twoxfour

**September 16, 2024**

**University of North Carolina at Chapel Hill**
**IFB #3000011905**
**Proposed Pricing Breakout**

Thank you again for considering Two by Four for this important initiative.

As requested, below is an itemized breakdown of our anticipated costs along with a detailed breakdown of estimated hours and corresponding costs by job title and deliverable.

**These costs are based on what we know today, and on the needs outlined in your RFP, the phased process and deliverables outlined on previous pages of this presentation and tempered by our experience on similar projects like this. That said, they should be considered a jumping off point for a conversation and refinement based on your feedback.**

As outlined in our response / proposal, we will organize our approach into four distinct phases:

**Phase 1: Discovery**

**Phase 2: Brand Development**

**Phase 3: Brand Expression**

**Phase 4: Execution**

The following pages provide a detailed breakdown of our phased approach and deliverables, along with a summary of corresponding costs.

## Phase 1: Discovery & Analysis

The purpose of this phase is to immerse our team into UNC's culture, engage leadership and analyze the greater environment in which you operate. This will result in a distilled presentation on opportunities, challenges and

*Kick-off Meeting*

During this meeting, we will hear from your team and review key data and input, as well as establish milestones, priorities, communication protocols, schedules and procedures for involving stakeholders.

*Campus Immersion*

We will spend 2-3 days touring the UNC campus and meeting leadership, students, faculty as they are available. This immersive experience will enable us to absorb the environment and culture of the institution firsthand—a critical experiential companion to our more objective review of materials and strategic plans.

We will request help from your team leadership to schedule meetings or group sessions with 10-15 individuals and groups who would like to share their experience and thoughts with us while we are on campus.

*Document Review*

We will that your team make available to us any materials that will further our understanding of the university, its work, its competitive environment and its communications. This might include reviewing websites, publications and communications from across the university, memos on plans and issues, org charts, development and other marketing materials, information on notable programs, relevant research, and information regarding relationships with external partners and programs.

*Peer Audit*

Peer Audit: We will leverage our experience in higher education to evaluate the positioning, messaging of up to five (5) peer institutions.

*Quantitative Research*

We will develop and execute an online survey to be sent to members of the school community, including faculty, staff, alumni, students and prospective students.

We can use this survey to inform, to understand awareness and familiarity, ask key questions around brand attributes and opportunities, and solicit input from the widest possible sample of core audiences.

We will design the survey questionnaire, reviewing it with your leadership team, field the survey to a list provided by UNC, collect and input all data, and deliver our findings as part of our overall analysis.

*Analysis*

Our team of strategists will thoroughly review and analyze all of the information gathered, through the methods listed above, and distill our findings into issues and opportunities most relevant to successful brand strategy development.

*Work Session*

In an in-person work session with the project team (2 hours), we will deliver a presentation to review our process, summarize our findings as they apply to your positioning, marketing and communication strengths, challenges and opportunities and conclude with key objectives for positioning and messaging.

The goal of this work session will be to gain leadership input and agreement on the positioning objectives, along with any additional feedback that will help us focus our efforts on the next phase.

**Timing: 6 – 8 Weeks**

## Phase 2: Brand Development

In this step we will develop a positioning strategy and storytelling framework that will enable the university to build appreciation and enthusiasm both internally and externally, to draw proper attention to programs, initiatives and partnerships in clear, distinct and complementary ways.

Positioning Development

Guided by our analysis and agreed upon objectives, we will develop 2-3 alternative positioning concepts. Each concept will seek to identify UNC in a differentiated, yet highly relevant way, in order to achieve sustainable impact with key audiences.

We will express each concept in a succinct concept statement, provide supportive language to flesh out the concept, and discuss our strategic rationale concerning the marketing and communications implications of each concept.

Work Session

We will meet with the project team to present positioning concepts and discuss the implications and competitive advantages of each. We will assist the team to establish agreement upon the best positioning strategy, storytelling and creative expression. It will be critical at this stage to secure your support for the idea that successful positioning requires focus—the discipline to not try to say everything—pleasing all, but inspiring none.

Positioning Platform Development

After receiving input and decisions from your team, we will develop the following for review:

- Positioning Statement—in short form (1-2 sentences), medium form (a paragraph), and long form narrative (2-3 paragraphs). This positioning statement will become the touchstone for all messaging and supporting language going forward.
- Product Attributes—we will identify the core personality attributes that will support the positioning concept and dovetail with the research division's values.
- Elevator Pitch—we will create a short, standard external statement that describes the division in a way that could be used to begin a conversation with any audience.

The above positioning deliverables will receive up to two (2) rounds of refinement.

Messaging Development

We will craft messages for up to six (6) critical audiences, all coherently supporting the positioning concept, but shaped for relevance to each audience.

Audience messages will be crafted in the form of important takeaways, which are the ideas we want each audience to have in their heads about the university and its offerings. These takeaways will serve the purpose of guiding communications across efforts and over time.

In parallel to messaging development, we will craft key themes to be infused throughout communications that allow flexibility and continuous refreshing while staying on message, We will present messaging and key themes to leadership for input and approval.

We will present messaging and key themes to the team via web conference, for input and approval. After receiving your feedback, we will provide up to two rounds of refinement to the proposed messaging.

*Creative & Media Briefs*

Once the positioning and messaging is finalized, we will develop creative and media briefs that reflects the new brand framework. Our creative and media briefs are written to inspire, focus and direct teams towards disruptive conceptual thinking, as well as…

- Kickstart the creative and planning processes.
- Express the challenge into concise, human terms.
- Focus on the role communications can play.

- Is written by the agency but must be approved by the client.
- Provides a yardstick to judge creative work.

We write both a data driven creative brief and a storytelling brief.

**Timing: 6 – 8 Weeks**

## Phase 3: Brand Expression

In this phase we bring your brand to life. We work in tandem with the overall brand strategy and creative and media brief to develop an integrated campaign and communications plan.

*Campaign Concept Development*

Typically, after our creative brief is approved, we take 2 to 3 weeks to create multiple interpretations of the approved brief. Our approach is to create multiple concepts that will disrupt and inspire, driving action overnight and loyalty over time.

- Creative Presentation: We will present a minimum of three (3) creative campaign concepts, each brought to life across multiple touchpoints including but not limited to video, digital, social, radio, print, OOH and on-campus.
- Each campaign will have a distinct but consistent look and feel that will be the basis of all communications.

Creative Approval: UNC will choose a singular creative direction for each deliverable with up to three (3) rounds of refinement / revisions.

*Media / Communications Plan Development*

Similar to the creative brief, we will develop a media brief that reflects our learnings from the Discovery Phase. Our media briefs are written to inspire, focus and direct teams towards disruptive conceptual thinking.

*Media Planning*

Based on our discovery phase, analysis of your target audience, and media brief, our media team will assemble a strategic recommendation that illustrates the most effective places and ways to engage with your target audiences.

Deliverables will include:

- A media consumption analysis of your target audiences.

- Recommended channels and media mix
- Recommended media budget levels

The plan will make recommendations on how to most effectively and efficiently use paid and owned media, and recommended budget levels. We will also include a recommendation on KPIs and how to measure success and optimize our efforts.

The presentation will include a mix of big ideas and more tactical driven components, with up to two (2) rounds of refinement to the recommended plan.

Note: *This SOW does not include execution of the media plan. This will be covered under a separate estimate and corresponding scope. once a plan and budget has been approved.*

*Brand Style Guide Update*

Once a campaign has been approved, we will refine UNC's brand style guide accordingly to reflect the new brand strategy and creative direction (logo, colors, and other brand identity elements will remain the same).

**Timing: 4 – 8 Weeks**

## Phase 4: Execution

In this phase we create the final assets for all deliverables and execute the approved media plan.

*Asset Production*

Once the campaign has been approved, we will work with the UNC team to produce the creative assets necessary to execute internal and external communication efforts.

Depending on the final campaign direction, this may include but not be limited to:

- Video / Photography Shoots & Edits
- Social Media & Digital Assets and / or Templates

- Signage & Other On-Campus Assets (Printer Ready Files or Produced Pieces)
- Direct Mail and Email Executions / Templates
- TBD Assets Based on UNC Needs

**Timing: 3 – 8 Weeks**

*Media Plan Execution*

Two by Four will execute the approved media plan inclusive of final negotiations, trafficking of creative files and measurement and reporting. The cost for this time will be covered by a 13% - 15% commission on the media spend.

**NOTES:**

- A breakdown of the hours and corresponding costs by job title for each deliverable above can be found on the accompanying Excel file.

- Timing above is based on a perfect world scenario. If needed, we can adjust timelines and parallel path phases where needed to hit any specific deadlines that UNC might have.

## ATTACHMENT E: CUSTOMER REFERENCE TEMPLATE

Solicitation #: 3000011905

Vendor Name: Two x Four LLC.

**Instructions**: Vendor shall use this template to submit three (3) customer references with its offer.

## ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION

Solicitation #: 3000011905

Vendor Name: Two x Four LLC.

The undersigned hereby certifies that: [check all applicable boxes]

- ■ The Vendor is in sound financial condition and, if applicable, has received an unqualified audit opinion for the latest audit of its financial statements.

  Date of latest audit: In Progress (If no audit within past 18 months, explain reason below.)
- ■ The Vendor has no outstanding liabilities, including tax and judgment liens, to the Internal Revenue Service or any other government entity.
- ■ The Vendor is current in all amounts due for payments of federal and state taxes and required employment-related contributions and withholdings.
- ■ The Vendor is not the subject of any current litigation or findings of noncompliance under federal or state law.
- ■ The Vendor has not been the subject of any past or current litigation, findings in any past litigation, or findings of noncompliance under federal or state law that may impact in any way its ability to fulfill the requirements of this Contract.
- ■ He or she is authorized to make the foregoing statements on behalf of the Vendor.

**Note:** This shall constitute a continuing certification and Vendor shall notify the Contract Lead within 30 days of any material change to any of the representations made herein.

**If any one or more of the foregoing boxes is NOT checked, Vendor shall explain the reason(s) in the space below. Failure to include an explanation may result in Vendor being deemed non-responsive and its submission rejected in its entirety.**

Our last audit was 24-months ago - we are currently in the process of conducting one that will be complete at the end of October.

| | |
|---|---|
| Matthew Johnson Digitally signed by Matthew Johnson Date: 2024.09.03 11:29:58 -05'00' | 09.09.24 |
| Signature | Date |
| Matthew Johnson | SVP, Chief Marketing Officer |
| Printed Name | Title |

**[This Certification must be signed by an individual authorized to speak for the Vendor]**

twoxfour

**September 16, 2024**

**University of North Carolina at Chapel Hill**
IFB #3000011905

Attn: Mak Thomas Sillman / Purchasing Services

First and foremost, thank you.

We appreciate the opportunity to present our capabilities and outline our process for helping the University of North Carolina at Chapel Hill refresh and streamline its brand elements and better communicate the University's story.

This letter confirms that:

- Two by Four has read the IFB in its entirety—including all links and addenda released in conjunction with the IFB.
- Two by Four agrees to perform in accordance with the scope of work, requirements and specifications contained within the IFB and corresponding links and addenda.
- Two by Four agrees to comply with all instructions, terms and conditions, and attachments.

We recognize UNC's position as a world-class research university and its leadership position among institutions of higher education. Your RFP has made it clear that you have established the priority to collaborate with a partner to refine and evolve your brand story and tell it in a compelling manner that resonates with both internal and external audiences.

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To surmount this challenge, it is critical that UNC covey a clear, compelling, and differentiated value proposition. It is equally critical that your audiences be inspired and compelled by this story.

We hope to accomplish two goals with this proposal—to convey our qualifications and approach to meeting the above need, and to inspire your team about the possibilities of working together. We hope that if we are chosen to work with you on this important initiative that it may also be natural for us to meet any additional / future needs the University may have.

Thank you again.

Sincerely,



**Matthew Johnson**
SVP, Chief Marketing Officer
**Two x Four LLC.**

## ATTACHMENT D: HUB Supplemental Vendor Information

Solicitation #: 3000011905

Vendor Name: Two x Four LLC.

Historically Underutilized Businesses (HUBs) consist of minority, women, and disabled business firms that are at least fifty-one percent owned and operated by an individual(s) from one of these categories. Also included in this category are disabled business enterprises and non-profit work centers for the blind and severely disabled.

Pursuant to G.S. 143B-1361(a), 143-48 and 143-128.4, the State invites and encourages participation in this procurement process by businesses owned by minorities, women, the disable, disabled business enterprises, and non-profit work centers for the blind and severely disabled. This includes utilizing individual(s) from these categories as subcontractors to perform the functions required in this Solicitation.

The Vendor shall respond to questions below, as applicable.

### PART I: HUB CERTIFICATION

Is Vendor a NC-certified HUB entity? ☐ **Yes** ■ **No**

If **yes**, provide Vendor #: _____

If **no**, does Vendor qualify for certification as HUB? ☐ **Yes** ■ **No**

Vendors that check "yes" will be referred to the HUB Office for assistance in acquiring certification.

### PART II: PROCUREMENT OF GOODS - SUPPLIERS

For *Goods* procurements, are you using Tier 2 suppliers? ☐ **Yes** ■ **No**

If ***yes***, then provide the following information:

| Company Name | Company Address | Website Address | Contact Name | Contact Email | Contact Phone | NC HUB certified? | Percent of total bid price |
|---|---|---|---|---|---|---|---|
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**PART III: PROCUREMENT OF SERVICES - SUBCONTRACTORS**

For *Services* procurements, are you using Subcontractors to perform any of the services being procured under this solicitation? ☐ **Yes** ■ **No**

If ***yes***, then provide the following information:

| Company Name | Company Address | Website Address | Contact Name | Contact Email | Contact Phone | NC HUB certified? | Percent of total bid price |
|---|---|---|---|---|---|---|---|
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**Need more information?**

Questions concerning the completion of this form should be presented during the Q&A period through the process defined in the Solicitation document.

Questions concerning NC HUB certification, contact the **North Carolina Office of Historically Underutilized Businesses** at 984-236-0130 or huboffice.doa@doa.nc.gov

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THE UNIVERSITY
*of* NORTH CAROLINA
*at* CHAPEL HILL

**PROCUREMENT SERVICES**
104 AIRPORT DRIVE
SUITE 3500, CB #1100
CHAPEL HILL, NC 27599-1100

T 919.962.9463
mark_sillman@unc.edu

**FAILURE TO RETURN THIS ADDENDUM IN ACCORDANCE WITH THE INSTRUCTIONS MAY SUBJECT YOUR PROPOSAL TO REJECTION.**

To: Prospective Offerors

Subj: UNC-CH Proposal Number: **65-3000011905**
Proposal Opening Date/Time: 09-17-2024
Addendum Date: 09-06-2024
Addendum Number: 01

This addendum is being issued to subject RFP to answer questions raised during the time for questions allowed for in the RFP. Please note that the proposal opening date has been changed to read 09-17-2024 vice 09-09-2024. All responses are to be submitted accordingly. All other information contained in the RFP remains the same.

**Question 01: Section 1.01, Page 5,** Can the University expand on the scope involved with the "implementation of a refreshed brand strategy"? For example, does it include campaign development, creative development, ad buying, campaign measurement, etc.?

Answer: The answer is open to interpretation so the agencies may offer their best approaches to the proposal. If necessary, vendors can propose tiered options for the implementation. More specifically to this question, all of the examples listed are ones we would expect to see in options.

**Question 02: Section 1.1, Page 7,** Can the University provide more detail on how long they anticipate this work requiring, or do they prefer the vendor to propose the duration?

Answer: The vendor may propose the duration. The University is open to multiple paths.

**Question 03: Section 4.1, Page 14,** Does the University require pricing and estimated levels-of-effort for the menu of other proposed services?

Answer: Yes, beyond the request for this initial engagement, we would like pricing for potential second-tier work with schools and units across campus.

**Question 04: Section 4.1, Page 12,** Can the University provide its proposed budget for this work?

Answer: The University prefers not to share that information at this time to allow for bidders to present their best option to fulfill the needs of the University. If submissions are beyond current funding, this will allow the department to consider requesting additional funding.

**Question 05: Section 3.3, Page 13,** What specific details of vendor's cost and price become publicly available? Is there a process to redact proprietary information regarding vendor's pricing or fee structures?

Answer: The full contract will be publicly available.

**Question 06:** IFB Section 1.01 Purpose, Page Number 5, Is UNC-CH aiming for a revolution, evolution, or refinement?

Answer: The University does not currently have a permanent, centralized marketing team or concrete marketing plan, so this would be a revolution. However, there are certain elements related to the University's brand and identity that would remain in place.

**Question 07:** IFB Section 1.01 Purpose, Page Number 5, What pages are you looking to develop further from your existing, publicly shared set of brand guidelines, found here? https://identity.unc.edu/wp-content/uploads/sites/885/2022/11/UNCCH_BrandingIdentityGuidlines.pdf

Answer: We are not seeking to change the University marks or logos used for schools, departments and units. We are open to proposed marketing brands that can either utilize or complement the current University branding.

**Question 08:** IFB Section 1.01 Purpose, Page Number 5, Do you have an existing messaging framework that we should align with, or should we develop all new messaging from scratch? Same with visuals?

Answer: identity.unc.edu contains the existing framework for University branding.

**Question 09:** IFB Section 1.01 Purpose, Page Number 5, What are the top 3 things UNC-CH's brand is doing well?

Answer: The brand is recognizable to a wide array of audiences and it is easily connected to the University. The brand is consistent and correctly supports the University's reputation as a leading global university. It is also easy to adapt.

**Question 10:** IFB Section 1.01 Purpose, Page Number 5, What are the top 3 things UNC-CH's brand is not doing well?

Answer: The current brand doesn't tell the University's story or demonstrate its excellence in research and teaching as well as the impact to the state of North Carolina. We would like the new brand to utilize our existing logo and wrap around it to modernize and deepen what audiences think of when they hear Carolina.

**Question 11:** IFB Section 1.01 Purpose, Page Number 5, Are there preferred formats or platforms for the creative assets (e.g., Adobe Creative Suite files, Canva templates)?

Answer: Adobe Creative Suite files are preferred.

**Question 12:** IFB Section 1.01 Purpose, Page Number 5, Are there specific channels where you see the brand having the most impact?

Answer: This would depend on the marketing strategy proposed by the selected vendor.

**Question 13:** IFB Section 1.01 Purpose, Page Number 5, Are there any existing templates or creative assets that should be considered for reuse, adaptation, or retirement? If so, would you all be willing to share an example or two?

Answer: identity.unc.edu contains the existing framework for University branding, much of which will not be changed, but incorporated into new strategies.

**Question 14:** IFB Section 1.01 Purpose, Page Number 5, How important is experiential branding (e.g., campus signage, virtual tours, student experiences) in this project? Should we consider creative approaches to storytelling that go beyond traditional media?

Answer: The vendor can make its best recommendations for these tactics, but we expect the marketing to focus more on external audiences primarily. Yes, tactics should focus on all facets of owned storytelling.

**Question 15:** IFB Section 1.01 Purpose, Page Number 5, Should the refreshed brand include sub-branding or secondary logos for different departments or initiatives?

Answer: Not at this time.

**Question 16:** IFB Section 1.01 Purpose, Page Number 5, What is the overlap and/or involvement with Development, Athletics, and Health?

Answer: UNC Health is a separate entity with its own branding and marketing, as is UNC Athletics. UNC Development has their own marketing strategies but will likely collaborate on this project.

**Question 17:** IFB Section 1.01 Purpose, Page Number 5,

Answer: No question asked.

**Question 18:** Is there any recent research that has been conducted about the brand, for example a brand tracking study, that can help to inform this work?

Answer: We will share any previous research that is relevant with the chosen vendor.

**Question 19:** IFB Section 1.01 Purpose, Page Number 5, Who do you consider to be the target audiences for the brand and how would you prioritize them at this stage in UNC-CH's tenure?

Answer: Constituents would include prospective students and their families, prospective faculty and staff, alumni, board members, and legislators.

**Question 20:** IFB Section 1.01 Purpose, Page Number 5, Do you have an expectation for the number of interviews? Number of stakeholder groups? For a partnership like this, we may do upwards of 60-100 interviews, but we've done as low as 20-25 interviews.

Answer: We are open to the recommendations from the vendor. If easier, you may present tiered options since increasing the number of interviews would increase the cost.

**Question 21:** IFB Section 1.01 Purpose, Page Number 5, What internal and external stakeholder groups does your team feel are essential to be included in this research?

Answer: Internal: Students, faculty staff; External: Prospective students and their parents; Alumni; Donors and prospective donors, North Carolina citizens, legislators.

**Question 22:** IFB Section 1.01 Purpose, Page Number 5, What % of your undergraduate students are from NC? Also, for undergraduates, what areas of the country do out of state students tend to be from?

Answer: 82% of undergraduate students must be from North Carolina. Out of state students tend to be from states with larger populations, such as New York, California, Texas and New Jersey, as well as neighboring states like Virginia, although we have students from all 50 states and 79 foreign countries.

