

**YOUNGSTOWN STATE UNIVERSITY
REQUEST FOR PROPOSAL**

Date Issued: November 18, 2020

Due Date/Time: December 10, 2020 2:00 PM

RFP#21-110220 – YSU Market Research and Brand Planning

Youngstown State University (YSU) is seeking qualified consulting firms for YSU market research and brand planning, in accordance with the terms, conditions and requirements set forth in this Request for Proposal (RFP).

Proposals must be received by the due date/time specified above at the location below. Proposals received after the due date/time may be returned unopened to the Vendor.

Sign and deliver proposal, cover sheet, and schedules to:

Procurement Services
Youngstown State University
One University Plaza
Youngstown, Ohio 44555
Phone: 330-941-3117
Attention: David McCracken
Email: procure@ysu.edu
No Fax or Email Bids Permitted

Envelopes must be sealed and designated- RFP#21-111820 – YSU Market Research and Brand Planning

Note:

1. No public proposal opening will be held due to the complexity of responses and need for committee review.
2. Completed proposal packages need to be received via a packet that includes an original printed hard copy and a flash drive. Emailed copies are not acceptable.

By signing this document I am agreeing, on behalf of my firm, to the RFP instructions and terms.

Submitted by: Company_____

Authorized Signature_____

Name_____

(Printed Name)	(Title)	(Date)
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RFP Timeline and Schedule

- **RFP ISSUED:** November 18, 2020
- **NOTIFICATION OF INTENT TO BID:** November 20, 2020 by 2:00 PM EST (Send email to procure@ysu.edu)
- **RFP QUESTIONS DUE:** December 1, 2020 by 2:00 PM EST
- **RESPONSES TO QUESTIONS:** December 3, 2020 by 2:00 PM EST
- **RFP CLOSING DATE:** December 10, 2020 by 2:00 PM EST
- **PRESENTATIONS for FINALISTS (Virtual Meeting):** Week of December 21st and 28th, 2020
- **SELECT VENDORS/NEGOTIATE CONTRACT (on or around):** January, 2021

About YSU

YSU, an urban research University, emphasizes a creative, integrated approach to education, scholarship, and service. YSU places students at its center; leads in the discovery, dissemination, and application of knowledge; advances civic, scientific, and technological development; and fosters collaboration to enrich the region and the world.

YSU consists of the College of Graduate Studies and six undergraduate colleges: the Williamson College of Business Administration; the Beeghly College of Education; the College of Creative Arts & Communication; the Bitonte College of Health and Human Services; the College of Liberal Arts and Social Sciences; and the College of Science, Technology, Engineering, and Mathematics. Degrees offered include associate, bachelors, masters, and doctorate.

YSU is located on a 145-acre campus near downtown Youngstown, Ohio and is equidistant (approximately 60 miles) from both Pittsburgh and Cleveland. Fall 2018 enrollment was 12,731. More information about YSU is available online at [Youngstown State University](http://www.ysu.edu).

RFP Background

This Request for Proposal (RFP) is issued by the Youngstown State University to obtain supplier proposals to be evaluated for a potential contract award for qualified firms to provide market research and brand planning. Youngstown State has identified alignment of the university image as a focus in its strategic plan. In order to address this priority, Youngstown State University seeks to engage consulting services to assist in refining the university narrative and aligning with the market.

SECTION I Definitions

Relative to this document, and any addenda incorporated therein, the following definitions apply.

Addendum: A written instrument, issued solely by YSU that details amendments, changes or clarifications to the specifications and terms and conditions of this RFP. Such written instrument shall be the sole method employed by YSU to amend, change or clarify this RFP, and any claims (from whatever source) that verbal amendments, changes or clarifications have been made shall be summarily rejected by YSU.

Agreement, Contract or Purchase Order: Award resulting from the RFP or Request for Quotation.

Bidder, Vendor, Awardee, Supplier: Respondent to the RFP or Request for Quotation.

May, Should: Indicates something that is requested but not mandatory. If the Vendor fails to provide requested information, YSU may, at its sole option, either request that the Vendor provide the information or evaluate the proposal without the information.

