

**MONTGOMERY COLLEGE - OFFICE OF PROCUREMENT**  
**REQUEST FOR PROPOSAL (RFP) TITLE:**  
**Strategic Marketing and Brand Strategy Development and Implementation**  
**CLOSING DATE: October 27, 2023 @ 3:00PM Eastern Standard Time**



**ADDENDUM #1**

Issued: October 23, 2023

**PURPOSE OF ADDENDUM:**

- To add the following requirement:

*Any online survey tools used to fulfill the requirements contained in the Request for Proposal, must be compliant with the Montgomery College policy and the law.*

- Replace section 5.2.2 with the following:

*Include in Technical Proposal the following:*

- *Transmittal Letter/Statement of Qualifications*
- *Completed Reference form (Attachment A)*
- *Requirements Checklist (Attachment B)*
- *Conflict of Interest Statement (Attachment C)*
- *Non-Debarment Acknowledgement (Attachment D)*
- *Completed Contractor Information Form (Attachment E)*
- *Subcontractor Listing (if applicable)*
- *Acknowledgement of Receipt of Addenda (if applicable)*

- Replace original Price Proposal with "REVISED PRICE PROPOSAL".
- To provide answers to all questions received by the October 19, 2023 question submittal deadline.

**All other specifications, terms and conditions remain unchanged.**

A handwritten signature in black ink, appearing to read 'Patrick Johnson', written over a horizontal line.

**Patrick Johnson, MBA**  
Director of Procurement

Please **sign** below to acknowledge receipt of this Addendum and return with the proposal. If proposal has already been submitted, acknowledgement should be submitted separately. Failure to return this Acknowledgement of Addendum may deem a proposal nonresponsive.

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**ADDENDUM #1 -continued**

**NOTE:** All proposals MUST BE RECEIVED electronically by 3:00pm Eastern Standard Time (EST) on **October 27, 2023**.

Electronic proposal and addendum or addenda shall be sent to the following email address prior to the submittal deadline date and time: [vendor.proposals@montgomerycollege.edu](mailto:vendor.proposals@montgomerycollege.edu). **No responses will be accepted after this date and time.**

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Company Name

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Authorized Signature

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Date

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Printed/Typed Signature

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**QUESTIONS & ANSWERS**

Question	Montgomery College Answer
Does MC have a contract term established for this solicitation?	No. It is a one-time purchase, to be completed in three phases, along with needed support.
Does MC have a contract budget established for this solicitation? Even a ballpark estimate would be helpful.	Range: \$675,000 - \$1,000,000
Why is now the right time to pursue these activities?	The current brand was launched in 2016 and then additional research was conducted in 2019. It is a good time to research the brand again and see if anything needs to change in marketing and branding materials.
What challenges do you anticipate for this engagement?	We do not anticipate any challenges for this engagement.
Are there any specific KPIs and goals outlined for this project?	We are looking for detailed reporting from the research and updated marketing and brand materials as needed based on the research findings.
What is the current state of the college brand? Are there existing guidelines that the agency will use to maintain consistency?	Montgomery College has a well-established brand. Here are the existing brand guidelines - <a href="https://www.montgomerycollege.edu/offices/advancement-and-community-engagement/communications/creative-services/branding/index.html">https://www.montgomerycollege.edu/offices/advancement-and-community-engagement/communications/creative-services/branding/index.html</a>
When you say brand architecture – are you looking for a new logo/identity system, including a hierarchy strategy and lockups for how the logos for the college’s programs, centers, and other units fit together?	We need to see the results of the brand research portion of this project before decisions can be made regarding other portions of the project.
Will you provide contact information for the stakeholder groups included in the market research? Are there any stakeholder groups that you will not have access to contact information?	Montgomery College will send emails to MC employees, students, and alumni. Their contact information will not be shared with the awarded company. Montgomery College does not have contact information for Montgomery County residents not affiliated with the College. The awarded company needs to secure those contacts themselves.
Are you looking for a comprehensive brand awareness/positioning study? Or should the focus be primarily on prospective students/influencers and the admissions marketing landscape?	We are looking for a comprehensive brand awareness/positioning study.