**Question 23:** IFB Section 1.01 Purpose, Page Number 5, What % of your graduate students are from NC? Also, for graduates, what areas of the country do out of state students tend to be from?

Answer: Approximately 40-45% of graduate students are from North Carolina. Out of state graduate students also tend to come from states with higher populations. 15-20% of graduate students are international students from countries such as China, India, South Korea and Canada.

**Question 24:** IFB Section 1.01 Purpose, Page Number 5, Will UNC-CH be able to share contact lists for students, alumni, faculty, and staff as part of this effort?

Answer: The University will work with the selected firm to determine and facilitate stakeholder interviews.

**Question 25:** IFB Section 1.01 Purpose, Page Number 5, Is there a specific strategic brand planning framework you are comfortable using or would you like us to recommend one?

Answer: We would like the vendor to recommend one.

**Question 26:** IFB Section 1.01 Purpose, Page Number 5, Are there particular universities or brands you view as competitors or benchmarks for your desired brand evolution? Are there specific elements you admire in their branding efforts?

Answer: We respect many of our peer institutions and their work and suggest you look at the branding efforts on other top public universities.

**Question 27:** IFB Section 1.01 Purpose, Page Number 5, Is there potential for cross-pollination and collaboration with these units? If so, which have the most potential for collaboration and potential overlap?

Answer: There will be collaboration between UNC units on this project.

**Question 28:** IFB Section 1.01 Purpose, Page Number 5, More specifically, we know that UNC-CH is ramping up for its next fundraising campaign. Is there potential to share a similar brand?

Answer: Yes, there may be an opportunity for collaboration with University Development, but that is not the primary goal of this engagement.

**Question 29:** IFB Section 1.01 Purpose, Page Number 5, Is there a ballpark or not-to-exceed budget for this work? If not, an expected breakdown between each of the core offerings being requested?

Answer: The University prefers not to share that information at this time to allow for bidders to present their best option to fulfill the needs of the University. If submissions are beyond current funding, this will allow the department to consider requesting additional funding.

**Question 30:** IFB Section 1.01 Purpose, Page Number 5,
Are there specific deadlines for creative deliverables, such as upcoming events, marketing campaigns, or academic milestones that the branding needs to align with? If not, is there an ideal timeline by which you'd like to have this project finished?

Answer: We are open to a proposed timeline. Ideally, the research phase would be completed in the first three months with a proposal for the execution to follow shortly thereafter.

**Question 31:** IFB Section 1.01 Purpose, Page Number 5, Who will be the key decision-makers or stakeholders involved in reviewing and approving creative work? Will there be a designated committee or a primary point of contact?

Answer: There will be a committee of stakeholders from across campus. University Communications leadership will be key decision-makers.

**Question 32:** IFB Section 1.01 Purpose, Page Number 5, How will feedback be provided during the creative development process? Are there established review cycles or deadlines we should be aware of?

Answer: Regular meetings via Zoom or in person would be expected for feedback and check-ins, to make sure all parties are aligned.

**Question 33:** IFB Section 1.01 Purpose, Page Number 5, Are there specific cultural or inclusivity considerations that should inform the brand's creative direction (e.g., representation of diversity, accessibility standards)?

Answer: Yes, we would like the diversity of our campus to be represented in all work.

**Question 34:** IFB Section 1.01 Purpose, Page Number 5, How does the university want its commitment to diversity, equity, and inclusion reflected in its brand and creative elements?

Answer: We would like the diversity of our campus to be represented in all work.

**Question 35:** When was the most recent time UNC completed this type of work?

Answer: UNC's University Communications department has not had designated marketing personnel in over five years and marketing efforts on campus have been largely decentralized.

**Question 36:** What about existing brand positioning and messaging no longer serving the university?

Answer: The brand positioning and messaging can be updated to the current needs of the University's audiences.

**Question 37:** Which are the most critical audiences with whom UNC wants to conduct research?

Answer: North Carolina residents. Prospective students and families. Prospective staff and faculty. Alumni. Citizens of NC and legislators

**Question 38:** What existing research on brand awareness, perceptions, key audiences, etc. if any, does the University have?

Answer: We will share that with the chosen vendor during the research phase.

**Question 39:** Who will the decision-making team consist of? How many people and/or groups will we need to secure approval from?

Answer: The decision making team will consist of University leaders and a team from University Communications. We do not have a set number of people for approvals at this time.

**Question 40:** How many stakeholders will need to be interviewed and/or involved in the project ?

Answer: The vendor can make a recommendation on a preferred number.

**Question 41:** Should we assume that the bid needs to include the cost to produce any creative assets, or is it just development of the creative concepts at this stage ?

Answer: Please include the cost to produce creative assets in the bid.

**Question 42:** Are there peer branding efforts that you find compelling? If so, please let us know which schools.

Answer: We respect many of our peer institutions and their work and suggest you look at the branding efforts on other top public universities.

**Question 43:** What is the budget allocated for this project?

Answer: The University prefers not to share that information at this time to allow for bidders to present their best option to fulfill the needs of the University. If submissions are beyond current funding, this will allow the department to consider requesting additional funding.

**Question 44:** On pg. 14 of the RFP, under section 4.6.4 "Documents Required," it mentions a list of full names matching a required government-issued photo ID, along with addresses and birth dates for each person representing the contracting company. This seems like a lot of personal information to share. Could you please confirm if this is non-negotiable, or if there is an alternative to this request?

Answer: This is a new requirement by the State but is only required if and when the University asks you to show proof because you are handling sensitive data or are coming into contact with people on campus.

**Question 45:** On pg. 18 of the RFP, under section 4.6.5 "Vendor Background Check Agreement," could you please clarify when this would be required? For example, would background checks be necessary only for those who travel to campus, or would they be required for everyone?

Answer: Background checks are required for anyone working for UNC-Chapel Hill who interacts with sensitive data or sensitive populations (e.g. underage students).

**Question 46:** Are you looking for general direction for future creative work, such as campaigns and videos, or are they looking for specific deliverables like a campaign concept, video scripts, and ideas for social media posts?

Answer: For the proposal phase, we expect more general creative direction and recommendations on how that direction would come to life through assets and example tactics. The look and feel of these assets and how the vendor would work with us to create them is more important.

**Question 47:** It appears that your expectations for the vendor-partner include in-depth research, brand strategy, and development of a brand platform and messaging. However, you also mention that the vendor will be responsible for "creative direction and production." Could you please clarify the specific elements you expect the awarded vendor to produce? Are you seeking a partner to create market-ready materials, such as campus signage, light pole banners, digital ads, videos (including production costs and on-site crews), and so forth? Or, are you looking for the vendor-partner to provide only guidelines and examples of market-ready materials for your Office of University Communications to implement?

Answer: We expect the vendor to produce and field the market research and the resulting report. From that, we expect the creative direction for an external marketing campaign. This may include market-ready material design and production, but we are open to collaborating with our content creators for some items.

**Question 48:** Additionally, in the RFP, you mention "themes for digital marketing" as part of the scope of work. Does this entail the creation of a brand and/or enrollment marketing ad campaign, including concepts, headlines, visual executions, and marketing content?

Answer: This refers to the digital pieces of the campaign. We expect the campaign to be brand reputation and not focused on enrollment.

**Question 49:** Within this scope, are you also seeking a redesign of the university's visual brand (logos, colors, typography, etc.)?

Answer: The University's visual brand (identity.unc.edu) is set, in terms of logo, typography and color palette.

**Question 50:** Should we include scope and pricing for photography and/or videography?

Answer: Yes.

**Question 51:** When was the last incumbent agency awarded, and has there been a period of time without an agency partner of this kind for the university?

Answer: This department has never had an agency partner of this type.

**Question 52:** Is the expectation that an incumbent agency will respond to this RFP?

Answer: This department has never had an agency partner of this type.

**Question 53:** Is the goal to evaluate and evolve the brand the entire university – inclusive of graduate, undergraduate, advancement, and athletics audiences? Is there a subset of these groups that is a primary, secondary, tertiary, etc. priority for this work?

Answer: This would evaluate and evolve the brand of the University, not including UNC Athletics or UNC Health.

**Question 54:** In the past, you've worked with large and long-tenured agencies to fulfill your needs. What is your appetite for a scrappy, younger agency with copious experience in the higher education space, particularly that involving significantly matrixed, multi-audience large public universities?

Answer: All agencies will be considered, based on the quality of the proposal and its alignment with the University's goals.

**Question 55:** What is the expected budget range for this work, and has said amount been reserved in the university's fiscal planning for the year ?

Answer: The University prefers not to share that information at this time to allow for bidders to present their best option to fulfill the needs of the University. If submissions are beyond current funding, this will allow the department to consider requesting additional funding. Yes

**Question 56:** What is the desired contract term? Evolving a brand of this kind can go many different directions, is the goal to create a foundation and pass to an internal team for rollout, or should a more collaborative, longer-term/multiyear relationship be explored?

Answer: At this time, the vendor engagement would be to create a foundation and the first round of execution. However, there is an option to create a more long-term relationship if the first phase is well received and budget is available.

**Question 57:** The scope of services with respect to the brand design and supporting content/elements/assets isn't fully defined. Can you elaborate on the expectations of the content output for the new branding? This will be important for what case examples we share as well as budgeting response. For example, new logo, tagline, and suite of identity elements – or revising and updating existing materials with new look and feel but no changes to logo?

Answer: The University of North Carolina logo and color scheme will remain the same. See identity.unc.edu for the branding elements.

**Question 58:** Can you offer some budget parameters or guidance planned for this work? Having a sense for how much qualitative and quantitative research, as well as design and content creation will be informed by a budget range.

Answer: The University prefers not to share that information at this time to allow for bidders to present their best option to fulfill the needs of the University. If submissions are beyond current funding, this will allow the department to consider requesting additional funding.

**Question 59:** Is there a requirement or strong preference to select a North Carolina partner vs out of state?

Answer: There is no preference between an in state or out of state partner.

**Question 60:** 1.01 PURPOSE, page 5, Is there a list of mandatory deliverables?

Answer: The market research survey, its execution and resulting report are mandatory deliverables. The campaign concepts and recommended materials are mandatory as well. We would like for the vendor to produce the materials for that campaign, but we are open to collaborating with the vendor on the execution.

**Question 61:** 1.01 PURPOSE, page 5, What are your pain points that instigated this IFB?

Answer: The University has not had a central marketing initiative. Schools and admissions have had marketing efforts, but we are now building a central marking effort for the University.

**Question 62:** 1.01 PURPOSE, page 5, What marketing initiatives have worked before?

Answer: The University has not had a central marketing initiative previously. Schools and admissions have had marketing efforts, but we are now building a central marking effort for the University.

**Question 63:** 4.1 PRICING, page 12, What is the budget or budget range?

Answer: The University prefers not to share that information at this time to allow for bidders to present their best option to fulfill the needs of the University. If submissions are beyond current funding, this will allow the department to consider requesting additional funding.

**Question 64:** 5.01 SPECS & SCOPE OF WORK, page 16, Who are the key stakeholders from the institution?

Answer: Constituents would include prospective students and their families, prospective faculty and staff, alumni, board members and legislators.

**Question 65:** 5.02 DUTIES AND RESPONSIBILITIES OF CONTRACTOR, page 17, What do you consider success to look like for the vendor agency?

Answer: Success at the end of the first engagement will be a campaign that had measurable success with the target audiences and helped support the efforts of the University's Communications. Success will also be a vendor team who works well with the University Communications team and is able to collaborate seamlessly.

**Question 66:** 5.02 DUTIES AND RESPONSIBILITIES OF CONTRACTOR, page 17, Are there deadlines that we need to meet?

Answer: Deadlines would be negotiated based on the proposed plan.

**Question 67:** 1.0 Page 5, Do you have an anticipated budget range for the project?

Answer: The University prefers not to share that information at this time to allow for bidders to present their best option to fulfill the needs of the University. If submissions are beyond current funding, this will allow the department to consider requesting additional funding.

**Question 68:** 1.0 Page 5, Why is now the right time for this project?

Answer: University Communications is a strong team that is building out its marketing capabilities, which makes this the right time to start the project.

**Question 69:** 1.0 Page 5, Who from the Office of University Communications is leading the RFP process?

Answer: Beth Keith, Associate Vice Chancellor for University Communications.

**Question 70:** 1.0 Page 5, Have you done similar brand perception research in the past? If so, any learnings to keep in mind for this next effort?

Answer: We do not have any data to share at this point.

**Question 71:** 1.0 Page 5, Are you open to both Quantitative and Qualitative research?

Answer: Yes.

**Question 72:** 1.0 Page 5, Do you have a ballpark range of agency fees?

Answer: The University prefers not to share that information at this time to allow for bidders to present their best option to fulfill the needs of the University. If submissions are beyond current funding, this will allow the department to consider requesting additional funding.

**Question 73:** 1.0 Page 5, Do you have a sense of how UNC Chapel Hill is currently perceived among your audiences? What do audiences get right? What might they not know about UNC Chapel Hill?

Answer: We do not have any data to share at this point.

**Question 74:** 1.0 Page 5, How would you define and prioritize your audiences for this project?

Answer: Constituents would include prospective students and their families, prospective faculty and staff, alumni, board members and legislators.

**Question 75:** 1.0 Page 5, When was the last time the University underwent a brand strategy refresh?

Answer: Eight years ago.

**Question 76:** 1.0 Page 5, How will you measure success?

Answer: Success at the end of the first engagement will be a campaign that had measurable success with the target audiences and helped support the efforts of the University's Communications. Success will also be a vendor team who works well with the University Communications team and is able to collaborate seamlessly.

**Question 77:** 1.0 Page 5, What is the main goal of refining the Brand strategy (e.g. increasing admissions, increasing reputation, connecting with donors, etc.)?

Answer: The main goal to support and increase the reputation and brand sentiment of the University. A secondary goal is a prepare for the next development campaign.

**Question 78:** 1.0 Page 5, What challenges are you currently facing with your current brand platform?

Answer: The University has a strong brand recognition, but would we would like for key audiences to know more about the University's excellence in research and teaching, as well as its impact on the state of North Carolina.

**Question 79:** 1.0 Page 5, Are there certain milestones or dates to be aware of as we develop a proposed project schedule?

Answer: Not at this time.

**Question 80:** 1.0 Page 5, What is the excepted outcome/output of this project?

Answer: The market research survey, its execution and resulting report are mandatory deliverables. The campaign concepts and recommended materials are mandatory as well. We would like for the vendor to produce the materials for that campaign, but we are open to collaborating with the vendor on the execution.

**Question 81:** 1.0 Page 5, How much of an evolution to UNC Chapel Hill's existing Brand strategy & Creative expression do you expect to come from this project?

Answer: We would like to keep the brand identity and logos at this time. This would be a brand that utilizes the existing materials and wraps around it.

**Question 82:** 1.0 Page 5, Will this Brand Strategy operate across the entire University (e.g. schools/colleges, admissions, advancement, athletics, etc)?

Answer: This would evaluate and evolve the brand of the University, not including UNC Athletics or UNC Health.

**Question 83:** 1.0 Page 5, How much of a creative evolution do you expect to see from UNC Chapel Hill's current look and feel?

Answer: Some elements of UNC Chapel Hill are set in stone (i.e. the logo; Carolina Blue) but some evolution would be expected and preferred.

**Question 84:** 1.0 Page 5, Can you provide more detail on how you would define a "strategic brand plan" and how that differs from a Brand Strategy?

Answer: We expect the strategic brand plan to be the recommended approach to the brand strategy, meaning the document you present to our team with the recommended campaign after the market research.

**Question 85:** 1.0 Page 5, When do you want the new brand to launch in market?

Answer: We are flexible on timing, but by next fall would be ideal.

**Question 86:** 1.0 Page 5, For the Homepage redesign what CMS is your website built on? Would you expect the agency to handle the full process from concept through development?

Answer: Homepage redesign is not the primary goal of this project.

**Question 87:** 1.0 Page 5, How would you define your current brand? Where is the opportunity for evolution?

Answer: The brand is recognizable to a wide array of audiences and it is easily connected to the University. The brand is consistent and correctly supports the University's reputation as a leading global university. It is also easy to adapt. The current brand doesn't tell the University's story or demonstrate its excellence in research and teaching as well as the impact on the state of North Carolina. We would like the new brand to utilize our existing logo and wrap around it to modernize and deepen what audiences think of when they hear Carolina.

**Question 88:** 1.0 Page 5, Can you share historical budgets for video productions?

Answer: Video production is not the primary goal of this project.

**Question 89:** 2.7 Page 9, Can you clarify what this means, "Completed and signed version of all EXECUTION PAGES, along with the body of the IFB" what are execution pages and what is the body of the IFB?

Answer: Execution Pages are any pages that are required to be filled out and returned. And yes, the entire RFP that we sent out needs to be returned to ensure that you properly received and had an opportunity to review each and every page.

**Question 90:** 2.7 Page 9, Can you clarify the 5-page limit? Is our entire proposal limited to 5 pages plus links to case studies?

Answer: No, just that one section.

**Question 91:** 2.7 Page 9, Does the "About Us" and "Team Bios" count toward the 5-page limit?

Answer: No.

**Question 92:** 2.7 Page 9, Does the proposal need to exactly follow the organization of bid contents as laid out in section 2.7?

Answer: Yes.

**Question 93:** 3.3 Page 11, Can you share what level of detail will be released for costs and price at the time of award? Are these distributed to all participating bidders or are they only available upon request?

Answer: The fully executed contract will be publicly available.

**Question 94:** 3.3 Page 11, Do you expect finalist presentations to be virtual or in-person?

Answer: Virtual.

**Question 95:** 3.3 Page 11, Can you share who will be part of the committee evaluating bids and selecting finalists?

Answer: There will be a committee of stakeholders from across campus. University Communications leadership will be key decision-makers.

**Question 96:** 3.3 Page 11, When will the tabulation be created and shared with the bidding companies? Will costs be shared in this tabulation or only after the award?

Answer: Only the determination for each entry will be shared.

**Question 97:** 3.3 Page 11, When do you expect the finalist presentations to occur?

Answer: Fall 2024.

**Question 98:** Do you envision this as a long-term partnership? Or a project-based assignment?

Answer: A project-based assignment, with potential for extension based on needs.

**Question 99:** Is there an incumbent agency invited to the process? If so, who?

Answer: No.

**Question 100:** Does UNC Chapel Hill currently have relationships with creative/research/consulting agencies? If so, who?

Answer: University Communications does not.

**Question 101:** What is the composition of UNC's internal capabilities and personnel (e.g., graphic designers, copywriters, developers, etc.)? What is the anticipated division of labor between UNC and the selected agency partner(s)?

Answer: There are some in-house creative resources, but the mix is to be determined based on the capabilities/cost of the selected firm.

**Question 102:** 4.6.4 Page 14 – 15, ? Can you clarify if these document requirements are applicable for the scope of work? We would not expect that this scope of work qualifies as performing services on University property.

Answer: But it may, and if so then this would apply.

**Question 103:** 7.0 Page 19, Is there a pricing form/document we need to complete?

Answer: Not at this time.

**Question 104:** 7.0 Page 19, Are we required to submit comments to the Terms & Conditions? Or can we assume contract term negotiations would take place upon award?

Answer: You need to mark up the Terms and Conditions that you take exception to and return them with your proposal for consideration.

**Question 105:** 7.0 Page 19, HUB Supplemental Vendor Information: subcontracting with a HUB vendor required? What if we are able to complete the entire scope of work using our own agency services as a non-HUB certified vendor, will that negatively impact our score?

Answer: No, but, if at all possible, we would encourage the use of HUB Certified Vendors if at all practical.

**Question 106:** When was the last time that UNC-CH did a branding update?

Answer: Eight years ago.

**Question 107:** What's not working today with the UNC-CH brand?

Answer: The brand is recognizable to a wide array of audiences and it is easily connected to the University. The brand is consistent and correctly supports the University's reputation as a leading global university. It is also easy to adapt. The current brand doesn't tell the University's story or demonstrate its excellence in research and teaching as well as the impact to the state of North Carolina. We would like the new brand to utilize our existing logo and wrap around it to modernize and deepen what audiences think of when they hear Carolina.

**Question 108:** What is the motivation to rebrand the university? What is the desired outcome of the rebrand? (Ex: Increased Enrollment, Better Perception, etc)

Answer: The main goal to support and increase the reputation and brand sentiment of the University. A secondary goal is to prepare for the next development campaign.

**Question 109:** Are there institutions who you feel are doing branding well / who the communications team admires?

Answer: We respect many of our peer institutions and their work and suggest you look at the branding efforts on other top public universities.

**Question 110:** Is there any existing brand research / audience research that the university has recently completed?

Answer: We do not have any data to share at this point.

**Question 111:** Section 1, page 7 - Is there a list of required deliverables you are seeking as part of this scope?

Answer: Deliverables would depend on the selected vendor and their plan.

