



Solicitation Information
August 26, 2016

RFP #7550913

TITLE: University of Rhode Island Perception Study

Submission Deadline: September 23, 2016 at 2:00 PM (ET)

Questions concerning this solicitation must be received by the Division of Purchases at gail.walsh@purchasing.ri.gov no later than **Tuesday, September 6, 2016 at 5:00 PM**. Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: No

BOND REQUIRED: No

GAIL WALSH
CHIEF BUYER

Applicants must register on-line at the State Purchasing Website at www.purchasing.ri.gov

Note to Applicants:

Offers received without the entire completed three-page RIVIP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

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SECTION 1: INTRODUCTION

The Rhode Island Department of Administration/Division of Purchases, on behalf of the University of Rhode Island, Department of Communications and Marketing, is soliciting proposals from qualified firms to provide a Perception Study, in accordance with the terms of this Request for Proposals and the State's General Conditions of Purchase, which may be obtained at the Rhode Island Division of Purchases Home Page by Internet at www.purchasing.ri.gov. The initial contract period will be 16 weeks.

This is a Request for Proposals, not an Invitation for Bid. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to price; there will be no public opening and reading of responses received by the Division of Purchases pursuant to this Request, other than to name those offerors who have submitted proposals.

INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS:

1. Potential vendors are advised to review all sections of this RFP carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.
2. Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP will be rejected as being non-responsive.
3. All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content shall be borne by the vendor. The State assumes no responsibility for these costs.
4. Proposals are considered to be irrevocable for a period of not less than 120 days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.
5. All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.
6. Proposals misdirected to other state locations, or which are otherwise not present in the Division at the time of opening for any cause will be determined to be late and will not be considered. For the purposes of this requirement, the official time and date shall be that of the time clock in the reception area of the Division.
7. It is intended that an award pursuant to this RFP will be made to a prime vendor, or prime vendors in the various categories, who will assume responsibility for all aspects of the work. Joint venture and cooperative proposals will not be considered. Subcontracts are permitted, provided that their use is clearly indicated in the vendor's proposal and the subcontractor(s) to be used is identified in the proposal.

8. All proposals should include the vendor's FEIN or Social Security number as evidenced by a W9, downloadable from the Division's website at www.purchasing.ri.gov.
9. The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.
10. Vendors are advised that all materials submitted to the State for consideration in response to this RFP will be considered to be Public Records as defined in Title 38, Chapter 2 of the General Laws of Rhode Island, without exception, and will be released for inspection immediately upon request once an award has been made.
11. Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.
12. Equal Employment Opportunity (G.L. 1956 § 28-5.1-1, et seq.) – § 28-5.1-1 Declaration of policy – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies to all areas where State dollars are spent, in employment, public services, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Opportunity Office at (401) 222-3090 or Raymond.lambert@doa.ri.gov.
13. In accordance with Title 7, Chapter 1.2 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the State until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). This is a requirement only of the successful vendor(s).
14. The vendor should be aware of the State's Minority Business Enterprise (MBE) requirements, which address the State's goal of ten percent (10%) participation by MBE's in all State procurements. For further information, contact the MBE Administrator at (401) 574-8670, visit the website www.mbe.ri.gov or contact Dorinda.keene@doa.ri.gov.
15. The State reserves the right to award to one or more offerors. The State also reserves the right to award this project based on pricing alone.

SECTION 2: BACKGROUND

BACKGROUND:

The University of Rhode Island embarked on a branding initiative in 2006 that rolled out a new brand expression in fall 2008. The brand expression consists of a distinct positioning statement and messaging; a branded “voice” infused in text; a new approach to images used in print and electronic publications; benefit-orientated/user-focused headlines that support imagery and story content; a new University logo; tagline and graphic; color and typeface palettes; and visual standards to guide use of graphic elements and design of various communication materials.

Internally, the brand expression has been infused into the design and creation of brochures, videos, event materials, screen savers, light pole banners, digital screens, PowerPoint templates, letterhead, merchandise and such special events as building openings and awards programs. Externally, the brand expression has been communicated through paid media advertising campaigns including television, cable, radio, online and billboard ads; University admissions recruitment materials; marketing materials, brochures, and flyers for units within the University; the University homepage and increasing portions of the URI website; a series of alumni speaking events throughout the country; awards presentations; and more.

The research phase of the branding initiative involved a 2007 pre-brand perception study to gather benchmark insights about stakeholders’ opinions and perceptions of the University. This study was two-fold: focus groups and interviews with alumni, faculty, staff, and opinion leaders determined brand equity dimensions that were further measured through a quantitative survey including telephone interviews of a random sampling of prospective students, alumni, and opinion leaders and an electronic survey of faculty and staff. Data were used to measure beliefs, attitudes and perceptions about the University, which now serve as baseline data to be used to measure success of the branding initiative.

