

Request for Proposals

Brand Visual Identity Initiative

Project Number: 234_041919

Advertisement & RFP issued to Vendors:	5/3/19
Last day for Submitting Written Questions:	5/20/19
Proposals due to UCR:	5/31/19
Notifications to Finalists (Top 3):	6/7/19
Presentation by shortlisted Companies:	6/12-6/17/19
Vendor Selection:	6/28/19

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SECTION 1 – OVERVIEW

The University of California, Riverside (referred to as “the University”) aims to develop a new Visual Identity that:

- Reflects UC Riverside’s new brand strategy, positioning, and pillars
- Can be deployed in print, web, mobile, social, apparel and products
- Can successfully be adapted for the University’s colleges, schools, co-branding, sub-brands, and University affiliations
- Also updates and modernizes the University athletics visual identity
- Develop assets and guidelines reflecting the new identify for use by campus partners
- Will set the stage for future integrated creative campaigns

SECTION 2 – EXISTING CONDITIONS

2.1 ABOUT THE UNIVERSITY

The University of California, Riverside is one of 10 universities within the prestigious University of California system, and the only UC located in Inland Southern California. Widely recognized as one of the most ethnically diverse research universities in the nation, the University currently hosts about 24,000 students, with 1,000 instructional faculty, and 5,500 staff. The campus is in the midst of a tremendous growth spurt with new and remodeled facilities coming on-line on a regular basis. We are located approximately 50 miles east of downtown Los Angeles. The University is also within easy driving distance of dozens of major cultural and recreational sites, as well as desert, mountain and coastal destinations.

University of California, Riverside is America’s fastest-rising ranked university. By nearly every notable metric – including rankings, enrollment, research funding, philanthropy, student success and others – the university is significantly growing by size, performance, and impact.

UC Riverside is going through a multi-year process of refining and modernizing its brand identity. The university recently completed its Brand Messaging Initiative, which included a robust research and discovery phase, insights on its core audiences, competitor analysis, a new brand strategy and platform, and messaging assets. Now that the Brand Messaging Initiative has been successfully completed and deployed, UC Riverside’s next phase is to update its visual identity – both for the main campus and for its Athletics program.

The last significant visual identity work at UC Riverside was completed in 2006, before social media, smartphones and tablets, online video, and other technologies became commonplace. In addition, since that time the university has significantly changed in size, reputation, research performance, and recognition in the American higher education landscape.

The time has come for UC Riverside's visual identity to align to its new brand strategy and reflect its standing as one of the country's truly unique research universities – which features a combination of student success, diversity, mission-centered culture, research prominence, and faculty expertise found in few places in the country.

SECTION 3 - SCOPE OF SERVICES

3.1 SUMMARY

The University of California Riverside's University Communications department is seeking to identify and select a consulting firm that has extensive experience in comprehensive brand visual identity assessment, design, and development, and creating visual identity systems with complex, consumer-facing national level organizations.

Project Goals: University Communications is seeking a firm to develop a new visual identity that:

1. Reflects UC Riverside's new Brand Strategy, positioning, and pillars
2. Can be deployed in print, web, mobile, social, apparel, signage, and products
3. Refines and reinforces the university's primary blue and gold color palette and secondary palette
4. Successfully can be adapted for colleges and schools, co-branding, sub-brands, and university affiliations
5. Updates and modernizes the UC Riverside athletics visual identity
6. Develops assets and guidelines reflecting the new Identity for use by campus partners
7. Sets the stage for future integrated creative campaigns

Scope of Work includes:

1. Review existing research and new UC Riverside brand strategy, positioning, messaging toolkit, brand site, and brand book
2. Assess the core University visual identity assets (print, online, apparel, signage, and products)

3. Assess the University Athletics' visual identity assets (print, online, apparel, signage, and products)
4. Create a new visual identity system and assets (for both the main University identity and that of UCR Athletics), that addresses points 1-7 above
5. Develop tools for roll out and implementation (in collaboration with in-house design team)

University Communications has defined these supplier minimum and preferred requirements:

Supplier Minimum Requirements

- a. Five (5) years' operating as a design agency.
- b. Five (5) years' experience developing and designing logos.
- c. Five (5) years' experience creating brand architecture systems.