**Question 112:** Section 1, page 7 - Are you seeking a physical (PDF) brand guide deliverable or a digital brand guide deliverable?

Answer: We can discuss deliverable options with the selected firm.

**Question 113:** Section 1 page 7 - Is there a desired timeline to start the work as well as completion?

Answer: ASAP.

**Question 114:** Section 1, page 7 - What is the make-up of the internal team the vendor will be working with?

Answer: Communicators from across campus, some with marketing background.

**Question 115:** Section 1, page 7 - Would you be interested in conducting preference testing on visual designs?

Answer: Yes.

**Question 116:** 1.0 Page 5, Has UNC Chapel Hill conducted market research in the past? If so, is there anything that hasn't been answered in past research that UNC Chapel Hill hopes to uncover now?

Answer: We do not have any data to share at this point.

**Question 117:** 1.0 Page 5, Can UNC Chapel Hill share more detail on priority internal and external audiences for the market research?

Answer: Constituents would include prospective students and their families, prospective faculty and staff, alumni, board members and legislators.

**Question 118:** 1.0 Page 5, Does UNC Chapel Hill have existing opt-in contacts lists (including email addresses) for the priority audiences for this market research? If so, what size is the available list for each audience?

Answer: No.

**Question 119:** 1.0 Page 5, Are there specific milestones/timing considerations we should be aware of for the market research?

Answer: Not at this time.

**Question 120:** 1.0 Page 5, Who at UNC Chapel Hill will be the primary users of the research?

Answer: Communications professionals.

**Question 121:** 1.0 Page 5, What are UNC Chapel Hill's specific objectives for the market research?

Answer: We would like to have up to date data on how target audiences feel about Carolina, what comes to mind when they see/hear about the University and any gaps between our expected outcomes and the impact on target audiences.

**Question 122:** 1.0 Page 5, At this time, Is UNC Chapel Hill looking to track metrics from this study over time? Or just to complete a single study?

Answer: Studies may be conducted at intervals to track changes.

**Question 123:** 1.0 Page 5, Can you share more detail on desired target markets or geos?

Answer: We are open to national market research with an emphasis on North Carolina.

**Question 124:** 1.0 Page 5, What decisions will the market research help inform?

Answer: The market research will inform the campaign recommendation from the vendor.

1. Check ONE of the following options for this addendum:

☑ Proposal has not been mailed. Any changes resulting from this addendum are included in our Proposal.

☐ Proposal has already been mailed. No changes resulted from this addendum.

☐ Proposal has already been mailed. Changes resulting from this addendum are as follows.

2. This addendum must be signed below and submitted with your:

**a.** Proposal if this is not a two-step RFP.
**b.** Technical Proposal if this is a two-step RFP.
**c.** Separate correspondence if you have already sent in your proposal.

---

Execute Addendum

Company Name: Two x Four LLC.

Authorized Signature: [signature]

Name and Title (Typed): Matthew Johnson — SVP, Chief Marketing Officer

Date: 09.17.24

## ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR

Solicitation #: 3000011905

Vendor Name: Two x Four LLC.

In accordance with NC General Statute G.S. 143-59.4, Vendor shall detail the location(s) at which performance will occur, as well as the manner in which it intends to utilize resources or workers outside of the United States in the performance of The Contract.

Vendor shall complete items 1 and 2 below.

1. **Will any work under this Contract be performed outside of the United States?** ☐ YES ■ NO

   If "YES":

   a) List the location(s) outside of the United States where work under the Contract will be performed by the Vendor, any subcontractors, employees, or any other persons performing work under the Contract.

   b) Specify the manner in which the resources or workers will be utilized:

2. **Where within the United States will work be performed?**

   Chicago, IL
   Nashville, TN
   San Francisco, CA

**NOTES:**

1. The State will evaluate the additional risks, costs, and other factors associated with the utilization of workers outside of the United States prior to making an award.
2. Vendor shall provide notice in writing to the State of the relocation of the Vendor, employees of the Vendor, subcontractors of the Vendor, or other persons performing services under the Contract to a location outside of the United States.
3. All Vendor or subcontractor personnel providing call or contact center services to the State of North Carolina under the Contract **shall disclose** to inbound callers the location from which the call or contact center services are being provided.




# STATE OF NORTH CAROLINA

## THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

**Invitation for Bid #: 3000011905**

**Description: Marketing and Branding Services Contract**

**Date of Issue: 08-26-2024**

**Bid Opening Date: 09-09-2024**

**@ 1:00 PM EST**

**Direct all inquiries concerning this IFB to:**

Mark Thomas Sillman

Associate Director Purchasing Services

Email: mark_sillman@unc.edu

# STATE OF NORTH CAROLINA

**Invitation for Bid #**

**3000011905**

For internal State agency processing, including tabulation of bids, provide your company's eVP (Electronic Vendor Portal) Number. Pursuant to G.S. 132-1.10(b) this identification number shall not be released to the public. **This page will be removed and shredded, or otherwise kept confidential,** before the procurement file is made available for public inspection.

**This page shall be filled out and returned with your bid.**
**Failure to do so may subject your bid to rejection.**

Two x Four LLC.

Vendor Name

Vendor eVP#

**Note**: For a contract to be awarded to you, your company (you) must be a North Carolina registered vendor in good standing. You must enter the vendor number assigned through eVP (Electronic Vendor Portal). If you do not have a vendor number, register at https://vendor.ncgov.com/vendor/login

*Electronic responses ONLY will be accepted for this solicitation.*

*Bid Number: 3000011905* *Vendor:* Two x Four LLC.

# STATE OF NORTH CAROLINA
## *The University of North Carolina at Chapel Hill*

| | |
|---|---|
| **Refer *ALL* Inquiries regarding this IFB to:** *See front cover* | **Invitation for Bid #: 3000011905** |
| | **Bids will be publicly opened: 09-09-2024** |
| **Using Agency: UNC-CH** | |
| **Requisition No.:** | |

**EXECUTION**

In compliance with this Invitation for Bid (IFB), and subject to all the conditions herein, the undersigned Vendor offers and agrees to furnish and deliver any or all items upon which prices are bid, at the prices set opposite each item within the time specified herein.

By executing this bid, the undersigned Vendor understands that false certification is a Class I felony and certifies that:

- this bid is submitted competitively and without collusion (G.S. 143-54),
- none of its officers, directors, or owners of an unincorporated business entity has been convicted of any violations of Chapter 78A of the General Statutes, the Securities Act of 1933, or the Securities Exchange Act of 1934 (G.S. 143-59.2), and
- it is not an ineligible Vendor as set forth in G.S. 143-59.1.

Furthermore, by executing this bid, the undersigned certifies to the best of Vendor's knowledge and belief, that:

- it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency.

As required by G.S. 143-48.5, the undersigned Vendor certifies that it, and each of its sub-Contractors for any Contract awarded as a result of this IFB, complies with the requirements of Article 2 of Chapter 64 of the NC General Statutes, including the requirement for each employer with more than 25 employees in North Carolina to verify the work authorization of its employees through the federal E-Verify system.

As required by Executive Order 24 (2017), the undersigned vendor certifies will comply with all Federal and State requirements concerning fair employment and that it does not and will not discriminate, harass, or retaliate against any employee in connection with performance of any Contract arising from this solicitation.

G.S. 133-32 and Executive Order 24 (2009) prohibit the offer to, or acceptance by, any State Employee associated with the preparing plans, specifications, estimates for public contracts; or awarding or administering public contracts; or inspecting or supervising delivery of the public contract of any gift from anyone with a contract with the State, or from any person seeking to do business with the State. By execution of this response to the IFB, the undersigned certifies, for Vendor's entire organization and its employees or agents, that Vendor is not aware that any such gift has been offered, accepted, or promised by any employees of your organization.

By executing this bid, Vendor certifies that it has read and agreed to the **INSTRUCTION TO VENDORS** and the **NORTH CAROLINA GENERAL TERMS AND CONDITIONS incorporated herein.** These documents can be accessed from the ATTACHMENTS page within this document.

**Failure to execute/sign bid prior to submittal may render bid invalid and it MAY BE REJECTED. Late bids shall not be accepted.**

| | | | |
|---|---|---|---|
| COMPLETE/FORMAL NAME OF VENDOR: Two x Four LLC. | | | |
| STREET ADDRESS: 10 N. Dearborn - Suite 1000 | | P.O. BOX: | ZIP: 60602 |
| CITY & STATE & ZIP: Chicago, IL 60602 | | TELEPHONE NUMBER: 312.382.0100 | TOLL FREE TEL. NO: |
| PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE (SEE INSTRUCTIONS TO VENDORS ITEM #21): | | | |
| PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR: Matthew Johnson — SVP, Chief Marketing Officer | | FAX NUMBER: | |
| VENDOR'S AUTHORIZED SIGNATURE*: | DATE: 09/16/24 | EMAIL: | |

**VALIDITY PERIOD**

Offer shall be valid for at least sixty (60) days from date of bid opening, unless otherwise stated here: _____ days, or if extended by mutual agreement of the parties in writing. Any withdrawal of this offer shall be made in writing, effective upon receipt by the agency issuing this IFB.

**ACCEPTANCE OF BIDS**

If your bid is accepted, all provisions of this IFB, along with the written results of any negotiations, shall constitute the written agreement between the parties ("Contract"). The NORTH CAROLINA GENERAL TERMS AND CONDITIONS are incorporated herein and shall apply. Depending upon the Goods or Services being offered, other terms and conditions may apply, as mutually agreed.

**FOR STATE USE ONLY:** Offer accepted and Contract awarded this_____ day of _____, 20____, as indicated on

The attached certification, by _____.

**(Authorized Representative of The University of North Carolina at Chapel Hill)**

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# 1.0 PURPOSE AND BACKGROUND

**1.01 PURPOSE:**

This bid document is being issued to obtain a contract to provide market research and branding services for the University of North Carolina at Chapel Hill, for its Office of University Communications. The University seeks to embark on a comprehensive marketing research project to refresh and streamline the University's branding elements. The University envisions this project as a pivotal step towards aligning its brand with the evolving landscape of public higher education and its role as a leading global research institution. The selected firm will be tasked with the meticulous examination of the current brand positioning, followed by research and development and implementation of a refreshed brand strategy that resonates with the institution's values, goals, and diverse groups of stakeholders.

The scope of work encompasses a detailed analysis of the institution's brand perception, both internally and externally, identification of key differentiators, and the creation of a brand strategy that aligns with the University's values, goals and market placement. The firm will be expected to deliver a comprehensive report, a strategic brand plan, and implementable guidelines for the university, as well as creative aspects to inform the look, feel and sound of university creative deliverables, such as themes for digital marketing, web communications, videos, social media elements and other brand presentations.

This project will be a collaborative effort, with designated points of contact from both the institution and the firm. Regular communication and updates will be integral to the project's success, with structured reporting and review processes in place to monitor progress and address any challenges that may arise.

Budget considerations and payment terms will be transparently conveyed, with a clear schedule for disbursements contingent upon the achievement of specified deliverables. The institution will also outline the criteria for payment approvals, ensuring fiscal responsibility and accountability.

Below is a profile of UNC-Chapel Hill as well as some key facts and figures to provide additional background.

**1.02 BACKGROUND:**

**University of North Carolina at Chapel Hill**

UNC-Chapel Hill, the nation's first public university to award degrees, prepares talented students from different perspectives and life experiences to become creators, explorers, innovators and leaders.

Carolina's innovative teaching, campus-wide spirit of inquiry and dedication to public service continue a legacy that began when the University was chartered in 1789.

In Chapel Hill, students develop a voice for critical thought and the courage to guide change. They connect to the future they're already shaping and prepare with one another to solve the grand challenges of our time.

Carolina is passionately public and committed to ensuring that every student who earns admission can come to Chapel Hill and thrive.

Our world-class research, over a billion-dollar enterprise, has quadrupled over the past two decades, firmly establishing Carolina as one of America's top-ranked research institutions. That success spurs opportunity and innovation that grows North Carolina's economy, creates jobs and supports Tar Heel businesses.

Students, faculty and staff are on the cusp of exciting breakthroughs in cancer, environmental challenges, chronic diseases and data and computer science.

Through Carolina Across 100, a five-year initiative, we partner with communities in all 100 counties to address critical challenges facing North Carolinians, including youth unemployment and suicide prevention.

In its third century – an era of groundbreaking study and discovery – UNC-Chapel Hill is harnessing the very best of our fast-changing world. We're proud to advance knowledge for this and each generation to come.

America's Best Value in Public Higher Education

Carolina ranks among the top universities in the nation and around the world. In 2024, U.S. News & World Report listed Carolina 4th among the country's public universities and 22nd overall. It was also ranked 14th for best value among public universities for the 19th time.

Numerous graduate programs also are highly ranked – 20 were in the top 10 nationally – by U.S. News & World Report for the 2024 edition of "Best Graduate Schools." For the third time in a row, UNC's Eshelman School of Pharmacy was ranked No. 1 in the U.S., and the Gillings School of Global Public Health was ranked second of 213.

Our Commitment to Access and Affordability

UNC-Chapel Hill is among the nation's few public flagship campuses to practice need-blind admissions and provide low-debt, full-need student aid. This approach makes the promise of a Carolina education possible for all academically qualified students regardless of their financial means.

Carolina has long been one of the nation's only two public universities to fund 100 percent of demonstrated need among eligible students.

The Carolina Covenant, a ground-breaking program, supports the full financial need of academically qualified low-income students so they may graduate debt-free. The program has brought over 10,500 scholars to Chapel Hill and led to dramatically improved graduation rates among our lowest-income students. Recent enhancements include a support network to help Covenant Scholars increase career readiness and admission to advanced degree programs.

The Carolina Student Transfer Excellence Program (C-STEP) partners with 14 North Carolina community colleges – most in rural counties – to identify talented low-and moderate-income community college students and to provide a pathway for admission to UNC-Chapel Hill.

The Carolina College Advising Corps places recent UNC-Chapel Hill graduates as admissions and financial-aid advisers in 82 underserved high schools across North Carolina to reinforce the advantages of a college education and guide prospective students through the admissions process.

In addition, the university ensures that students whose families make under $80,000 per year and have typical assets will have all of their college costs covered.

**Powerful Research Impact Benefits North Carolina and Beyond**

Our campus conducts over $1 billion of sponsored research, ranking as the 13th largest U.S. research university in volume and annual expenditures and 10th for total federal funding. With a record-breaking $1.2 billion in awards in fiscal 2022, our researchers continue to drive research projects and experiments for external sponsors including federal agencies, industry partners and nonprofits.

The faculty's expertise – spanning a broad range of health, behavioral, social and environmental sciences – drives innovations and breakthroughs in many fields, from gene therapies and the search to cure cancer to population studies and coastal resilience.

During the global pandemic, Carolina emerged as a global leader in COVID-19 research, leading to milestones including a $65 million grant from the National Institutes of Health to create the Antiviral Drug Discovery Center, one of nine established by the NIH. The center will develop oral antivirals that can combat pandemic-level viruses.

UNC-Chapel Hill's research creates jobs for over 10,400 North Carolinians in projects that span all 100 counties. Since most research funding comes from out of state, that support represents new revenue for North Carolina's gross state product; spending on research benefits over 3,500 Tar Heel businesses.

Carolina Facts

- A member of the prestigious Association of American Universities, Carolina was the first and only public university in the United States to award degrees in the 18th century.

- We offer 78 bachelor's, 113 master's, 66 doctorate and seven professional degree programs through the College of Arts & Sciences and 16 schools, including the new School of Data Science and Society and the School of Civic Life and Leadership.

- More than 356,000 alumni live in all 50 states, the District of Columbia, U.S. territories and 147 countries. Nearly 190,000 are North Carolinians.

- Three Tar Heels were selected for prestigious Rhodes Scholarships for study at Oxford University in 2021 – a first in Carolina history. We've produced 54 Rhodes Scholars since the program began in 1902.

- Over 150 faculty have been members of the national academies and distinguished learned societies. Two professors became Nobel laureates – Dr. Aziz Sancar, co-recipient of the 2015 Nobel Prize in Chemistry, and the late Dr. Oliver Smithies, co-recipient of the 2007 Nobel Prize in Physiology or Medicine.

- Carolina Across 100 aims to form meaningful partnerships in all 100 counties to respond to statewide challenges stemming from or exacerbated by COVID-19. "Our State, Our Work" connects unemployed and underemployed young adults with better jobs in response to disruptions in the U.S. labor market. A new "Our State, Our Wellbeing" program will work with local communities to identify and implement strategies to prevent suicide and improve resources available for mental and behavioral health.

### 1.1 CONTRACT TERM

This contract shall be binding on both parties from the date of the contract award, through the satisfactory completion of the work required under the scope of work and shall be complete when final payment has been made.

Bids shall be submitted in accordance with the terms and conditions of this IFB and any addenda issued hereto.

## 2.0 GENERAL INFORMATION

### 2.1 INVITATION FOR BID DOCUMENT

This IFB is comprised of the base IFB document, any attachments, and any addenda released before Contract award, which are incorporated herein by reference.

### 2.2 E-PROCUREMENT FEE

This section was intentionally omitted.

### 2.3 NOTICE TO VENDORS REGARDING IFB TERMS AND CONDITIONS

It shall be the Vendor's responsibility to read the Instructions to Vendors, the North Carolina General Terms and Conditions, all relevant exhibits and attachments, and any other components made a part of this IFB and comply with all requirements and specifications herein. Vendors are also responsible for obtaining and complying with all Addenda and other changes that may be issued in connection with this IFB.

If Vendors have questions or issues regarding any component of this IFB, those must be submitted as questions in accordance with the instructions in the BID QUESTIONS Section. If the University determines that any changes will be made as a result of the questions asked, then such decisions will be communicated in the form of an IFB addendum. The University may also elect to leave open the possibility for later negotiation of specific provisions of the Contract that have been addressed during the question-and-answer period, prior to contract award.

Other than through the process of negotiation under 01 NCAC 05B.0503, the University rejects and will not be required to evaluate or consider any additional or modified terms and conditions submitted with Vendor's bid or otherwise. This applies to any language appearing in or attached to the document as part of the Vendor's bid that purports to vary any terms and conditions or Vendors' instructions herein or to render the bid non-binding or subject to further negotiation. Vendor's bid shall constitute a firm offer that shall be held open for the period required herein ("Validity Period" above).

**The University may exercise its discretion to consider Vendor proposed modifications. By execution and delivery of this IFB Response, the Vendor agrees that any additional or modified terms and conditions, whether submitted purposely or inadvertently, shall have no force or effect, and will be disregarded unless expressly agreed upon during negotiations and incorporated by way of a Best and Final Offer (BAFO). Noncompliance with, or any attempt to alter or delete, this paragraph shall constitute sufficient grounds to reject Vendor's bid as nonresponsive.**

## 2.4 IFB SCHEDULE

The table below shows the *intended* schedule for this IFB. The University will make every effort to adhere to this schedule.

| Event | Responsibility | Date and Time |
|---|---|---|
| Issue IFB | University | 08-26-2024 |
| Hold Pre-Bid Meeting/Site Visit | University | N/A |
| Submit Written Questions | Vendor | NLT 08-30-2024 @ 1:00 PM EST |
| Provide Response to Questions | University | ASAP |
| Submit Bids | Vendor | NLT 09-09-2024 @ 1:00 PM EST |
| Contract Award | University | ASAP |

## 2.5 SITE VISIT or PRE-BID CONFERENCE

This section was intentionally omitted.

## 2.6 BID QUESTIONS

Upon review of the IFB documents, Vendors may have questions to clarify or interpret the IFB in order to submit the best bid possible. To accommodate the Bid Questions process, Vendors shall submit any such questions by the "Submit Written Questions" date and time provided in the IFB SCHEDULE Section above, unless modified by Addendum.

Written questions shall be emailed to *mark_sillman@unc.edu* by the date and time specified above. Vendors should enter "IFB # *3000011905: Questions*" as the subject for the email. Question submittals should include a reference to the applicable IFB section and be submitted in the format shown below:

| Reference | Vendor Question |
|---|---|
| IFB Section, Page Number | Vendor question ...? |

Questions received prior to the submission deadline date, the University's response, and any additional terms deemed necessary by the University will be posted in the form of an addendum to *the electronic Vendor Portal (eVP), https://evp.nc.gov,* and shall become an Addendum to this IFB. No information, instruction or advice provided orally or informally by any University personnel, whether made in response to a question or otherwise in connection with this IFB, shall be considered authoritative or binding. Vendors shall rely *only* on written material contained in the IFB and an addendum to this IFB.

## BID SUBMITTAL

**IMPORTANT NOTE: This is an absolute requirement.** Late bids, regardless of cause, will not be opened or considered, and will be automatically disqualified from further consideration. Vendor shall bear the sole risk of late submission due to unintended or unanticipated delay. It is the Vendor's sole responsibility to ensure its bid has been received as described in this IFB by the specified time and date of opening. The time and date of receipt will be electronically recorded. Any bid or portion thereof received after the bid deadline will be rejected.