Proposal, Quotation: Response provided by Vendor.

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Proposal Closing Date: The date and time specified in this RFP by which the quotation or proposal must be received by YSU Procurement Services in accordance with Section II of this RFP. Proposals received after such date and time may not be considered.

RFP: Request for Proposal.

Shall, Must, Will: This indicates a mandatory requirement. Failure to meet mandatory requirements may invalidate the proposal, or result in rejection of a proposal or quotation as non-responsive.

SECTION II **YSU Standard RFP Instructions and Agreement Terms**

Vendors are cautioned to read this entire document carefully and to prepare and submit their response providing all requested information in accordance with the terms and conditions set forth herein. To be considered, vendors must submit a complete response to this RFP in the format detailed by the specifications. Proposals must be dated, signed by an official authorized to bind the Vendor to the terms of the proposal and submitted to YSU in accordance with the instructions, terms and conditions of this RFP.

Youngstown State University reserves the right to:

- Accept or reject any or all proposals, or any part thereof, or to withhold the award and to waive, or decline to waive, irregularities in any proposal when determined that it is in its best interest to do so;
- Hold all proposals for a period of up to ninety (90) days after the opening date and to accept a proposal not withdrawn before the scheduled proposal opening date;
- Waive any informality or technicality contained in any proposal received;
- Waive any minor or major defect in the proposal;
- Conduct discussions with respondents and accept revisions of proposals after the closing date;
- Make an award based upon various selection criteria;
- Request clarification from any Vendor on any or all aspects of its proposal;
- Cancel and/or reissue this RFP at any time;
- Retain all proposals submitted in response to this RFP;
- Invite some, all, or none of the Vendor(s) for interviews, demonstrations, presentations and further discussion;
- Negotiate a possible contract and potentially solicit "best and final offers" from some or all respondents prior to or during this negotiation process;
- Award to one, some, or none of the Vendors who submit proposals.

Proposals received after the time for closing may be considered invalid.

Apart from the contact required for any on-going business at YSU, Vendors are specifically prohibited from contacting any individual at, or associated with, YSU regarding this RFP. Vendor communication shall be limited to the contact named on the cover page of this document.

RFP Terms and Instructions:

1. Agreement Extension: YSU reserves the right to extend any agreement resulting from this RFP beyond the normal expiration date if YSU determines it to be in their best interest and the selected Vendor(s) agrees to the extension.
2. Assignment: Any agreements entered into as a result of this offering may not be assigned by the selected Vendor without the expressed written consent of YSU and the participating members.

Compliance: Vendor warrants that both in submission of its proposal and performance of any resultant purchase order or contract, Vendor will comply with all applicable Federal, state, and local laws, regulations, rules, and/or ordinances.

