



Request for Proposals for Communications/Public Relations Services
Date Issued: February 24, 2014

I. INTRODUCTION

Background

Chapman University, a highly ranked private institution located in Orange, California, seeks to generate measurable awareness among identified audiences of the University's growth in health- and earth-science programs. In addition, Chapman seeks to encourage interest and participation in financial support of identified science initiatives, including funding for anticipated physical growth. The University has grown from a small liberal arts college in at the turn of the century to a vigorous mid-sized multi-faceted university, welcoming 7,000 students from throughout the United States and around the world. More than 1,600 students are involved in graduate-degree programs, many of which are located within the University's Schmid College of Science and Technology. In 2013, the University established the first School of Pharmacy in Orange County. That program is completing accreditation requirements and anticipates admitting students in Fall 2015. Later this year (June 2014), the University will establish a new College of Health and Behavioral Sciences. To accommodate this growth, the University purchased and renovated more than 166,000 sq feet of space in Irvine, California, to house the Rinker Health Science Campus, and has plans in place to build a state-of-the-art 144,660 sq foot science and technology center as a new home for the Schmid College on the Orange campus. These three schools, coupled with other science-related programs in the university's other six colleges, represent the core focus of anticipated public relations activities.

Chapman University has a 40-person marketing/communications marketing team that includes five public relations professionals with varying expertise. The selected public relations firm should anticipate working closely with identified Chapman personnel to implement a comprehensive integrated communications strategy.

This RFP is soliciting bids from all interested parties for a two-year contract, with the potential for an additional one-year extension.

Request for Proposals

Chapman University (CU) is requesting proposals from interested public relations firms to provide communications and public relations services that will:

- Promote CU as a highly respected university offering strong programs in earth and environmental science, allied/applied health sciences, pharmacy, and behavioral sciences.
- Position CU-affiliated faculty as leading and trusted sources of appropriate science information for the media and the public;
- Inspire well-qualified potential donors (individuals, foundations and corporations) to consider providing financial support to the science programs at Chapman University.
- Drive traffic to the CU website and associated social media;
- Grow awareness of Chapman University's reputation and brand; and
- Produce clear measures of success.

The firm submitting the successful proposal is expected to negotiate and enter into a contract with Chapman University.

Term of Contract

CU intends to enter into a contract with a proposer for an initial 2-year term beginning June 1, 2014 and concluding on May 30, 2016. At its sole option, CU may choose to exercise one additional one-year term.

II. Scope of Services

The following provides a general overview of the specific work assignments Chapman University will expect the selected firm to complete. These should not be considered an exhaustive listing of tactics to be employed to meet the goal stated above. Chapman welcomes proposer's recommendations to add strategies and tactics to this list that can further enhance CU's ability to create awareness of its enhanced strength in the sciences.

The agency will need to complete a comprehensive action plan for how the agency would approach each of the categories below; the budget page should itemize anticipated costs for fulfilling expectations.

The Scope of Services includes three major components: Media Relations; Web and Interactive Media; and Reputation and Branding.

1. Media Relations

The anticipated scope of work will include:

- Propose and implement a regional (Southern California) media-relations strategy that elevates the exposure of Chapman University to identified audiences via regional news and media organizations.
- Proactively identify opportunities for media coverage, both locally and regionally, and work to facilitate that coverage.
- Schedule media interviews for identified CU faculty, alumni and supporters to promote Chapman University science programs.
- Develop relevant messaging that can take advantage of current opportunities and events, and that can be used by the CU marketing/communications and fundraising/development teams.
- Propose and facilitate approved media events to promote Chapman University and its science-related programs, faculty, visiting lecturers, alumni and research.
- Draft news releases, advisories and backgrounders to promote science programs, faculty and research at Chapman University, and generate placement of the same with regional news and media organizations.
- Track and respond to stories in the media that might benefit from a response from CU.
- Monitor and report on the effectiveness of CU's own press releases, story pitches and activities.
- Generate measurable increases in media coverage of Chapman University's expanding programs in science.

