.
- 5.8 Prices quoted will be firm for a minimum of four years.
- 5.9 Any products required are to be quoted F.O.B.: The University of Michigan, various locations as applicable, with freight paid. Any variance in F.O.B. point is subject to negotiation.

## 6.0 SUBMISSION DIRECTIONS

- 6.1 Any questions regarding this RFP must be directed to the primary UM contact noted on the cover of this RFP utilizing the template provided in Attachment A – "Supplier's Question Form". All questions must be submitted by email as per the timetable in Section 2.0 Planned Procurement Schedule of this RFP. Questions submitted after this deadline may not receive a response by the University.
- 6.2 Intent to Respond. The "Intent to Respond" Form, Attachment B, must be completed and received by Procurement Services by the date specified in Section 2.0 of this document (June 6, 2014). *Suppliers who fail to submit the "Intent to Respond" form on time risk disqualification from the RFP process.* Receipt of the form will allow the University to

also notify the supplier of any additional information or addenda. The fully completed “Intent to Respond” form must be faxed or e-mailed to the Procurement Services representative on the cover of this RFP.

- 6.3 A legally authorized representative of the supplier must sign the proposal.
- 6.4 Proposals must be received (1) by the time specified in Section 2.0 Planned Procurement Schedule and (2) at the office indicated on the front cover of this RFP. Carefully review the Planned Procurement Schedule in Section 2.0 for due dates for submittal of important documents and for the University’s response dates. Each supplier is solely responsible for the timely delivery of its proposal. Faxed and/or late proposal responses will not be accepted. **Receipt of the proposal by the University mail system does not constitute receipt of a proposal by the University of Michigan Purchasing Services/Contracts and Procurement.**
- 6.5 The proposal must be submitted as follows:
  - 6.5.1 The proposal should be transmitted electronically via e-mail or delivered to the University to the individual and address named on the front cover of this RFP. Text must be submitted in Adobe PDF format. All Excel attachments must be submitted in Excel format along with a scanned copy of the signed signature page
  - 6.5.2 If delivered in hard copy, please include one (1) copy of the entire proposal on a flash drive or cd. Text must be submitted in Adobe PDF format. All Excel attachments must be submitted in Excel format. Label flash drive or cd with the RFP number and supplier name.
- 6.6 The ability of the University to “open” all electronic information submitted must be verified by the University Procurement Services prior to being accepted.
- 6.7 A supplier may withdraw a proposal prior to the closing time on the due date. After the closing time, submitted proposals constitute an offer by the supplier and shall remain irrevocable for a period of 120 days.

**7.0 RIGHTS RESERVED BY THE UNIVERSITY AND RESTRICTIONS ON RFP PROCESS**

- 7.1 The University reserves the right to reject any or all proposals, including by way of example only and without limitation, any proposal that does not contain all the requested information.
- 7.2 The University reserves the right to negotiate with any supplier considered qualified or to make an award without further discussions. The University highly recommends that a supplier’s initial proposal reflect supplier’s terms most favorable to the University.
- 7.3 The University retains the right to select, request further information from, and negotiate with respondents it deems qualified for this program. The University also reserves the right to reject any quotations submitted and to terminate negotiations at any time without incurring liability.
- 7.4 The University reserves the right to select the most responsive Supplier(s) without further discussion, negotiation, or prior notice.

- 7.5 The University may presume that any proposal is a best-and-final offer.
- 7.6 The University reserves the rights to award in part, in whole, or not at all.
- 7.7 Suppliers who offer prices on all items may be given preference; however, the University reserves the right to delete specific line items in order to provide a basis for an evaluation of the prices quoted by all suppliers.
- 7.8 The University will not pay for any information requested nor is it liable for costs incurred by the supplier in responding to this request.
- 7.9 Any discussions with University personnel, other than as listed above, regarding this RFP while the RFP is in progress (from the time supplier receives this RFP until final award is made) are strictly prohibited. Such contact and discussion may result in disqualification of Supplier's proposal.
- 7.10 The University is the sole owner of all data and information contained within the RFP document and accompanying attachments. Supplier shall use this information exclusively to prepare a proposal. Supplier should not disclose this information to any other firm or use it for any other purpose unless required by law or legal process.
- 7.11 Supplier proposals will be opened and reviewed at the convenience of the University; there is no public opening.
- 7.12 All proposals submitted become the property of the University; they will not be returned and may be subject to disclosure under the STATE OF MICHIGAN FREEDOM OF INFORMATION ACT ("FOIA") or other legal process. As such, proposal may be released to third parties, without prior notice to Supplier, as required to comply with legal requirements.