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3. Confidential Information: Any and all information, the release of which is prohibited by state or federal law or regulation, including but not limited to the protections of the Family Educational Rights and Privacy Act (FERPA), and the Gramm Leach Bliley Act (GLBA) constitutes Confidential Information. Vendor agrees to hold the Confidential Information in strictest confidence. Vendor shall not use or disclose Confidential Information received from or on behalf of University or any of its students, faculty, or staff except as permitted or required by contract or by law, or as otherwise agreed to in writing by University. Vendor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentiality, integrity, and availability of all electronically maintained or transmitted Confidential Information. Service Organization Control (SOC) Audit reports must be available if applicable to this event. Vendor shall abide by the Privacy and Security Rules as set forth by the Health Insurance Portability and Accountability Act of 1996 (HIPAA).
4. Conflicts of Interest and Ethics Compliance: No personnel of Vendor or member of the governing body of any locality or other public official or employee of any such locality in which, or relating to which, the work under this Agreement is being carried out, and who exercise any functions or responsibilities in connection with the review or approval of this Agreement or carrying out of any such work, shall, prior to the completion of said work, voluntarily acquire any personal interest, direct or indirect, which is incompatible or in conflict with the discharge and fulfillment of his or her functions and responsibilities with respect to the carrying out of said work. Any such person who acquires an incompatible or conflicting personal interest, on or after the effective date of this Agreement, or who involuntarily acquires any such incompatible or conflicting personal interest, shall immediately disclose his or her interest to YSU in writing. Thereafter, he or she shall not participate in any action affecting the work under this Agreement, unless YSU shall determine in its sole discretion that, in the light of the personal interest disclosed, his or her participation in any action would not be contrary to the public interest.
5. Ethical Conduct: It is expected that once an agreement is issued, Vendors (awarded or not awarded) will not undertake any actions that might interfere with, or be detrimental to, the contractual obligations of YSU. YSU reserves the right to take any and all actions deemed appropriate in response to unethical conduct by a Vendor. Such actions include, but are not limited to, establishing guidelines for campus visits by a Vendor, and/or removal of a Vendor from YSU's Vendor's list(s).
6. Contact: Apart from the contact required for any on-going business at YSU, Vendors are specifically prohibited from contacting any individual at, or associated with YSU regarding this RFP. Vendor communication shall be limited to the contact named in this RFP document. A Vendor's failure to adhere to this prohibition may, at YSU's sole discretion, disqualify the Vendor's proposal.
7. Evaluation: If an award is made, the Vendor(s) whose proposal, in the sole opinion of YSU, represents the best overall value to YSU will be selected.
8. Findings for Recovery (Ohio Revised Code Section 9.24): Ohio Revised Code (O.R.C.) Section 9.24, prohibits the State from awarding a contract to any Vendor against whom the Auditor of State has issued a finding for recovery if the finding for recovery is "unresolved" at the time of award. By submitting a proposal, Vendor warrants that it is not now, and will not become subject to an "unresolved" finding for recovery under O.R.C. 9.24, prior to the award of any contract arising out of this RFP, without notifying YSU of such finding.
9. Hold Harmless: It is understood that the Vendor, if awarded an Agreement agrees to protect, defend, indemnify, and save harmless YSU from any claims suits or demands for payment that may be brought against it due to the acts errors or omissions of Vendor in providing the services under this agreement..
10. Incurred Expenses: The Vendor, by submitting a proposal, agrees that any costs incurred by responding to this RFP or in support of activities associated with this RFP shall be the Vendor's sole responsibility and may not be billed to YSU. YSU will incur no obligation of liability whatsoever to anyone resulting from issuance of, or activities pertaining to this RFP.
11. Minimum Insurance Coverage's and Requirements:

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The selected Vendor(s) shall obtain and maintain the minimum insurance coverage's set forth below. By requiring such minimum insurance, YSU shall not be deemed or construed to have assessed the risk that may be applicable to the selected Vendor(s). The selected Vendor(s) shall assess its own risks and, if it deems appropriate and/or prudent, maintain higher limits and/or broader coverages.

The selected Vendor(s) is not relieved of any liability or other obligations assumed or pursuant to the contract by reason of its failure to obtain or maintain insurance in sufficient amounts, duration, or types.

Coverages:

A. Commercial General Liability: ISO form CG0001 or its equivalent. Coverage to include:

- Premises and Operations
- Personal Injury/Advertising Injury
- Products/Completed Operations
- Liability assumed under an Insured Contract (including tort liability of another assumed in a business contract)
- Independent Contractors

Limits Required: The selected Vendor(s) shall carry the following limits of liability: [Minimum Insurance Requirements](#).

Additional Requirements:

Commercial General Liability (CGL) must include coverage for liability arising from products-completed operations and liability assumed under an insured contract.

If the CGL insurance has a general aggregate limit, then ISO endorsement CG2504 (03/97 Edition) or its equivalent must be added. The Designated Location(s) General Aggregate Limit must be maintained for the duration of the agreement, and the limit must be twice the minimum required occurrence limit.

The selected Vendor(s) shall name YSU and its Board of Trustees, officers, employees, agents, and volunteers as Additional Insured's on ISO endorsement CG 2026 or its equivalent.

The CGL policy shall contain no endorsement or modification limiting the scope of coverage for liability assumed under a contract or liability arising from pollution.