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Are you seeking market research for WDCE? If so, should that occur in Phase 1 or Phase 3? Who are the primary stakeholders for the WDCE?	We are seeking market research for WDCE in Phase 1. WDCE classes cover a wide variety including career advancement classes, enrichment classes, and youth classes. WDCE also offers English classes for those that speak another language, test prep (such as GED test prep), and many other options.
Your phases include oral presentations to college stakeholders. Can you provide any details about who is included in that group and generally how large of an audience those presentations might include?	There would be multiple presentations. One would be for the Office of Communications (approximately 20 staff members), College leadership (approximately 10 people), and one would be for the Office of Advancement and Community Engagement division (approximately 75 people).
Are you looking for both design and copy for the strategic marketing plan creative deliverables?	Yes, we are looking for both design and copy for the deliverables.
For the strategic marketing plan implementation, do you want to create the same tactics laid out in the past, or are you open to new tactics or omitting some?	We are open to new tactics and revising/omitting tactics as needed.
Is there an incumbent firm that previously handled these types of projects? If so, have they been included in this RFP process? If not, why not?	No.
Is Attachment H required with our proposal, or should that only be completed by a chosen partner?	Attachment H is not a required submittal.
Who are the primary peers and competitors for the college?	Montgomery College considers all other community colleges in Maryland as primary peers. Many students that consider attending Montgomery College also consider attending University of Maryland (any location) or a variety of other four-year universities.
What do you feel is your biggest competitive advantage over your competitors?	Montgomery College offers a high-quality education at an affordable cost.
What internal resources (personnel, content, video, photography, other assets, and the like) exist to support this project?	The Office of Communications staff will assist with this project. Any existing assets can be used and a plan can be put in place to secure new assets too.
What is the makeup of your in-house team, and where are they best suited to support the project and execution?	The Office of Communications consists of the following teams: Marketing, Creative Services, MCTV, and Media Relations. Each area will support the project as needed.
Who will be on the core day-to-day working team for this engagement? The final decision-makers?	The Marketing Director and Creative Services Director will lead day-to-day parts of this project. The Senior Vice President for Advancement and Community Engagement will be the final decision maker.

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Are there any key milestones or dates that should be considered when building the project timeline?	We would like to start the project in January 2024.
What budget or budget range is anticipated for this project? Is the budget all-inclusive of travel and expenses as well as the other items (consultation, production, execution, delivery, follow-up consultation)?	The budget range for this project is \$675,000 - \$1,000,000, and includes all associated expenses.
Will the cost proposals be evaluated as part of selecting the finalists? Or will they stay sealed until after presentations?	In accordance section 4.1.2 (Evaluation Criteria), all submitted price proposals will be evaluated and scored accordingly. In addition, presentations are considered <u>post</u> contract award activity, and not considered in the award of contract.
When will the project commence?	We would like to start the project in January 2024.
How long is the contract for?	Contract is for a one-time purchase; however, completion of all phases is expected to take 2-3 years.
How long do you anticipate/plan for each phase of the project to last?	The time for each phase is to be determined. The full project should take 2-3 years.
What is the meaning of, "Each phase will have its own deliverables and will be a one-time cost" in Section 2.2 Scope of Services?	Each phase includes its own set of deliverables as listed in the RFP. Each phase will have a cost determined and then agreed upon by both organizations.
Should potential vendors price out the work based on each phase?	Refer to REVISED Price Proposal Page.
What insights into MC's branding were drawn/created from the 2019 MC brand study?	The 2019 brand study showed that Montgomery College has a strong, well-established brand. The full research results will be shared with the awarded company.
Is this the branding MC is currently using?	Montgomery College is still using the brand materials that launched in 2016. This has additional details - <a href="https://www.montgomerycollege.edu/offices/advancement-and-community-engagement/communications/creative-services/branding/index.html">https://www.montgomerycollege.edu/offices/advancement-and-community-engagement/communications/creative-services/branding/index.html</a>
The Background states, "In 2019, a brand research study was conducted to gain new insights into MC's branding, and as a result, marketing materials were updated. The College now needs to conduct a marketing and branding strategy refresh." Who/which company conducted the brand research study?	Opinion Works conducted the brand research study.
How big was the team who conducted the brand research study?	Four staff members.

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How big of a team would MC like the proposing vendor to provide for this Strategic Marketing and Brand Strategy Development?	There is not a specific team size in mind. It is more important that the proposing vendor staff have enough hours to allocate for the project.
How many support team members from MC will be staffed to this project?	We will have Office of Communications staff available as needed.
Are there any marketing collateral MC liked to use in the past that it would like to continue to use in the future? Is there a specific form of marketing MC has discovered works best for its institution (i.e., traditional media, social media, word of mouth, etc.)?	We need to see research results before deciding on what marketing materials to continue to use in the future. Different forms of marketing work best for very specific goals, though we discovered that we need the full marketing mix to be fully effective.
What is MC's goal with rebranding and refreshing at this time? Are you looking to completely do away with the branding that was built in 2019?	The primary goal is to conduct market research, then make changes as needed. We are not looking to completely do away with the branding launched in 2016.
Is there an incumbent vendor for this project?	No.
Are vendors who are new to MC encouraged to bid on this project?	Yes, as long as they meet all mandatory requirements listed in sections 3.1 and 3.2.
Is there a minority business goal MC's is trying to fulfill with this project? Are minority vendors encouraged to submit proposals?	Montgomery College maintains a minority participation goal for all bid opportunities, and minority vendors are indeed encouraged to submit proposals.
How will the success of the market research be measured?	Completed research reports with detailed insights and recommendations listed. Quality data from each target area, and successful presentations about the findings.
Is there a specific outcome or metric the college is targeting with the new marketing and branding strategy?	There is not one specific outcome. We need to see the results of the brand research portion of this project before decisions can be made regarding other portions of the project.
For the "ongoing advice and counsel" specified in the scope of services, what is the expected frequency and duration for these services?	This will be determined at that phase of the project based on input from both organizations.
Are there specific technologies or platforms that the college prefers to be used for conducting surveys and focus groups?	No.
What format is expected for the raw data collected? (CSV, Excel, etc.)	Excel.