2. Web Site Usage/Visitation

The anticipated scope of work will include:

- Evaluate and recommend enhancements to the CU web pages associated with science programs and promote those pages appropriately to relevant audiences. CU will monitor traffic to identified pages as a metric for vendor success.
- Assist the University in optimizing relevant pages for search engine viability.
- Develop and implement in close cooperation with the University a robust social media outreach targeting appropriate audiences on multiple social media platforms in a strategized communications flow that emphasizes engagement.

3. Reputation and Branding

Chapman University is well known for its film school, performing arts programs, and historic emphasis on liberal arts. General perception of the University among SoCal residents is very positive, and the University is consistently ranked among the top ten “most trusted brands” in Orange County.

However, its recent expansion into the sciences remains relatively unknown among prospective audiences. The expansion is a deliberate strategy for moving the University onto the national stage, and reflects an institutional commitment to shift from a strictly liberal arts reputation to that of a comprehensive university. At the same time, the University acknowledges its limitations and will focus its growth in the sciences into areas that are more applied than theoretical. More specifically, emphasis will be given to earth and environmental sciences, computer and computational sciences, and health and behavioral sciences. To that end, the University has recruited a respectable number of highly qualified faculty with national reputations in their respective fields.

The anticipated scope of work should include a thorough discussion of the ways in which the vendor can augment the University’s reputation and use the institution’s brand to generate awareness of and preference for the science programs at Chapman. Anticipated outcomes might include establishing CU as a “science and technology thought leader” in Southern California; encouraging/facilitating state and federal support of science programs/projects at Chapman; pursuing corporate and/or foundation partners to co-sponsor science-related events, scholarships or endowed chairs/professorships at Chapman; developing strategic alliances with major players in the disciplines most closely associated with Chapman’s identified areas of strength..

III. Issuing Information

This RFP is issued on behalf of Chapman University. The following individual will serve as the Issuing Officer from the date of release of this RFP until a contract is awarded:

Mark Woodland, Vice President
Strategic Marketing & Communications
Chapman University
One University Drive
Orange, CA 92866
woodland@chapman.edu

Restriction on Communication

From the issue date of this RFP until announcement of the successful vendor, vendors may contact only the Issuing Officer and only via email. The Issuing Officer will respond only to questions via email, but answers to individual questions will be shared with all interested vendors (without disclosing proprietary information). Vendors may be disqualified if they contact any Chapman University employee other than the Issuing Officer (including any and all senior administrators, faculty and staff).

Proprietary Information

Any and all information provided to proposers is to be considered proprietary information and is to be used solely for the purpose of responding to this RFP. Such information is not to be released to any party outside the proposer’s organization without the explicit written consent of Chapman University.

IV. SCHEDULE OF EVENTS AND STRUCTURE OF PROPOSALS

Respondents will be notified of any changes to this schedule.

Date Event

- February 24, 2014RFP issued and distributed to potential vendors
- March 10, 2014Deadline for submitting written questions
- March 17, 2014Responses to written questions
- March 31, 2014RFP responses due by 5 P.M. Pacific Time
- April 18, 2014Notification of First-round Selections
- April 30, 2014Notification of chosen vendor / Begin contract discussion
- June 2, 2014Contract finalized / Work begins

Note: This Schedule of Events is subject to change.

Questions and Requests for Clarification

Vendors may submit written questions and requests for clarification regarding the RFP. The questions or requests for clarification must be submitted via e-mail and received by the Issuing Officer before 5:00 p.m. Pacific Time on March 10, 2014. Oral inquiries will not be permitted. If a question or request for clarification pertains to a specific section of the RFP, the page and section number must be referenced. Issuing Officer will post all questions and requests for clarification received and responses on the SMC website at Chapman.edu/SMC on March 17, 2014.

Amendment to the RFP and Bid Proposal and Withdrawal of Bid Proposal

Chapman University reserves the right to amend the RFP at any time. The Vendor shall acknowledge receipt of any and all amendments in its proposal. If the amendment occurs after the closing date for receipt of bid proposals, CU may, in its sole discretion, allow Vendors to amend their bid proposals in response to the amendment if necessary.