Preferred Requirements

Five (5) years' experience working with higher education and athletic organizations on branding and marketing efforts.

Other Supplier Considerations:

- a. **Project Target:** The total target including supplier travel and tax is \$125,000 - \$150,000.00
- b. University will consider working with more than one vendor and would consider proposals for either only the general university or athletics visual identity work.
- c. Selected supplier will visit the campus or have at least two in-person meetings with UCR during project
- d. Suppliers should include references and/or client list

3.2 SCOPE PROCESS INCLUDES

1. Discovery
 - a. Review all existing research and outputs from recently-completed Brand Messaging Initiative (vendor must primarily use existing discovery assets to align with recent messaging work and to remain on budget)
 - b. Assessment of existing design identity and assets
2. Design
 - a. Multiple rounds of review
 - b. Adequate time to share with range of campus partners
3. Final decision on direction by UC Riverside
4. Create guidelines and campus assets in collaboration with in-house design team

5. Consult with internal stakeholders at each stage of the process.

3.3 Exclusions (not included):

- Changes to the UCR team name of the Highlanders
- Changes to the primary color palette
- Changes to the University’s Scotty mascot

3.4 Contract Details:

This will be a new, one-year, fixed price contract, with a possibility for a one-year extension. University stakeholders include: Admissions, Student Affairs, Athletics, Advancement, Deans, and the Provost / Chancellor’s Office.

SECTION 4 – PROPOSAL SUBMISSION INSTRUCTIONS

4.1 OVERVIEW

The purpose of this Request for Proposal to obtain information as complete as possible to enable the University to determine which supplier is best able to meet all stated requirements of this RFP. Any statements made by prospective suppliers must be complete and accurate. Omission, inaccuracy, or misstatement may be sufficient cause for rejection of your proposal.

4.2 SCHEDULE

The University will make every effort to adhere to the schedule below. However, the University reserves the right to modify these activities and dates.

No	Activity	Date
1	Issuance of RFP	5/3/19
2	Deadline to Submit Questions/Inquiries (5:00 pm Pacific). Please submit questions early in the process, if possible.	5/20/19
3	Proposals/ Responses Due (5:00 pm Pacific)	5/31/19
4	Notifications of top three Finalists (Shortlist)	6/7/19
5	Presentation by shortlisted Companies	6/12 – 6/17
6	Award Notification	6/28/2019
7	Work Begins	7/29/2019
8	Visual ID Direction Decided	4/1/2020
9	Roll out assets completed and deployed	6/1/2020

4.3 PROCUREMENT OFFICER

The University has designated a Procurement Officer (listed below) who is responsible for conducting this procurement. All inquiries, concerns, or clarifications regarding this procurement must be submitted to this individual only.

Kathy Ensign
Procurement Analyst, Procurement Services
E-Mail: Katherine.ensign@ucr.edu
Office: 951.827.3007

The University of California ("UC") will make any changes, additions, or deletions to the RFP in the form of amendments electronically. UC will not be responsible for failure of any prospective Supplier to receive such amendments. All amendments will become part of the RFP.

It is the Supplier's responsibility to read the entire RFP document, including any attachments, references and amendments, and to comply with all requirements listed herein.

4.4 ELECTRONIC SUBMISSION

All proposals MUST be received no later than the date and time indicated in the Schedule in Section 4.2. Prospective Suppliers are strongly encouraged to complete and submit proposals well before the RFP due date. Proposals submitted after the specified closing time will be rejected.

This solicitation, the evaluation of proposals, and the award of any resulting contract will be made in conformance with applicable UC policies and California law. UC reserves the right to withdraw this RFP at any time. All documents submitted to UC in response to this RFP will become the exclusive property of UC and will not be returned.

