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Proposal for:

Market Research (CI-225)

Presented to:

California State University Channel Islands

Prepared by:

**Grant De Roo
Founder and Principal
ADV Market Research & Consulting**

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Cover Letter

Thank you for the opportunity to present this proposal to California State University Channel Islands (CSUCI) for collaborating with your team on research and informing brand. We are excited by the opportunity to partner with you to enhance your identity among your various audiences.

In this proposal, ADV addresses being your trusted partner to collect accurate insights that will enhance the University's profile and reputation and provide counsel as needed to extend your brand. Our work is done from our strong background in this field, in California, and on the topic of reputation. To this end, ADV's benefits for CSUCI include:

- **A Higher Education Brand Agency.** ADV's team has practitioner and consulting experience in enrollment and brand strategy. Higher education is all we do – this category focus means deep industry knowledge and relevant understanding of rebranding initiatives.
- **Research Leads Everything:** We know the value of data, so research leads every project we undertake. The insights we glean from the research will shape all recommendations for you, from detailed messaging nuances to holistic audience engagement. Many firms can obtain data; some can interpret it—but few can make it *relevant*. We do.
- **Diversity and Inclusion: Higher Education and Society in 2022.** In our work we live in the space of 2022's societal realities and today's higher education challenges. Your distinct audiences deserve the attention of a team who understands their goals and priorities and we are custom-built to address these needs.
- **HBCU, HSI, and Public University Experience:** Our guidance comes from extensive experience with public universities including HBCUs and HSIs around the country.
- **Tailored to You:** We do not “productize” solutions like large firms who will plug CSUCI into their formulas. We believe we should adapt to *your* needs, so our solutions are designed according to your questions, circumstances, and existing resources.
- **Engaging With Stakeholders:** CSUCI evokes strong emotions in its stakeholders, from employees to students to alumni. The ADV team has spent significant time in projects like this addressing the interests, priorities, and passions of our clients' various stakeholders. We educate, engage, and hopefully inspire them on why this is all so important.

Please let us know if we can answer any questions or clarify any aspect of our proposal. Thank you again for this opportunity and we hope to be your partner in this important work.

Sincerely,



Grant De Roo
Founder and Principal

Schedule 1. Project Plan

Provide a draft project plan for collecting market research including:

Statement concerning the unique needs of higher education clients.

Higher education is not simply one of our strengths, it is our primary focus and field of expertise.

As succinctly detailed here, our plan is built on knowing the category and how to navigate its many audiences, politics, possibilities, and therefore its promise for our collective futures. While we don't know the answers yet, we do know and understand the nuances of higher education so we know how to find them. This focus makes ADV an ideal partner.

With that as context, we have encountered a variety of needs distinct to higher education. In this particular case, given what we know about CSUCI now, some of the unique dynamics of higher education that we see at play in this work include:

- Navigating the balance between a commitment to higher education access and projecting academic strength – the two are not mutually exclusive (far from it), but they are often perceived to be.
- Enhancing and strengthening a brand identity for an institution within a well-established system – we know there are rules that must be respected and politics at play, but we do not know the specifics yet. Determining what is “allowed” and the brand space you can own will be important parts of this work.
- Communicating a deep and authentic commitment to diversity, equity, and inclusion can be a challenge, particularly in a higher education environment in which nearly every institution claims a similar commitment. Conveying CSUCI's diversity and inclusivity as being a part of the fabric of the institution will inevitably be a significant part of the challenge ahead.

This is not an exhaustive list; rather, these are just some of the dynamics of higher education branding and communication we have addressed before that we see being relevant in this work ahead. We have navigated them successfully for others (which we outline later in this proposal) and we look forward to doing the same for CSUCI.

A means for addressing the complex and diverse nature of the university environment.

ADV's team has conducted extensive higher education research, informed enrollment and brand plans, and developed and help execute brand-centered reputation campaigns for many colleges and universities. Our team uses four guiding principles on every higher education project:

- **Brand starts within** is a tenet more important in higher education than almost any other category. We work with your campus to educate them on the most important

findings and recommendations from our work because in higher education, stakeholders – your faculty and staff, students, donors, and alumni – are your most important audience. If they don't know where you're going and why, no externally focused campaign will work and more people invited into the University will simply find out how disjointed things are internally.

- Similarly, we collaborate/partner with your team at each step rather than serve as “experts” telling them what to do. Reputation and enrollments are best built by your people; ADV believes a collaborative approach will help CSUCI's team take confident action and succeed in its varied goals.
- **Determining the distinct role of a university's culture** leads to far more effective reputation building. ADV strives to understand what it is you deliver and how that is important and makes a difference to your target audiences. Our way builds your trust in something authentic that the right people can engage with for the right reasons at the right time.
- **Brand is behavior.** Our past success in university research and branding focuses on how a client acts more than taglines, fonts, press releases, and websites. Most firms see research as a means to an end (“let's get to a creative campaign!”) while ADV sees – and can prove – research leading to impacting and inspiring behavior is the heart of brand which only then can be properly expressed in creative.

Evidence of experience in conducting market research with a focus on diversity, equity, and inclusion.

The ADV team has conducted diversity, equity, and inclusion (DEI) research, and recommendations from it, in a variety of settings. The purpose of each engagement, the methodology chosen, and the actions the research informs differ by institution and situation. Some examples from our recent experience with a variety of institution types and settings:

We have long-term experience with the **University of Houston-Downtown (UHD)**, a Hispanic-Serving Institution located in the fourth-largest city in the country. Though distinct from CSUCI in several ways, you share important qualities including operating as a regional public university within a competitive market for public universities (including flagships and land-grants) and seeking to grow reputation and intentionally build enrollment in a variety of ways.