The Vendor may amend its bid proposal. The amendment must be in writing, signed by the Vendor and received via email by the time set for the receipt of proposals. Vendors who submit

proposals in advance of the deadline may withdraw, modify, and resubmit proposals at any time prior to the deadline for submitting proposals. Vendors must notify the Issuing Officer via email if they wish to withdraw their proposals.

Submission of Bid Proposals

The Issuing Officer must receive the bid proposal at the email address set forth above before 5:00 p.m. Pacific Time, March 31, 2014. This is a mandatory requirement and will not be waived by Chapman University. Any bid proposal received after this deadline will be rejected. It is the Vendor's responsibility to ensure that the bid proposal is received prior to the deadline. Vendors must furnish all information necessary to evaluate the bid proposal. Bid proposals that fail to meet the mandatory requirements of the RFP will be disqualified. Verbal information provided by the Vendor shall not be considered part of the Vendor's proposal.

Bid Proposal Opening

The bid proposals will remain confidential until the evaluation committee has reviewed all the bid proposals submitted in response to this RFP and Chapman University has announced a notice of intent to award a contract.

Costs of Preparing the Bid Proposal

The costs of preparation and delivery of the bid proposal is solely the responsibility of the Vendor submitting such proposal.

Rejection of Bid Proposals

Chapman University reserves the right to reject any or all bid proposals, in whole and in part, received in response to this RFP. Issuance of this RFP in no way constitutes a commitment by Chapman University to award a contract.

Disqualification

CU may reject proposals outright for any one of the following reasons, or for other reasons not specified below:

- The Vendor fails to deliver the bid proposal by the due date and time.
- The Vendor fails to include information necessary to substantiate that it will be able to meet a service requirement. A response of "will comply" or merely repeating the requirement is not sufficient. Responses must indicate present capability and/or cite evidence of past fulfillment of similar requirements; representations that future developments will satisfy the requirement will not be considered sufficient.
- The Vendor provides misleading or inaccurate responses.
- The Vendor fails to respond to Chapman's request for information, documents, or references.
- The Vendor fails to include any signature, certification, authorization, stipulation, disclosure or guarantee requested by this RFP.
- The Vendor presents the information requested by this RFP in a format inconsistent with the instructions of the RFP.
- The Vendor initiates unauthorized contact regarding the RFP with Chapman University employees.

Nonmaterial and Material Variances

Chapman University reserves the right to waive or permit cure of nonmaterial variances in the bid proposal if, in the judgment of Chapman University, it is in CU's best interest to do so. Nonmaterial variances include minor informalities that do not affect responsiveness; that are merely a matter of form or format; that do not change the relative standing or otherwise prejudice other Vendors; that do not change the meaning or scope of the RFP; or that do not reflect a material change in the services. In the event CU waives or permits cure of nonmaterial variances, such waiver or cure will not modify the RFP requirements or excuse the Vendor from full compliance with RFP specifications or other contract requirements if the Vendor is awarded the contract. The determination of materiality is in the sole discretion of CU.

Reference Checks

Chapman University reserves the right to contact any reference to assist in the evaluation of the bid proposal, to verify information contained in the bid proposal and to discuss the Vendor's qualifications.

Information from Other Sources

CU reserves the right to obtain and consider information from other sources concerning a Vendor, such as the Vendor's capability and performance under other contracts.

Verification of Bid Proposal Contents

The content of a bid proposal submitted by a Vendor is subject to verification. Misleading or inaccurate responses may result in disqualification.

Bid Proposal Clarification Process

CU reserves the right to contact a Vendor after the submission of bid proposals for the purpose of clarifying a bid proposal to ensure mutual understanding. CU will not consider information received if the information materially alters the content of the bid proposal. An individual authorized to legally bind the Vendor shall sign responses to any request for clarification. Responses shall be submitted to CU within the time specified in the request. Failure to comply with requests for additional information may result in rejection of the bid proposal as noncompliant.

Disposition of Bid Proposals

All proposals become the property of CU and shall not be returned to the Vendor unless all bid proposals are rejected or the RFP is cancelled.