## **8.0 EVALUATION CRITERIA**

Proposals will be evaluated on the basis of the most competitive offer considering quality of products and services offered, cost, responsiveness to the RFP requirements, and the most responsiveness in meeting those requirements.

The major criteria that will be used to evaluate proposals will include, but not be limited to the following:

- Supplier's ability to meet the functional requirements of this RFP.
- Supplier's financial stability.
- Supplier's pricing structure.
- Supplier's willingness to comply with the proposed agreement with no objections.
- Supplier's commitment and experience in successfully performing similar agreements.
- Experience of individuals staffed on project.
- Quality of references.
- Supplier's commitment to healthcare.
- Supplier's adherence to industry standards.
- Overall service quality.



- Value added proposals.

## 9.0 PROPOSAL SUBMISSION FORMAT

The following table is a summary of the required proposal submission format for this RFP. Please structure your proposal submission per the content and sequence below. Where noted under “Template for Submission”, utilize the attachments provided with this RFP for inputting your responses.

Proposal Section	Section Title	Template for Submission
Pre-Proposal	Questions on the RFP	Attachment A – Supplier’s Question Form
	Intent to Respond	Attachment B – Intent to Respond Form
Intro	Title Page	Open-Ended Responses  (see proposal response guidelines below for overview of content required)
	Table of Contents	
	Letter of Transmittal	
1.0	Executive Summary	
2.0	Scope of Proposed Solution	
3.0	Comprehensive List of Assumptions	
4.0	Company Background/Customer List	
5.0	Supplier Code of Conduct	
6.0	Supplier Relationships or Potential Conflicts with the University	
7.0	Exceptions to the University’s Terms and Conditions	
8.0	Signature Page	Attachment D – Signature Page
9.0	Response to Supplier Information & RFP Questionnaire	Attachment E– Supplier Information & RFP Questionnaire
10.0	Project Staffing/Resumes	
11.0	Cost Proposal	Attachment F – Schedule Quantities and Supplies Spreadsheet plus open-ended response.

An overview of the proposal response guidelines are below for your review. Detailed instructions have also been included within all attachments.

### **PROPOSAL RESPONSE GUIDELINES**

The following are detailed guidelines for the format and content of your proposal submission. Please review the guidelines below in full prior to beginning your proposal.

#### **Letter of Transmittal** (*Maximum Length=1 page*)

The letter should briefly list the name of the company, address of corporate headquarters, contact information of account executive, confirm major components of the work being proposed, validity of proposal (i.e., 120 days) and be signed by an individual that is authorized to bind the firm.

#### **Proposal Section 1.0 – Executive Summary** (*Maximum Length=3 pages*)

This part of the response to the RFP should be limited to a brief narrative highlighting the supplier's proposal. The summary should contain as little technical jargon as possible and should be oriented toward non-technical personnel. The summary should describe the following:

- Key differentiators in service offerings, account management, and value added services proposed by your company.
- Your understanding of the scope of requirements and the level to which your proposal has met the requirements.
- The summary should also specify the names of similar sized higher education/healthcare and other comparably sized clients that have used the services being proposed.
- High level project execution plan.
- Risk management considerations.
- Cost by service type.
- Value and outcomes delivered to University.

**Proposal Section 2.0 - Scope of Proposed Solution** (*Maximum Length=5 pages*)

Provide a description of the overall solution or methodology for RFP P 051214-01KW. Include a high level description of the steps of how the services will be provided and any associated value added services solution that meets the requirements. Confirm that the solution being provided is comprehensive as defined in Section 4.0 of the Request for Proposal (Project Scope and Requirements). In addition, describe the methodology for solution delivery. Finally, describe the client relationship management approach (e.g., steering committee, status reporting).

**Proposal Section 3.0 - Comprehensive List of Assumptions** (*Maximum length = 2 pages*)

Rather than have assumptions be scattered throughout the proposal, University requires that all assumptions be listed and explained in this section. Please ensure that all assumptions listed reference the appropriate section of the RFP and/or associated product or services.

**Proposal Section 4.0 - Company Background/Customer List** (*Maximum Length=5 pages*)

Supplier must provide the following information about its company so that the University can evaluate the supplier's financial stability and ability to support the commitments set forth in response to the RFP.