For UHD, our research considered audiences of many ages and roles in the community. The local economy drives enrollment, fund-raising, and reputation, a challenge to this university in the heart of Houston. UHD's students are largely Hispanic and African American as is legislative representation and leaders in Houston politics; our research showed how to best make the case to an institution so reflective of one of the nation's most diverse cities. We respected this diversity in our research by ensuring strong representation from groups that

are often under-represented in survey research (e.g., lower-income and Hispanic/Latinx audiences). We used several methods of reaching survey participants to have their voices included in the brand strategy process.

UHD wanted to better understand the motivations and perceptions of its target audiences while also defining its brand among the University's stakeholders. The University sought to develop a stronger brand platform that would build reputation and guide messaging to target audiences by clearly articulating the substance of UHD's brand. Further, because UHD serves such a variety of student audiences, the University had us develop audience/influencer personas that bring its segments to life and clarify their distinct priorities, experiences, and expectations.

The research, paired with our brand platform, led to our holistic reputation campaign *Determined. Dedicated. Downtown.* that guides UHD's messaging today. Our work with UHD is ongoing as we partner with them to implement persona-based messaging for both internal and external audiences. Our respect for UHD's diversity also emerged in our creative work. We were careful to ensure that photography and videography accurately captured the rich diversity of the student body, which was critical for connecting UHD's messaging and creative assets with its target audiences.



COLORADO COLLEGE

In another example, our team has worked extensively with **Colorado College** (Colorado Springs, CO). The College officially declared its antiracism initiative in 2019. In pursuit of its aims, our team

member Kyndra was invited to conduct several projects. The first was meant to assess the perceptions of wellness among stakeholders, delving deeply to the extent that wellness and well-being are influenced by experiences of power, access, and equity. The work focused on increasing individual awareness of the continuum of violence and behaviors associated with power-based violence (such as incapacitation through use of substances, isolation, grooming, and boundary testing), developing a sense of personal responsibility for taking action, and strengthening individual skills for active bystander intervention and for healthy sexual and relationship engagement. The work highlighted the stories of students who took action when they saw potentially harmful situations and utilized survey data to shift perceived norms that might discourage active bystander intervention or encourage excessive alcohol use.

The work also included an assessment of Colorado College's conduct process with the specific aim of identifying where and how the process might be susceptible to bias and injustice. The team conducted in-depth interviews with students, faculty, and staff to hear about firsthand experiences with the College's student conduct process and hear reflections on how bias may have impacted the experience. The work also included an assessment of the Butler Center – the College's center for diversity, equity, and inclusion. The goal of the assessment was to see who felt included and excluded by the Center's services and activities and how to position the Center as a partner in the college's antiracism initiative.

One key goal of this work was to ensure Colorado College did not let the rest of the campus community off the hook for doing their part of the work.

All these projects were done on-campus with stakeholders, including representative student groups, staff and faculty of color, athletics, and campus administrators. The findings of the projects were extensive and led to significant reforms in Colorado College's policies and processes. One example of an outcome was that Colorado College decided to seek restorative justice training and committed to closely watch its conduct infraction data to stay attuned to potential inequities.

An additional example is our work with **Pikes Peak Community College** (PPCC), Southern Colorado's only community college serving 20,000 students. The College went through its 5-year strategic planning process in 2017, beginning with a look at current and estimated changes to the population it serves. Members of our team developed and led the planning process and one of the things we considered was likely changes in population demographics. We learned that Colorado's population was aging and increasingly diverse. Colorado's population at the time was close to 21% Latino/a. One of the five-year strategic plan goals was to increase the Latino/a enrollment from 18%--where it was at the time—to 25%. Not only would this better reflect the demographic makeup of PPCC's service area, it would also make PPCC eligible to apply to become an official Hispanic Service Institution.



The research led to assistance with how best to target its Latino/a outreach. Our team member, Kyndra, was raised in Ecuador and is a fluent Spanish speaker who—though white herself—understands and appreciates the cultural nuances of the Latino/a community. Kyndra conducted primary research with students, teachers, and family members. Many of the sessions were bilingual or in Spanish. We gained many important insights:

- As they are often heavily invested in their family, many Latino/a students are unwilling to go too far from home for their higher education.
- Marketing channels to students are likely different than they are for their parents as students are often bilingual, but parents may not be English speakers.
- If families are newer to the country (as many are), students are under a great deal of pressure as they navigate the liminal space between two cultures. Many often play the role of translator for any official communication with their parents.
- Even the term "Latino/a" or "Hispanic" is not one they typically use for themselves—preferring instead to identify the country they came from. It is those in power—often white people—who tend to lump them into one generalized category.
- Further, very few had ever heard the term "Latinx" and if they had, they didn't like it as it's another generalizing term, doesn't work in Spanish (there is no sound for "ecks") and many tend to be traditional in their values.

Kyndra and her team translated primary outreach pieces like the viewbook and top-level website pages and presented recommendations pertaining to the segmentation of marketing channels for parents and students. Notably, in the first year of the outreach campaign (and prior to the pandemic), PPCC's Latino/a enrollment rose from 18% to 21%.

While nearly all ADV client projects have at least one DEI component, to further answer your request we offer current and past clients who required significant specific work in DEI from ADV and our team members:

Alabama A&M University	Rutgers University (NJ)
Albany State University (GA)	Tennessee State University
California Baptist University	Texas A&M University-Central Texas
California State University, Dominguez Hills	University of California-Merced
California State University, Northridge	University of Houston-Downtown (TX)
Dominican University (IL)	University of Kentucky
Earlham College (IN)	University of Mississippi
East Carolina University (NC)	University of Nebraska-Lincoln
Hamline University (MN)	University of New Orleans
Kentucky Community & Technical Colleges	University of North Carolina System
Landmark College (VT)	University of North Florida
Minnesota State University, Mankato	University of Pacific
Mott Community College (MI)	University of Texas-Rio Grande Valley
North Carolina A&T State University	University of Texas at San Antonio
Pikes Peak Community College (CO)	Washington State University Tri-Cities

Provide a narrative which outlines how the market research will be conducted, including a proposed strategy for research and consultation with the CSUCI community.