In June-July 2011, the University measured the to-date effectiveness of the branding initiative with a three-year perception review study measuring changes in opinions, beliefs and attitudes toward the University of Rhode Island that have occurred since the beginning of brand implementation. Those outcomes were used to further develop ongoing branding efforts, strategies, and creative concepts.

SECTION 3: SCOPE OF WORK

General Scope of Work:

This RFP is for a quantitative perception study, to be compared against similar studies conducted in 2007 and 2011 in order to demonstrate longitudinal change in perceptions about the University of Rhode Island and effects of the University’s advertising investment since its brand initiative launched in 2008. This study will be a post-campaign survey following the University’s fall 2016 advertising campaign, which is expected to be administered over a four to six-week period beginning November 14, 2016.

The survey instrument will be a statistically valid questionnaire with more than two-dozen questions for tracking and comparison with the 2007 and 2011 studies, and others for comparison to the 2011 study only. The 2011 survey instrument consists primarily, but not entirely, of seven-point Likert-scale and demographic questions, along with up to two open ended questions. Questions measure: exposure to paid

advertising campaigns and specific ads; ad effects, including initial response, action tendencies and perception change; perceptions about the University of Rhode Island; and demographics.

The survey will be administered by the consulting firm using a combination of telephone interviews and electronic surveys, with a random, statistically sound sample of five different participant groups: 1) alumni; 2) prospective students; 3) opinion/community leaders; 4) current students; and 5) faculty/staff.

Opinion/community leaders are defined as individuals currently holding a public office or those who consider themselves community or business leaders in the State of Rhode Island. The opinion leader group consists of high-level government, civic and business representatives (CEOs, presidents, or executive directors, etc.). It also includes businesses that currently work with URI to recruit and hire graduates.

SPECIFIC ACTIVITIES/TASKS

- Within ten (10) calendar days of signing a contract, consulting firm will review both the 2007 and 2011 perception studies and results and elements of the branding initiative and make recommendations for deletions, additions and other changes needed for statistically valid survey results useful for assessing longitudinal changes in perceptions of the University in 2017. Guided by the 2007 and 2011 surveys, consulting firm will work with the University to finalize all questions and response sets for the study and determine optimal and final length of survey and number of questions.
- Consulting firm will recommend incentives for participation, if necessary, generate a cost-estimate for incentives, and secure incentives agreed upon and funded by the University. (incentives would NOT be included in the bid cost)
- Project kick-off meeting at the University of Rhode Island, to include all members of the consulting firm project team.
- Consulting firm will work with the University to coordinate cost-effective approaches to organizing and administering the surveys, and to develop a project timeline that will result in completion of the entire project no later than January 16, 2017.
- Considering the relative importance of each survey population, the consulting firm will determine the response rate and sample sizes necessary for a 95% accuracy with +/- 5% margin of error **for each population.**
 1. Consulting firm will clearly specify the desired format and contact information needed for each population list. Population lists will include: 1) approximately 110,000 alumni worldwide; 2) approximately 5,000-7,500 prospective students in CT, MA, RI, NY, NJ, PA, DE and Chicago; 3) approximately 16,000 current students; 4) approximately 500-1,000 opinion/community leaders in CT, MA, RI, NY, NJ, PA, DE and Chicago; 5) approximately 2,500 URI faculty and staff.
 2. Consulting firm secures list for prospective students and out-of-state opinion leaders while University provides all other lists

- Consulting firm will administer the survey using a mix of telephone interview and electronic survey suitable for the most statistically valid outcomes. The 2007 and 2011 surveys generally consisted of telephone interviews with alumni, prospective students, and opinion/community leaders, and electronic questionnaires for current students and faculty/staff.
- Using basic analyses, regression analyses, multi-variate analyses, cross-tabulations, and other advanced statistical analyses, consulting firm will analyze raw data for each population to understand the full effects of the University's branding initiative since 2007.
- Using raw data analysis described above, consulting firm will generate a comprehensive narrative report that includes
 - Analysis of the raw data in its disaggregated and aggregated states
 - Comparison of data to pre-brand perception data (2007) and three-year perception review data (2011) wherever possible
 - Interpretations of the raw data and perception changes, including assessments about the strengths of the branding initiative and the advertising campaigns, and areas for improvement
 - Recommendations for:
 - improving the effectiveness of future advertising campaigns
 - increasing and improving brand equity as the branding initiative moves forward
 - enhancing of brand messages, reach, and impact with all internal and external audiences
- Consulting firm will meet regularly with the University throughout the duration of the contract, including up to eight face-to-face meetings at the University on date/time mutually agreed upon. All expenses for these meetings, including but not limited to travel, shipping, and presentation materials desired by the consulting firm, shall be included in the bid price.
- Consulting firm will make up to six (6) formal presentations of survey results to various University audiences at a University location on mutually agreed upon dates and times. The University will provide presentation facility, projector, speakers, and screen. Firm will be responsible for other equipment and any other costs associated with the presentations.
- Consulting firm will provide client with electronic files of both raw data and final narrative report as well. Firm must provide data in SPSS form or compatible with SPSS or an EXCEL file.
- Consulting firm will deliver results of the perception study to the client no later than January 31, 2017.