All Policies:

- Must be written on a primary basis, non-contributory with any other insurance coverage's and/or self-insurance carried by YSU.
- Must include a Waiver of Subrogation Clause.
- May not be non-renewed, cancelled, or materially changed or altered unless thirty (30) days advance written notice via certified mail is provided to YSU.

12. Non-Discrimination: In submitting their proposal, or performing that which results from an award by YSU, the successful Vendor agrees not to discriminate against any employee or applicant for employment with respect to hire, tenure, terms, conditions or privileges of employment or any matter directly or indirectly related to employment because of race, color, creed, religion, sexual orientation, national origin, sex, age, handicap or Vietnam era veteran status. The successful Vendor further agrees that every sub-contract for parts and/or service for any ensuing order will contain a provision requiring non-discrimination in employment as specified above. This covenant is required pursuant to Executive Order 11246, Laws and Regulations of the State of Ohio. Any breach thereof may be regarded as material breach of contract or purchase order.

13. Prohibition of Offshore Outsourcing: The Vendor affirms to have read and understands Executive Order 2011-12K and shall abide by those requirements in the performance of this Contract, and shall perform no services required under this Contract outside of the United States.

[Governor's Executive Order 2011-12K.](#)

The Vendor also affirms, understands, and agrees to immediately notify YSU of any change or shift in the location(s) of services performed by the Vendor or its sub-contractors under this Contract, and no services shall be changed or shifted to a location(s) that is (are) outside of the United States.

The Vendor also agrees to disclose if requested by YSU all of the following:

- The location where all services under this Contract will be performed by any Vendor;
- The location where any state data associated with any of the services the Vendor is performing under this Contract, or seek to provide will be accessed, tested, maintained, backed-up or stored;
- The principle location of business for any Vendors supplying services under this Contract.

If any Vendor performs services under this contract outside of the United States, the performance of such services shall be treated as a material breach of the contract. YSU is not obligated to pay and shall not pay for such services. If any vendor performs any such services, vendor shall immediately return to YSU all funds paid for those services. YSU may also recover from the vendor all costs associated with any corrective action YSU may undertake, including but not limited to an audit or a risk analysis, as a result of the vendor performing services outside the United States.

YSU may, at any time after the breach, terminate the contract, upon written notice to the vendor. YSU may recover all accounting, administrative, legal and other expenses reasonably necessary for the preparation of the termination of the Contract and costs associated with the acquisition of substitute services from a third party.

If YSU determines that actual and direct damages are uncertain or difficult to ascertain, YSU in its sole discretion may recover a payment of liquidated damages in the amount of two percent of the value of the contract.

YSU in its sole discretion may provide written notice to vendor of a breach and permit the vendor to cure the breach. Such cure period shall be no longer than 21 calendar days. During the cure period, YSU may buy substitute services from a third party and recover from the vendor any costs associated with acquiring those substitute services.

Notwithstanding YSU permitting a period of time to cure the breach or the Vendor's cure of the breach, YSU does not waive any of its rights and remedies provided YSU in this contract, including but not limited to recovery of funds paid for services the Vendor performed outside of the United States, costs associated with corrective action, or liquidated damages.

The vendor will not assign any of its rights, nor delegate any of its duties and responsibilities under this contract, without prior written consent of YSU. Any assignment or delegation not consented to may be deemed void by YSU.

14. Pricing: Vendors are asked to thoroughly explain their pricing structure in their response. YSU reserves the right to negotiate this and other pertinent terms with the selected finalist(s) and this could become one of the selection criteria used in the award process.
15. Proprietary Information: All evaluation criteria for proposals are non-proprietary and subject to public disclosure after contract award. All proposals, except for items reasonably identified by Vendor as trade secrets or proprietary information, are subject to public disclosure under Ohio Revised Code Section 149.43. Vendor shall be solely responsible for protecting its own trade secret or proprietary information, and will be responsible for all costs associated with protecting this information from disclosure.