First of all, your stated goals and scope are the basis for our recommended methodology.

ADV's work plan has four components to address your goals:

1. Discovery
2. Survey Research
3. Brand Position and Recommended Messaging
4. Planning Counsel

1. Discovery

Context for the overall project is paramount for CSUCI's team as much as ours. You have brand reputation opportunities (and challenges) as you strive to serve the world as best you can. We want to first understand a select group of representatives' views of the University, marketplace, opportunities, dreams, and goals all within the context of the University's current state.

Interviews

Initial interviews here are exploratory and fact-finding, not the final research for this project. Some of the requested parties in this foundation-building work will be engaged again throughout the work plan.

Given the realities of COVID, travel restrictions, CSUCI campus protocols, and project timing, our initial approach to this work would be as follows:¹

- Virtual interviews with CSUCI leadership and representative groups:
 - Interim President Yao
 - Marketing leadership
 - Admissions/enrollment leadership
 - Advancement/Foundation leadership
 - Foundation Board representation
 - Academic leadership
 - Board representation
 - Select current students
 - Select faculty
 - Others as deemed essential by CSUCI

Brand Assessment

Our team requests the following to better understand CSUCI's current state:

- **All current reputation-related communications plans (including audiences, priorities, and targeting strategies) and relevant strategic planning documents**

¹ We can adjust to in-person interviews if possible but respect your answer to this in the Q&A. Know that our team is fully vaccinated and boosted, should that be a factor.

- Current marketing strategy documentation and assets of all types
- Current sub-branding strategy documentation such as athletics and community outreach organizations
- Other data collection as needed to better understand the situation at CSUCI, in your immediate region, in the Cal State system, and in California as a whole

Competitive Analysis

Brand reputation is about position as much as institutional identity. We will provide an analysis of several select CSUCI competitors with a focus on the brand space they own, the qualities driving their brand positions, the data points supporting or challenging those brand positions, and the space that CSUCI owns or could own in the future.

We will begin with some context-gathering discussions with members of the CSUCI team. These will be helpful in understanding internal perceptions of competitors as well as candid perspectives on CSUCI's own brand position in the marketplace. Following these interviews, we will conduct a competitor assessment in two distinct but related ways:

1. Data analysis of all institutions: We believe a university's brand is reflected in how it behaves, and that this behavior is reflected in its data. We therefore begin with an assessment of critical data points. Paired with the qualitative assessment of a university's position and messaging (discussed below), this is a powerful way to contextualize a brand position (i.e., put numbers to abstract claims) as well as to either affirm a stated brand position or refute it. We will collect data on admissions and enrollment (acceptance rate, diversity, yield, total enrollment and enrollment trends); pricing and cost (tuition, discount rate, net cost); student success (retention and graduation rate); and academic programs

2. Top-level brand position evaluation: For each institution we examine, there lives an expressed brand position that is more than a tagline. Our top-level evaluation of each institution's brand will inform CSUCI as to current positions taken by your competitors. We will identify and explain each brand position and the appropriateness of each university's efforts to engage external audiences with that position.

This analysis will focus on how competitors position themselves to their target audiences, how they leverage their strengths, the qualities they promote, and, ultimately, what strategies may be appropriate, replicable, or distinguishing for CSUCI. From this, we will know what approaches may be considered for CSUCI based on your own institutional strengths and brand identity.

Deliverable

We will compile a Strategy Brief of what we have learned to date and present it to your teams as needed. to discuss with you and seek your agreement. This Brief is essential not only to guide your thinking ahead per the RFP but to ensure our research methodologies, survey instruments, and intent is fully appropriate for the next step.

2. Survey Research w/ Stakeholders and Target Audiences

ADV believes that research done right and then interpreted and leveraged properly will tie the findings of Discovery with the future of the CSUCI reputation efforts and guide our recommendations for your plans.

Informed by Discovery, we will conduct market research that will affordably provide CSUCI and our team the critical, real-time insight into the hearts and minds of audiences about the University.

We will collaborate with you in creating, fielding, and analyzing surveys aimed at soliciting response to better understand their opinions of your brand reputation, the role you can and should play in the region and the state of California, and, importantly, their hopes of the moment and the value CSUCI can/should offer in the years to come.

We recommend two forms of primary research:

- **In-Depth Interviews (IDIs)** with external individuals who are important to CSUCI but who may be too few in number to make survey findings generalizable, impractical to survey due to demands on their time, or for whom in-depth insights are more informative than survey responses. For CSUCI, these parties include legislators and other government elected individuals of influence, top community partners, higher education leaders in California and potentially other states (as needed), Foundation Board members, and top University donors.
 - Our approach to IDIs is to surgically ask each person's ideas that truly impact CSUCI's position.
 - Using an interview guide, interviews will be focused and respectful of time, covering the most salient topics appropriate for each person. We will seek their input about CSUCI and their hopes and expectations of the University in the future.
- **Online surveys** are intended to reach a large number of individuals within broader audiences. We will use targeted survey instruments to draw insights from prospective undergraduate students and their parents, prospective graduate students, current students, faculty and staff, alumni, and the remainder of the CSUCI donor pool. We would also add to this high school counselors given their role in influencing students and their families.

About ADV Surveying

Our survey research offers several key benefits:

- **Rigorous methodology.** We use a rigorous survey approach to ensure the validity of results so that CSUCI has confidence in the findings and the brand direction moving forward.

- Survey validity begins with a detailed understanding of the survey sample – its origins, composition, completeness, and generalizability to the broader target population. For most of the audiences included in this research, we will use lists provided by CSUCI.
- To ensure we are reaching the true target audience and doing so in a way that makes the findings representative, we will work with the CSUCI team when compiling the sample and clarify several questions about the individuals we want to reach and the accuracy of their contact information.
- **Incentives and margin of error.** We then take several measures to ensure we have a large enough response sample to feel confident in the findings. We strive for a margin of error of +/- 5%, which requires at least 400 responses from a given audience. We use monetary incentives and reminders to generate as large of a response as practically and economically feasible.
- **Candid and thorough analysis by detailed audience and in aggregate.** We are careful to let the data speak for itself and therefore allow valid findings to surface. We use statistical tests to ensure significance and review the data carefully to avoid calculation errors. In sum, we have a time-tested process for ensuring the validity of our survey process, the resulting data, and, critically, the decisions that stem from the findings.

