



— STATE COLLEGES SYSTEM —

CASTLETON UNIVERSITY
COMMUNITY COLLEGE OF VERMONT
NORTHERN VERMONT UNIVERSITY
VERMONT TECHNICAL COLLEGE

REQUEST
FOR PROPOSALS

**Audience Research and
Name and Brand Strategy and Development
for New University Unifying
Castleton University, Northern Vermont University,
and Vermont Technical College**

**Content and Design Strategy
for Print and Digital Collateral**

Issued by: Vermont State Colleges Office of the Chancellor

Date Issued: April 29, 2021

Deadline for Inquiries: May 7, 2021

Deadline for Proposals: 4 p.m. EST, May 14, 2021

OVERVIEW

The Vermont State Colleges System is seeking proposals for Audience Research, Brand Strategy and Development, logo development, and print and design collateral for a new, singly-accredited university created from the unification of Castleton University, Northern Vermont University, and Vermont Technical College. The combined entity will be launched on July 1, 2023. As of the date of this proposal, work on this transformation process has begun; but the name of the new institution is yet to be decided.

This consolidation requires a new institutional presence, including brand and visual identity, that unites the three institutions under a common accreditation, administration, and mission while 1) promoting the expanded opportunities and strengths inherent in the unification, 2) helping to create a shared culture and pride for the new institution, 3) expanding the outreach to adult learners seeking to complete degrees, as well as to upskill and reskill and 4) reflecting the diversity of our campus cultures, environments, and programs.

We are seeking proposals from qualified, full-service agencies or partnerships for 1) Audience research to inform the naming of the new combined entity and proposed names for the new institution; 2) Audience research to inform the brand; 3) Brand strategy and development; 4) Collateral, including items such as print and advertising, for a robust 9-12 month transitional marketing campaign, 5) Collateral, including key publications and assets for the new entity such as view book, brochure, digital and print ads, etc. for fall 2022 recruitment cycle; and 5.) Creation of a logo for the new entity with variations for use with campus and other identity names (these names based on academic groupings are not yet developed, but might be something like School of Technology). A website for the new combined institution is excluded from this RFP. An RFP for a new website will be launched in fall 2021.

Bidders may respond to any or all of the services required. Bidders are encouraged to partner and engage subcontractors (please identify) on solutions. Preference will be given to firms or partnerships that propose the full range of services.

While we are still developing this new institution, we know we are aspirational in what we are creating. We know our sense of place and our locations in the state of Vermont are critically important to who we are. We know the audiences we have traditionally served, as well as the additional audiences that we seek to serve. We know we are building an institution that is flexible and student-centric. We also know our colleges are critically important as educational, cultural, and economic drivers in each of their local communities.

Together we offer higher educational opportunities ranging from Early College and Dual Enrollment to undergraduate and graduate degrees, to credit-bearing and non-credit- bearing professional training

and certificates. We have a combination of traditional residential campuses (now colleges/universities) and additional learning sites across Vermont. A fully online division offers undergraduate and graduate degrees with individual colleges offering online degrees as well. Together we bring educational opportunities to all the compass points of Vermont and attract students from outside the borders of Vermont.

The chosen firm will be charged with achieving these deliverables through an inclusive process that incorporates ideas and feedback from stakeholders at the institutions and the Office of the Chancellor.

Audience Research and Name and Brand Strategy and Development

We seek to create an authentic, distinctive, and aspirational name, brand strategy, and visual identity for this new institution. We intend to lead the nation with this unique transformation. Our name, brand, and visual identity must stand out within and beyond the borders of Vermont. The new name, brand, and visual identity must tell our collective story and build our new story in an authentic and relatable way. While each organization currently has its own name, brand strategy, and visual identity, we need to build recognition, excitement, and trust for the new institution.

The questions we are asking ourselves include, how do we seize this opportunity to distinguish this new, yet-to-be-named institution and illustrate excitement for our new institution without abandoning those who love our current institutions? Do we want something modern or traditional? What will our new institution's name, branding tagline, and high-level branding statements be? How do we market as this new institution while reflecting beloved attributes and traditions of our current campuses? We need a singularly memorable name and brand that capitalizes on the Vermont brand along with a clear way for students to identify access points regardless of where they are located. Should the logo harken to the identities of our respective institutions (e.g., contain elements of our current logos and color palettes) or break completely away?