All proposal responses shall be submitted electronically via the electronic Vendor Portal (eVP). Additional information can be found at the eVP updates for Vendors link: https://eprocurement.nc.gov/news-events/evp-updates-vendors.

Failure to submit a bid in strict accordance with these instructions shall constitute sufficient cause to reject a Vendor's bids(s). Vendors are strongly encouraged to allow sufficient time to upload bids.

Critical updated information may be included in Addenda to this IFB. It is important that all Vendors responding to this IFB periodically check the State's eVP website for any Addenda that may be issued prior to the bid opening date. All Vendors shall be deemed to have read and understood all information in this IFB and all Addenda thereto.

## 2.7 BID CONTENTS

Vendors shall populate all attachments of this IFB that require the Vendor to provide information and include an authorized signature where requested. Failure to provide all required items, or Vendor's submission of incomplete items, may result in the University rejecting Vendor's bid, in the University's sole discretion.

Vendor IFB responses shall include the following items and attachments, which shall be arranged in the following order:

a) Cover Letter, which must include all of the following: (i) a statement that confirms that the Vendor has read the IFB in its entirety, including all links, and all Addenda released in conjunction with the IFB; (ii) a statement that the Vendor agrees to perform in accordance with the scope of work, requirements, and specifications contained herein; and (iii) Vendor's agreement to comply with all instructions, terms and conditions, and attachments.

b) Title Page: Include the company name, address, phone number and authorized representative along with the Bid Number.

c) Completed and signed version of all EXECUTION PAGES, along with the body of the IFB.

d) Signed receipt pages of any addenda released in conjunction with this IFB, if required to be returned.

e) Vendor's Response.

1. The Offeror shall provide no more than 5 pages on the firm's approach to marketing, specifically research and branding, as well as the proposed process and timeline of the project.

2. The Offeror shall provide 3-5 case studies of similar marketing and branding work, particularly for higher education institutions and/or North Carolina organizations. Please send links to this work with your submission.

3. The Offeror shall provide "About us" background information about your company as well as bios for the team members who will work on the project.

f) The Offeror shall list a minimum of three (3) references, including point of contact, phone number and address.

g) Completed version of ATTACHMENT A: PRICING

h) Completed version of ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION

i) Completed version of ATTACHMENT E: CUSTOMER REFERENCE FORM

j) Completed version of ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR

k) Completed and signed version of ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION

### 2.8 ALTERNATE BIDS

Unless provided otherwise in this IFB, Vendor may submit alternate bids for comparable Goods, various methods or levels of Service(s), or that propose different options. Alternate bid must specifically identify the IFB requirements and advantage(s) addressed by the alternate bid. Any alternate bid, in addition to the marking described above, must be clearly marked with the legend: "Alternate Bid #___ *[for 'name of Vendor']*". Each bid must be for a specific set of Goods and Services and must include specific pricing. If a Vendor chooses to respond with various offerings, each must be offered with a separate price and be contained in a separate bid. Each bid must be complete and independent of other bids offered.

### 2.10 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

Relevant definitions for this IFB are provided in 01 NCAC 05A .0112 and in the Instructions to Vendors found below which are incorporated herein by this reference.

## 3.0 METHOD OF AWARD AND BID EVALUATION PROCESS

### 3.1 METHOD OF AWARD

North Carolina G.S. 143-52 provides a general list of criteria the University shall use to award contracts, as supplemented by the additional criteria herein. The Goods or Services being procured shall dictate the application and order of criteria; however, all award decisions shall be in the University's best interest.

All responsive bids will be reviewed, and an award or awards will be based on the responsive bid(s) offering the lowest price that meets the specifications provided herein, to include any required verifications set out here in such as but not limited to past performance, references, and financial documents. .

While the intent of this IFB is to award a Contract(s) to a single Vendor, the University reserves the right to make separate awards to different Vendors for one or more line items, to not award one or more line items, or to cancel this IFB in its entirety without awarding a Contract, if it is considered to be most advantageous to the University to do so.

The University reserves the right to waive any minor informality or technicality in bids received.

### 3.2 CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION

While this IFB is under evaluation, the responding Vendor, including any subcontractors and suppliers, is prohibited from engaging in conversations intended to influence the outcome of the evaluation. See the Paragraph 29 of the Instructions to Vendors entitled COMMUNICATIONS BY VENDORS.

Each Vendor submitting a bid to this IFB, including its employees, agents, subcontractors, suppliers, subsidiaries and affiliates, is prohibited from having any communications with any person inside or outside the using agency; issuing agency; other government agency office or body (including the purchaser named above, any department secretary, agency head, members of the General Assembly and Governor's office); or private entity, if the communication refers to the content of Vendor's bid or qualifications, the content of another Vendor's proposal, another Vendor's qualifications or ability to perform a resulting contract, and/or the transmittal of any other communication of information that could be reasonably considered to have the effect of directly or indirectly influencing the evaluation of proposals, the award of a contract, or both.

Any Vendor not in compliance with this provision shall be disqualified from evaluation and award. A Vendor's proposal may be disqualified if its subcontractor and/or supplier engage in any of the foregoing communications during the time that the procurement is active (*i.e.*, the issuance date of the procurement until the date of contract award or cancellation of the procurement). Only those discussions, communications or transmittals of information authorized or initiated by the issuing agency for this IFB or inquiries directed to the purchaser named in this IFB regarding requirements of the IFB (prior to proposal submission) or the status of the award (after submission) are excepted from this provision.

## 3.3 BID EVALUATION PROCESS

Only responsive submissions will be evaluated.

**The University will conduct an evaluation of responsive Bids, as follows:**

Bids will be received according to the method stated in the Bid Submittal section above.

All bids must be received by the issuing agency not later than the date and time specified in the IFB SCHEDULE Section above, unless modified by Addendum. Vendors are cautioned that this is a request for offers, not an offer or request to contract, and the University reserves the unqualified right to reject any and all offers at any time if such rejection is deemed to be in the best interest of the University.

At the date and time provided in the IFB SCHEDULE Section above, unless modified by Addendum, the bids from each responding Vendor will be opened publicly and all offers (except those that have been previously withdrawn, or voided bids) will be tabulated. The tabulation shall be made public at the time it is created. When negotiations after receipt of bids is authorized pursuant to G.S. 143-49 and 01 NCAC 05B.0503, only the names of offerors and the Goods and Services offered shall be tabulated at the time of opening. Cost and price shall become available for public inspection at the time of the award. Interested parties are cautioned that these costs and their components are subject to further evaluation for completeness and correctness and therefore may not be an exact indicator of a Vendor's pricing position.

The process that will be used shall be.

A. The team shall review all proposals for completeness and accuracy to ensure vendors have provided all information noted above.
B. The top five companies will be invited to meet for a one-hour presentation over zoom or in-person to further discuss the scope of this engagement.
C. Award shall be made to the proposal that is most advantageous to the University.

All bids should be complete and reflect the most favorable terms available from the Vendor. Prices bid cannot be altered or modified as part of a clarification.

Bids will generally be evaluated, based on completeness, content, cost and responsibility of the Vendor to supply the requested Goods and Services. Specific evaluation criteria are listed in Section 3.1 METHOD OF AWARD.

Upon completion of the evaluation process, the University will make Award(s) based on the evaluation and post the award(s) to the State's eVP website under the IFB number for this solicitation. Award of a Contract to one Vendor does not mean that the other bids lacked merit, but that, all factors considered, the selected bid was deemed most advantageous and represented the best value to the University.

The University reserves the right to negotiate with one or more Vendors, or to reject all original offers and negotiate with one or more sources of supply that may be capable of satisfying the requirement, and in either case to require Vendor to submit a Best and Final Offer (BAFO) based on discussions and negotiations with the University.

## 3.4 PERFORMANCE OUTSIDE THE UNITED STATES

Vendor shall complete ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR. In addition to any other evaluation criteria identified in this IFB, the University may also consider, for purposes of evaluating proposed or actual contract performance outside of the United States, how that performance may affect the following factors to ensure that any award will be in the best interest of the University:

a) Total cost to the University
b) Level of quality provided by the Vendor
c) Process and performance capability across multiple jurisdictions
d) Protection of the University's information and intellectual property

e) Availability of pertinent skills
f) Ability to understand the University's business requirements and internal operational culture
g) Particular risk factors such as the security of the University's information technology
h) Relations with citizens and employees
i) Contract enforcement jurisdictional issues

### 3.5 INTERPRETATION OF TERMS AND PHRASES

This IFB serves two functions: (1) to advise potential Vendors of the parameters of the solution being sought by the University; and (2) to provide (together with other specified documents) the terms of the Contract resulting from this procurement. The use of phrases such as "shall," "must," and "requirements" are intended to create enforceable contract conditions. In determining whether bids should be evaluated or rejected, the University will take into consideration the degree to which Vendors have proposed or failed to propose solutions that will satisfy the University's needs as described in the IFB. Except as specifically stated in the IFB, no one requirement shall automatically disqualify a Vendor from consideration. However, failure to comply with any single requirement may result in the University exercising its discretion to reject a bid in its entirety.

## 4.0 REQUIREMENTS

This Section lists the requirements related to this IFB. By submitting a bid, the Vendor agrees to meet all stated requirements in this Section as well as any other specifications, requirements, and terms and conditions stated in this IFB. If a Vendor is unclear about a requirement or specification, or believes a change to a requirement would allow for the University to receive a better bid, the Vendor is urged to submit these items in the form of a question during the question and answer period in accordance with the Bid Questions Section above.

### 4.1 PRICING

The Offeror shall propose the costs of furnishing the services in accordance with the specifications within this bid document. Award will be made to the Contractor(s) whose proposal is most advantageous to the University.

The bid should be priced with a lump sum to complete the entirety of the project. In addition, it would be helpful to provide a menu of other services and deliverables that may be provided, including layer-down branding exercises for interested schools, or other expressions of the new brand including a signature video, homepage redesign, digital marketing themes, or other items. Also include a table of the firm's billing rates by position. These additional services will be acted upon based on separate purchase orders.

Complete ATTACHMENT A: PRICING FORM and include in Vendor's response.

### 4.2 INVOICES

Vendor shall invoice the Purchasing Agency. The standard format for invoicing shall be Single Invoices meaning that the Vendor shall provide the Purchasing Agency with an invoice for each order. Invoices shall include detailed information to allow Purchasing Agency to verify pricing at point of receipt matches the correct price from the original date of order. The following fields shall be included on all invoices, as relevant:

Vendor's Billing Address, Customer Account Number, NC Contract Number, Order Date, Buyer's Order Number, Manufacturer Part Numbers, Vendor Part Numbers, Item Descriptions, Price, Quantity, and Unit of Measure.

***INVOICES MAY NOT BE PAID UNTIL AN INSPECTION HAS OCCURRED AND THE GOODS OR SERVICES ACCEPTED.***

### 4.3 FINANCIAL STABILITY

As a condition of contract award, the Vendor must certify that it has the financial capacity to perform and to continue to perform its obligations under the Contract; that Vendor has no constructive or actual knowledge of an actual or potential legal proceeding being brought against Vendor that could materially adversely affect performance of this Contract; and that entering into this Contract is not prohibited by any contract, or order by any court of competent jurisdiction.

Each Vendor shall certify it is financially stable by completing ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION. The University is requiring this certification to minimize potential issues from contracting with a Vendor that is financially unstable. From the date of the Certification to the expiration of the Contract, the Vendor shall notify the University within thirty (30) days of any occurrence or condition that materially alters the truth of any statement made in this Certification. The Contract Manager may require annual recertification of the Vendor's financial stability.

## 4.4 HUB PARTICIPATION

Pursuant to North Carolina General Statute G.S. 143-48, it is University policy to encourage and promote the use of small, minority, physically handicapped, and women contractors in purchasing Goods and Services. As such, this IFB will serve to identify those Vendors that are minority owned or have a strategic plan to support the State's Historically Underutilized Business program by meeting or exceeding the goal of 10% utilization of diverse firms as 1st or 2nd tier subcontractors. Vendor shall complete ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION.

## 4.5 REFERENCES

Vendor shall provide at least three (3) references, using ATTACHMENT E: CUSTOMER REFERENCE FORM, for which it has provided Services of similar size and scope to those proposed herein. The University *may* contact these users to determine whether the Services provided are substantially similar in scope to those proposed herein and whether Vendor's performance has been satisfactory. The information obtained *may* be considered in the evaluation of the Bid.

## 4.6 BACKGROUND CHECKS

Any personnel or agent of Vendor performing Services under any Contract arising from this IFB may be required to undergo a background check at the expense of the Vendor, if so requested by the University.

### 4.6.1 GENERAL INFORMATION

It is the policy of the University to provide a safe environment for University Government employees to work. Due to the Contract requirements, the University requires criminal background checks of awarded Vendors, including but not limited to: owners, employees, agents, representatives, subcontractors, and all personnel of their respective companies. All costs and expenses associated with criminal background checks are the responsibility of the Vendor.

The following requirements must be met:

a) Criminal background checks shall be current and completed within ninety (90) days of the Contract effective date.
b) The criminal background check shall include a social security verification/check, felonies, misdemeanors, and traffic records covering a minimum of the last seven (7) years for all states and countries where the individual has resided. The criminal background check information shall be first thoroughly reviewed by the Vendor and then sent to the Contract Administrator for review and approval. Out of state searches shall be required for persons living in the state of NC for fewer than seven (7) years. Fingerprint background checks may be required in some instances depending on the facility requirements.
c) A criminal background check on the awarded Vendor and its employees shall be provided by the Vendor prior to Contract effective date. Copies of the original criminal background check shall be sent to the Contract Administrator for evaluation. In some cases, badging cannot take place until after the evaluation and approval of the Vendor's criminal checks.
d) When a new employee or individual is identified to perform Services on this Contract, the Vendor shall provide the Contract Administrator with a criminal background check before the individual can be approved for work. Persons without approved criminal background checks shall not be allowed to work in the relevant buildings until proper documentation is submitted and approved.
e) The University may require the Vendor to exclude the Vendor's employees, agents, representatives, or subcontractors based on the background check results. Discovery that one or more employees have convictions does not disqualify the Vendor from award.
f) Additionally, the University may use The North Carolina Department of Public Safety Offender Public Information or similar Services to conduct additional background checks on the Vendor's proposed employees.

**4.6.2 BACKGROUND CHECK REQUIREMENTS**

As part of Vendor's criminal background checks, the details below must be provided to the University:

a) Any **criminal felony conviction,** or conviction of any crime involving moral turpitude, including but not limited to fraud, misappropriation or deception, of Vendor, its officers or directors, or any of its employees or other personnel to provide Services on this project of which Vendor has knowledge, or provide a statement that Vendor is aware of none;

b) Any **criminal investigation** for any offense involving moral turpitude, including, but not limited to fraud, misappropriation, falsification or deception pending against Vendor of which it has knowledge, or provide a statement Vendor is aware of none;

c) Any **regulatory sanctions** levied against Vendor or any of its officers, directors or its professional employees expected to provide Services on this project by any state or federal regulatory agencies within the past three years or a statement that there are none. As used herein, the term "regulatory sanctions" includes the revocation or suspension of any license or certification, the levying of any monetary penalties or fines, and the issuance of any written warnings;

d) Any **regulatory investigations** pending against Vendor or any of its officers, directors or its professional employees expected to provide Services on this project by any state or federal regulatory agencies of which Vendor has knowledge, or provide a statement that there are none.

e) Any **civil litigation,** arbitration, proceeding, or judgments pending against Vendor during the three (3) years preceding submission of its bid herein, or provide a statement that there are none.

**4.6.3 BACKGROUND CHECK LIMITATIONS**

Any individual representing the Vendor, who:

a) In his/her lifetime, has been adjudicated as a habitual felon as defined by GS 14-7.1 or a violent habitual felon as defined by GS 14-7.7, shall not be allowed to work in buildings occupied by University employees.

b) During the last seven (7) years has been convicted of any criminal felony or misdemeanor sexual offense or a crime of violence shall not be allowed to work in buildings occupied by University employees.

c) At any time has an outstanding warrant or a criminal charge for a crime described in (b) above shall not be allowed to work on University property.

d) The Vendor must ensure that all employees have a responsibility to self-report to the Vendor within twenty-four (24) hours any arrest for any disqualifying offense. The Vendor must notify the Contract Administrator within twenty-four (24) hours of all details concerning any reported arrest.

e) Upon the request of the Contract Administrator, the Vendor will re-screen any of its employees, agents, representatives, and subcontractors during the term of the Contract.

f) Vendor's responses to these background check requests shall be considered a continuing representation, and Vendor's failure to notify the University within thirty (30) days of any criminal charge, investigation, or proceeding involving Vendor or its then-current officers, directors or persons providing Services under this Contract during its term shall constitute a material breach of contract. The provisions of this paragraph shall also apply to any subcontractor utilized by Vendor to perform Services under this Contract.

g) If there are problems or delays with performance associated with the completion and compliance with this background check requirements, any Vendor's performance bond could be used to complete these Services.

**4.6.4 DOCUMENT REQUIREMENTS**

Required documentation to be submitted prior to date Contract is effective and for performing any Services on University property shall include:

a) A cover letter by the Vendor on company letterhead with a list of the full names matching a required government issued photo ID, addresses, and birth dates of each person representing the contracting company.

b) Vendor shall also provide a photocopy of the required State or Federal government issued picture ID or Driver License.

c) A letter on company letterhead is not acceptable proof in itself but can be used to further clarify information on the criminal background check submitted. All documentation shall be submitted at the same time. Submit documents which are clear and legible.

d) Background checks consisting of:

1. Original unaltered criminal background check from the organization providing the background check.
2. The background check provider's company name, company mailing address, and contact phone numbers.
3. The full name of the individual, which matches the government issued photo ID.
4. The current address of individual being checked.
5. The date the criminal background check search was conducted.

**4.6.5 VENDOR BACKGROUND CHECK AGREEMENT**

Vendor agrees to conduct a criminal background check per the specifications above in this section on all employees proposed to work under this Contract, at its expense, and provide the required documentation to the University in order to perform Services under this Contract:

☑ YES ☐ NO

## 4.7 PERSONNEL

Vendor warrants that qualified personnel shall provide Services under this Contract in a professional manner. "Professional manner" means that the personnel performing the Services will possess the skill and competence consistent with the prevailing business standards in the industry. Vendor will serve as the prime contractor under this Contract and shall be responsible for the performance and payment of all subcontractor(s) that may be approved by the University. Names of any third-party Vendors or subcontractors of Vendor may appear for purposes of convenience in Contract documents; and shall not limit Vendor's obligations hereunder. Vendor will retain executive representation for functional and technical expertise as needed in order to incorporate any work by third party subcontractor(s).

Should the Vendor's bid result in an award, the Vendor shall be required to agree that it will not substitute key personnel assigned to the performance of the Contract without prior written approval by the Contract Lead. Vendor shall further agree that it will notify the Contract Lead of any desired substitution, including the name(s) and references of Vendor's recommended substitute personnel. The University will approve or disapprove the requested substitution in a timely manner. The University may, in its sole discretion, terminate the Services of any person providing Services under this Contract. Upon such termination, the University may request acceptable substitute personnel or terminate the contract Services provided by such personnel.

## 4.8 VENDOR'S REPRESENTATIONS

If Vendor's bid results in an award, Vendor agrees that it will not enter any agreement with a third party that may abridge any rights of the University under the Contract. If any Services, deliverables, functions, or responsibilities not specifically described in this solicitation are required for Vendor's proper performance, provision and delivery of the Service and deliverables under a resulting Contract, or are an inherent part of or necessary sub-task included within such Service, they will be deemed to be implied by and included within the scope of the Contract to the same extent and in the same manner as if specifically described in the Contract. Unless otherwise expressly provided herein, Vendor will furnish all of its own necessary management, supervision, labor, facilities, furniture, computer and telecommunications equipment, software, supplies and materials necessary for the Vendor to provide and deliver the Services and/or other Deliverables.

# 5.0 SPECIFICATIONS AND SCOPE OF WORK

**5.01 DUTIES AND RESPONSIBILITIES OF THE UNIVERSITY**

The general responsibility of the University is to aid and assist the Contractor in facilitating the work to be performed under this contract as specified. Specific responsibilities are limited to the following:

A. The University shall prepare and make available to the Contractor, existing branding guidelines and staff familiar with the decentralized nature of the University's work in this area.

B. The University shall provide adequate staff for regular meetings for brainstorming and logistics, and coordinate with key staff across the institution, as well as key stakeholders.

**5.02 DUTIES AND RESPONSIBILITIES OF CONTRACTOR**

The Contractor hereby agrees to work directly with the University, or its designated Contract Administrator, in connection with carrying out and conducting all of the following duties and responsibilities during the term of this agreement.

A. The Contractor shall furnish all staff and expertise necessary to complete this project in accordance with the University's needs.