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16. Provisions: If any provisions in the resultant agreement are held to be invalid, void, or unenforceable, the remaining provisions shall nevertheless continue in full force and effect without being impaired or invalidated in any way.
17. Quality of Service: The successful Vendor(s) must be prepared to furnish continual high quality service to YSU. Failure to do so may be considered just cause for cancellation of the agreement.
18. Right to Set-Off: Upon the occurrence of any default or breach of an Agreement resulting from this RFP by Vendor, University shall have the right to withhold and set-off against any amount otherwise due to be paid to Service Provider, for the amount of any such cost, loss, damage, expense, liability, obligation or claim resulting from Vendor's default or breach of this Agreement. Neither the exercise of, nor the failure to exercise, such right of set-off will constitute an election of remedies or limit University in any manner in the enforcement of any other remedies that may be available to it.
19. Sales Tax: YSU, as an instrumentality of the State of Ohio, is exempt from Ohio sales tax and Federal excise tax, including Federal transportation tax. An exemption certificate will be furnished by YSU upon request.
20. State Law: Any agreement entered into as a result this solicitation will be governed by the laws of the State of Ohio.
21. Use of Data: Vendor agrees that it will keep confidential the features of any technical or proprietary information furnished by YSU and use such items only in the production of items awarded as a result of this inquiry and not otherwise, unless YSU's written consent is first obtained.
22. Contract Term
 - a. The University intends to award multi-year agreements. The length of the agreements will be negotiated by the parties.
 - b. The University maintains the right to terminate this agreement and any additions upon failure of the Vendor to abide by the terms and conditions of the agreement and performance specifications. The University will give sufficient notice to correct all outstanding issues and deficient performance connected to this agreement. If not corrected in the specified time, the University may notify the Vendor, in writing, of the intent to terminate the agreement. The agreement will be terminated sixty (60) days after notification.
 - c. No subcontracting or assignment of agreement without prior written consent and approval of the University.
23. Revisions to RFP
 - a. In the event that it becomes necessary to revise any part of this RFP prior to the assigned return date, revision will be provided by YSU's Procurement Services, or designee, to all respondents involved in the RFP. Changes in the specifications will be provided to all respondents through an addendum made by Procurement Services.
 - b. YSU will be the sole determinant of whether any revisions/addenda should be issued as a result of any question or other matters, and may extend the proposal deadline, if in YSU's judgment such information significantly amends this solicitation, or makes compliance with the original proposed due date impractical.
24. Selection Criteria
 - a. The selection of the successful vendor(s) for this proposal will be determined solely by YSU. All proposals will be reviewed very closely for areas such as, but not limited to the following:
 - 1) Price proposal (is not the sole determining factor in the selection process)
 - 2) Quality of products/services
 - 3) Qualifications and experiences
 - 4) References

SECTION III
RFP Response Instructions

1. RFP Questions: Vendors must submit questions to Procurement Services via email at procure@ysu.edu. All questions must be submitted via email and include **RFP#21-111820 – YSU Market Research and Brand Planning**. Questions submitted by the deadline will be answered via email and will be sent to all RFP participants.
2. **During the competitive proposal process, up to and including the issuance of an award letter, under no circumstances may a vendor contact other individuals at YSU to discuss any aspect of this inquiry or attempt to influence the process. Failure of a vendor to comply with this protocol may invalidate their proposal response.**
3. Proposal Instructions
 - a. Provide notification of intent to bid via email to procure@ysu.edu no later than November 20, 2020, at 2:00 pm EST.
 - b. Complete the RFP cover sheet (page 1 of this RFP)
 - c. Complete Section IV of this RFP by submitting your responses directly into your proposal.
 - d. Proposal Package Requirements. The following **MUST** be included in the proposal-response package by the proposal due-date/time; failure to do so may invalidate the proposal response:
 - (1) Signed and dated RFP cover sheet.
 - (2) Proposals exactly as specified in this RFP in both hard copy and on a flash drive.
 - (3) Agreement to all terms required within this RFP.