The Vermont State Colleges and its faculty are currently working with an external consultant to identify the most appropriate array of high-quality and relevant academic programs for the new entity. Looking ahead, we anticipate that students will be able to access programs at a location that works for them, on a schedule that works for them, and in a format that works for them. For example, a student may reside on one campus and take courses at another campus location. While we will continue to offer our courses, degrees, and programs in-person, we will also deliver courses through hybrid, remote, and online modalities. Additionally, the identities of two of our current universities are squarely based on their existing location while the identity of the third is based on its hands-on, experiential technical program offerings.

We seek audience-based research to inform our decisions, and the new institution name, in order to position the unified institution to achieve these goals.

The chosen firm, working in conjunction with the marketing leads of each institution and the Office of the Chancellor, will be able to synthesize this information to define who and how potential students will be served by the newly consolidated entity's name, brand identity, and purpose. Identifying and synthesizing the value propositions and key audiences of the member institutions is critical to determining what each brings to the unification as well as to helping inform how to leverage this information to create the brand identity for the new institution.

Collateral Content, Design Recommendations, and Print and Digital Materials

Currently each of the three institutions have their own uniquely branded — and very distinct — collateral materials. We need a new shared visual identity and organizational structure for our view books and other marketing publications that promotes the combined strengths and additional features the unified university brings to prospective students while also helping the student understand the distinctions of each campus (campus culture, academics, and athletics) to aid in their ultimate decision.

Timeline

The unified college will be launched on July 1, 2023. Given the enrollment cycle, the name of the new institution must be available for Fall 2021, therefore the audience research relevant to the name must be completed by July 15, 2021. Additionally, Admissions staff need to have limited print material and message points ready by Fall 2021. A robust transition marketing campaign will also need to be in place by Fall 2021 to help potential students (as well as existing/returning students) understand the transformation. Full recruiting material and an accompanying website will need to be in place by August 2022 to recruit the incoming class for Fall 2023.

Because deliverables will take place over the course of more than 12 months, the timeline will include phases of work:

June-July 15, 2021	July 15-Oct '21	Oct '21-May '22	Apr-June '22
Name Development and Audience Research	Branding		
	Ad design	Key collateral design	
		Pre-launch marketing initiative	
		Website development (not in RFP)	

Although we envision the project proceeding according to this schedule, your proposal and any resulting agreement must include VSC’s absolute right to cancel future services after 60 days written notice, without payment of cancellation or termination charges.

ABOUT THE COLLEGES

Castleton University

Castleton University is small enough to be a community where every student matters, yet large enough to offer more than 75 programs of study for undergraduate and graduate students, 28 varsity sports, and over 50 clubs and organizations. The university stresses experiential learning through internships, community service and research opportunities provided by more than 400 community partnerships. www.castleton.edu.

Northern Vermont University

Northern Vermont University is a two-campus institution of higher education that combines the best of our campuses' nationally recognized liberal arts and professional programs. Our wide range of science, humanities, arts, business, and professional programs are grounded in our commitment to our NVU students. At Northern Vermont University, our goal is to guide curious, motivated, and engaged students on their paths to success and their places in the world. NVU Online offers flexible, affordable, high-quality options for learners pursuing their bachelor's and master's degrees as well as certificates. Located in the northern tier of Vermont, NVU offers a full range of associates, bachelor's, and master's degrees as well as credit and non-credit certificates and professional development courses. Learn more at NorthernVermont.edu.

Vermont Technical College

Vermont Technical College is a leading public college with a mission of applied education and student-centeredness. One of the four institutions of the Vermont State Colleges System, Vermont Tech serves students from throughout Vermont, New England, and beyond at its residential campuses in Williston and Randolph Center, regional campuses in Brattleboro and Bennington, and at seven nursing sites located throughout the state. Vermont Tech features state-of-the-art laboratory experience and a highly personalized classroom and student-life experience. All of our programs utilize a technological educational component, from the simulators used by our nursing program around the state, to manufacturing laboratories in Randolph Center and Williston. Our academic programs encompass a wide range of engineering technology, agricultural, health, and business fields that are vital to producing the knowledgeable workers needed most by employers in the state and in the region. www.vtc.edu.