B. The Contractor shall provide all creative direction and production with approval by the contract administrator.

C. The Contractor shall ensure that the final product is within budget and within agreed upon deadlines.

D, The Contractor shall be responsible for producing best-in-class research and marketing support to promote the University.

## 6.0 CONTRACT ADMINISTRATION

All Contract Administration requirements are conditioned on an award resulting from this solicitation. This information is provided for the Vendor's planning purposes.

### 6.1 CONTRACT MANAGER AND CUSTOMER SERVICE

The Vendor shall be required to designate and make available to the University a contract manager. The contract manager shall be the University's point of contact for Contract related issues and issues concerning performance, progress review, scheduling, and service.

| Contract Manager Point of Contact | |
|---|---|
| Name: | Matthew Johnson |
| Office Phone #: | 312.382.0100 |
| Mobile Phone #: | |
| Email: | |

The Vendor shall be required to designate and make available to the University for customer service. The customer service point of contact shall be the University's point of contact for customer service-related issues (define roles and responsibilities).

| Customer Service Point of Contact | |
|---|---|
| Name: | Amy Partipilo |
| Office Phone #: | 312.382.0100 |
| Mobile Phone #: | |
| Email: | |

## 6.2 POST AWARD PROJECT REVIEW MEETINGS

The Vendor, at the request of the University, shall be required to meet periodically *as and when required* with the University for Project Review meetings. The purpose of these meetings will be to review project progress reports, discuss Vendor and University performance, address outstanding issues, review problem resolution, provide direction, evaluate continuous improvement and cost saving ideas, and discuss any other pertinent topics.

## 6.3 CONTINUOUS IMPROVEMENT

The University encourages the Vendor to identify opportunities to reduce the total cost the University. A continuous improvement effort consists of various ways to enhance business efficiencies as performance progresses.

## 6.4 PERIODIC STATUS REPORTS

The Vendor may be required to provide Management Reports to the designated Contract Lead on a to be negotiated basis. This report shall include, at a minimum, information concerning *work accomplished during the reporting period; work to be accomplished during the subsequent reporting period; problems, real or anticipated, and notification of any significant deviation from previously agreed upon work plans and schedules, Etc.* These reports shall be well organized and easy to read. The Vendor shall submit these reports electronically using the format required by the Purchasing Agency. The Vendor shall submit the reports in a timely manner and on a regular schedule as agreed by the parties.

## 6.5 ACCEPTANCE OF WORK

Performance of the work and/or delivery of Goods shall be conducted and completed at least in accordance with the Contract requirements and recognized and customarily accepted industry practices. Performance shall be considered complete when the Services or Goods are approved as acceptable by the Contract Administrator.

***THE REMAINDER OF THIS PAGE IS INTENTIONALLY LEFT BLANK***

## 7.0 ATTACHMENTS

# **IMPORTANT NOTICE**

**RETURN THE REQUIRED ATTACHMENTS WITH YOUR RESPONSE**

FOLLOW THE LINKS TO ACCESS EACH ATTACHMENT

### ATTACHMENT A: PRICING

Complete and return the Pricing associated with this IFB, which can be found below:

The Offeror shall propose the costs of furnishing the services in accordance with the specifications within this bid document. Award will be made to the Contractor(s) whose proposal is most advantageous to the University.

The bid should be priced with a lump sum to complete the entirety of the project. In addition, it would be helpful to provide a menu of other services and deliverables that may be provided, including layer-down branding exercises for interested schools, or other expressions of the new brand including a signature video, homepage redesign, digital marketing themes, or other items. Also include a table of the firm's billing rates by position. These additional services will be acted upon based on separate purchase orders.

Note: to open links below please highlight the link, copy it, and then paste it into your browser.

### ATTACHMENT B: INSTRUCTIONS TO VENDORS

The Instructions to Vendors, which are incorporated herein by this reference, may be found here:
*https://ncadmin.nc.gov/formnorth-carolina-instructions-vendors032023/download?attachment*

### ATTACHMENT C: THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL GENERAL TERMS & CONDITIONS

The University of North Carolina at Chapel Hill General Terms and Conditions, which are incorporated herein by this reference, may be found here:

*https://www.doa.nc.gov/form-north-carolina-general-terms-and-conditions-11-2023/open*

### ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION

Complete and return the Historically Underutilized Businesses (HUB) Vendor Information form, which can be found at the following link:
*https://www.doa.nc.gov/pandc/onlineforms/form-hub-supplemental-vendor-information-9-2021/download*

### ATTACHMENT E: CUSTOMER REFERENCE FORM

Complete and return the Customer Reference Form, which can be found at the following link:
*https://ncadmin.nc.gov/media/15503/open*

### ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR

Complete and return the Location of Workers Utilized by Vendor, which can be found at the following link:

*https://www.doa.nc.gov/pandc/onlineforms/form-location-workers-09-2021/download*

## ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION

**Complete, sign, and return the Certification of Financial Condition, which can be found at the following link:**

*https://www.doa.nc.gov/pandc/onlineforms/form-certification-financial-condition-09-2021/download*

***** Failure to Return the Required Attachments May Eliminate Your Response from Further Consideration *****

# STATE OF NORTH CAROLINA

## THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

**Invitation for Bid #: 3000011905**

**Description: Marketing and Branding Services Contract**

**Date of Issue: 08-26-2024**

**Bid Opening Date: 09-09-2024**

**@ 1:00 PM EST**

**Direct all inquiries concerning this IFB to:**

Mark Thomas Sillman

Associate Director Purchasing Services

Email: mark_sillman@unc.edu

# STATE OF NORTH CAROLINA

## Invitation for Bid #

## 3000011905

For internal State agency processing, including tabulation of bids, provide your company's eVP (Electronic Vendor Portal) Number. Pursuant to G.S. 132-1.10(b) this identification number shall not be released to the public. **This page will be removed and shredded, or otherwise kept confidential,** before the procurement file is made available for public inspection.

**This page shall be filled out and returned with your bid.**
**Failure to do so may subject your bid to rejection.**

Two x Four LLC.

Vendor Name

Vendor eVP#

**Note**: For a contract to be awarded to you, your company (you) must be a North Carolina registered vendor in good standing. You must enter the vendor number assigned through eVP (Electronic Vendor Portal). If you do not have a vendor number, register at https://vendor.ncgov.com/vendor/login

*Electronic responses ONLY will be accepted for this solicitation.*

*Bid Number:* 3000011905 *Vendor:* Two x Four LLC.

# STATE OF NORTH CAROLINA
## *The University of North Carolina at Chapel Hill*

| | |
|---|---|
| **Refer *ALL* Inquiries regarding this IFB to:** *See front cover* | **Invitation for Bid #: 3000011905** |
| | **Bids will be publicly opened: 09-09-2024** |
| **Using Agency: UNC-CH** | |
| **Requisition No.:** | |

**EXECUTION**

In compliance with this Invitation for Bid (IFB), and subject to all the conditions herein, the undersigned Vendor offers and agrees to furnish and deliver any or all items upon which prices are bid, at the prices set opposite each item within the time specified herein.

By executing this bid, the undersigned Vendor understands that false certification is a Class I felony and certifies that:

- this bid is submitted competitively and without collusion (G.S. 143-54),
- none of its officers, directors, or owners of an unincorporated business entity has been convicted of any violations of Chapter 78A of the General Statutes, the Securities Act of 1933, or the Securities Exchange Act of 1934 (G.S. 143-59.2), and
- it is not an ineligible Vendor as set forth in G.S. 143-59.1.

Furthermore, by executing this bid, the undersigned certifies to the best of Vendor's knowledge and belief, that:

- it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency.

As required by G.S. 143-48.5, the undersigned Vendor certifies that it, and each of its sub-Contractors for any Contract awarded as a result of this IFB, complies with the requirements of Article 2 of Chapter 64 of the NC General Statutes, including the requirement for each employer with more than 25 employees in North Carolina to verify the work authorization of its employees through the federal E-Verify system.

As required by Executive Order 24 (2017), the undersigned vendor certifies will comply with all Federal and State requirements concerning fair employment and that it does not and will not discriminate, harass, or retaliate against any employee in connection with performance of any Contract arising from this solicitation.

G.S. 133-32 and Executive Order 24 (2009) prohibit the offer to, or acceptance by, any State Employee associated with the preparing plans, specifications, estimates for public contracts; or awarding or administering public contracts; or inspecting or supervising delivery of the public contract of any gift from anyone with a contract with the State, or from any person seeking to do business with the State. By execution of this response to the IFB, the undersigned certifies, for Vendor's entire organization and its employees or agents, that Vendor is not aware that any such gift has been offered, accepted, or promised by any employees of your organization.

By executing this bid, Vendor certifies that it has read and agreed to the **INSTRUCTION TO VENDORS** and the **NORTH CAROLINA GENERAL TERMS AND CONDITIONS incorporated herein.** These documents can be accessed from the ATTACHMENTS page within this document.

**Failure to execute/sign bid prior to submittal may render bid invalid and it MAY BE REJECTED. Late bids shall not be accepted.**

| | | | |
|---|---|---|---|
| COMPLETE/FORMAL NAME OF VENDOR: Two x Four LLC. | | | |
| STREET ADDRESS: 10 N. Dearborn - Suite 1000 | | P.O. BOX: | ZIP: 60602 |
| CITY & STATE & ZIP: Chicago, IL 60602 | | TELEPHONE NUMBER: 312.382.0100 | TOLL FREE TEL. NO: |
| PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE (SEE INSTRUCTIONS TO VENDORS ITEM #21): | | | |
| PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR: Matthew Johnson — SVP, Chief Marketing Officer | | FAX NUMBER: | |
| VENDOR'S AUTHORIZED SIGNATURE*: | DATE: 09/16/24 | EMAIL: | |

**VALIDITY PERIOD**

Offer shall be valid for at least sixty (60) days from date of bid opening, unless otherwise stated here: _____ days, or if extended by mutual agreement of the parties in writing. Any withdrawal of this offer shall be made in writing, effective upon receipt by the agency issuing this IFB.

**ACCEPTANCE OF BIDS**

If your bid is accepted, all provisions of this IFB, along with the written results of any negotiations, shall constitute the written agreement between the parties ("Contract"). The NORTH CAROLINA GENERAL TERMS AND CONDITIONS are incorporated herein and shall apply. Depending upon the Goods or Services being offered, other terms and conditions may apply, as mutually agreed.

**FOR STATE USE ONLY:** Offer accepted and Contract awarded this_____ day of _____, 20____, as indicated on

The attached certification, by _____.

**(Authorized Representative of The University of North Carolina at Chapel Hill)**

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# 1.0 PURPOSE AND BACKGROUND

**1.01 PURPOSE:**

This bid document is being issued to obtain a contract to provide market research and branding services for the University of North Carolina at Chapel Hill, for its Office of University Communications. The University seeks to embark on a comprehensive marketing research project to refresh and streamline the University's branding elements. The University envisions this project as a pivotal step towards aligning its brand with the evolving landscape of public higher education and its role as a leading global research institution. The selected firm will be tasked with the meticulous examination of the current brand positioning, followed by research and development and implementation of a refreshed brand strategy that resonates with the institution's values, goals, and diverse groups of stakeholders.

The scope of work encompasses a detailed analysis of the institution's brand perception, both internally and externally, identification of key differentiators, and the creation of a brand strategy that aligns with the University's values, goals and market placement. The firm will be expected to deliver a comprehensive report, a strategic brand plan, and implementable guidelines for the university, as well as creative aspects to inform the look, feel and sound of university creative deliverables, such as themes for digital marketing, web communications, videos, social media elements and other brand presentations.

This project will be a collaborative effort, with designated points of contact from both the institution and the firm. Regular communication and updates will be integral to the project's success, with structured reporting and review processes in place to monitor progress and address any challenges that may arise.

Budget considerations and payment terms will be transparently conveyed, with a clear schedule for disbursements contingent upon the achievement of specified deliverables. The institution will also outline the criteria for payment approvals, ensuring fiscal responsibility and accountability.

Below is a profile of UNC-Chapel Hill as well as some key facts and figures to provide additional background.

**1.02 BACKGROUND:**

**University of North Carolina at Chapel Hill**

UNC-Chapel Hill, the nation's first public university to award degrees, prepares talented students from different perspectives and life experiences to become creators, explorers, innovators and leaders.

Carolina's innovative teaching, campus-wide spirit of inquiry and dedication to public service continue a legacy that began when the University was chartered in 1789.

In Chapel Hill, students develop a voice for critical thought and the courage to guide change. They connect to the future they're already shaping and prepare with one another to solve the grand challenges of our time.

Carolina is passionately public and committed to ensuring that every student who earns admission can come to Chapel Hill and thrive.

Our world-class research, over a billion-dollar enterprise, has quadrupled over the past two decades, firmly establishing Carolina as one of America's top-ranked research institutions. That success spurs opportunity and innovation that grows North Carolina's economy, creates jobs and supports Tar Heel businesses.

Students, faculty and staff are on the cusp of exciting breakthroughs in cancer, environmental challenges, chronic diseases and data and computer science.

Through Carolina Across 100, a five-year initiative, we partner with communities in all 100 counties to address critical challenges facing North Carolinians, including youth unemployment and suicide prevention.

In its third century – an era of groundbreaking study and discovery – UNC-Chapel Hill is harnessing the very best of our fast-changing world. We're proud to advance knowledge for this and each generation to come.

America's Best Value in Public Higher Education

Carolina ranks among the top universities in the nation and around the world. In 2024, U.S. News & World Report listed Carolina 4th among the country's public universities and 22nd overall. It was also ranked 14th for best value among public universities for the 19th time.

Numerous graduate programs also are highly ranked – 20 were in the top 10 nationally – by U.S. News & World Report for the 2024 edition of "Best Graduate Schools." For the third time in a row, UNC's Eshelman School of Pharmacy was ranked No. 1 in the U.S., and the Gillings School of Global Public Health was ranked second of 213.

Our Commitment to Access and Affordability

UNC-Chapel Hill is among the nation's few public flagship campuses to practice need-blind admissions and provide low-debt, full-need student aid. This approach makes the promise of a Carolina education possible for all academically qualified students regardless of their financial means.

Carolina has long been one of the nation's only two public universities to fund 100 percent of demonstrated need among eligible students.

The Carolina Covenant, a ground-breaking program, supports the full financial need of academically qualified low-income students so they may graduate debt-free. The program has brought over 10,500 scholars to Chapel Hill and led to dramatically improved graduation rates among our lowest-income students. Recent enhancements include a support network to help Covenant Scholars increase career readiness and admission to advanced degree programs.

The Carolina Student Transfer Excellence Program (C-STEP) partners with 14 North Carolina community colleges – most in rural counties – to identify talented low-and moderate-income community college students and to provide a pathway for admission to UNC-Chapel Hill.

The Carolina College Advising Corps places recent UNC-Chapel Hill graduates as admissions and financial-aid advisers in 82 underserved high schools across North Carolina to reinforce the advantages of a college education and guide prospective students through the admissions process.

In addition, the university ensures that students whose families make under $80,000 per year and have typical assets will have all of their college costs covered.

**Powerful Research Impact Benefits North Carolina and Beyond**

Our campus conducts over $1 billion of sponsored research, ranking as the 13th largest U.S. research university in volume and annual expenditures and 10th for total federal funding. With a record-breaking $1.2 billion in awards in fiscal 2022, our researchers continue to drive research projects and experiments for external sponsors including federal agencies, industry partners and nonprofits.

The faculty's expertise – spanning a broad range of health, behavioral, social and environmental sciences – drives innovations and breakthroughs in many fields, from gene therapies and the search to cure cancer to population studies and coastal resilience.

During the global pandemic, Carolina emerged as a global leader in COVID-19 research, leading to milestones including a $65 million grant from the National Institutes of Health to create the Antiviral Drug Discovery Center, one of nine established by the NIH. The center will develop oral antivirals that can combat pandemic-level viruses.

UNC-Chapel Hill's research creates jobs for over 10,400 North Carolinians in projects that span all 100 counties. Since most research funding comes from out of state, that support represents new revenue for North Carolina's gross state product; spending on research benefits over 3,500 Tar Heel businesses.

Carolina Facts

- A member of the prestigious Association of American Universities, Carolina was the first and only public university in the United States to award degrees in the 18th century.

- We offer 78 bachelor's, 113 master's, 66 doctorate and seven professional degree programs through the College of Arts & Sciences and 16 schools, including the new School of Data Science and Society and the School of Civic Life and Leadership.

- More than 356,000 alumni live in all 50 states, the District of Columbia, U.S. territories and 147 countries. Nearly 190,000 are North Carolinians.

- Three Tar Heels were selected for prestigious Rhodes Scholarships for study at Oxford University in 2021 – a first in Carolina history. We've produced 54 Rhodes Scholars since the program began in 1902.

- Over 150 faculty have been members of the national academies and distinguished learned societies. Two professors became Nobel laureates – Dr. Aziz Sancar, co-recipient of the 2015 Nobel Prize in Chemistry, and the late Dr. Oliver Smithies, co-recipient of the 2007 Nobel Prize in Physiology or Medicine.

- Carolina Across 100 aims to form meaningful partnerships in all 100 counties to respond to statewide challenges stemming from or exacerbated by COVID-19. "Our State, Our Work" connects unemployed and underemployed young adults with better jobs in response to disruptions in the U.S. labor market. A new "Our State, Our Wellbeing" program will work with local communities to identify and implement strategies to prevent suicide and improve resources available for mental and behavioral health.

### 1.1 CONTRACT TERM

This contract shall be binding on both parties from the date of the contract award, through the satisfactory completion of the work required under the scope of work and shall be complete when final payment has been made.

Bids shall be submitted in accordance with the terms and conditions of this IFB and any addenda issued hereto.

## 2.0 GENERAL INFORMATION

### 2.1 INVITATION FOR BID DOCUMENT

This IFB is comprised of the base IFB document, any attachments, and any addenda released before Contract award, which are incorporated herein by reference.

### 2.2 E-PROCUREMENT FEE

This section was intentionally omitted.

### 2.3 NOTICE TO VENDORS REGARDING IFB TERMS AND CONDITIONS

It shall be the Vendor's responsibility to read the Instructions to Vendors, the North Carolina General Terms and Conditions, all relevant exhibits and attachments, and any other components made a part of this IFB and comply with all requirements and specifications herein. Vendors are also responsible for obtaining and complying with all Addenda and other changes that may be issued in connection with this IFB.

If Vendors have questions or issues regarding any component of this IFB, those must be submitted as questions in accordance with the instructions in the BID QUESTIONS Section. If the University determines that any changes will be made as a result of the questions asked, then such decisions will be communicated in the form of an IFB addendum. The University may also elect to leave open the possibility for later negotiation of specific provisions of the Contract that have been addressed during the question-and-answer period, prior to contract award.

Other than through the process of negotiation under 01 NCAC 05B.0503, the University rejects and will not be required to evaluate or consider any additional or modified terms and conditions submitted with Vendor's bid or otherwise. This applies to any language appearing in or attached to the document as part of the Vendor's bid that purports to vary any terms and conditions or Vendors' instructions herein or to render the bid non-binding or subject to further negotiation. Vendor's bid shall constitute a firm offer that shall be held open for the period required herein ("Validity Period" above).

**The University may exercise its discretion to consider Vendor proposed modifications. By execution and delivery of this IFB Response, the Vendor agrees that any additional or modified terms and conditions, whether submitted purposely or inadvertently, shall have no force or effect, and will be disregarded unless expressly agreed upon during negotiations and incorporated by way of a Best and Final Offer (BAFO). Noncompliance with, or any attempt to alter or delete, this paragraph shall constitute sufficient grounds to reject Vendor's bid as nonresponsive.**

## 2.4 IFB SCHEDULE

The table below shows the *intended* schedule for this IFB. The University will make every effort to adhere to this schedule.

| Event | Responsibility | Date and Time |
|---|---|---|
| Issue IFB | University | 08-26-2024 |
| Hold Pre-Bid Meeting/Site Visit | University | N/A |
| Submit Written Questions | Vendor | NLT 08-30-2024 @ 1:00 PM EST |
| Provide Response to Questions | University | ASAP |
| Submit Bids | Vendor | NLT 09-09-2024 @ 1:00 PM EST |
| Contract Award | University | ASAP |

## 2.5 SITE VISIT or PRE-BID CONFERENCE

This section was intentionally omitted.

## 2.6 BID QUESTIONS

Upon review of the IFB documents, Vendors may have questions to clarify or interpret the IFB in order to submit the best bid possible. To accommodate the Bid Questions process, Vendors shall submit any such questions by the "Submit Written Questions" date and time provided in the IFB SCHEDULE Section above, unless modified by Addendum.