Bids must follow the format specified in the RFP. The submission of a Proposal confirms that it has been issued and reviewed by an individual authorized to enter into contracts on behalf of Prospective Supplier.

4.6 QUALIFICATION CONTENTS AND REQUIREMENTS

Each Prospective Supplier shall submit a proposal to include the following attachments.

Attachment A – Company Data

Attachment B– Capability Statement and Minimum Qualifications (Include resumes and/or bios in this section.)

Attachment C – Execution Plan (Proposal relative to scope/statement of Work)

Attachment D – Portfolio Samples: Digital portfolio featuring range of work comparable to scope in this RFP (minimum 3 clients)

Attachment E – Cost Proposal

SECTION 5 – COMPANY QUALIFICATIONS CONTENTS

5.1 ATTACHMENT TEMPLATES

This RFP contains attachments, which outline the proposal submission requirements. Prospective Suppliers shall use the required formats and NOT create their own attachments, or edit the format of the attachments (font type, font size, etc.)

5.2 COMPANY DATA (ATTACHMENT A)

The Prospective Supplier must complete all information requested in this Attachment. This document requests information on the following items:

- Contact information
- Signature (of a person authorized to contractually obligate the company)
- Acknowledgement of any and all addenda released by the University
- Certifications of Responsibility
 - To be considered responsible, at a minimum, Prospective Suppliers must be presently engaged in providing the services similar to those required in this RFP, must have appropriate insurance, and must be capable of performing the services outlined in this RFP. The University, in its sole discretion, may reject any qualification in which the Consultant does not meet the Certifications.

5.3 CAPABILITIES AND MINIMUM QUALIFICATIONS (ATTACHMENT B)

- a. Capability Statement -- The purpose of the Capability Statement is to illustrate the Supplier's unique capabilities that sets them apart from all other suppliers. Prospective suppliers should describe their characteristics, experiences, and any other relevant information that demonstrate their skills and abilities that would contribute to their success as a supplier at the University.
- b. Minimum Qualifications -- The University, in its sole discretion, reserves the right to determine if a Supplier meets the minimum eligibility standards, to determine whether a proposal is responsive, and to select a supplier which best serves its objectives. Minimum Standards:
 - Have at least 5 years of company experience successfully delivering similar type services and of the same complexity for clients, preferably with experience in higher education, State Government, national nonprofit organizations, and/or Athletics enterprises.
 - Provide resumes or bios, not to exceed 3 pages each, of all personnel that will be directly assigned to the University's project to execute the services. Personnel should have the demonstrated success in delivering similar services, and have completed at least 3 comparable projects.

5.4 EXECUTION PLAN (ATTACHMENT C)

The purpose of the Execution Plan Section is to demonstrate to the University that the successful supplier can visualize their overall approach relative to the listed scope of work. An Execution Plan should be developed around fulfilling the University's requirements within the known constraints of this service (i.e. cost, time, resources, quality, expectations, etc.).

5.5 Portfolio Review (Attachment D)

All vendors submitting proposals should provide a digital portfolio featuring a range of work for multiple clients (minimum 3) comparable to the scope of work outlined in this RFP.

5.6 COST PROPOSAL (ATTACHMENT E)

Suppliers must provide sufficient detail in the cost proposal to determine price reasonableness and your understanding of the project. For the Cost Proposal, we want to understand your approach and staffing plan for the project. We need to know your pay rate in case we increase or decrease the project scope. We require an estimate of hours by the labor category.

SECTION 6 – PROPOSAL EVALUATION

6.1 OVERVIEW

Proposals will be evaluated and scored based on the following criteria:

Evaluation Category	Weight
Attachment B: Capability Statement and Minimum Qualifications should include the resumes and/or bios)	25%
Attachment C: Execution Plan (Proposal relative to Statement of Work)	35%
Attachment D - Portfolio Review	15%
Attachment E - Cost Proposal	25%

6.2 RESPONSIVENESS

The University shall only consider and evaluate proposals from responsive Prospective Suppliers. To be considered responsive, at a minimum, Prospective Suppliers must complete and submit all of the required information that is requested in this RFP and its Attachments, and must submit the proposal by the response deadline as identified in this RFP. Any proposal that is unsigned, improperly signed, conditional, illegible, obscure, contains arithmetic errors, erasures, alterations, or irregularities of any kind, may be marked as non-responsive. The University reserves the right to contact any Prospective Supplier to clarify any information in its Proposal, to request additional information, or to conduct additional investigation not outlined in this RFP. Prospective Suppliers that do not, or cannot provide the requested information may be considered non-responsive.