SCOPE OF WORK: AUDIENCE RESEARCH AND NAME AND BRAND STRATEGY AND DEVELOPMENT

As noted in the Overview, we need to create an authentic, distinctive, and aspirational brand strategy and visual identity for this new institution, as well as a new name. We will look to the winning firm to engage in qualitative and quantitative research with in-state and out-of-state stakeholders (prospective students, students, faculty, staff, employers, alumni, and referring agencies – the Vermont Department of Labor, VSAC, high school counselors).

Through qualitative and quantitative research, the winning firm will put forward a proposed name for the new entity and craft a brand construct that includes the defining characteristics and attributes, the unique brand experience, what physical and emotional benefits exist, and the brand meaning. Based on the research results and synthesis of existing needs states and institutional contributions, the winning firm will provide its recommendations for brand identity, to inform the value proposition, name, and brand icons, fonts, images, symbols, visual design elements, colors, marks, or any other features that will identify the newly consolidated entity.

Deliverables

- Proposed name(s) for the new institution, including a narrative summary, on or before July 15, 2021;
- Qualitative and quantitative data;
- Brand construct, based on tested brand frameworks;
- Survey instrument designed to study consumer preferences for framework options;
- Analysis and narrative summary of findings, including recommendations of proposed name(s) and to inform brand identity;
- A report that outlines key themes from stakeholder discussions, identifies creative goals and objectives, and recommends an overall branding strategy, color palette, and typography;
- Logo development;
- Branding guide.

SCOPE OF WORK: COLLATERAL CONTENT, DESIGN RECOMMENDATIONS, AND PRINT AND DIGITAL MATERIALS

We need support in creating a shared visual identity for our Admissions publications and advertising. Will a shared view book promote the university as one entity with shared aspects of each campus? Or will the shared view book devote sections to each campus? We need assets for our Admissions staff and for a transitional marketing campaign in Fall 2021, as well as for the new university in Fall 2022.

Deliverables

- Collateral, including proposed costs for viewbook, two sets of digital ads, and 'one sheet' for admissions use in fall 2021 as part of a robust 9-12 month transitional marketing campaign;
- Collateral, including key publications for the new entity such as view book, brochure, digital and print ads, etc. for fall 2022 recruitment cycle.

SCOPE OF WORK: EXCLUSIONS

NOT included in the scope of work for this RFP are the following:

- Any work related to the development of the new institution's website
- Any work related to the athletics websites of Castleton University, Northern Vermont University-Johnson, Northern Vermont University-Lyndon, and Vermont Technical College; and
- Any work related to the colleges' intranet portals

BIDDER REQUIREMENTS AND QUALIFICATIONS

Bidders must have extensive experience in audience research, and name and brand strategy and development with particular emphasis on and knowledge of higher education. Partnerships are accepted.

- Demonstrated experience with naming, branding, and brand identity;
- A portfolio of work inclusive of qualitative and quantitative research that provide consumer insights;
- Demonstrated ability of providing actionable findings to clients and creative agencies to develop branding, messaging and style guides;
- Demonstrated long-term client relationships;
- A portfolio of brand strategy and development, including the creative content and print and digital design work for higher education;
- A portfolio of logo development.

Bidders must be licensed in their state(s) of operation and comply with all federal, state and local laws, including the Equal Opportunity Employment Act, the Americans with Disabilities Act, civil rights legislation and OSHA regulations.

Bidders must describe any functions that are currently outsourced as part of the bid and the length of the relationship including any related-party relationship. The related-party relationship is defined as the bidder having a direct or indirect ownership interest of great than or equal to three percent of the related party organization.

Bidders must disclose any relevant conflicts of interest and/or pending lawsuits, as well as the name of any officer, director or agent who is also an employee of any institution in the Vermont State Colleges System.

Bidders must be prepared to describe their experience with and process for soliciting feedback from faculty, students, community stakeholders, and administrators at various stages of development.