Written questions shall be emailed to *mark_sillman@unc.edu* by the date and time specified above. Vendors should enter "IFB # *3000011905:* Questions" as the subject for the email. Question submittals should include a reference to the applicable IFB section and be submitted in the format shown below:

| Reference | Vendor Question |
|---|---|
| IFB Section, Page Number | Vendor question ...? |

Questions received prior to the submission deadline date, the University's response, and any additional terms deemed necessary by the University will be posted in the form of an addendum to *the electronic Vendor Portal (eVP), https://evp.nc.gov,* and shall become an Addendum to this IFB. No information, instruction or advice provided orally or informally by any University personnel, whether made in response to a question or otherwise in connection with this IFB, shall be considered authoritative or binding. Vendors shall rely *only* on written material contained in the IFB and an addendum to this IFB.

## BID SUBMITTAL

**IMPORTANT NOTE: This is an absolute requirement.** Late bids, regardless of cause, will not be opened or considered, and will be automatically disqualified from further consideration. Vendor shall bear the sole risk of late submission due to unintended or unanticipated delay. It is the Vendor's sole responsibility to ensure its bid has been received as described in this IFB by the specified time and date of opening. The time and date of receipt will be electronically recorded. Any bid or portion thereof received after the bid deadline will be rejected.

All proposal responses shall be submitted electronically via the electronic Vendor Portal (eVP). Additional information can be found at the eVP updates for Vendors link: https://eprocurement.nc.gov/news-events/evp-updates-vendors.

Failure to submit a bid in strict accordance with these instructions shall constitute sufficient cause to reject a Vendor's bids(s). Vendors are strongly encouraged to allow sufficient time to upload bids.

Critical updated information may be included in Addenda to this IFB. It is important that all Vendors responding to this IFB periodically check the State's eVP website for any Addenda that may be issued prior to the bid opening date. All Vendors shall be deemed to have read and understood all information in this IFB and all Addenda thereto.

## 2.7 BID CONTENTS

Vendors shall populate all attachments of this IFB that require the Vendor to provide information and include an authorized signature where requested. Failure to provide all required items, or Vendor's submission of incomplete items, may result in the University rejecting Vendor's bid, in the University's sole discretion.

Vendor IFB responses shall include the following items and attachments, which shall be arranged in the following order:

a) Cover Letter, which must include all of the following: (i) a statement that confirms that the Vendor has read the IFB in its entirety, including all links, and all Addenda released in conjunction with the IFB; (ii) a statement that the Vendor agrees to perform in accordance with the scope of work, requirements, and specifications contained herein; and (iii) Vendor's agreement to comply with all instructions, terms and conditions, and attachments.

b) Title Page: Include the company name, address, phone number and authorized representative along with the Bid Number.

c) Completed and signed version of all EXECUTION PAGES, along with the body of the IFB.

d) Signed receipt pages of any addenda released in conjunction with this IFB, if required to be returned.

e) Vendor's Response.

1. The Offeror shall provide no more than 5 pages on the firm's approach to marketing, specifically research and branding, as well as the proposed process and timeline of the project.

2. The Offeror shall provide 3-5 case studies of similar marketing and branding work, particularly for higher education institutions and/or North Carolina organizations. Please send links to this work with your submission.

3. The Offeror shall provide "About us" background information about your company as well as bios for the team members who will work on the project.

f) The Offeror shall list a minimum of three (3) references, including point of contact, phone number and address.

g) Completed version of ATTACHMENT A: PRICING

h) Completed version of ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION

i) Completed version of ATTACHMENT E: CUSTOMER REFERENCE FORM

j) Completed version of ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR

k) Completed and signed version of ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION

### 2.8 ALTERNATE BIDS

Unless provided otherwise in this IFB, Vendor may submit alternate bids for comparable Goods, various methods or levels of Service(s), or that propose different options. Alternate bid must specifically identify the IFB requirements and advantage(s) addressed by the alternate bid. Any alternate bid, in addition to the marking described above, must be clearly marked with the legend: "Alternate Bid #___ *[for 'name of Vendor']*". Each bid must be for a specific set of Goods and Services and must include specific pricing. If a Vendor chooses to respond with various offerings, each must be offered with a separate price and be contained in a separate bid. Each bid must be complete and independent of other bids offered.

### 2.10 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

Relevant definitions for this IFB are provided in 01 NCAC 05A .0112 and in the Instructions to Vendors found below which are incorporated herein by this reference.

## 3.0 METHOD OF AWARD AND BID EVALUATION PROCESS

### 3.1 METHOD OF AWARD

North Carolina G.S. 143-52 provides a general list of criteria the University shall use to award contracts, as supplemented by the additional criteria herein. The Goods or Services being procured shall dictate the application and order of criteria; however, all award decisions shall be in the University's best interest.

All responsive bids will be reviewed, and an award or awards will be based on the responsive bid(s) offering the lowest price that meets the specifications provided herein, to include any required verifications set out here in such as but not limited to past performance, references, and financial documents. .

While the intent of this IFB is to award a Contract(s) to a single Vendor, the University reserves the right to make separate awards to different Vendors for one or more line items, to not award one or more line items, or to cancel this IFB in its entirety without awarding a Contract, if it is considered to be most advantageous to the University to do so.

The University reserves the right to waive any minor informality or technicality in bids received.

### 3.2 CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION

While this IFB is under evaluation, the responding Vendor, including any subcontractors and suppliers, is prohibited from engaging in conversations intended to influence the outcome of the evaluation. See the Paragraph 29 of the Instructions to Vendors entitled COMMUNICATIONS BY VENDORS.

Each Vendor submitting a bid to this IFB, including its employees, agents, subcontractors, suppliers, subsidiaries and affiliates, is prohibited from having any communications with any person inside or outside the using agency; issuing agency; other government agency office or body (including the purchaser named above, any department secretary, agency head, members of the General Assembly and Governor's office); or private entity, if the communication refers to the content of Vendor's bid or qualifications, the content of another Vendor's proposal, another Vendor's qualifications or ability to perform a resulting contract, and/or the transmittal of any other communication of information that could be reasonably considered to have the effect of directly or indirectly influencing the evaluation of proposals, the award of a contract, or both.

Any Vendor not in compliance with this provision shall be disqualified from evaluation and award. A Vendor's proposal may be disqualified if its subcontractor and/or supplier engage in any of the foregoing communications during the time that the procurement is active (*i.e.*, the issuance date of the procurement until the date of contract award or cancellation of the procurement). Only those discussions, communications or transmittals of information authorized or initiated by the issuing agency for this IFB or inquiries directed to the purchaser named in this IFB regarding requirements of the IFB (prior to proposal submission) or the status of the award (after submission) are excepted from this provision.

## 3.3 BID EVALUATION PROCESS

Only responsive submissions will be evaluated.

**The University will conduct an evaluation of responsive Bids, as follows:**

Bids will be received according to the method stated in the Bid Submittal section above.

All bids must be received by the issuing agency not later than the date and time specified in the IFB SCHEDULE Section above, unless modified by Addendum. Vendors are cautioned that this is a request for offers, not an offer or request to contract, and the University reserves the unqualified right to reject any and all offers at any time if such rejection is deemed to be in the best interest of the University.

At the date and time provided in the IFB SCHEDULE Section above, unless modified by Addendum, the bids from each responding Vendor will be opened publicly and all offers (except those that have been previously withdrawn, or voided bids) will be tabulated. The tabulation shall be made public at the time it is created. When negotiations after receipt of bids is authorized pursuant to G.S. 143-49 and 01 NCAC 05B.0503, only the names of offerors and the Goods and Services offered shall be tabulated at the time of opening. Cost and price shall become available for public inspection at the time of the award. Interested parties are cautioned that these costs and their components are subject to further evaluation for completeness and correctness and therefore may not be an exact indicator of a Vendor's pricing position.

The process that will be used shall be.

A. The team shall review all proposals for completeness and accuracy to ensure vendors have provided all information noted above.
B. The top five companies will be invited to meet for a one-hour presentation over zoom or in-person to further discuss the scope of this engagement.
C. Award shall be made to the proposal that is most advantageous to the University.

All bids should be complete and reflect the most favorable terms available from the Vendor. Prices bid cannot be altered or modified as part of a clarification.

Bids will generally be evaluated, based on completeness, content, cost and responsibility of the Vendor to supply the requested Goods and Services. Specific evaluation criteria are listed in Section 3.1 METHOD OF AWARD.

Upon completion of the evaluation process, the University will make Award(s) based on the evaluation and post the award(s) to the State's eVP website under the IFB number for this solicitation. Award of a Contract to one Vendor does not mean that the other bids lacked merit, but that, all factors considered, the selected bid was deemed most advantageous and represented the best value to the University.

The University reserves the right to negotiate with one or more Vendors, or to reject all original offers and negotiate with one or more sources of supply that may be capable of satisfying the requirement, and in either case to require Vendor to submit a Best and Final Offer (BAFO) based on discussions and negotiations with the University.

## 3.4 PERFORMANCE OUTSIDE THE UNITED STATES

Vendor shall complete ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR. In addition to any other evaluation criteria identified in this IFB, the University may also consider, for purposes of evaluating proposed or actual contract performance outside of the United States, how that performance may affect the following factors to ensure that any award will be in the best interest of the University:

a) Total cost to the University
b) Level of quality provided by the Vendor
c) Process and performance capability across multiple jurisdictions
d) Protection of the University's information and intellectual property

e) Availability of pertinent skills
f) Ability to understand the University's business requirements and internal operational culture
g) Particular risk factors such as the security of the University's information technology
h) Relations with citizens and employees
i) Contract enforcement jurisdictional issues

### 3.5 INTERPRETATION OF TERMS AND PHRASES

This IFB serves two functions: (1) to advise potential Vendors of the parameters of the solution being sought by the University; and (2) to provide (together with other specified documents) the terms of the Contract resulting from this procurement. The use of phrases such as "shall," "must," and "requirements" are intended to create enforceable contract conditions. In determining whether bids should be evaluated or rejected, the University will take into consideration the degree to which Vendors have proposed or failed to propose solutions that will satisfy the University's needs as described in the IFB. Except as specifically stated in the IFB, no one requirement shall automatically disqualify a Vendor from consideration. However, failure to comply with any single requirement may result in the University exercising its discretion to reject a bid in its entirety.

## 4.0 REQUIREMENTS

This Section lists the requirements related to this IFB. By submitting a bid, the Vendor agrees to meet all stated requirements in this Section as well as any other specifications, requirements, and terms and conditions stated in this IFB. If a Vendor is unclear about a requirement or specification, or believes a change to a requirement would allow for the University to receive a better bid, the Vendor is urged to submit these items in the form of a question during the question and answer period in accordance with the Bid Questions Section above.

### 4.1 PRICING

The Offeror shall propose the costs of furnishing the services in accordance with the specifications within this bid document. Award will be made to the Contractor(s) whose proposal is most advantageous to the University.

The bid should be priced with a lump sum to complete the entirety of the project. In addition, it would be helpful to provide a menu of other services and deliverables that may be provided, including layer-down branding exercises for interested schools, or other expressions of the new brand including a signature video, homepage redesign, digital marketing themes, or other items. Also include a table of the firm's billing rates by position. These additional services will be acted upon based on separate purchase orders.

Complete ATTACHMENT A: PRICING FORM and include in Vendor's response.

### 4.2 INVOICES

Vendor shall invoice the Purchasing Agency. The standard format for invoicing shall be Single Invoices meaning that the Vendor shall provide the Purchasing Agency with an invoice for each order. Invoices shall include detailed information to allow Purchasing Agency to verify pricing at point of receipt matches the correct price from the original date of order. The following fields shall be included on all invoices, as relevant:

Vendor's Billing Address, Customer Account Number, NC Contract Number, Order Date, Buyer's Order Number, Manufacturer Part Numbers, Vendor Part Numbers, Item Descriptions, Price, Quantity, and Unit of Measure.

***INVOICES MAY NOT BE PAID UNTIL AN INSPECTION HAS OCCURRED AND THE GOODS OR SERVICES ACCEPTED.***

### 4.3 FINANCIAL STABILITY

As a condition of contract award, the Vendor must certify that it has the financial capacity to perform and to continue to perform its obligations under the Contract; that Vendor has no constructive or actual knowledge of an actual or potential legal proceeding being brought against Vendor that could materially adversely affect performance of this Contract; and that entering into this Contract is not prohibited by any contract, or order by any court of competent jurisdiction.

Each Vendor shall certify it is financially stable by completing ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION. The University is requiring this certification to minimize potential issues from contracting with a Vendor that is financially unstable. From the date of the Certification to the expiration of the Contract, the Vendor shall notify the University within thirty (30) days of any occurrence or condition that materially alters the truth of any statement made in this Certification. The Contract Manager may require annual recertification of the Vendor's financial stability.

## 4.4 HUB PARTICIPATION

Pursuant to North Carolina General Statute G.S. 143-48, it is University policy to encourage and promote the use of small, minority, physically handicapped, and women contractors in purchasing Goods and Services. As such, this IFB will serve to identify those Vendors that are minority owned or have a strategic plan to support the State's Historically Underutilized Business program by meeting or exceeding the goal of 10% utilization of diverse firms as 1st or 2nd tier subcontractors. Vendor shall complete ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION.

## 4.5 REFERENCES

Vendor shall provide at least three (3) references, using ATTACHMENT E: CUSTOMER REFERENCE FORM, for which it has provided Services of similar size and scope to those proposed herein. The University *may* contact these users to determine whether the Services provided are substantially similar in scope to those proposed herein and whether Vendor's performance has been satisfactory. The information obtained *may* be considered in the evaluation of the Bid.

## 4.6 BACKGROUND CHECKS

Any personnel or agent of Vendor performing Services under any Contract arising from this IFB may be required to undergo a background check at the expense of the Vendor, if so requested by the University.

### 4.6.1 GENERAL INFORMATION

It is the policy of the University to provide a safe environment for University Government employees to work. Due to the Contract requirements, the University requires criminal background checks of awarded Vendors, including but not limited to: owners, employees, agents, representatives, subcontractors, and all personnel of their respective companies. All costs and expenses associated with criminal background checks are the responsibility of the Vendor.

The following requirements must be met:

a) Criminal background checks shall be current and completed within ninety (90) days of the Contract effective date.
b) The criminal background check shall include a social security verification/check, felonies, misdemeanors, and traffic records covering a minimum of the last seven (7) years for all states and countries where the individual has resided. The criminal background check information shall be first thoroughly reviewed by the Vendor and then sent to the Contract Administrator for review and approval. Out of state searches shall be required for persons living in the state of NC for fewer than seven (7) years. Fingerprint background checks may be required in some instances depending on the facility requirements.
c) A criminal background check on the awarded Vendor and its employees shall be provided by the Vendor prior to Contract effective date. Copies of the original criminal background check shall be sent to the Contract Administrator for evaluation. In some cases, badging cannot take place until after the evaluation and approval of the Vendor's criminal checks.
d) When a new employee or individual is identified to perform Services on this Contract, the Vendor shall provide the Contract Administrator with a criminal background check before the individual can be approved for work. Persons without approved criminal background checks shall not be allowed to work in the relevant buildings until proper documentation is submitted and approved.
e) The University may require the Vendor to exclude the Vendor's employees, agents, representatives, or subcontractors based on the background check results. Discovery that one or more employees have convictions does not disqualify the Vendor from award.
f) Additionally, the University may use The North Carolina Department of Public Safety Offender Public Information or similar Services to conduct additional background checks on the Vendor's proposed employees.

**4.6.2 BACKGROUND CHECK REQUIREMENTS**

As part of Vendor's criminal background checks, the details below must be provided to the University:

a) Any **criminal felony conviction,** or conviction of any crime involving moral turpitude, including but not limited to fraud, misappropriation or deception, of Vendor, its officers or directors, or any of its employees or other personnel to provide Services on this project of which Vendor has knowledge, or provide a statement that Vendor is aware of none;

b) Any **criminal investigation** for any offense involving moral turpitude, including, but not limited to fraud, misappropriation, falsification or deception pending against Vendor of which it has knowledge, or provide a statement Vendor is aware of none;

c) Any **regulatory sanctions** levied against Vendor or any of its officers, directors or its professional employees expected to provide Services on this project by any state or federal regulatory agencies within the past three years or a statement that there are none. As used herein, the term "regulatory sanctions" includes the revocation or suspension of any license or certification, the levying of any monetary penalties or fines, and the issuance of any written warnings;

d) Any **regulatory investigations** pending against Vendor or any of its officers, directors or its professional employees expected to provide Services on this project by any state or federal regulatory agencies of which Vendor has knowledge, or provide a statement that there are none.

e) Any **civil litigation**, arbitration, proceeding, or judgments pending against Vendor during the three (3) years preceding submission of its bid herein, or provide a statement that there are none.

**4.6.3 BACKGROUND CHECK LIMITATIONS**

Any individual representing the Vendor, who:

a) In his/her lifetime, has been adjudicated as a habitual felon as defined by GS 14-7.1 or a violent habitual felon as defined by GS 14-7.7, shall not be allowed to work in buildings occupied by University employees.

b) During the last seven (7) years has been convicted of any criminal felony or misdemeanor sexual offense or a crime of violence shall not be allowed to work in buildings occupied by University employees.

c) At any time has an outstanding warrant or a criminal charge for a crime described in (b) above shall not be allowed to work on University property.

d) The Vendor must ensure that all employees have a responsibility to self-report to the Vendor within twenty-four (24) hours any arrest for any disqualifying offense. The Vendor must notify the Contract Administrator within twenty-four (24) hours of all details concerning any reported arrest.

e) Upon the request of the Contract Administrator, the Vendor will re-screen any of its employees, agents, representatives, and subcontractors during the term of the Contract.

f) Vendor's responses to these background check requests shall be considered a continuing representation, and Vendor's failure to notify the University within thirty (30) days of any criminal charge, investigation, or proceeding involving Vendor or its then-current officers, directors or persons providing Services under this Contract during its term shall constitute a material breach of contract. The provisions of this paragraph shall also apply to any subcontractor utilized by Vendor to perform Services under this Contract.

g) If there are problems or delays with performance associated with the completion and compliance with this background check requirements, any Vendor's performance bond could be used to complete these Services.

**4.6.4 DOCUMENT REQUIREMENTS**

Required documentation to be submitted prior to date Contract is effective and for performing any Services on University property shall include:

a) A cover letter by the Vendor on company letterhead with a list of the full names matching a required government issued photo ID, addresses, and birth dates of each person representing the contracting company.

b) Vendor shall also provide a photocopy of the required State or Federal government issued picture ID or Driver License.

c) A letter on company letterhead is not acceptable proof in itself but can be used to further clarify information on the criminal background check submitted. All documentation shall be submitted at the same time. Submit documents which are clear and legible.

d) Background checks consisting of:

1. Original unaltered criminal background check from the organization providing the background check.
2. The background check provider's company name, company mailing address, and contact phone numbers.
3. The full name of the individual, which matches the government issued photo ID.
4. The current address of individual being checked.
5. The date the criminal background check search was conducted.

**4.6.5 VENDOR BACKGROUND CHECK AGREEMENT**

Vendor agrees to conduct a criminal background check per the specifications above in this section on all employees proposed to work under this Contract, at its expense, and provide the required documentation to the University in order to perform Services under this Contract:

☑ YES ☐ NO

## 4.7 PERSONNEL

Vendor warrants that qualified personnel shall provide Services under this Contract in a professional manner. "Professional manner" means that the personnel performing the Services will possess the skill and competence consistent with the prevailing business standards in the industry. Vendor will serve as the prime contractor under this Contract and shall be responsible for the performance and payment of all subcontractor(s) that may be approved by the University. Names of any third-party Vendors or subcontractors of Vendor may appear for purposes of convenience in Contract documents; and shall not limit Vendor's obligations hereunder. Vendor will retain executive representation for functional and technical expertise as needed in order to incorporate any work by third party subcontractor(s).

Should the Vendor's bid result in an award, the Vendor shall be required to agree that it will not substitute key personnel assigned to the performance of the Contract without prior written approval by the Contract Lead. Vendor shall further agree that it will notify the Contract Lead of any desired substitution, including the name(s) and references of Vendor's recommended substitute personnel. The University will approve or disapprove the requested substitution in a timely manner. The University may, in its sole discretion, terminate the Services of any person providing Services under this Contract. Upon such termination, the University may request acceptable substitute personnel or terminate the contract Services provided by such personnel.

## 4.8 VENDOR'S REPRESENTATIONS

If Vendor's bid results in an award, Vendor agrees that it will not enter any agreement with a third party that may abridge any rights of the University under the Contract. If any Services, deliverables, functions, or responsibilities not specifically described in this solicitation are required for Vendor's proper performance, provision and delivery of the Service and deliverables under a resulting Contract, or are an inherent part of or necessary sub-task included within such Service, they will be deemed to be implied by and included within the scope of the Contract to the same extent and in the same manner as if specifically described in the Contract. Unless otherwise expressly provided herein, Vendor will furnish all of its own necessary management, supervision, labor, facilities, furniture, computer and telecommunications equipment, software, supplies and materials necessary for the Vendor to provide and deliver the Services and/or other Deliverables.