SECTION IV
Proposal Requirements

Supplier proposals need to include:

1. Confirmation that you have reviewed and incorporated YSU's strategic plan into your proposal. YSU's strategic planning website is: <https://ysu.edu/strategic-planning>
2. A minimum of 5 professional references and contact information (name, title, organization, phone number, email) of at least one individual that could be contacted by YSU regarding their professional experience with you.
3. Details regarding your firm:
 - a. What is the background of the firm including size, experience, market position, location and headquarters, and date of founding?
 - b. Explicitly include the staff, their credentials, experiences, and contributions to innovations that will be made available during the entirety of the engagement as well as those who will provide expertise at significant milestones of the engagement.
 - c. How long has the firm been in the marketing and brand planning industry?
 - d. Provide information regarding the stability of the firm considering the possibility of a multi-year engagement.
4. Cost and timing for:
 - a. Section 1, subsections a-g
 - b. Section 2, subsections a-j
 - c. Section 3

Note: If a firm's capabilities limit them from proposing any of the following sections, sub-contracting proposals will also be considered. Partner firms need to be identified as a part of the proposal with specifics as to what they will complete on behalf of the firm and why.

SECTION V
Specification Requirements

The following outlines the scope of work:

1. Market Research
 - a. Internal viewpoint
 - b. Input session with Youngstown State University leadership
 - c. One-on-one interviews with key stakeholder groups
 - d. Secondary research
 - e. Consumer viewpoint
 - f. Focus groups with key stakeholder groups
 - g. Survey methods and privacy
2. Brand Planning
 - a. Brand development
 - b. Test creative with panel
 - c. Comprehensive branding and research report
 - d. Finalize branding
 - e. Outdoor, print, social media and web content alignment
 - f. Brand asset library
 - g. Strategic Marketing Plan development
 - h. Definition of benchmarks and tracking protocols
 - i. Budget analysis
 - j. Resource analysis
3. Impact Research and Benchmarking

Note: See next page for detailed specifications regarding each section.

1. Market Research

- i. Study and report on the impact of the marketplace including competition, best practices, macro-market influences and trends, and a look into the perceptions and attitudes of the target consumer/prospective student groups that will make a final decision to attend Youngstown State University.
 - ii. Research should be conducted utilizing at least three distinct viewpoints: internal, market and consumer, so that it can be determined if the three unique viewpoints align. If they do not, strategic planning should then focus on how marketing initiatives can help align those viewpoints.
 - iii. The alignment of market perception and brand perception should be an underlying theme throughout the market research process. Our goal with this project is to understand our target consumer, their decision process and the perception of Youngstown State University in order to plan our branding, marketing and advertising strategies.
- a. Internal Viewpoint
- i. Determine how Youngstown State University leadership, administration, faculty and key community influencers perceive Youngstown State University and its position in the marketplace. This internal viewpoint should be leveraged against the market viewpoint to determine if there is a misperception in how Youngstown State University currently is positioned or part of a siloed viewpoint that is not reflective of the external viewpoints.
- b. Input Session with Youngstown State University Leadership
- i. This should include senior administration as well as key board members where appropriate. The objective of these input sessions is to gain a clear and explicit understanding of Youngstown State University offerings, the internal perception of the competitive landscape, historical marketing communications, promotional activities, institutional goals, marketing goals and stakeholder perspectives.
 - ii. Youngstown State University will provide any competitor information/SWOT analysis/internal research prior to any meetings. If there is any information not readily available, it will be a topic that will be covered at the beginning of the meeting. The chosen research team would develop a formal agenda and meeting outline and would facilitate the meetings.
- c. One-on-one Interviews with Key Stakeholder Groups
- i. In conjunction with the input sessions, one-on-one interviews with key stakeholders should be conducted. As a tactic, one-on-one interviews are highly conversational and will work to effectively gather management perspectives, front-line perspectives, strategic considerations, as well as stakeholder buy-in and support of the process.
 - ii. The purpose of the interviews would be to understand Youngstown State University's stakeholders' current opinions and points of view regarding the current brand and image of Youngstown State University as well as their thoughts and ideas regarding the future positioning of the institution. Individual interviews conducted should also provide an opportunity to explore key strategic issues and opportunities for organizational growth and development, as well as to solicit any concerns with the strategic direction of the branding effort.
 - iii. Individuals from the following groups should be a part of the one-on-one interviews but not limited to:
 - 1. Senior Executive Staff
 - 2. Faculty
 - 3. Staff
 - 4. Student representatives
 - 5. Alumni