6.3 PROPOSAL EVALUATION

An Evaluation Committee will be asked to independently review and score the responses to one another based on a 1, 5, 10 scale. A “10” represents that the item being evaluated is dominantly greater (or has more value) than the average. A “5” represents that the item being evaluated is about average (or there is insufficient information to make a dominant decision). A “1” represents that the item being evaluated is dominantly below the average. Once each member has individually scored each item, they will be tabulated to obtain the final average score for each of the evaluated criteria.

Basis of Award – Proposals will be evaluated on the following basis:

1. Management/Technical Approach:
 - a. Project Management
 - b. Ability to implement and deliver the project in a timely manner (Execution Plan)
 - c. Clarity and reasonableness of proposed method of providing services
 - d. Demonstrated knowledge of the services required by the Scope of Services
 - e. Availability of qualified staff to support the project
2. Compliance to RFP Requirements:
 - a. **Acceptance of UC Terms & Conditions (Exhibit 1)**, Data Security & Privacy (Exhibit 2)
 - b. General quality and adequacy of response
 - i. Completeness
3. Past Experience and demonstrated expertise in this particular field
 - a. Qualifications of personnel to be assigned to the project
 - b. Past experience in providing similar services to organizations of comparable size and complexity
 - c. Demonstrated knowledge and experience in working with higher education institutions, nonprofit organizations, and/or athletics enterprises
 - d. Experience facilitating consensus among key stakeholders
 - e. Experience working with senior level clients
 - f. Portfolio of comparable work
 - g. Any value-added services, program features, or capabilities included as part of the proposal response

4. Cost
 - a. Total Firm Fixed Priced- The Project Target, including Travel Costs and Tax is: between \$125,000 - \$150,000. **(Tax rate for the campus is 8.75%)**
 - I. Hourly rate(s)
 - II. Estimated number of hours required to complete work
 - III. Travel & Living Expense (T&E) (if applicable)

6.4 AWARD

The University expects to award the contract to the best-valued Prospective Supplier, whose proposal is responsive, and is the most advantageous to the University, as determined by the University in its sole discretion.

SECTION 7 – ADDITIONAL CONDITIONS AND REQUIREMENTS

7.1 CANCELLATION OF THE RFP

At any time during the RFP process, UCR reserves the right to reject any or all responses to this RFP, cancel the RFP, amend the RFP, and to waive non-material irregularities in any response received.

7.2 QUESTIONS, INQUIRIES, CLARIFICATIONS, REQUESTS FOR INFORMATION

Prospective Suppliers are expected to promptly review this RFP, including all of the attachments, exhibits, and addendum. If there are any discrepancies, inconsistencies, or omissions, the Supplier shall immediately notify the designated Procurement Officer. If the Supplier has questions or requires clarification of the scope of work, the intent, or any aspect of this RFP, they shall immediately notify the Procurement Officer. All questions, inquiries, clarifications, must be emailed by the Due Date for questions identified in the Procurement Schedule.

7.3 ADDENDA

The University may issue addenda to make changes to the RFP, provide clarification to information stated within the RFP, or to respond to any questions. All addenda shall become part of this RFP, and must be considered by the Supplier in its proposal.

7.4 PROPOSAL PREPARATION COSTS

Prospective Suppliers will bear all costs incurred in the preparation and submission of the Proposal and related documentation. If Prospective Supplier is the apparent awardee, Prospective Supplier will bear its own costs in negotiating and finalizing an agreement with the University.