# 5.0 SPECIFICATIONS AND SCOPE OF WORK

**5.01 DUTIES AND RESPONSIBILITIES OF THE UNIVERSITY**

The general responsibility of the University is to aid and assist the Contractor in facilitating the work to be performed under this contract as specified. Specific responsibilities are limited to the following:

A. The University shall prepare and make available to the Contractor, existing branding guidelines and staff familiar with the decentralized nature of the University's work in this area.

B. The University shall provide adequate staff for regular meetings for brainstorming and logistics, and coordinate with key staff across the institution, as well as key stakeholders.

**5.02 DUTIES AND RESPONSIBILITIES OF CONTRACTOR**

The Contractor hereby agrees to work directly with the University, or its designated Contract Administrator, in connection with carrying out and conducting all of the following duties and responsibilities during the term of this agreement.

A. The Contractor shall furnish all staff and expertise necessary to complete this project in accordance with the University's needs.

**B.** The Contractor shall provide all creative direction and production with approval by the contract administrator.

**C.** The Contractor shall ensure that the final product is within budget and within agreed upon deadlines.

**D,** The Contractor shall be responsible for producing best-in-class research and marketing support to promote the University.

# 6.0 CONTRACT ADMINISTRATION

All Contract Administration requirements are conditioned on an award resulting from this solicitation. This information is provided for the Vendor's planning purposes.

## 6.1 CONTRACT MANAGER AND CUSTOMER SERVICE

The Vendor shall be required to designate and make available to the University a contract manager. The contract manager shall be the University's point of contact for Contract related issues and issues concerning performance, progress review, scheduling, and service.

| Contract Manager Point of Contact | |
|---|---|
| Name: | Matthew Johnson |
| Office Phone #: | 312.382.0100 |
| Mobile Phone #: | |
| Email: | |

The Vendor shall be required to designate and make available to the University for customer service. The customer service point of contact shall be the University's point of contact for customer service-related issues (define roles and responsibilities).

| Customer Service Point of Contact | |
|---|---|
| Name: | Amy Partipilo |
| Office Phone #: | 312.382.0100 |
| Mobile Phone #: | |
| Email: | |

## 6.2 POST AWARD PROJECT REVIEW MEETINGS

The Vendor, at the request of the University, shall be required to meet periodically *as and when required* with the University for Project Review meetings. The purpose of these meetings will be to review project progress reports, discuss Vendor and University performance, address outstanding issues, review problem resolution, provide direction, evaluate continuous improvement and cost saving ideas, and discuss any other pertinent topics.

## 6.3 CONTINUOUS IMPROVEMENT

The University encourages the Vendor to identify opportunities to reduce the total cost the University. A continuous improvement effort consists of various ways to enhance business efficiencies as performance progresses.

## 6.4 PERIODIC STATUS REPORTS

The Vendor may be required to provide Management Reports to the designated Contract Lead on a to be negotiated basis. This report shall include, at a minimum, information concerning w*ork accomplished during the reporting period; work to be accomplished during the subsequent reporting period; problems, real or anticipated, and notification of any significant deviation from previously agreed upon work plans and schedules, Etc.* These reports shall be well organized and easy to read. The Vendor shall submit these reports electronically using the format required by the Purchasing Agency. The Vendor shall submit the reports in a timely manner and on a regular schedule as agreed by the parties.

## 6.5 ACCEPTANCE OF WORK

Performance of the work and/or delivery of Goods shall be conducted and completed at least in accordance with the Contract requirements and recognized and customarily accepted industry practices. Performance shall be considered complete when the Services or Goods are approved as acceptable by the Contract Administrator.

***THE REMAINDER OF THIS PAGE IS INTENTIONALLY LEFT BLANK***

## 7.0 ATTACHMENTS

# **IMPORTANT NOTICE**

**RETURN THE REQUIRED ATTACHMENTS WITH YOUR RESPONSE**

FOLLOW THE LINKS TO ACCESS EACH ATTACHMENT

### ATTACHMENT A: PRICING

Complete and return the Pricing associated with this IFB, which can be found below:

The Offeror shall propose the costs of furnishing the services in accordance with the specifications within this bid document. Award will be made to the Contractor(s) whose proposal is most advantageous to the University.

The bid should be priced with a lump sum to complete the entirety of the project. In addition, it would be helpful to provide a menu of other services and deliverables that may be provided, including layer-down branding exercises for interested schools, or other expressions of the new brand including a signature video, homepage redesign, digital marketing themes, or other items. Also include a table of the firm's billing rates by position. These additional services will be acted upon based on separate purchase orders.

Note: to open links below please highlight the link, copy it, and then paste it into your browser.

### ATTACHMENT B: INSTRUCTIONS TO VENDORS

The Instructions to Vendors, which are incorporated herein by this reference, may be found here:
*https://ncadmin.nc.gov/formnorth-carolina-instructions-vendors032023/download?attachment*

### ATTACHMENT C: THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL GENERAL TERMS & CONDITIONS

The University of North Carolina at Chapel Hill General Terms and Conditions, which are incorporated herein by this reference, may be found here:

*https://www.doa.nc.gov/form-north-carolina-general-terms-and-conditions-11-2023/open*

### ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION

Complete and return the Historically Underutilized Businesses (HUB) Vendor Information form, which can be found at the following link:
*https://www.doa.nc.gov/pandc/onlineforms/form-hub-supplemental-vendor-information-9-2021/download*

### ATTACHMENT E: CUSTOMER REFERENCE FORM

Complete and return the Customer Reference Form, which can be found at the following link:
*https://ncadmin.nc.gov/media/15503/open*

### ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR

Complete and return the Location of Workers Utilized by Vendor, which can be found at the following link:

*https://www.doa.nc.gov/pandc/onlineforms/form-location-workers-09-2021/download*

## ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION

**Complete, sign, and return the Certification of Financial Condition, which can be found at the following link:**

*https://www.doa.nc.gov/pandc/onlineforms/form-certification-financial-condition-09-2021/download*

***** Failure to Return the Required Attachments May Eliminate Your Response from Further Consideration *****



September 17, 2024

# Vendor Response: IFB #3000011905 Marketing & Branding Services for:

THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

**Two x Four LLC.**
10 N. Dearborn - #1000
Chicago, IL 60602
(312) 382-0100

Attn: Matthew Johnson

We always begin with...

# THANKS!

**Thank you for considering us as a potential marketing partner.**

We know when it comes to selecting an agency you have many good options. So, we greatly appreciate your thoughtful consideration of our firm.

We are excited to introduce you to Two by Four's capabilities, extensive experience in higher education and our approach to a potential partnership with the University of North Carolina at Chapel Hill.

# WE'VE BROKEN OUR RESPONSE INTO FOUR SECTIONS:

1. Our Process & Approach to Your RFP
2. Relevant Experience
3. About Us / Agency Overview
4. Pricing & Budget





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# Navigation:

**First off, we know this is a HUGE presentation.** And we apologize for that, but we couldn't help ourselves. But hopefully this navigation will help a bit. Just click an orange header / subhead below and go to that section. And you can link back here from every other page as well.


## 1.0 OUR APPROACH & YOUR RFP

- Strategy & Research Capabilities
- Our Approach
- Our Process
- Phased Approach to Your RFP

## 2.0 RELEVANT EXPERIENCE

- Higher Education Clients
- Higher Education Case Studies

## 3.0 AGENCY OVERVIEW

- Executive Summary
- Agency Overview
- Capabilities & Services
- Our Portfolio
- Client Roster

## 4.0 PRICING & BUDGET

- Pricing Approach
- Pricing Methodology
- Proposed Cost for UNC RFP

## APPENDIX

- Staffing Approach
- Executive Leadership + Bios
- Senior Management + Bios

# Section 01



## Included in this section:

- Strategy & Research Capabilities
- Our Approach
- Our Process
- Phased Approach to Your RFP

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# WHO IS THE 2x4 STRATEGY & RESEARCH TEAM?

**We find the insights and develop the foundational messages and stories that inspire great creative.**

We are knowledge-seekers, curious to a fault, who seek to fully understand our clients and the world they live in, as well as the perceptions, needs and aspirations of their customers.

Through a combination of qualitative, quantitative and desk research methodologies, we listen closely to identify the patterns, gaps and opportunities that result in story-inspiring insights.

We leverage those insights to create the foundational concepts, messages and stories that inspire strong creative and stand the test of time as our clients grow and evolve.

We measure our success in the same way we get to our core understanding – through listening and data analysis to help our clients optimize and respond to context changes.


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# Research Approach:

**Qualitative Research:** We spend time listening deeply to our clients, their stakeholders and other audiences to gain a well-rounded and in depth understanding of realities, challenges and opportunities. Our qualitative approaches take the following forms:

- In-Depth Interviews with leaders, stakeholders and peers
- Focus Groups (live and online) with faculty and staff, alumni and prospect groups
- Message testing sessions, either live or online bulletin boards, to gain input into external storytelling tools such as institutional or school/program messaging.

**Quantitative Research:** We are skilled in designing, fielding and analyzing large scale surveys, incorporating third party data, and using analytic tools to identify patterns, detect changes in beliefs and behaviors and seize opportunities. Our quantitative offerings include:

- Brand awareness studies
- Audience segmentation and persona development
- Decision trend and pattern analysis, including complete journey mapping.

Link to Table of Contents

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THE PROCESS APPROACH

> We've built our agency on strategic thought leadership and breakthrough creativity. A potent combination that—when combined with flawless execution and a fanatical attention to doing more with less—yields tremendous results.

# POSITIVE MOMENTUM REQUIRES THOUGHT. AND COURAGE.

**Moving clients' brands forward is all Two by Four thinks about.** **Positive Momentum.** That makes us a relentless, eclectic group of creative thinkers, tinkers and troublemakers consumed by solving complex brand challenges. And we've honed our skills for over 26 years—blending insight, intuition, strategy, creativity and flawless execution to achieve momentum. These disciplines mix into the perfect elixir—one focused on manufacturing action to create sales overnight and loyal, raving, brand-rabid fans over time.

LEARN + THINK + WORK + DO



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THE PROCESS APPROACH

# SIMPLIFY.
# SURPRISE.
# SELL.
# SUPPORT.

"We put these four words on one of our walls, so they MUST be important!

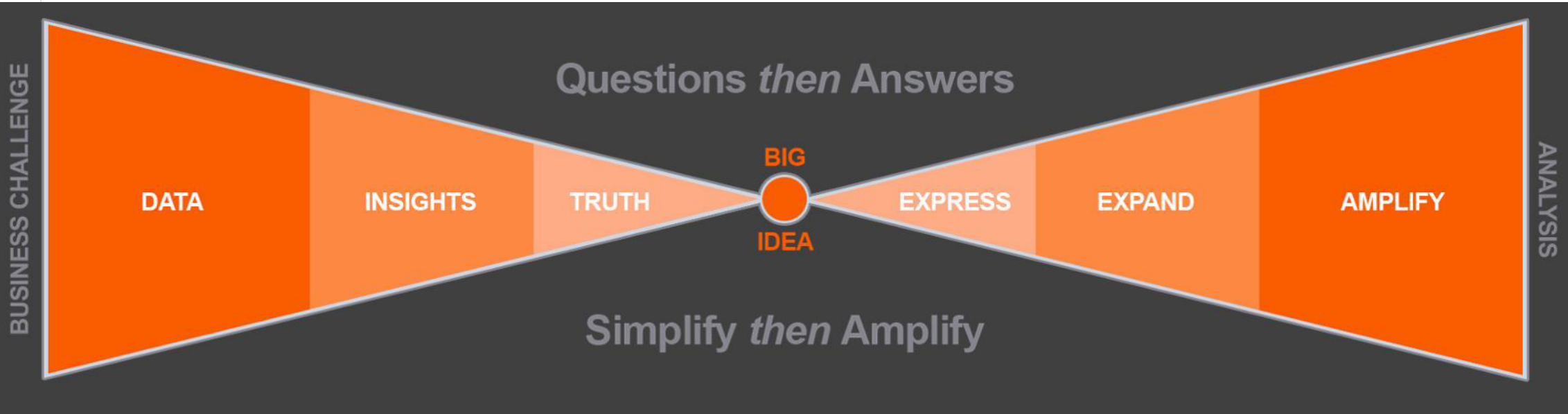



**Two by Four loves elegantly simple solutions to complex marketing problems.** To discover those solutions, we are as ardently focused on thoughtful processes that simplify as we are on creativity that surprises. All with only one outcome in mind: selling and supporting our clients' brands, services, products and customers.

LEARN + THINK + WORK + DO

Link to Table of Contents





# Process Phases and Outcomes

**PLEASE NOTE: This outlines our complete agency process — not all aspects below are required for every client. We will build a customized scope of work based on your needs and budget parameters.**

**PHASE 1:**
DISCOVERY

- Stakeholder Interviews
- Market Research
- Communications Audit
- Peer Audit
- Analysis

**PHASE 2:**
DEVELOPMENT

- Brand/Product Naming
- Positioning & Messaging Development
- Brand Architecture
- Creative & Media Briefs

**PHASE 3:**
EXPRESSION

- Logo/Visual Identity
- Brand Guidelines
- Creative Concepts
- Key Messaging Document
- Media Planning

**PHASE 4:**
EXECUTION

- Asset Production
- Executed Media Plan

**PHASE 5:**
EVALUATION

- Real-Time Tracking
- Reporting
- Optimization

## Desired Outcomes:

*"You really get us."*

*"We are inspired by our story and how we can now tell it."*

*"We are now telling our story better than we have ever told it."*

*"We are making an impression and manufacturing action."*

*"We are ensuring optimal results. Always."*

**A detailed explanation of how we will apply this process to your RFP follows...**



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# Our Process: Phase 1

## DISCOVERY

Kick-Off Meeting

On-Campus Immersion

Peer Audit

Communications Audit

Quantitative Survey

Analysis & Observations

The purpose of this phase is to immerse our team into UNC's culture, engage leadership and analyze the greater environment in which you operate. This will result in a distilled presentation on opportunities, challenges and recommended brand concepts.

Deliverables:

- Kickoff Meeting
- On-Campus Immersion
- Communication & Peer Audit
- Quantitative Survey
- Analysis & Observations Work Session

Timing: 6-8 Weeks

Link to Table of Contents

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IFB #3000011905

PHASE ONE

# CAMPUS IMMERSION:

We will spend 2-3 days touring the UNC campus and meeting leadership, students and faculty as they are available. This immersive experience will enable us to absorb the environment and culture of the institution firsthand—a critical experiential companion to our more objective review of materials and strategic plans.

We will request help from your team leadership to schedule meetings or group sessions with 10-15 individuals and groups who would like to share their experience and thoughts with us while we are on campus.



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IFB #3000011905 PHASE ONE

# BRAND IMMERSION:

To immerse ourselves in the brand and culture of UNC, we will conduct the following:

- Kickoff Meeting / Discovery Session: During this meeting, we will hear from your team and review key data and input, as well as establish milestones, priorities, communication protocols, schedules and procedures for involving stakeholders.
- Materials Review: We will ask that your team make available to us any materials that will further our understanding of the university, its work, its competitive environment and its communications. This might include: reviewing websites, publications and communications from across the university, memos on plans and issues, org charts, development and other marketing materials, information on notable programs, relevant research, and information regarding relationships with external partners and programs.
- Peer Audit: We will leverage our experience in higher education to evaluate the positioning and messaging of up to five (5) peer institutions.


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# QUANTITATIVE SURVEY:

We will develop and execute an online survey to be sent to members of the school community, including faculty, staff, alumni, students and prospective students.

We can use this survey to inform, to understand awareness and familiarity, ask key questions around brand attributes and opportunities, and solicit input from the widest possible sample of core audiences.

We will design the survey questionnaire, reviewing it with your leadership team, field the survey to a list provided by UNC, collect and input all data, and deliver our findings as part of our overall analysis.


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# WORK SESSION:

In an in-person work session with the project team (2 hours), we will deliver a presentation to review our process, summarize our findings as they apply to your positioning, marketing and communication strengths, challenges and opportunities and conclude with key objectives for positioning and messaging.

The goal of this work session will be to gain leadership input and agreement on the positioning objectives, along with any additional feedback that will help us focus our efforts in the next phase.


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# Our Process: Phase 2

## DEVELOPMENT

Brand Positioning

Brand Messaging

Creative Brief

Media Brief

In this step we will develop a positioning strategy and storytelling framework that will enable the university to build appreciation and enthusiasm both internally and external and draw proper attention to programs, initiatives and partnerships in clear, distinct and complementary ways.

Deliverables:

- Brand Positioning
- Brand Messaging
- Creative & Media Briefs

Timing: 6-8 Weeks



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IFB #3000011905 PHASE TWO

# POSITIONING:

## Positioning Development

Guided by our analysis and agreed upon objectives, we will develop 2-3 alternative positioning concepts. Each concept will seek to identify UNC in a differentiated, yet highly relevant way, in order to achieve sustainable impact with key audiences.

We will express each concept in a succinct concept statement, provide supportive language to flesh out the concept, and discuss our strategic rationale concerning the marketing and communications implications of each concept.

## Work Session

We will meet with the project team to present positioning concepts and discuss the implications and competitive advantages of each. We will assist the team to establish agreement upon the best positioning strategy, storytelling and creative expression. It will be critical at this stage to secure your support for the idea that successful positioning requires focus—the discipline to not try to say everything—pleasing all, but inspiring none.




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IFB #3000011905 PHASE TWO

# POSITIONING PLATFORM:

After receiving input and decisions from the leadership team, we will develop the following for review:

- Positioning Statement: In short-form (1-2 sentences), medium-form (a paragraph) and long-form narrative (2-3 paragraphs). This positioning statement will become the touchtone for all messaging and supporting language going forward.
- Brand Attributes: We will identify the core personality attributes that will support the positioning concept and dovetail with the School's values.
- Voice and Tone: We will develop guidelines for expressing the university's unique character visually and verbally. This voice and tone will complement the brand positioning and attributes to inform how the creative campaign comes to life.

Each of the above will receive up to two (2) rounds of refinement.


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# MESSAGING:

We will craft messages for up to six (6) critical audiences, all coherently supporting the positioning concept, but shaped for relevance to each audience.

Audience messages will be crafted in the form of important takeaways, which are the ideas we want each audience to have in their heads about the university and its offerings. These takeaways will serve the purpose of guiding communications across efforts and over time.

In parallel to messaging development, we will craft key themes to be infused throughout communications that allow flexibility and continuous refreshing while staying on message. We will present messaging and key themes to leadership for input and approval.

Messaging will receive up to two (2) rounds of refinement.





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IFB #30000011905 PHASE TWO

# BRIEF DEVELOPMENT: Telling Better Stories.

Using the concepts and content from the new positioning and messaging we will draft creative and media briefs. Our briefs are written to inspire, focus and direct teams towards disruptive conceptual thinking, as well as...

- Kick start the creative and planning processes.
- Express the challenge into concise, human terms.
- Focus on the role communications can play.
- Is written by the agency but must be approved by the clien
- Provides a yardstick to judge creative work.




Link to Table of Contents

# Our Process: Phase 3

## EXPRESSION

Creative Concept Development

Media Planning

Brand Guidelines

In this phase we bring your brand to life. We work in tandem with the overall brand strategy and creative and media brief to develop an integrated campaign and communications plan.

Deliverables:

- Integrated Campaign Concepts
- Media Plan
- Updated Brand Guidelines

Timing: 4-6 Weeks

Link to Table of Contents

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# CREATIVE CONCEPTS:

Typically, after our creative brief is approved, we take 2 to 3 weeks to create multiple interpretations of the approved brief. Our approach is to create multiple concepts that will disrupt and inspire, driving action overnight and loyalty over time.

- Creative Presentation: We will present a minimum of three (3) creative campaign concepts, each brought to life across multiple touchpoints including but not limited to video, digital, social, radio, print, OOH and on-campus.
- Each campaign will have a distinct but consistent look and feel that will be the basis of all communications.
- Creative Approval: UNC will choose a singular creative direction for each deliverable with up to three (3) rounds of refinement / revisions.


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FB #3000011905 PHASE THREE

# BRAND STANDARDS:

nce the brand strategy and campaign concepts are complete, we l provide an updated brand standards.

e document will be comprised of all rules, regulations and idelines for verbal and visual expression of the brand to ensure nsistency across all communication touchpoints.

e will work with the leadership team to determine the specific desired contents prior to development, and the initial document will receive up to two (2) rounds of refinement.

Note: We recognize that UNC's visual identity (logo, seal, colors, etc.) are not changing. We will only update areas effected by the new strategy and campaign concepts.