PROPOSAL REQUIREMENTS

Please format proposals to standard 8.5" x 11" paper size and adhere to the following format:

SECTION 1: Company Information

Name, address, phone, email, fax, and website URL

Contact person for the purpose of your proposal

Date of incorporation/how long in business

Number of employees

SECTION 2: Company Narrative

Provide a 1- to 4-page narrative describing your experience with audience research, name and brand strategy and development, logo development, and work developing publications and visual assets for higher education, your philosophy/approach to this work, especially related to higher education, and how that philosophy/approach relates to the project outlined in this RFP.

SECTION 3: Personnel

Provide a list of key personnel who will work on this project along with an overview of their professional background/experience and the role they would play in this project.

SECTION 4: Scope of Work, Timeline, and Pricing

Describe the scope of work as you see it and how you will approach the project. Provide an estimated time schedule and costs associated with all phases and deliverables.

Indicate hourly rates for additional design and development work.

Note any additional parameters affecting the cost of this project, including travel, optional services, and contingencies.

Provide a list of options and costs for continued training and support beyond the parameters of this project.

Your proposal and any resulting agreement must include VSC's absolute right to cancel future services upon 60 days written notice without payment of cancellation or termination charges.

SECTION 5: References and Work Samples

Provide three to five references (including at least two higher education clients) with case studies and links to URLs for projects involving a similar scope of work as outlined in this RFP.

GENERAL DISCLAIMER

This RFP does not commit the Vermont State Colleges System to award a contract. This RFP and the process it describes are proprietary to the VSCS and are for the sole and exclusive benefit of the corporation. No other party, including any Applicant, is granted any rights hereunder. Any response, including written documents and verbal communication, by any Applicant to this RFP, shall become the property of the VSCS and may be subject to public disclosure as described in the Confidentiality section, below.

CONFIDENTIALITY

The Vermont State Colleges System complies with the Vermont Public Records Act, 1 VSA § 315 *et seq.* which requires public agencies to allow any person to inspect or copy any public record upon request. Accordingly, bidders are hereby advised that any communications, data or other information received

by the Vermont State Colleges System during the RFP process could be subject to a public records request. However, certain public records are exempt from public inspection and copying, as set forth in 1 VSA § 317(c), including, for example, those portions of a record which meet the statutory definition of a trade secret. Accordingly, bidders should submit a second copy of their proposal, from which any portion of the proposal that the bidder reasonably believes to be exempt from disclosure under the Public Records Act has been redacted. By submitting a proposal, you indicate that you understand the requirements of this section and the potential applicability of Vermont's Public Records Act to your proposal.

APPLICATION INSTRUCTIONS

Email PDF versions of all documents to Katherine.Levasseur@vsc.edu by the deadline, using the following naming convention:

- Email Subject Line: Branding RFP Response
- Proposal: Applicant_Name_Branding_RFP.pdf
- Proposal: Applicant_Name_Branding_RFP_Redacted.pdf (if requested)

QUESTIONS REGARDING THE RFP

Questions regarding this RFP may be directed to Katherine.Levasseur@vsc.edu. For the fastest response, please enter Branding RFP Question in the subject line of your message.

Please note, responses to questions will be available to all bidders.

PREDETERMINED PRESENTATION DATES

Given the aggressive timeline, we are establishing dates for presentations among short-listed bidders. Please hold these times to assure availability should a submission be accepted.

PROJECT TIMELINE

RFP release	April 29, 2021
Due date for questions about this RFP	May 7, 2021
Proposal due date	May 14, 2021
Select Vendors for Presentation	May 21, 2021

Vendor Presentations

Week of May 24, 2021

May 25, 2021, 12-4pm EST

May 26, 2021, 12-4pm EST

May 27, 2021, 12-4pm EST

Vendor(s) selected

Week of May 31st

Vendor(s) must be prepared to launch initial work on June 7, 2021

BACKGROUND—VERMONT STATE COLLEGES SYSTEM

The [Vermont State Colleges System](#) (VSCS) is comprised of four member institutions – [Castleton University](#) (CU), [Community College of Vermont](#) (CCV), [Northern Vermont University](#) (NVU)¹, and [Vermont Technical College](#) (VTC). Across all four institutions, the system educates over ten thousand Vermonters and non-Vermonters each year, employs over three thousand Vermonters, and in Spring 2020, graduated over eighteen hundred Vermonters and out-of-state students into the workforce with certificates and degrees.²