SELECTION 4: TECHNICAL PROPOSAL

Narrative and format: The separate technical proposal should address specifically each of the required elements:

1. Executive Summary – The executive summary is intended to highlight the contents of the Technical Proposal and to provide evaluators with a broad understanding of the offeror’s technical approach and ability
2. Staff Qualifications –This section shall include identification of all staff and/or subcontractors proposed as members of the project team, including the duties and responsibilities of each team member. Qualifications and relevant experiences of team members who will work on the project.
3. Staff Capacity and Capability -- This section shall describe the extent of the consultant’s demonstrated understanding of the project including the result(s) intended. Extent to which the consulting firm and project team has personnel, equipment and knowledge to perform the scope of work. The team’s demonstrated ability to maintain open communication with client and respond to any requests in a timely manner, regardless of the physical location of the consultant. A listing of similar projects undertaken and/or similar clients served, including a brief description of the projects; project challenges, methods and results.
4. Quality of Work Plan/Approach Proposed –The work plan description shall include a detailed proposed project schedule (by task and subtask), activities, and/or milestones that will be employed to administer the project. The plan will include the assignment of specific staff members and subcontractors, concentration of effort for each, and expected deliverables. Discuss and justify the proposed approach for each task, and the technical issues that will or may be confronted at each stage on the project.

SELECTION 5: COST PROPOSAL

A separate, signed and sealed, Cost Proposal reflecting the fee structure proposed for this scope of service. Attached is a table or matrix for specific fees/rates or requested breakdown.

Pricing should include:

- **all inclusive project costs for:**
 - Post-campaign study, 10-minute survey
 - Post-campaign study, 15-minute survey
- **a per-survey cost** for each stakeholder group to account for the possibility that the University may want to increase the number of completed surveys throughout the execution of the survey.
- Consulting firm should also consider in their pricing, the possibility of requests from the University for revisions to the final narrative reports as well as further data analysis.

SECTION 6: PROPOSAL SUBMISSION

Questions concerning this solicitation may be e-mailed to the Division of Purchases at gail.walsh@purchasing.ri.gov no later than the date and time indicated on page one of this solicitation. Please reference **RFP #7550913** on all correspondence. Questions should be submitted in a Microsoft Word attachment. Answers to questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information. If technical assistance is required to download, call the Help Desk at (401) 222-3766 or lynda.moore@doit.ri.gov.

Offerors are encouraged to submit written questions to the Division of Purchases. **No other contact with State parties will be permitted.** Interested offerors may submit proposals to provide the services covered by this Request on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the Division of Purchases will not be considered.

Responses (**an original plus eight (8) copies**) should be mailed or hand-delivered in a sealed envelope marked "**RFP# 7550913 Perception Study**" to:

RI Dept. of Administration
Division of Purchases, 2nd floor
One Capitol Hill
Providence, RI 02908-5855

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other State locations or those not presented to the Division of Purchases by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed, or emailed, to the Division of Purchases will not be considered. The official time clock is in the reception area of the Division of Purchases.

RESPONSE CONTENTS

Responses shall include the following:

1. A completed and signed three-page R.I.V.I.P generated bidder certification cover sheet downloaded from the RI Division of Purchases Internet home page at www.purchasing.ri.gov.
2. A completed and signed W-9 downloaded from the RI Division of Purchases Internet home page at www.purchasing.ri.gov.
3. **A separate Technical Proposal** describing (1) Staff Qualifications, (2) Staff Capacity and Capability (3) Quality of Work Plan and Suitability of Approach/Methodology

4. Executive Summary – The executive summary is intended to highlight the contents of the Technical Proposal and to provide evaluators with a broad understanding of the offeror’s technical approach and ability
5. Staff Qualifications –This section shall include identification of all staff and/or subcontractors proposed as members of the project team, including the duties and responsibilities of each team member. Qualifications and relevant experiences of team members who will work on the project.
6. Staff Capacity and Capability -- This section shall describe the extent of the consultant’s demonstrated understanding of the project including the result(s) intended. Extent to which the consulting firm and project team has personnel, equipment and knowledge to perform the scope of work. The team’s demonstrated ability to maintain open communication with client and respond to any requests in a timely manner, regardless of the physical location of the consultant. A listing of similar projects undertaken and/or similar clients served, including a brief description of the projects.
7. Quality of Work Plan/Suitability of Approach/Methodology –The work plan description shall include a detailed proposed project schedule (by task and subtask), activities, and/or milestones that will be employed to administer the project. The plan will include the assignment of specific staff members and subcontractors, concentration of effort for each, and expected deliverables. Discuss and justify the proposed approach for each task, and the technical issues that will or may be confronted at each stage on the project.
8. **A separate, signed and sealed Cost Proposal** reflecting the hourly rate, or other fee structure, proposed to complete all of the requirements of this project. Proposed budget presented as noted earlier.