In both the focused IDIs and field survey research, we will incorporate internal and external perspectives for more complete (and therefore accurate) findings. To illustrate the balance:

Internal Stakeholders

- Current students
- Faculty and staff
- Alumni
- Foundation Board
- Donors

External Target Audiences

- Prospective students (all)
- Parents of prospective undergraduates
- Community partners
- High school counselors²

We will design the survey based on the information learned to date, our prior experience conducting similar studies, and input from the CSUCI team. These surveys will be administered online via email with contact information provided by you. Based on our prior experience and the information contained in your RFP, we expect the surveys will focus on:

- Internal Stakeholders
 - Perceptions of CSUCI on brand attributes and key characteristics
 - Words/phrases used to describe CSUCI

² *Optional. We see them as potentially influential.*

- Issues of diversity, equity, and inclusion
- Strengths and specific points of distinction; opportunities for improvement
- Opinions of how well CSUCI is delivering on its brand promise and pillars
- Likelihood to recommend CSUCI to others
- Information students wish they had known when they were applying to college
- Accuracy and authenticity of current campaign messaging
- Opinion on the next steps for CSUCI per the COVID-19 pandemic on several factors
- External Target Audiences
 - Name of their top-choice institution and why it became their top choice [prospective students and parents]
 - Awareness and familiarity with CSUCI
 - The importance of various qualities/characteristics when evaluating a college (including diversity and inclusivity)
 - Words/phrases used to describe their ideal college environment
 - Methods of collecting information about colleges
 - Likelihood to recommend CSUCI to others
 - Perceptions of CSUCI on various college qualities/characteristics
 - Strengths and weaknesses of CSUCI
 - Knowledge of academic programming options and opportunities at CSUCI
 - Expectations of CSUCI to the community and region
 - Descriptions of students who are a good fit for CSUCI
 - Changes in perceptions of CSUCI over time

ADV will handle all survey logistics, such as programming and testing within our survey platform. We will work with the project team at CSUCI to administer the surveys to each audience. We recommend a monetary incentive for some audiences to encourage their participation, which we will discuss with the CSUCI team prior to fieldwork. After data collection, our team will analyze responses to extract meaning from the data.

Deliverable

A full research report will be provided for discussion with your team and leadership as requested. From our extensive experience, there will be significant implications and recommendations to address regarding CSUCI's brand on its own merits, its position in the marketplace, each audience you serve, and your opportunities and challenges. This research sets the direction for the stages to come.

3. Brand Position and Recommended Messaging

The research to date will be detailed in both analysis and recommendations. Much of it will focus specifically on enrollment issues, audiences, and all that the University needs to consider ahead.

ADV also sees a need to bridge research findings with your plans by focusing on brand position and the best ways CSUCI can and should build its comprehensive brand and messaging strategies.

Working with your team established for this project³, we strive to align your mission, vision, and values with our research to define and distinguish your brand position moving ahead to best impact reputation. This means clarifying the verbal vocabulary foundation the University uses to serve as the unifying story that connects all CSUCI constituents and stakeholder groups to a single compelling brand idea.

Our Brand Platform has the following four components:

- **A Brand Promise** is what CSUCI promises to deliver those who align with you. It is a statement that captures the benefit to *any* audience and clarifies what you ultimately deliver to your target audiences. It is a compass when developing key messages and communication materials.
- **Brand Pillars** are how CSUCI demonstrates what you deliver to stakeholders. The key words and phrases that provide rationale and supporting proof points bring added dimension to the Brand Promise. These guide your marketing staff and other communicators when developing and executing communication programs.
- **Brand Character** refers to how CSUCI acts. Every brand has a personality, a way of presenting itself to the world. It is a set of human characteristics (adjectives) that define the Institute's brand's voice, look, and actions in the world. We want to clarify those traits and determine how they will be expressed and reinforced.
- **Brand Idea** is not *necessarily* a final recommended tagline but rather a powerful central idea that will drive the brand ahead and is derived from this body of work.

After using research to establish the appropriate succinct and compelling verbal vocabulary of the Brand Platform, we will develop a **Brand Message Matrix** which applies the Brand Pillars to a range of distinct CSUCI audiences to create sample copy. This document serves as the guide to all verbal vocabulary of the CSUCI brand reputation work ahead.

³ Likely the team noted in Q&A as your Integrated Marketing Communication Steering Committee

Visual Identity

While not specifically requested in the RFP, the visual branding of CSUCI is an important consideration in your future planning.

Respecting its role vis-à-vis your focus and budget, we will assess and comment on the current visual elements of the CSUCI brand and make recommendations based on this to consider. We will validate and suggest enhancements to style and assets in content or presentation to best serve you ahead. This may include photography or videography, advertising, or storytelling formats.

Deliverable

The result of the verbal and visual work will be provided in a third project report for your consideration and our shared discussion. Once you approve the document, we will finish the requested scope of work with Planning Counsel and specific recommendations.

4. Planning Counsel

First, we acknowledge that you are not seeking a full planning partner – the purpose of this RFP is the market research and subsequent guidance only.

As requested in your RFP, we will provide you recommendations and next steps for development of both your IMC and SEM plans. This documentation is a distillation of the work to date assembled to give you the clearest and most impactful guidance possible for both your enrollment and marketing needs.

ADV strongly believes that planning is best done as at least a shared endeavor at this stage, so we are committing a small pool of advisory hours as part of the final deliverable pricing to partner with you at the time we deliver the promised recommendations to answer questions, further explore topics as you require, and serve as a reality sounding board in the initial phase of your effort, as needed.