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<p>Can you provide additional information about the target audience for the marketing and branding efforts? Are there specific demographics, psychographics, or other criteria that should guide the development of the brand strategy?</p>	<p>Montgomery College is very diverse. The Office of Institutional Research and Effectiveness provides reports with additional detail - <a href="https://www.montgomerycollege.edu/offices/institutional-research-and-effectiveness/reports-and-resources.html">https://www.montgomerycollege.edu/offices/institutional-research-and-effectiveness/reports-and-resources.html</a></p>
<p>Could you please specify the budget allocation for each of the three project phases and the overall budget for the entire project? What is the expected period of performance or timeline for completing all three phases?</p>	<p>Allocated budget by phase is not available. Total project budget range is \$675,000 - \$1,000,000. The time for each phase is to be determined. The full project should take 2-3 years.</p>
<p>For the pricing proposal, are potential vendors to complete both sections for Group A and Group B, where labor costs are fully burdened in the pricing model of Group B for all personnel provided by the proposed vendor? Or would you like Group A to include the labor costs of the vendor team?</p>	<p>Please refer to REVISED Price Proposal.</p>
<p>You mention that the last research was done in 2019. Will we have access to this research when designing the new project?</p>	<p>Yes. The data will be shared.</p>
<p>Could you provide more specifics regarding the “Training and adoption of new/refreshed brand story across campus footprint,” specifically the audience and format you anticipate the training to take?</p>	<p>The awarded company will need to create any brand guide changes and initial print and digital assets. The awarded company needs to train the team on key elements and how to execute them based on the brand guide. In depth training via a virtual session will be needed for the Office of Communications staff. We are also looking for a short pdf guide to share with MC employees collegewide that discusses the new changes.</p>
<p>“Ongoing advice and counsel” and “ongoing enrollment data analysis, review, and presentation,” are listed withing Phase 1 and 2 Deliverables, but the pricing sheet includes a line for hourly rates for these items. Could you please confirm these services will indeed be requested on an ad hoc basis and pricing should NOT be included in the fixed cost for Phase Deliverables?</p>	<p>Ongoing plan implementation, advice and counsel, and enrollment data analysis are included in Group A of price proposal. Refer to “REVISED” Price Proposal.</p>
<p>Do you anticipate a budget allocation for paid media? If so, can you estimate what that might be?</p>	<p>There will not be a budget allocation for paid media as part of this project.</p>

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<p>Regarding helping implement the strategic marketing plan: does the college have marketing staff resources available for the implementation and ongoing management of programs, or do you anticipate the awarded contractor will need to handle those? If you do have staff that we would be training or assisting, could you please describe how many and their general skill sets?</p>	<p>Montgomery College has staff available for the implementation and ongoing management of programs. The Marketing Team consists of four experienced professionals and the Creative Services Team consists of seven experienced professionals. The awarded company will need to create any brand guide changes and initial print and digital assets. The awarded company needs to train the team on key elements and how to execute them based on the brand guide.</p>
<p>With the emphasis on the order of the proposal, I would like to clarify where we should be including our approach to the scope of services listed. Would you like this in the statement of qualifications (section 5.2.4) or would you like it to have its own section?</p>	<p>Approach is not a required submittal in response to this solicitation.</p>
<p>What is the proposed length of this contract? Are there any extension options?</p>	<p>Contract is for a one-time purchase; however, completion of all phases is expected to take 2-3 years.</p>

\*\*\*\*\*END OF QUESTIONS & ANSWERS\*\*\*\*\*



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**REVISED**

**SECTION 6 – PRICE PROPOSAL**

The prices offered on the Price Proposal must include all charges, costs, and fees incurred in the delivery of this procurement. No allowance will be made at a later date for additional charges due to the Offeror's omission.

Line Item	Description	Total Price
01	All deliverables contained Phase I	\$
02	All deliverables contained Phase II	\$
03	All deliverables contained Phase III	\$
<b>GRAND TOTAL:</b>		<b>\$</b>

**OPTION ITEM**

Description	Hourly Rate**
Post deliverable support, if needed. Support would not commence until all deliverables have been completed.	\$ _____/HR

\*\*If multiple labor categories exist, please provide hourly rates for each category, under separate cover.

**Montgomery College is tax exempt. Certification provided upon request.**

By signing below, your firm agrees to provide said goods and/or services as specified and that those goods and/or services shall be provided or performed in accordance with the bid specifications, stipulations and terms and conditions specified and that your firm has read and agrees to the College terms, conditions, stipulations, and specifications and any College approved or authorized exceptions and that your firm will adhere to said terms and conditions in any contract resulting.

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Authorized Signature and Date