In addition to the multiple hard copies of proposals required, Respondents are requested to provide their proposal in **electronic format (CD-Rom, disc, or flash drive)**. Microsoft Word / Excel OR PDF format is preferable. Two electronic copies are requested (One for the State and one for the University) and it should be placed in the proposal marked “original”.

SECTION 7: EVALUATION AND SELECTION

Proposals will be reviewed by a Technical Review Committee comprised of staff from state agencies. To advance to the Cost Evaluation phase, the Technical Proposal must receive a minimum of 60 (85.7%) out of a maximum of 70 (100%) technical points. Any technical proposals scoring less than 60 points will not have the cost component opened and evaluated. The proposal will be dropped from further consideration.

Proposals scoring 60 technical points or higher will be evaluated for cost and assigned up to a maximum of 30 points in cost category, bringing the potential maximum score to 100 points.

The University of Rhode Island reserves the exclusive right to select the individual(s) or firm (vendor) that it deems to be in its best interest to accomplish the project as specified herein; and conversely, reserves the right not to fund any proposal(s).

Proposals will be reviewed and scored based upon the following criteria:

Criteria	Possible Points
Staff Qualifications	15 Points
Staff Capacity & Capability	25 Points
Quality of Work Plan-Suitability of Approach/Methodology	30 Points
Total Possible Technical Points	70 Points
Cost calculated as lowest responsive cost proposal divided by (this cost proposal) times 30 points *	30 Points
Total Possible Points	100 Points

*The Low bidder will receive one hundred percent (100%) of the available points for cost. All other bidders will be awarded cost points based upon the following formula:

$$(\text{low bid} / \text{vendors bid}) * \text{available points}$$

For example: If the low bidder (Vendor A) bids \$65,000 and Vendor B bids \$100,000 for monthly cost and service fee and the total points available are Thirty (30), vendor B's cost points are calculated as follows:

$$\$65,000 / \$100,000 * 30 = 19.5$$

Points will be assigned based on the offeror's clear demonstration of his/her abilities to complete the work, apply appropriate methods to complete the work, create innovative solutions and quality of past performance in similar projects.

Applicants may be required to submit additional written information or be asked to make an oral presentation before the technical review committee to clarify statements made in their proposal.

CONCLUDING STATEMENTS

Notwithstanding the above, the State reserves the right not to award this contract or to award on the basis of cost alone, to accept or reject any or all proposals, and to award in its best interest.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

The State may, at its sole option, elect to require presentation(s) by offerors clearly in consideration for award.

The State's General Conditions of Purchase contain the specific contract terms, stipulations and affirmations to be utilized for the contract awarded to the RFP. The State's General Conditions of Purchases/General Terms and Conditions can be found at the following URL: <https://www.purchasing.ri.gov/RIVIP/publicdocuments/ATTA.pdf>

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COST PROPOSAL

Bidder:

Legal name of entity	

Address (street/city/state/zip)	
_____	_____
Contact name	Contact email
_____	_____
Contact telephone	Contact fax

1. BASE BID PRICE – All Inclusive Project Cost with 10 MINUTE SURVEY

The Bidder submits this cost proposal to perform all of the work (including labor and materials) described in the Technical Proposal with a post-campaign study, 10-minute survey:

\$ _____
 (base bid price *in figures* printed electronically, typed, or handwritten legibly in ink)

 (base bid price *in words* printed electronically, typed, or handwritten legibly in ink)

2. BASE BID PRICE – All Inclusive Project Cost with 15 MINUTE SURVEY

The Bidder submits this cost proposal to perform all of the work (including labor and materials) described in the Technical Proposal with a post-campaign study, 15-minute survey:

\$ _____
 (base bid price *in figures* printed electronically, typed, or handwritten legibly in ink)

 (base bid price *in words* printed electronically, typed, or handwritten legibly in ink)

3. Alternate: PER-SURVEY COST

	10-Minute Survey			15-Minute Survey		
	Online	Phone	Other	Online	Phone	Other
Alumni						
Prospective Students						
Opinion Leaders						
Current Students						
URI Staff						

Date: _____

BIDDER

 Name of Bidder

 Signature in ink

 Printed name and title of person signing on behalf of Bidder