Ongoing Counsel (Optional)

In our experience in similar arrangements, ADV team members have typically been called on as a trusted colleague in the background of planning projects. Our agnostic, external point-of-view, knowledge of the research conducted for CSUCI, and our broader experience in planning for others ensures one-of-a-kind influential insights to bring your plans to powerful life.

Therefore, we would welcome a discussion upon contract signing about adding a limited pool of hours for feedback, reaction, and guidance needed in any form through your planning process.

Provide an estimated timeline for all phases of the project.

At the outset of the project, we will work with your team to outline a thorough project timeline that includes the estimated amount of time to complete each phase of the work and goal dates for completion. We will also consider important dates or periods in the University’s calendar when constructing the project timeline.

We will build a system of consistent communication with the University’s team and necessary leaders as we strive to engage University audiences and representatives.

At this point, our expectation for this project’s timing is as follows:

Month	Feb	March	April	May	June
Discovery					
Review of Current State					
Survey Research					
Strategic Brief, Recommendations					
Planning Counsel (as needed)					

Describe the roles and responsibilities of both vendor staff and University employees in the project.

It is our experience that the best working relationships with our clients are built on mutual trust. Our team members are doing the extensive work needed to properly execute this project in full; your employees have three simple roles:

- Always be candid
- Respond to requests from us in a timely manner
- Always communicate, be it about timetables, delays, deliverables, change-of-plans, or anything impacting the project from your perspective.

Overall, the goal of a clear and trusted project is why we ensure our Discovery process properly introduces you to our team and vice versa, allowing for ample time and focus on getting the relationship and responsibilities aligned, and make certain that everyone ahead knows exactly who does what, why, and how on your team and ours.

While the human aspect of on-boarding is critical, so is a two-way understanding of the project. This is the time to have a candid conversation about CSUCI’s current state and a fuller discussion about what you know about your situation (in terms of data, politics, plans) and what we know about best practices that apply to those. This provides a more complete foundation of trust from Day One.

Define the management organizational structure for this project including point-of-contact and project manager.

Grant De Roo will serve as principal contact and project manager.

However, note that when appropriate any CSUCI team member can contact any ADV team member as needed. We believe in organization and discipline, but we also do not believe in stringent rules needlessly applied to a communication model of mutual respect.

Schedule 2. Vendor Information and Qualifications

Provide the number of years in business providing the types of services described in the RFP.

ADV was founded in 2018 as a formal corporate entity and our team members have extensive higher education research and branding experience that extends well beyond that. Grant De Roo, Principal and Founder, has 10 ½ years of higher ed experience; Chuck Reed, Senior Client Counsel, has 39 years; and Kyndra Wilson, Research and Messaging Strategist, has 20 ½ years.

For reference, here is a **sampling** of our higher education work.

Current Clients

Albany State University (GA)
 Assumption University (MA)
 Bucknell University (PA)
 Colorado College
 Earlham College (IN)
 Elon University (NC)
 Fairmont State University (WV)
 Hamline University (MN)
 Iowa State University
 Landmark College (VT)
 Minnesota State University, Mankato
 Montana Technological University
 Mott Community College (MI)
 North Carolina A&T State University
 University of Houston-Downtown (TX)
 University of Nebraska-Lincoln
 The University of Texas at San Antonio
 Washington State University Tri-Cities
 Wayne State University (MI)

Relevant Past Clients⁴

Alabama A&M University
 California State University, Dominguez Hills
 California State University, Northridge
 East Carolina University (NC)
 Kentucky Community & Technical Colleges
 Murray State University (KY)
 Portland State University (OR)
 Rutgers University (NJ)
 Tennessee State University
 Texas A&M University-Central Texas
 University of Arizona
 University of Kentucky
 University of Mississippi
 University of Montana
 University of Nevada-Reno
 University of New Mexico
 University of North Carolina System
 University of North Florida
 University of Pacific (CA)
 University of Texas-Rio Grande Valley

Provide the year the business was organized.

ADV was founded in 2018.

Briefly describe your firm's culture and character.

ADV is a focused research and brand strategy firm that does exactly the type of work CSUCI is seeking from a partner. We are highly customized and collaborative – every project we undertake is tailored to the specific dynamics of the client, the team, the challenge, the

⁴ Chuck Reed's limited work with CSUCI on messaging for a website is legitimate although tangential to this current effort, so we do not count it here.

competition, and the audience. Solutions built for our clients defines our culture and commitment.

Our approach to market research is to use the very best methodology possible while acknowledging the constraints of money and time. Market research must be done well to be believable and trusted, but it is also grounded in reality. We see our challenge as your partner as creating the best research study possible within the goals set for the project and being respectful of your budget.

We are quick to communicate and value constructive candor in delivering findings. Only through clear, candid communication will we arrive at agreement on the current state of the CSUCI brand and the opportunities for you in the future.

In terms of ADV's character, we would offer that while this work for you is both serious and important, we are fun and substantive partners. The proof? In our 3 years, each and every client to date has solicited more work from us after the initial scope is complete.

Provide a narrative describing the qualifications and successes of vendor staff to be assigned to the project. Include resumes outlining the backgrounds of staff.

Grant De Roo, Principal and Founder

Grant will serve as project head, conduct all research, and work with CSUCI's team as contact in all aspects of our work together. He will support the development of messaging based on the research, as well.

Grant has worked in higher education as both a practitioner and consultant. Prior to founding ADV, he was the research director at a large national agency where he conducted market research for a variety of regional and larger public universities.

Before that, Grant led the recruitment team at Elon University in North Carolina where he was part of the famous rebranding of that institution (detailed in George Keller's book, *Transforming a College: The Story of a Little-Known College's Strategic Climb to National Distinction*). At Elon, he learned how to collect, analyze, and act on data in the recruitment and enrollment process.