The VSCS is currently undergoing a significant transformation, with the guidance of the Governor, Legislature, the Board of Trustees, and the State's [Select Committee on the Future of Public Higher Education in Vermont](#). The VSCS began working on internal transformation in summer 2020 with the [VSCS Forward Task Force](#) and several institutional tasks forces including [NVU Strong](#) and [VTC's Transformation Advisory Team](#).

BACKGROUND—TRANSFORMATION PRINCIPLES

As the VSCS continues this transformation, we are converting many of the challenges we have confronted, both pandemic-related and financial, into opportunities for transforming the system to better deliver for Vermont and the students we serve for decades to come. Our efforts have focused on three key questions: first, does the action meet the needs of students; second, does the proposal meet the needs of Vermont; and, third does it contribute to the VSCS's financial sustainability?

Student success is the key focus of the Vermont State Colleges: We are committed to delivering on the higher education and continuing education needs of Vermont and Vermonters while preserving the

¹ Northern Vermont University was created on July 1, 2018 from the merger of Lyndon State College and Johnson State College. The unification effort was approved on [September 29, 2016](#) by the board and fully completed by June 30, 2018. [Unification documentation](#) can be found on the VSC website.

²[VSCS Sourcebooks](#) as well as [Board & Committee Meeting Materials and Minutes](#) are available on the System's website.

high-touch, personalized approach and close-knit campus communities that the VSCS is known for. While doing that, we seek to better serve students where they are with a learning modality that works for them, on a schedule that works for them, with the courses, programs, credentials, credit bearing and non-credit-bearing, that provide them with the skills they need to attain their life goals, and at a price they can afford.

Education for life: We create opportunities for Vermonters at every point in their adult life, from early college/dual enrollment programs for high school students, to credentials of value for working adults and those seeking to upskill and reskill. We recognize that, moving forward, we need to develop even more high-quality educational opportunities that meet the needs of students, employers, and the state, by expanding the availability of credentials of value, such as associate's degrees and credentials and certificates that will enable students to secure higher-paying employment or advance at work. Additionally, we need to continue our work to create stackable credentials within degree programs to provide the maximum value and flexibility to our students.

Vermont is our community: In addition to serving our students and meeting the workforce needs of Vermont, we are looking to maintain our physical presence in each of our current host communities, combining a reduced physical footprint with expanded access to academic programs state-wide. Rural public institutions, such as ours, provide crucial educational and employment opportunities to local residents, serve as economic, social and cultural anchors in their host communities, and help to educate workers in high demand local industries, such as health care, education, business, mental health counseling, and hospitality and tourism.

Consolidation of administrative functions: To achieve fiscal sustainability, we recognize that we need to reduce administrative costs. A common accreditation for three of our four institutions, as proposed by the Select Committee, will enable the VSCS to avoid duplication, increase efficiency, improve compliance, and reduce costs.

BACKGROUND—TRANSFORMATION OVERVIEW

The Vermont State Colleges System is embarking on a period of transformation. This transformation includes the consolidation of three institutions into a singly-accredited entity, administrative transformation, and physical transformation over the next five years.

These transformation efforts will right size the Vermont State College System into a financially sustainable organization that meets the needs of Vermont and Vermonters now and into the future.

Primary inputs into this decision include the following:

- Reports from Vermont's *Select Committee on the Future of Public Higher Education in Vermont*. Including the most recent [Revised Report](#) from the Select Committee.
- A [High-Level Plan for evaluation of Select Committee recommendations](#) as approved by the Executive Committee of the Board of Trustees

- [VSCS Structural Transformation Preliminary Analysis](#) as submitted to the Board of Trustees
- Written and oral public comment, a copy of which can be viewed www.vsc.edu/live and read [here](#).
- A preliminary [project plan](#) for system transformation presented by the Chancellor and approved by the VSCS's Board of Trustees on February 22, 2021.