7.5 FIRM PROPOSALS

Prospective Supplier's pricing/fees/costs in response to this RFP shall remain firm for a period of 90 days from the RFP due date.

7.6 UNIVERSITY'S RIGHT TO NEGOTIATE

The University reserves the right to negotiate each and every aspect of any offer received in response to this RFP, and to reject or negotiate additional terms and conditions offered by the apparent successful Prospective Supplier prior to the execution of a contract. In addition, the University may require additional cost and pricing data or documentation prior to award of any contract in whole or in part which may result from this RFP.

The University may waive irregularities in a Proposal provided that, in the University's judgment, such action will not negate fair competition and will permit proper comparative evaluation of proposals. The University's waiver of an immaterial deviation or defect will not modify the RFP documents or excuse Prospective Supplier from full compliance with the RFP specifications in the event a contract is awarded to Prospective Supplier.

7.7 GUIDELINES

Prospective Supplier must operate within the guidelines of all federal, state, and local labor laws and codes. Prospective Supplier must possess all trade, professional or business licenses as may be required by the work contemplated by this RFP.

7.8 CALIFORNIA PUBLIC RECORDS ACT

All proposals, supporting materials and related documentation are subject to the California Public Records Act. Marking a document "confidential" or "proprietary" may not prevent its release.

7.9 COLLUSION AMONG PROSPECTIVE SUPPLIERS

Collusion among Prospective Suppliers is not allowed. If there is proof of collusion among Prospective Suppliers, UC will reject all proposals involved in the collusive action.

7.10 COMPLAINTS AND PROTESTS

Controversies over the solicitation or award of a contract are covered by University of California Policy BFB-BUS-43 (Purchases of Goods and Services; Supply Chain Management), which is posted online. The policy requests that a party with a complaint regarding the solicitation or award of a contract first attempt to resolve the complaint with the University procurement officer involved in the transaction.

If the complaint cannot be resolved informally, the complainant may file a formal written protest with the University contracting officer, who will escalate this protest to the proper authority. Complainants should use the phrase "Formal Bid Protest" in the communication's subject line to indicate the intent to escalate the complaint. Under University of California policy, formal written protests must be filed promptly (and in any event within two calendar weeks after the complainant knows or should have known the facts giving rise to the protest).

7.11 NON-SOLICITATION

Unless specifically agreed in writing by the parties to this Agreement, neither party shall employ any employee of the other during the term of any contract resulting from this RFP or for a three-month period following the termination or expiration of same.

7.12 ERRORS AND OMISSIONS

Prospective Supplier should immediately notify the University of any apparent discrepancy, error, omission, ambiguity or lack of clarity in this RFP, any attachments, references and amendments. Prospective Supplier will not be entitled to compensation for any error or discrepancy that appears in this RFP.

7.13 AGREEMENT FORM

Any Agreement awarded pursuant to this RFP will be in writing and incorporate the RFP requirements and specifications, as well the contents of the Prospective Supplier's Proposal as accepted by the University.

ATTACHMENT A – COMPANY DATA

I) APPLICANT AND CONTACT INFORMATION

Company Name: _____

<i>Name of Project Manager</i>	
<i>Title</i>	
<i>Email</i>	
<i>Telephone</i>	

II) SIGNATURE

This proposal must be signed by the person authorized to contractually obligate the company.

<i>Printed Name</i>	
<i>Signature</i>	
<i>Date Signed</i>	

III) ADDENDA ACKNOWLEDGEMENT

Supplier acknowledges receipt of the following addenda, and has incorporated the requirements of such addenda into the proposal (*List all addenda dates issued for this RFP and initial*):