Relevant to CSUCI, Grant has led many projects involving brand, reputation, enrollment opportunities, and enrollment modeling. He has worked with a number of university systems identifying the role of the system in brand, the value of each member as an independent campus and as part of a system, brand position, competitor/comparator positioning, and using data to determine opportunities and challenges to top public universities.

Finally, Grant's work since March 2020 often addresses COVID-19 and pandemic-related topics in research relevant to CSUCI including overall impact, pricing, programmatic delivery and audience expectations, and changing prospective student and family motivations.

Grant's related work to CSUCI in scope or goal includes two of your fellow Cal State schools, California State University-Northridge and California State University-Dominguez Hills, and other California institutions including California Baptist University, La Sierra University, and Palo Alto College.

Also, while most current projects touch on diversity and inclusion in some way, specific client work for three HBCUs and several HSIs stand out currently in his work.

Finally, Grant has led relevant projects for Washington State University Tri-Cities, University of North Carolina System, University of Montana, Montana Technological University, Miami University (OH), University of Kentucky, Boston University, University of Houston-Downtown, University of Texas-San Antonio, and the University of Nebraska.

Chuck Reed, Senior Client Counsel

Chuck will support the research to be done for CSUCI and then translate it into all of the actionable messaging.

Relevant to CSUCI, Chuck has extensive experience with research, brand assessment, and brand and enrollment planning for public universities. He has a specialty of working with urban and system-member public universities nationwide including a number of HSIs and HBCUs. His relevant experience provides guidance for you in any capacity.



Chuck's early background in admissions (admissions leader for a public college in a system) and university marketing led to a senior leadership role at a national higher education brand and research consultancy until he joined ADV.

Chuck has led many projects in California including immersive work with California State University-Dominguez Hills, University of California-Merced, and University of Pacific (and several separate Colleges and Schools thereof) over time, and specific projects for California Baptist University and American Jewish University. Chuck had a tertiary role commenting on messaging on a past CSUCI project, a website and messaging engagement with a former agency.

Other relevant experience includes work with four western flagships where California's population played a major role in his work – University of Nevada-Reno, University of Arizona, University of New Mexico, and University of Idaho.

In addition, Chuck has led a number of HSI projects. He orchestrated a large team including both Grant and Kyndra creating the brand of a new University of Texas institution and one of the nation's largest HSIs, UT-Rio Grande Valley. The scope of his work included both brand position and desired brand position five years later and a workplan built with Grant for enrollment and brand planning purposes – the same as CSUCI.

Chuck's other experience most relevant to CSUCI includes: HBCUs (North Carolina A&T University, Albany State (GA) University, Alabama A&M University, Tennessee State University); other HSIs (Dominican University, Texas Tech University); Western U.S. system institutions similar to you in some way (Montana Technological University, Portland State University, and Washington State University Tri-Cities); and other system institutions with similar goals as you have in this RFP (University of Houston-Downtown, University of Texas at San Antonio).

Kyndra Wilson, Interviewer/DEI lead

Kyndra will conduct interviews with key individuals as needed and help address the diversity, equity, and inclusion needs of the project.

A bilingual researcher raised in Ecuador, Kyndra brings 20 years of higher education and community culture experience to this project including research on diversity (particularly Latino/a research) and building messaging and identity from that work. She has conducted literally hundreds of consumer insight projects, developed brand strategies, and written comprehensive marketing plans.



Kyndra has worked extensively with ADV's Chuck Reed including California work with your fellow system institution California State University-Dominguez Hills and the University of Pacific and all three of their campuses (Sacramento, Stockton, San Francisco). She also worked with Chuck and Grant on the founding work for the University of Texas-Rio Grande Valley.

Kyndra works frequently for her alma mater, Colorado College, one of the nation's leading liberal arts colleges. Among these was research and planning work for the College's Center for Diversity, Equity, and Inclusion and work with food insecurity issues.

Other relevant clients to CSUCI include brand and DEI work with Occidental College, Palo Alto University, California Lutheran University, Marymount College, Pikes Peak Community College (CO), and the U.S. Air Force Academy.

Provide examples of work focusing on diversity, equity, and inclusion in the context of higher education.

Provide a portfolio to include 2-3 examples⁵ of market research completed for higher education clients. Upon selection of a vendor, portfolios will be returned to the vendor.

The following examples address both of these requests, along with the examples provided previously. We have other examples, but we feel each one of these properly blends diversity, equity, and inclusion research into the deliverable output from the data, typically messaging, brand positioning, and even creative executions that address diversity, equity, and inclusion in the context of a project.

In each case, we can provide additional details of research and deliverables if requested.

Alabama A&M University

In 2020, ADV conducted extensive audience research with Alabama A&M University (AAMU) to explore the opportunities and challenges for this historic HBCU. Like our work plan for CSUCI, the research focused on better understanding AAMU's brand reputation as defined by top audiences with a part of the surveying focused on questions of diversity, equity, and inclusion.



In addition to exploring what is important to AAMU's audiences and how the University was viewed on these qualities, we also wanted to determine how well labels such as "land-grant university" and "HBCU" were known and understood by target audiences. We learned that knowing the benefits of these labels/identities is far more impactful than merely understanding terminology.

The research led to a clear understanding of the AAMU brand identity and where there were areas of misalignment between what the University does well and what outside audiences believe about it. With this information in hand, AAMU was able to create new and powerful ways to engage individual audiences to build reputation.⁶

⁵ We are not including more than 3 examples because of indecision or to "show off." Rather, each of these tells a distinct narrative that is relevant to this work for CSUCI and therefore worthy of inclusion.

⁶ ADV is currently working with two other HBCUs on brand reputation and enrollment projects. Neither project is far enough along to detail – but both include scopes of work similar to that requested by CSUCI.

University of Texas Rio Grande Valley

Urban-serving University of Texas Rio Grande Valley (UTRGV) was created by merging University of Texas Pan American and University of Texas-Brownsville and adding a new medical school, all in the fastest growing region of the nation. ADV senior counsel Chuck Reed and a team including Kyndra and Grant were tasked with creating the new brand for the new university based on work with the UT system, both campuses, the new medical school, and the communities of South Texas.