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d. Secondary Research

- i. Conduct research using specific data available from third-parties on market trends, competitor programs and offerings, positioning and any other market conditions relevant to making recommendations. This research would be aggregated and reported to Youngstown State University with supporting analysis.
- ii. The following should be part of the secondary research portion of the project:
- iii. Review and summarize salient brand-related points from existing research including:
 1. EAB
 2. Gray & Associates
 3. Youngstown State University institutional research
 4. Student databases/Internal databases
 5. Other research conducted by, and for, the school
- iv. Examine what methods and messages other regional competitors are utilizing and map out the position of Youngstown State University marketing versus competitors.

e. Consumer Viewpoint

- i. Consumer research aims to gather an in-depth understanding of perceptions, attitudes and behavior, and the reasons that govern such behavior. This is especially important that we, as a University, understand the dynamic of choosing to learn more about Youngstown State University, what prompts the application process, and ultimately why students choose to attend or not attend once accepted.
- ii. Understanding this perception, the influences and decision process will help to craft better messaging to target groups, understand what barriers exist in the enrollment of prospective students, provide better targeting of marketing initiatives, and ultimately provide a path to increasing enrollment.

f. Focus Groups with Key Stakeholder Groups

- i. Qualitative methods investigate the why and how of decision making, not just what, where and when. Smaller but focused samples are more often used than large samples.
- ii. Focus groups should be employed to understand current and desired brand positioning perspectives and to uncover any other issues from the student's perspective.
- iii. We need to find out what spot Youngstown State University currently occupies in the customer's mind, and reveal new ways to approach them in-market. Typically, duplicative focus groups are conducted to determine any bias and increase perspective.
- iv. Due to anticipated budgets and the role of quantitative research immediately following the focus groups, one group per target should be completed. For this, individuals from the following groups should be a part of the research.
- v. It will be important that Youngstown State University seek a mix of individuals that live in our region. These locations will be provided to research firm prior to this stage.
- vi. In total, there should be seven focus groups:
 1. Prospects: High school students
 2. Prospects: Non-traditional students
 3. Browsers and Lost Prospects: Students who requested program info or attended an info session within the last one to two years but did not apply, and accepted applicants who did not enroll at Youngstown State University
 4. Students: Accepted applicants who are currently enrolled at Youngstown State University
 5. Recent Alumni: Recent graduates of Youngstown State University
 6. Other: Students who are currently in, or are recent alumni of, other university or community college programs
 7. Parents: Parents of prospect and current student groups

8. Note: *During selection and participation of focus groups, unique participants should be chosen for the brand development portion of this project.*
- vii. The goal here with focus groups should be a resolution. It is important to uncover what is real and what the facts are. Confirmatory methods are applied to narrow options and concentrate efforts along the optimal path. Narrow questions along with numerical data from a sample of participants that answer the questions should be collected. The numbers should yield an unbiased quantitative result that can be applied to the larger population.
- g. Survey Methods and Privacy
 - i. Youngstown State University will rely on the consultant to choose and execute the surveys for all sections of this project while choosing methods that are of best practice and protect the privacy of the individuals involved. All methods should conform to FERPA regulations.
- h. **Market Research, Key Deliverables:**
 - i. **Summary Report**
 1. Upon completion of subsections **A:G** of the Market Research portion of this RFP, a summary report consisting of methods, participant data and findings will be produced to Youngstown State University for each subsection.
 - ii. **Comprehensive Market Research Report and Presentation**
 1. In addition to the summary reports, a comprehensive report including the market data and findings will be delivered to Youngstown State University in digital and print formats.
 2. Consultant will present findings to key Youngstown State University members for review.