No.	Date/Initials	No.	Date/Initials
No.	Date/Initials	No.	Date/Initials

IV) CERTIFICATIONS

No	Criteria	Response*
1	The Supplier certifies that it is not currently debarred, suspended, proposed for debarment, or declared ineligible for award by any Public entity.	True / False
2	The Supplier certifies that there is no pending litigation against the Supplier.	True / False
3	The Supplier certifies that it has not had a contract terminated by the University of California for non-performance.	True / False
4	The Supplier certifies that it is not engaged in unresolved disputes or in litigation with the University of California.	True / False
5	The Supplier certifies that it does not have judgments rendered against them for fraud, embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or tax evasion.	True / False
6	The Supplier certifies that it currently has the level of insurance required and can provide current insurance certificates/proof of coverage or certifies that coverage will be in place prior to execution of the Supplier Agreement.	True / False

7	The Supplier certifies that it has an Equal Employment Opportunity policy, and is in compliance with applicable federal law pertaining to Equal Employment Opportunity.	True / False
8	The Supplier certifies that it has reviewed the University’s Policy and procedures relating to Conflict of Interest (BFB-G-39—Conflict of Interest Policy and Compendium of Specialized University Policies, Guidelines, and Regulations related to Conflict of Interest) and does not have a possible conflict of interest with any employee involved in this Qualification and/or ensuing contract. (this Policy and the procedures are posted on the University’s website and are available on request).	True / False

Failure to answer, or answering “False” may be grounds for disqualification. Please attach additional support.

ATTACHMENT B – CAPABILITY STATEMENT AND MINIMUM QUALIFICATIONS

Provide responses to Attachment B, #s 1, 6 - 7 on additional pages.

No	Criteria	Response*
1.	Describe your capabilities to deliver the scope of services	
2.	The Supplier has current and ongoing work comparable in scope and complexity to the Scope of Services described herein.	True / False
3.	The Supplier’s proposed project manager and team have the required experience to deliver services described herein.	True/ False
4.	Supplier has the demonstrated financial stability and resources to provide the University with the services in a timely and professional manner.	True/ False
5.	Confirm the ability to obtain all required insurance coverage (listed in UC Terms and Conditions of Purchase, Article 9) and <u>accept Terms and Conditions</u> as specified.	
6.	The supplier shall present evidence (provide references) that the supplier has been engaged with clients for at least the past five (5) years in providing services as listed in the RFP. At least 3 references must be included stating the name, position and telephone/ email number of a contact person.	
7.	Include resumes and/or bios in this section.	

** Failure to answer, or answering “False” may be grounds for disqualification. Please attach additional support.*

ATTACHMENT C – EXECUTION PLAN

The purpose of the Execution Plan is to allow the Supplier to create a brief roadmap that describes the supplier’s management experience and, in major activities and tasks, how the supplier will meet the University’s expectations as set forth in this RFP. This should be a concise synopsis of the work and approach that will be taken to execute this service.

Please include 2-5 pages for your response to Attachment C.

No	Criteria	Response
1.	Address and build upon the scope of work described herein, demonstrating your knowledge of the University’s requirements.	
2.	Describe how your firm achieves customer satisfaction and communicates between all the parties involved for achieving the best results.	
3.	Describe the project management approach that will be employed for the best possible results.	
4.	Provide the University with any added alternatives or features for the University to consider.	
5	Provide a list of any implementation/post-implementation risks or assumptions that the University should take into consideration	

ATTACHMENT D – PORTFOLIO REVIEW

Digital portfolio featuring range of work comparable to scope in this RFP (minimum 3 clients)

ATTACHMENT E – COST CONSIDERATIONS

Supplier must provide a detailed cost proposal in this section. The cost proposal shall have a breakdown of the key project task and clearly articulate the projected number of hours by project team member, the hour bill rate(s) and names of personnel assigned.

For the Cost Proposal, we want to understand your approach and staffing plan for the project. We need to know your pay rate in case we increase or decrease the project scope.

We require an estimate of hours by the labor category.

The Project Target is \$125,000 to \$150,000.00 (includes all travel, and tax at 8.75%).

		Staff/Pay Rate	# of Hours	Cost Subtotal
1	Review UCR Brand Strategy			
2	Assess UCR’s core and Athletics visual identity assets			
3				
4	Create a new visual identity system and assets for both UCR and for Athletics			
5	Develop tools for rollout and implementation			
6				
7				
	Totals			