Everything we recommended and/or executed had to achieve two things: 1) address the new university's ambitious enrollment goals and 2) connect the University as a resource with the diverse populations of South Texas. As one of the nation's largest HSIs, UTRGV was one of our largest and most complicated brand messaging projects ever.

We compiled data and analyzed it to identify populations most impacted by the opportunities and challenges ahead. Like CSUCI, our task included position research in the marketplace as well as extensive analysis of the underserved, socio-economic disadvantaged, and fundamentally diverse populations.

We informed and then created a broad and complex inaugural brand campaign, *We Will*, and a comprehensive communications plan which introduced the both the rural and urban world to the new university. This detailed and granular data-based approach provided UTRGV's new leadership with a roadmap for successful branding, recruitment, and community relationships.⁷

Washington State University Tri-Cities

We have conducted extensive research for WSU-Tri Cities. Our first work started with a similar incentive as CSUCI – informing and shaping a set of plans to impact enrollment and overall reputation with an eye on demographics.

To inform its planning process, Grant and Chuck conducted a full analysis of its brand and marketplace position to assess messaging, academic program opportunities, and appropriate growth with an eye towards diversity, equity, and inclusion.

No research had been conducted for years despite significant economic evolution in the area and changes in the WSU system. The University's new plan was therefore essential to align the University with the needs of the immediate area's population and communities and inform enrollment goals. Outdated messaging and academic program alignment were problematic.



WASHINGTON STATE
UNIVERSITY
TRI-CITIES

⁷ UTRGV is one of the nation's largest Hispanic Serving Institutions (HSIs). ADV and our team members have worked with or are currently working with several others around the nation.

Grant and Chuck conducted extensive stakeholder and external audience research and examined the local economy, as well as prospective students, families, high school counselors, and industry leaders to understand WSU-Tri Cities' potential ahead. The WSU system brand, the short history of institution, the distinctive regional economy, and the true growth potential of different audiences were fully examined, along with messaging to each audience.

As with most ADV clients, our good initial work has led to more research. Our most recent work are academic program marketability assessments tied back to the extensive brand work we did initially. In a region so full of engineering, science, and technology opportunities, WSU-Tri Cities is well positioned for growing enrollment in a wide range of demographics.

California State University-Dominguez Hills

The ADV team worked together on your fellow California State system institution in 2016-17.



The comprehensive research examined everything possible about the University's enrollment, marketplace, position, brand messaging, and the distinctive nature of CSUDH's audiences which came prominently from Carson and Compton but also from an eclectic geography around the Los Angeles metropolitan area.

Chuck led the quantitative research and messaging recommendations; Kyndra interviewed key individuals and immersed herself in the communities impacted by CSUDH to better understand their goals, interests, needs, and beliefs about the University.

The resulting reports and recommendations were candid about challenges but hopeful in recommendations. In all, we addressed seven different areas with detailed data analysis, our team's commentary, and action steps regarding specific enrollment, DEI, and brand building issues.

University of North Carolina System

The University of North Carolina System governing the 16 public universities in North Carolina sought assistance with a statewide issue that, if addressed, would enhance educational attainment and better serve the North Carolina community.

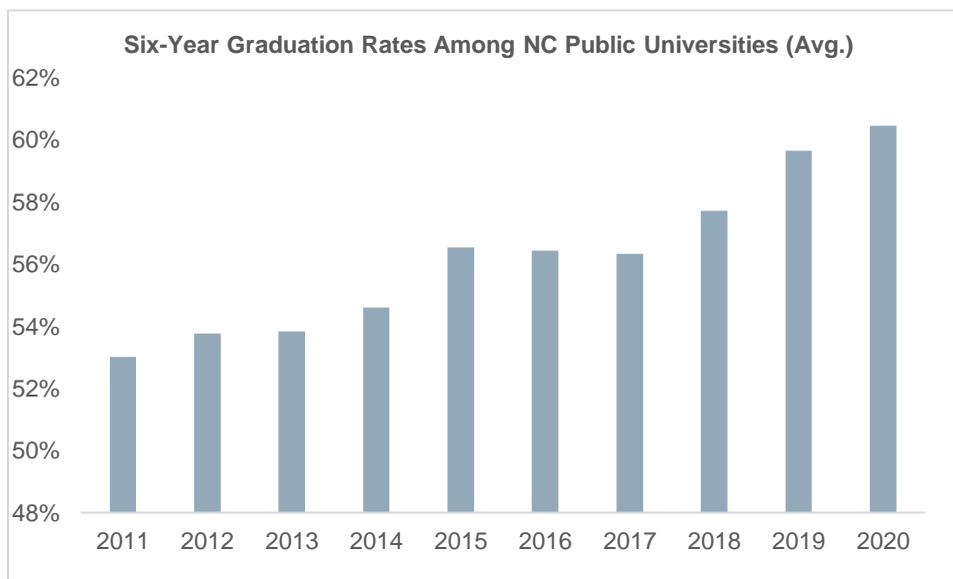


The System was concerned with the rising number of students from every socio-economic, racial, and geographic background withdrawing from public universities in North Carolina. These individuals—dubbed “part-way home” (PWH) students—had earned college credits and possibly took on debt to do so but were not earning credentials that would help them in the job market. The System sought our help with determining why students were withdrawing and what could be done to encourage them to re-enroll.

We conducted qualitative and quantitative research to address this challenge including numerous focus groups and a comprehensive survey of students who had withdrawn from all 16 universities to assess these factors at scale. We learned about the barriers that kept them from re-enrolling and procedural challenges that impacted the withdrawal process.

The research pointed to clear and actionable changes that system universities should implement to either decrease the number of withdrawing students or provide a better pathway for re-enrollment. The findings also paved the way for a new marketing campaign that used the survey results about students' motivations and barriers to create tailored messaging that engaged the target audiences more effectively.