2. **Brand Planning**

- i. Findings from the market research interviews, surveys and focus groups should inform the brand planning and development process.
- ii. The deliverables from this process should be as follows:
 1. Conceptualization and development of several brand ideas
 2. Identification of supporting Youngstown State University value propositions and benefit messages
 3. Focused working sessions with student group and marketing creative team to determine brand look and feel creative
 4. Refinement of all presented creative per focused working session
 5. Development of three to four unique brand concepts and any associated messages or visual assets, including tone, voice and writing samples.
- a. Brand Development
 - i. Utilizing information from the market research, multiple brand creative that includes visual assets, tone, voice and writing statements should be developed and presented to the marketing team.
 - ii. At this point in the process, the presentation is only for minor refinement and visual standard compliance.
 - iii. We want to ensure that the process is objective to the research and that the panel testing helps to inform the final brand creative.
- b. Test Creative with Panel
 - i. In order to determine the validity and resonance of the branding concepts, a panel review should be employed to test preference and effectiveness after the creative concepts have been finalized.
 - ii. This panel should be comprised of students, faculty, parents and alumni.
 - iii. The panel groups should be recruited during the focus groups and phone surveys and utilized during the process as needed.

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- c. Comprehensive Branding and Research Report
 - i. All data, data inferences, insights and verbatim from one-on-one interviews, focus groups and the panel will be used to create one comprehensive report.
 - ii. This report will serve as the benchmark for future marketing efforts and subsequent research.
- d. Finalize Branding
 - i. An executive summary of the comprehensive report will be used to finalize the creative brand deliverables for the re-positioning of Youngstown State University.
 - ii. This includes all elements needed for the execution of the strategic marketing plan.
- e. Outdoor, Print, Social Media and Web Content Alignment
 - i. As part of the brand development process, we would like examples of outdoor, print, social media and web content alignment to the brand assets.
 - ii. This should include working examples and templates to be used in the future by our design teams.
- f. Brand Asset Library
 - i. All brand creative should be compiled into a digital library and made accessible to Youngstown State University.
 - ii. This includes logos, messages, visual elements, print, outdoor, web and social media examples.
- g. Strategic Marketing Plan Development
 - i. Research, goals and budget should be used to determine the best marketing mix and a formal strategic marketing plan.
 - ii. Youngstown State University requires a written, executable marketing plan for use in 2021 and beyond.
- h. Definition of Benchmarks and Tracking Protocols
 - i. Youngstown State University, along with the consultant, would establish appropriate goals and benchmarks against which marketing communication efforts will be measured.
 - ii. These benchmarks would be used to implement tracking protocols that would define goals, gauge achievement to them, and provide an opportunity for further feedback as the marketing plan is executed.
- i. Budget Analysis
 - i. Develop a budget analysis with variable spending amounts for designated market locations.
 - ii. Budget should suggest media spending allocations based on target audience profiles and demographic location.
 - iii. In reference to variable spending, there should be breakpoints of spend amounts to represent low, medium and high spends and potential market penetration.
- j. Resource Analysis
 - i. Conduct a resource analysis of the Youngstown State University Marketing and Communications department and related marketing entities.
 - ii. Review size, structure, resources and responsibilities and vehicles of communication (social media, web, mobile).
 - iii. Research comparable colleges to determine proper and effective staffing and structure based on similar enrollment and size.
 - iv. Make recommendations to help best serve the college and the community while identifying additional resources if needed to execute the proposed marketing plan.
- k. Brand Planning Key Deliverables:
 - i. Strategic Marketing Plan and Presentation

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1. An executive summary of the strategic marketing plan, including brand creative, budget proposals, target demographics, benchmarks and tracking protocols will be presented to Youngstown State in digital and print formats.
2. Consultant will present findings with key Youngstown State University members for review.
- ii. Brand Asset Library
 1. All brand assets must be accessible to Youngstown State University in a digital library.

3. Impact Research and Benchmarking

- i. To measure the impact of the market research and brand development, Youngstown State University is asking for an additional cost proposal to conduct a smaller research report at a designated future time period.
- ii. This research should be conducted to measure the impact of the strategic marketing plan.
- iii. A second report with findings will be provided to the stakeholders of Youngstown State University, including the Board of Trustees and the Marketing and Communications team.