Copyrights

By submitting a bid proposal, the Vendor agrees that CU may copy the bid proposal for purposes of facilitating the evaluation of the bid proposal. The Vendor consents to such copying by submitting a bid proposal and warrants that such copying will not violate the rights of any third party. CU shall have the right to use ideas or adaptations of ideas that are presented in the bid proposals.

Release of Claims

By submitting a bid proposal, the Vendor agrees that it will not bring any claim or cause of action against CU based on any misunderstanding concerning the information provided herein or concerning CU's failure, negligent or otherwise, to provide the Vendor with pertinent information as intended by this RFP.

Acceptance of Terms and Conditions

The Vendor shall specifically agree that the bid proposal is predicated upon the acceptance of all terms and conditions stated in the RFP. If the Vendor objects to any term or condition, the Vendor must specifically refer to the RFP page and section. Objections or responses that materially alter the RFP may be deemed non-responsive and disqualify the Vendor.

Evaluation of Bid Proposals Submitted

Bid proposals that are timely submitted and are not subject to disqualification will be reviewed in accordance with Section V and VI of the RFP.

Choice of Law and Forum

This RFP and the resulting contract are to be governed by the laws of the state of California. Changes in applicable laws and rules may affect the award process or the resulting contract. Vendors are responsible for ascertaining pertinent legal requirements and restrictions. Any and all litigation or actions commenced in connection with this RFP shall be brought in the appropriate California forum.

No Minimum Guaranteed

Chapman University anticipates that the selected Vendor will provide services as requested by University. CU will not guarantee any minimum compensation will be paid to the Vendor or any minimum usage of the Vendor's services.

Certification of Independence and No Conflict of Interest

The Vendor shall certify that it developed the bid proposal independently. The Vendor shall also certify that no relationship exists or will exist during the contract period between the Vendor and CU that interferes with fair competition or is a conflict of interest. CU reserves the right to reject a bid proposal or cancel the award if, in their discretion, any relationship exists that could interfere with fair competition or conflict with the interests of CU.

Vendor Bid Proposal Terms

Terms of the proposal, including price, will remain firm for a minimum of 90 days following the deadline for submitting proposals.

V. PROPOSAL REQUIREMENTS

Instructions

These instructions prescribe the format and content of the bid proposal. They are designed to facilitate a uniform review process. Failure to adhere to the proposal format may result in the disqualification of the bid proposal.

- The proposal shall be an Adobe PDF document using 8.5” x 11” paper size.
- The proposal shall be an attachment to an email addressed to the issuing officer listed previously. The subject line of the email should be “Proposal for Communication and Public Relations Services to Chapman University.”
- The following electronic documents and responses shall be included in the bid proposal in the order given below.

A. Company Background – In order to be considered for selection, the following should be included in the proposal as proof that the following minimum qualifications listed below are met. The Respondent has a continuing obligation to disclose information throughout the RFP process should any qualifications or situations change that might render the Respondent as an unqualified candidate.

1. Name of agency.
2. Federal tax identification number.
3. Business address and phone number.
4. Principle contact (phone and email address).
5. Please give a brief description of your operation as you would describe it to prospective clients. Include evidence the firm has five years’ experience in providing public relations services in the same manner as described in this RFP.
6. Indicate the year the agency was founded. Indicate if it has it operated continuously since that time.
7. Submit an organizational chart of your staff by title and indicate the number of full-time professionals. In addition, attach biographies of the principals.
8. List all primary services offered by the agency, excluding those that are subcontracted. Please provide a list of subcontractors that may be used for this account.
9. List four clients with a brief description of the work you do for each account (respondent should include accounts with similar scope and or purpose as is described in this RFP) and indicate the following for each: client name, a reference contact and telephone number.
10. Provide the name of the person that will be the key personnel assigned to work with CU. Include evidence that the key personnel has a minimum of three years’ experience managing an account with similar scope as is described in this RFP.
11. The firm and its personnel has all authorizations, permits, licenses, and certifications as may be required under federal, state or local law to perform the services specified in this RFP at the time it submits a response to the RFP.
12. The firm has a policy and practice of equal employment opportunity and non-discrimination based on race, age, creed, sexual orientation or gender.