It is powerful for us to see the distinct increase in six-year graduation rates among North Carolina's public universities in the years since our 2016 work and recommendations.



Describe what sets the products and services of the vendor apart from its competitors.

While it is truly a collection of factors that together distinguish ADV, the simplest way to articulate our distinctive point-of-view is this:

There are no other personal (focused), custom-built teams of higher education enrollment and brand experts who are fully resourced and California- and public-university experienced who happen to specialize in the research you need.

Unlike most respondents to the RFP, especially large enrollment firms and global-minded agencies from your backyard, ADV offers CSUCI the benefits of a:

- ***Lean, focused firm*** with all of the resources to accomplish your stated goals without the vast overhead and complications of large agencies. This also means we do not assign

interns and junior staff to deliver the work – senior leaders and proven professionals are the only ADV resources you will work with.

- **Enrollment and marketing practitioners** who also have consulting experience in enrollment and brand strategy. Our team members rely on our experience and will not “productize” solutions like others who will simply plug CSUCI into their formulas. We believe we should adapt to *your* needs, so our solutions are designed according to your questions, circumstances, and existing resources.
- **Higher education-focused research and branding background.** We do not dabble in higher ed or claim it as an “important” category – it is what we do and who we are. And while we all have experiences outside of higher education to bring to bear, building CSUCI’s reputation requires a team who has done this as practitioners and as counsel.
- **History with HSIs, HBCUs, and public universities on diversity, equity, and inclusion.** CSUCI’s distinct audiences deserve the attention of a team who understands their goals and priorities. ADV team members’ guidance comes from experience with distinctive public universities around the country who require attention on DEI matters similar to CSUCI.
- **History with California.** ADV’s team members have worked with a number of California universities and institutions with a focus on California markets (including a tertiary role with CSUCI once). We feel we know something of your backyard without letting that mean we know the answers – far from it – but we offer an ideal balance of knowledge and curiosity for CSUCI that allows us to find them.
- **Your data drives everything.** Many firms – particularly the large researchers in higher ed – boast about their own databases and proprietary pool of data as a selling point and a positive. We don’t agree – we tailor to you and your data, then acquire and assess data from relevant other sources so the answers are about CSUCI. ADV believes that this is the best way to help you better serve your students, employees, and communities. The insights we glean from our pure look at CSUCI will shape all recommendations for you, from detailed messaging nuances to holistic audience engagement. We make your data *relevant*.

Provide a list of 2-3 current higher education institutions that your firm is servicing or has serviced, preferably four-year universities in California. Information should include company name, contact name, email address, telephone, and deliverables.

California State University-Dominguez Hills

Extensive audience research including DEI topics, demographics analysis, competitor analysis, brand messaging audit. Recommendations made for enrollment, brand position, DEI, specific academic program opportunities (impacting enrollment), and related messaging.

Client contact was **Tiffany Edlin**

** (now an athletic administrator at Cal State-Long Beach)*

Tiffany.Edlin@csulb.edu

562.985.1626

University of Texas-San Antonio

Extensive audience research including significant DEI topics, competitor and marketplace analysis, brand messaging audit, messaging and brand to leverage for its strategic plan to become an R1 HSI, testing of brand creative. Recommendations made for enrollment audiences, brand position, audience-specific messaging, community relations.

Brett Calvert

brett.calvert@utsa.edu

210.458.6160

University of Houston-Downtown

Extensive audience research focused on diversity, enrollment, and brand, UHD's opportunities as the member of the UH system, brand audit, competitor audit, all new creative campaign, executions of brand assets as needed.

Elisa Olsen (now CMO of the entire Lone State College system)

Elisa.L.Olsen@lonestar.edu

832.813.6205

Indicate if your company is a certified Small Business Contractor by the State of California and are requesting the 5% Small Business Preference. YES (certification letter is attached) or NO (reference General Provisions article 25).

No. ADV is a certified small business; however, as our principal office is not located in California, we cannot provide certification of being a Small Business Contractor with the State of California.

Schedule 3. Pricing

Service Type	Description	Cost (USD)
Review of Previous Market Research, Strategic Initiatives	Review of previous market research collected in 2009 and 2018; strategic initiatives from 2018, marketing communication, enrollment, and development materials.	\$4,300
Market Research	Collect market research (qualitative including Discovery interviews and quantitative) including instrument development, sampling plan creation, survey programming and testing, data collection, analysis, communication preferences, and all reporting among internal and external audiences as noted in the Project Purpose and Overview (items 1-4).	\$53,300
Competitor brand assessment and strategy brief	Research, assessment and strategy brief among competitors as noted in the Overview	\$9,700
Brand positioning and messaging strategy	Documented brand positioning and messaging strategy, tone and personality. Provide summation of direction for SEM and IMC plans as requested.	\$8,900
Travel Expenses ¹	Includes all travel expenses as described in the vendor's project plan	\$0
GRAND TOTAL		\$76,200
Additional Professional Services, hourly rate	For additional consulting after completion of the project, if needed	Market Research (\$175) Brand Strategy (\$200) Design (\$145) Web Strategy (\$150)

¹ At this time we do not anticipate any travel needs (and per the Q&A for this RFP, it appears that is the preference for all parties). If there comes a point in the project when travel to campus would be necessary and/or highly beneficial, we can assess the state of the Covid-19 pandemic and decide on the best course. If we were to travel to campus, all travel expenses will be billed at cost and we will abide by the University's travel policies. Travel expenses can also be capped at a certain point if preferred.

Schedule 5. Proposer Information Criteria

Signature of Proposer:	
Name of Proposer:	Grant De Roo
Submission Date:	January 11, 2022
Company Name:	ADV Market Research & Consulting, LLC
Company Address:	450 Hwy 1 W #184 Iowa City, IA 52246
Email:	gderoo@advmrc.com
Phone:	603-686-1928