The supplier should describe the company's background, including:

- How long the company has been in business.
- A brief description of the company size and organizational structure as it relates to services proposed.
- How long the company has been working with a) higher education clients; b) government clients; and c) commercial clients.
- Most recent industry analyst reports about your firm's products and services (this information would not count against the page limit)
- Describe any current lawsuits, legal actions or governmental investigations against your company including, but not limited to, parties of dispute, any equipment affected, cause of action, jurisdiction and date of legal complaint.

### **Proposal Section 5.0 -Supplier Code of Conduct**

The University of Michigan has a longstanding commitment to sound, ethical and socially responsible practices. To ensure that such practices are codified for the University's suppliers, the President's Task Force on Purchasing Ethics and Policies has developed a [Code of Conduct](#) for University of Michigan Suppliers.

To promote socially responsible purchasing, UM and suppliers will aspire to follow the Code of Conduct. The Code of Conduct is not a contractual document but preference may be given to suppliers, when all other criteria are equal, who demonstrate compliance with the Code.

University employees are prohibited from accepting any gifts, services or gratuities from suppliers or potential suppliers. Respondent and supplier conformance to this standard is expected.

Please confirm in your proposal that you have read and agree to the University's Supplier Code of Conduct.

### **Proposal Section 6.0 - Supplier Relationships or Potential Conflicts with the University**

Describe any business relations that Supplier currently has or has had with the University; include relationships any parent, subsidiary, or other affiliate company may have with the University.

Please indicate if any employees, officers, directors, members, agents or consultants of Supplier are also an employee of the University. Please refer to the [University's Conflict of Interest Policy](#) available on the Procurement Services Web page.

### **Proposal Section 7.0 - Exceptions to the University's Terms and Conditions** *(No maximum page length)*

This RFP and any subsequently offered contracts will be governed by the laws of the State of Michigan. Any and all applicable valid executive orders, Federal, State or local laws, ordinances or rules or regulations shall apply to any contract if and when offered and are deemed incorporated herein.

While it is the University's preference that the supplier sign the standard template "as is" and in fact the University may consider extensive changes to the agreement as a reason to exclude a supplier from further consideration; Suppliers may take select exception to terms and conditions (Attachment C- "General and Professional Services Agreement"). The supplier must clearly set forth each exception in its proposal, referencing the affected RFP section, paragraph and page. The supplier must set forth the reason(s) for the exception and indicate what (if any) alternative is being offered by the supplier. University shall determine (in its sole discretion) the acceptability of any proposed exception(s).

### **Proposal Section 8.0 – Signature Page**

Please refer to the RFP Template Attachment D- "Signature Page" and provide your responses in the space provided.

### **Proposal Section 9.0 – Response to Supplier Information & RFP Questionnaire**

Please refer to the RFP Template Attachment E – “Supplier Information & RFP Questionnaire”.

The Supplier Information tab is for capturing general information about your company, including RFP contact information and supplier diversity programs. This tab also includes a template for entering client reference information. Please enter your responses in the space provided (blue cells). Note that completion of all content on this tab is required as part of your proposal submission.

The questions on the General and Professional Services RFP Questionnaire tab relate specifically to your qualifications and proposed solution for fulfilling the requirements of this RFP initiative. Please enter your responses in the space provided (blue cells).

**Proposal Section 10.0 – Project Staffing/Resumes** (*Maximum Length = 10 pages*)

Describe your proposed Project Organization Chart and provide resumes for the Project Manager and all proposed staff on the Organization Chart. University will require interviews for Key Personnel prior to project start. Each resume should not exceed two pages.

Note: Since project staffing/resumes will be evaluated across suppliers, it is in the supplier’s interest to customize the resumes/staffing to the skill sets and experiences required to do this work. Individuals proposed will be required to be available to do the work in the time period that we have provided in this RFP.

**Proposal Section 11.0 – Cost Proposal** (*Maximum length = 5 pages*)

Please refer to the Excel spreadsheet Attachment F – “Schedule Quantities and Supplies Spreadsheet” and provide your responses in the space provided on the Tab labeled “quantities,” in columns D, E, and F.

Provide in narrative form an explanation of the comprehensive cost proposal for this project as well as any assumptions being made. Suppliers should provide University with breakdown of the following:

- Hours and Rates by Supplier Role (including time that is on-site in Ann Arbor vs. off-site although the University expects the vast majority of the work to be completed on-site)
- Hours by University Role (expected time the University is to contribute by role)
- Travel Cost Breakdown
- Payment Schedule by Milestone/Deliverables