B. Action Plan for Scope of Services

Provide a project narrative which describes the agency's overall approach including strategies for accomplishing the Scope of Services and rationale for the agency’s approach. For each service

requested please provide an overview of your approach, including your rationale for proposing any alternative strategies, and how you could successfully implement the services requested.

C. Work Schedule for Completing Scope of Services

Provide a work schedule that outlines possible timelines and potential completion dates for each of the itemized requirements in the Scope of Services.

D. Measurement Plan

Provide a measurement plan that details metrics to be used to determine the success of the implementation of the itemized requirements in the Scope of Services.

E. Budget

Provide a comprehensive budget page detailing the projected costs for the activities listed in the Scope of Services (and other services as anticipated by the Vendor). Include in this budget the planned compensation to your agency as a separate item. Your proposed compensation should be stated for each of the following contract periods: (1) an initial contract to run from June 1, 2014 through May 31, 2016; and (2) a potential renewal period from June 1, 2016 through May 31, 2017.

Contrary to common perceptions, CU has limited marketing resources and is interested in creative ideas that maximize the value of the communication and PR dollar spent. Please outline your plan (which would include all associated costs, such as salary, travel, administration, etc.) by referencing projects listed in the Scope of Services within the specified target ranges outlined below. Again, please show compensation to your agency as a separate item.

Option A: \$40,000 - \$60,000

Option B: \$75,000 – \$90,000

If there are specific recommendations that would exceed the above annual budget targets, please outline the additional value that could be gained with the additional investment.

F. Litigation. Provide details of any state regulatory, self-regulatory organization, professional organization, litigation or other legal proceedings action taken against your firm or any of its owners, principals, or personnel, in the three preceding years.

G. Flexibility. Chapman University is interested in providing flexibility to all Vendors in their responses to this RFP. Provide any additional comments or information relevant to your proposal that has not already been included in your responses to the preceding questions.

VI. EVALUATION AND SELECTION

All proposals timely received will be considered by Chapman University's selection committee.

Discussions and/or Presentations

After the review and evaluation of the proposals, CU may conduct interviews. Finalists chosen for interviews will be notified. CU reserves the right, in its sole discretion, to award the contract based upon the written proposals received without prior discussion or negotiations.

Selection

Chapman University will select/recommend the firm that the institution determines, in its sole discretion, to be fully qualified and best suited among those submitting proposals to fulfill the purposes of the RFP in a cost effective manner.

Evaluation Criteria

Corporate Information

Evidence of corporate maturity, fiscal stability and full-time senior and intermediate staff resources to provide the services outlined in the Scope of Services.

Account Services

Past, current and prospective services demonstrating capabilities to mount and execute a marketing program outlined in the Scope of Services.

Account Team

Professional qualifications and work experience on similar project engagements of the account team members who will be primarily responsible for the majority of the work performed in the Scope of Services.

Action Plan for Scope of Services

An understanding of the Scope of Services to be performed and evidence of the capabilities and creativity necessary to perform the Scope of Services in a manner that is the most advantageous to Chapman.

Cost of Services

Evidence that services will be reasonably priced and provide a good value to CU.

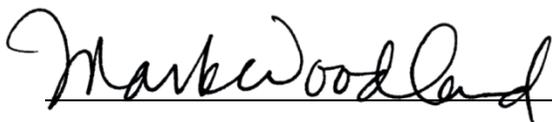
VII. CONTRACT NEGOTIATION

Upon selection of the chosen Vendor, CU will require a proposed contract from the Vendor. The contract must be vetted and approved by the University’s legal department before work begins.

Issued: February 24, 2014

By: Mark Woodland

Title: Vice President, Marketing & Communications, Chapman University

Signature: 

Westbound Communications
625 The City Drive, Ste. 360
Orange, CA 92868

Capwell Communications
260 Newport Center Drive, Ste. 300
Newport Beach, CA 92660

Bluetone Marketing & PR
25068 El Carrizo
Laguna Niguel, CA 92677

FleishmanHillard
4 Studebaker
Irvine, CA 92618

The Brand AMP
3030 Old Ranch Parkway, Ste. 300
Seal Beach, CA 90740