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# MEDIA PLANNING & BUYING



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IFB #3000011905 PHASE THREE

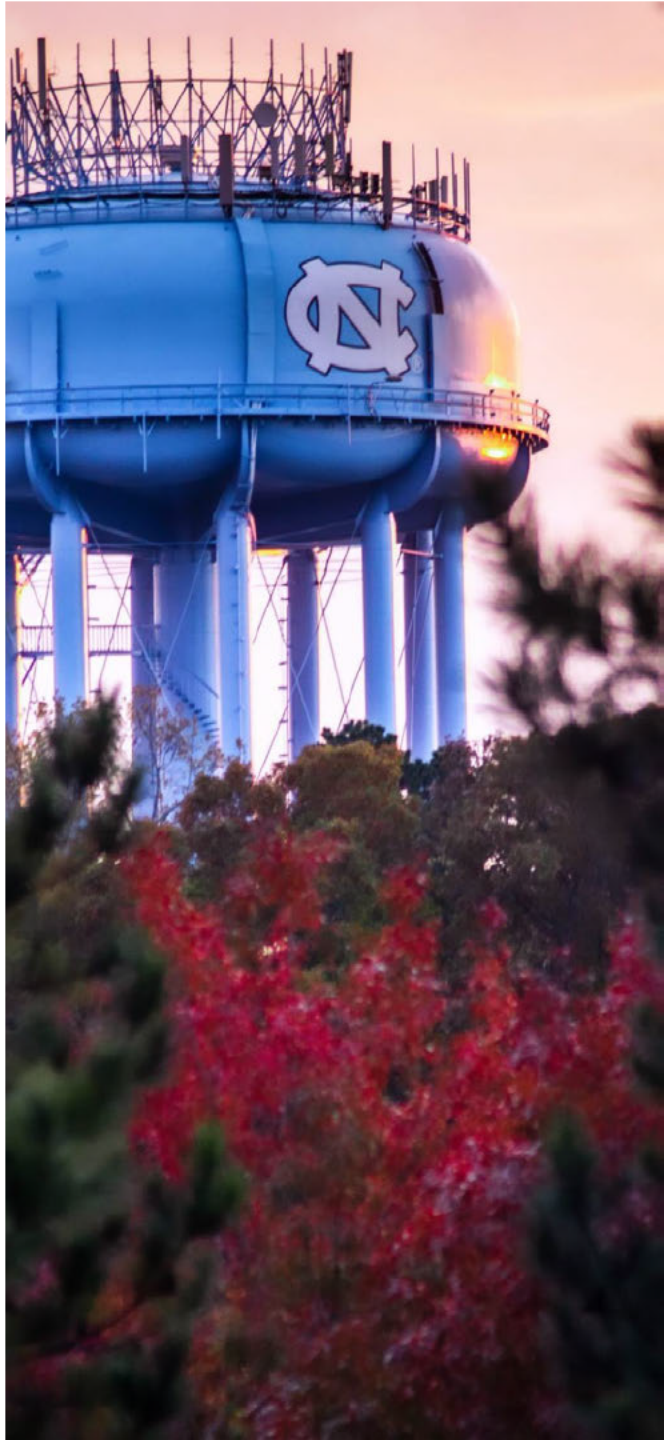
# MEDIA PLAN:

Based on our Discovery phase, analysis of your target audience, and media brief, our Media Team will assemble a strategic recommendation that illustrates the most effective places and ways to engage with our target audience. Deliverables will include:

- A media consumption analysis of your target audience.
- Recommended channels and media mix
- Recommended media budget levels

The plan will make recommendations on how to most effectively and efficiently use paid media, and recommended budget levels. We will also include a recommendation on KPIs and how to measure success and optimize our efforts.

There will be a mix of big ideas and more tactical driven components, with two (2) rounds of refinement to the recommended plan.




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# WHO IS THE 2x4 MEDIA TEAM?

**Impactful media strategy requires creative thinking.**

Our strength lies in creating strategic omnichannel campaigns that reach your core customers, driving awareness and action. The know-how to deliver a message that inspires action is woven through our data-driven framework.

We are a nimble team of big thinkers, built for speed with expertise across traditional and digital media channels.

Unlike the larger holding companies, our senior leadership is in your line of sight and involved in every aspect of your campaign.

Our philosophy is built on being a results-orientated extension of your team. As your partner, you will see the power of our process and real impact.



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IFB #3000011905 PHASE THREE

# INSIGHT. STRATEGY. OPTIMIZATION. ANALYSIS.



## LEARN

*RESEARCH & INSIGHT:*

*Market Research / Brand Health Tracking*
*CRM Onboarding & Audience Analysis*
*Competitive Auditing / Journey Mapping*



## THINK

*STRATEGY & PLANNING SERVICES:*

*Target Audience Segmentation*
*Omnichannel Media Planning*
*SEM , SEO & Social Auditing*



## AMPLIFICATION

PAID MEDIA EXECUTION :

*Traditional Media (TV, Radio, Print, OOH, Experiential)*
*Programmatic Buying / Retail Media*
*Advanced TV & Online Video / e-Commerce*
*Paid Social / Paid Search / Brand Sponsorships*



## COLLECT & REPORT

*DATA INSIGHTS:*

*Awareness Lift / Conversion Lift / Foot Traffic Lift*
*Purchase Behavior / Omnichannel Attribution*
*Dynamic Creative Analysis / Online & Offline ROAS*
*TV & Digital Overlap Analysis*



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IFB #3000011905 PHASE THREE

# STRATEGIC, OMNICHANNEL MEDIA CAMPAIGNS.

Unlike larger media holding companies, we ensure that your account is staffed with a small group of seasoned media experts that are dedicated to your institution and doing high quality work.

Our team specializes in planning and buying online and offline media across channels in order to:

- Garner the most efficient rates for our clients.
- Utilize CRM onboarding tools for audience insights, targeting and look-a-like modeling to ensure there's no wasted scale.
- Reach optimal investment and reach/frequency levels across our clients' media channel mixes.
- Create robust, real-time, dashboard reporting across the metrics that matter.





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IFB #3000011905 PHASE THREE




# WE'LL CREATE AN IMPACT BY USING A DATA-DRIVEN MEDIA APPROACH.

Understanding all of your audiences is paramount in any campaign we run at Two by Four. In order to figure out exactly who our target is, we:

- Leverage tools like MRI-Simmons and our DSP to build robust profiles of how our audience consumes media, their likes and dislikes, demographics, purchase habits and more using Raw Sugar's own 1st party CRM data.
- Examine competitive approaches and media consumption data with partners like Kantar and Nielsen to identify whitespace that our advertising can fill.
- Use omnichannel media planning tools and MMM analysis to help determine the optimal media mix based on historical sales data.

Through our audience analysis, we'll craft meaningful media campaigns designed to efficiently reach your target audiences and deliver results.

eMarketer MRI SIMMONS Nielsen SEMRUSH KANTAR MEDIA ADELPHIC BY VIANT. comScore


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IFB #3000011905 PHASE THREE

# CONNECTED MEDIA PLANNING & BUYING.

## Consumer Intelligence Helps Turn Insights into Ideas

category & trend forecasting, consumer segmentation, journey mapping and marketing mix models build the framework.

eMarketer, comScore, MRI Simmons, Path to Purchase Institute, GfK, Kantar Media, Mintel

## Media Reaches the Omnichannel Consumer Across Channels

offline & online media reach the right consumer at the right place and time (pre-shop, in-store and post-shop).

amazon ads, Google, Simulmedia, Walmart Connect, Viant, YouTube, Meta, Microsoft Advertising, aki

## Measurement and Analytics Solutions Track and Measure Success

cross-channel performance reporting and real-time dashboarding solutions ensure performance success against real business outcomes.

cardlytics, Circana, skai, NCSolutions, Supermetrics, Google Marketing Platform, tableau



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# PROSPECTIVE STUDENTS

Prospective students in California care a lot about their status and image. They work hard to create and maintain a very specific style, while also remaining true to their ideologies. As family plays a major role in their lives, they are looking to further their education in order to evolve their family's lifestyle.

| Segment Size | Proportion of population | Avg. HHI | White vs. Non-White |
|---|---|---|---|
| | 3.9MM | $77,442 | 37% / 63% |

## Customer Profile

52% 48%

Average age 20

82% Lives with one or more parents

48% Are currently a college or university student

## Buying Behaviours

| | |
|---|---|
| My number one goal when shopping is to save as much as possible. | 76% |
| I buy brands that reflect my style. | 69% |
| I smell personal care and household products in the store before I buy them. | 66% |
| I enjoy wandering the store looking for new, interesting products. | 59% |
| I am more likely to purchase brands that support a cause I care about. | 57% |
| I am willing to pay more for a product that is safe for the environment. | 57% |
| I usually like to wait until other people have tried things before I try them myself. | 54% |
| I prefer to buy products that offer the latest in new technology. | 53% |

## Attitudes

**Swayable Shopaholics**
Impulse buyers, these prospective students are willing to pay extra for image-enhancing products.

**Faith & Family**
They consider themselves to be spiritual and say that prayer is a part of their daily lives.

**Fiscally Fit**
They are not risk-takers but are optimistic about the future of the American economy.

**Tech Wizards**
They cannot live without the internet or imagine life without new electronic gadgets.

## Ad Receptivity

Internet on Computer 27%

Mobile Internet 25%

Print 19%

TV 11%

Social Media 9%

Podcasts 7%

Radio 3%

## Media Profile

| | | | | |
|---|---|---|---|---|
| Nickelodeon 22% | Netflix 81% | Forbes 17% | YouTube 30% | Spotify 60% |
| Cartoon Network 20% | YouTube 79% | Nat Geo 16% | TikTok 20% | Apple Music 29% |
| Adult Swim 19% | Hulu 49% | Vogue 14% | Instagram 19% | Soundcloud 16% |
| Univision 18% | Disney+ 49% | Cosmopolitan 11% | Snapchat 9% | iTunes 9% |



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# Our Process: Phase 4

## EXECUTION

Creative Asset Development

Media Buying

In this phase we create the final assets for all deliverables and execute the approved media plan.

Deliverables:

- Campaign Assets
- Executed Media Plan (if needed)

Timing: 4-8 Weeks

Link to Table of Contents

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# WHO IS THE 2x4 PRODUCTION TEAM?

**We are fully integrated creative partners.**

Two by Four has twenty-four years of experience creating and producing fully-integrated marketing campaigns across all traditional and digital platforms.

Our strength lies in our creative, production and media teams working collaboratively to bring campaigns to to life in the most impactful and efficient way possible.

Our in-house production team is comprised of a group of seasoned producers, digital producers and programmers, editors content creators, and production artists who are constantly on the lookout for emerging technologies, techniques and capabilities that will allow us to make an impact with budgets of any size.

Because it is vital to keep our client's digital and social efforts relevant and fresh, we are able to produce large quantities of content, quickly and efficiently, by utilizing our in-house studio and content creation teams.



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IFB #3000011905 PHASE FOUR

# CAMPAIGN PRODUCTION:

Once the campaign has been approved, we will work with the UNC team to produce the creative assets necessary to execute internal and external communication efforts.

Depending on the final campaign direction, this may include but not be limited to:

- Video / Photography Shoots & Edits
- Social Media & Digital Assets and / or Templates
- Signage & Other On-Campus Assets (Printer Ready Files or Produced Pieces)
- Direct Mail and Email Executions / Templates
- TBD Assets Based on UNC Needs


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# Our Process: Phase 5

EXECUTION

Real-Time Tracking

Reporting

Optimization

In this phase we create a plan to analyze and track progress of all communications so that we can report, adjust and optimize in real-time.

Deliverables depend on the level of monitoring and reporting required.

- Weekly / Monthly Reporting & Optimization
- Campaign Learnings Recap
- Stakeholder Meetings (Monthly)

Timing

- Throughout the Campaign

*Note: Phase 5 is not currently included in this proposal, as it is contingent on Two by Four executing a paid media campaign. As such, it would be covered under a separate scope, once a media plan and budget are approved.*



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Section

02

RELEVANT EXPERIENCE

## Included in this section:

- Higher Education Experience
- Case Studies
- References

Specific to your needs, we have over twenty-six years of experience working with Colleges and Universities across the country.


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[redacted]



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# SUCCESS STORIES

Following are examples of brand identity work we have completed over the past year.

Click a logo to go to that page or just advance slideshow.



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# CLIENT REFERENCES



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# Section 03

AGENCY OVERVIEW

## Included in this section:

- Agency Overview
- Capabilities & Services
- Portfolio
- Client Roster

NEXT

# THE ABOUT



# TWO by FOUR OVERVIEW:

## Two by Four LLC.

- **Founded:** 1998
- **Ownership:** Two by Four is part of the We Can't Stop Thinking holding company
- **Website**: twoxfour.com
- **CEO:** David Stevenson

## Primary Contact:

Matthew Johnson—SVP, Chief Marketing Officer





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THE ABOUT

COMPANY OVERVIEW

# MAKING AN IMPACT.

**Hit someone with a 2x4 and you will have their attention.** From the very start, Two by Four wanted to make an impact. First by creating disruptive strategic thinking and creative work to drive sales overnight and loyalty over time. Then by obliterating the concept of “above the line” and ”below the line” marketing tactics through a proactive process of integration across every conceivable communication touchpoint. And finally, by building our structure and approach not around the status quo business plan of a traditional advertising agency, but centered on transparency, efficiency and a relentless—almost fanatical—desire to be the most nimble, fast and responsive agency without sacrificing quality, content and service.

Two by Four is a full-service creative, digital advertising and design agency with extensive expertise in digital marketing, media, research & analytics, public relations, social media, content creation, brand strategy, corporate brand guidance, production and all things creative.





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THE ABOUT

COMPANY OVERVIEW

# RELATIONSHIP + CREATIVITY + FIDUCIARY RESPONSIBILITY.

**"If we can excel at any two of these three pillars, we know we have a good client we can help. All three and we're killing it."**

Two by Four's foremost focus is building great relationships. You see, we believe the very best work comes from great relationships. In fact, for us everything tracks back to great relationships. With our clients. With our clients' consumers. With our staff. With our regular FedEx guy—Gary from Glen Ellyn. The point is, Two by Four is first and foremost a relationship company.

Creativity and Fiduciary Responsibility are the other two pillars of our agency. And we have spent many years honing processes and policies to successfully guide both disciplines. Our proven methods not only help us consistently produce award winning, results driven work at a fair profit, but this relentless focus has also helped build an impeccably well-run business. This fact is best reflected in the long-term tenure of our clients, vendors and staff.

(See, it all comes back to relationships.)






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NEXT

# THE WHAT






Link to Table of Contents

THE WHAT

SERVICES & CAPABILITIES OVERVIEW

# INSIGHT.
# STRATEGY.
# CREATIVE.
# AMPLIFICATION.

For a detailed list of Two by Four's capabilities, please click **HERE.**



## LEARN

RESEARCH & INSIGHT:

Market Research / Brand Health Tracking
Digital Analytics / Customer Journey Mapping
Media Analytics / Competitive Auditing



## THINK

STRATEGIC SERVICES:

Strategy / Naming / Target Segmentation
Brand Architecture / Brand Identity
Digital & Social Media Strategy
Public Relations / Media Planning



## WORK

CREATIVE SERVICES:

Concepting / Art Direction / Copywriting
Digital & Social Content Creation
**Design:**
Identity - Packaging - Web - Environmental



## DO

AMPLIFICATION SERVICES:

Editorial / Event Planning
Media Buying / Media Relations
Web Dev / Content Curation
**Production:**
Print - Digital - Broadcast - Merchandising

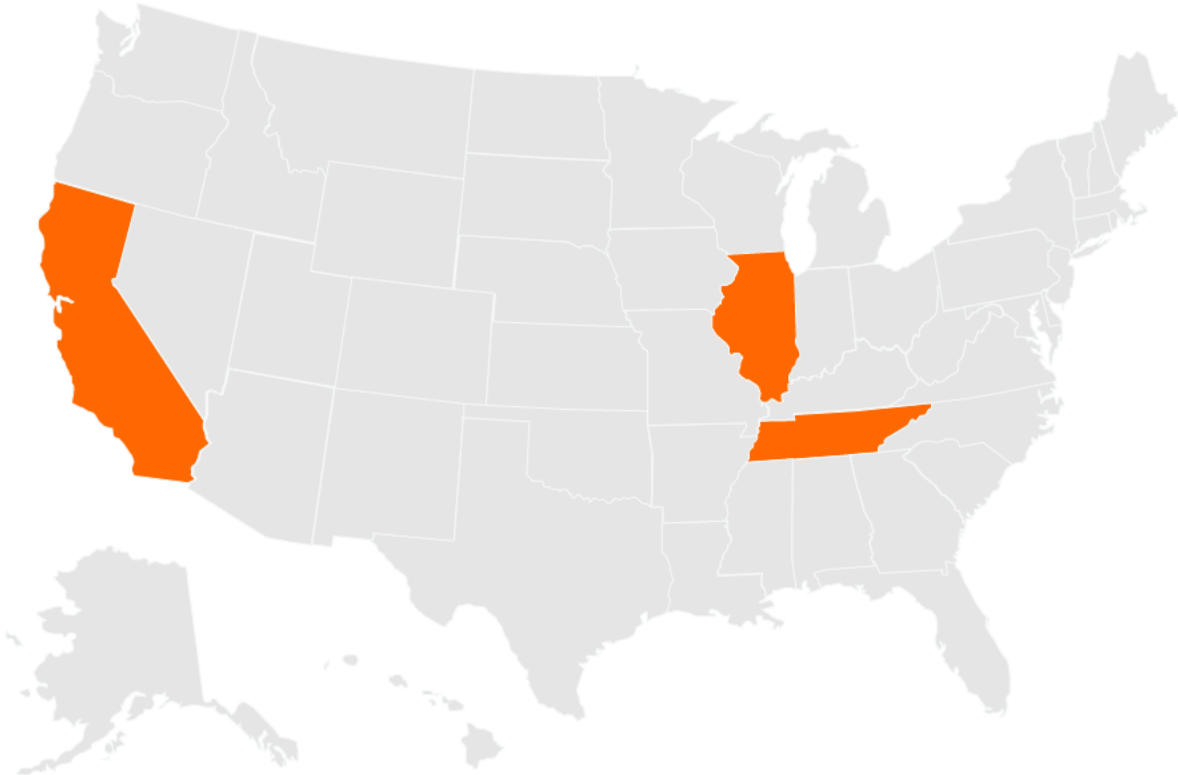


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# WINDY CITY.
# SAN FRAN.
# NASH.

**Two by Four has full-service offices in Chicago, San Francisco and Nashville.**

Each office offers our full capabilities to service global / national brands, but also has deep rooted geographic experience and local expertise.





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THE WHAT

SERVICES & CAPABILITIES OVERVIEW

# MANUFACTURING ACTION.

**"We seek to disrupt."** Two by Four is focused on creating brand value by disrupting markets and status quo. Our fully integrated, digital-first approach leverages creativity along every touchpoint of an audience's journey. We are as comfortable with B2B and B2C as we are with TV and Data-Driven Direct Mail. Budget and tactics are not what drives us. The opportunity to solve problems and move markets with creativity, that is what we are all about.

We create concepts that are forward thinking, disruptive and urge people to do something—buy a product, click a link, go to a website. Whatever. Our relentless, focused goal is to move brands forward and create momentum.

LEARN + THINK + WORK + DO

Link to Table of Contents

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THE WHAT

SERVICES & CAPABILITIES OVERVIEW

# 2x4's PORTFOLIO

The very best way to experience Two by Four's portfolio is on our website—where there is a MASSIVE number of client examples, in every medium.

**Click to see the WORK on our site.**

PLEASE NOTE: Our Radio & Television work is best viewed there.

Following is an overview of some of the other mediums we are prolific in...



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24
VIDEO

NEXT

# THE WHO FOR








THE WHO FOR

CLIENT HISTORY

# CREATING BIG IDEAS FOR OVER 500 BRANDS and COUNTING...

**Two by Four keeps company with some very good companies.** Our 26-year history has yielded an impressive client list—but a really long one as well. So, as to not add too many pages to this document, we invite you to visit the client page of our website where you will find a complete listing of EVERY client we have ever worked for as well as a sorting function to allow you to see the many categories we have experience in.

And as a testament to our team's success, the average retainer client tenure at Two by Four is around seven years—with our longest tenured client having been with us for 25 of our 26.

We currently have 42 clients across an array of categories for whom we provide a wide range of services ranging from Agency of Record to project based.
To see our Client List, just click.

## In good company with great Companies for over 26 years.

**Here are just a few of the brands we are BFF's with...**



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# Section 04

PRICING & BUDGET

## Included in this section:

- Pricing Approach
- Pricing Methodology
- Proposed Budget for UNC

THE ABOUT PRICING APPROACH

Simply put, we strive to be the best financial partner of any agency, any where.

Two by Four is EXTREMELY flexible and transparent when it come to our financial relationships. We pride ourselves on finding efficient solutions for even the tightest budgets— choosing to be a thoughtful, respectful and fair partner when it comes to return on investment for both parties.

The one area we are not creative is in our financial transactions.

We are always efficient, nimble and flexible.
We are always thoughtful stewards of your money.
And our financial transparency is only rivaled by our financial generosity.

To keep things simple, we bill clients in one of only two ways— by Project using staff billing rates or by Retainer using a blended billing rate.






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THE ABOUT

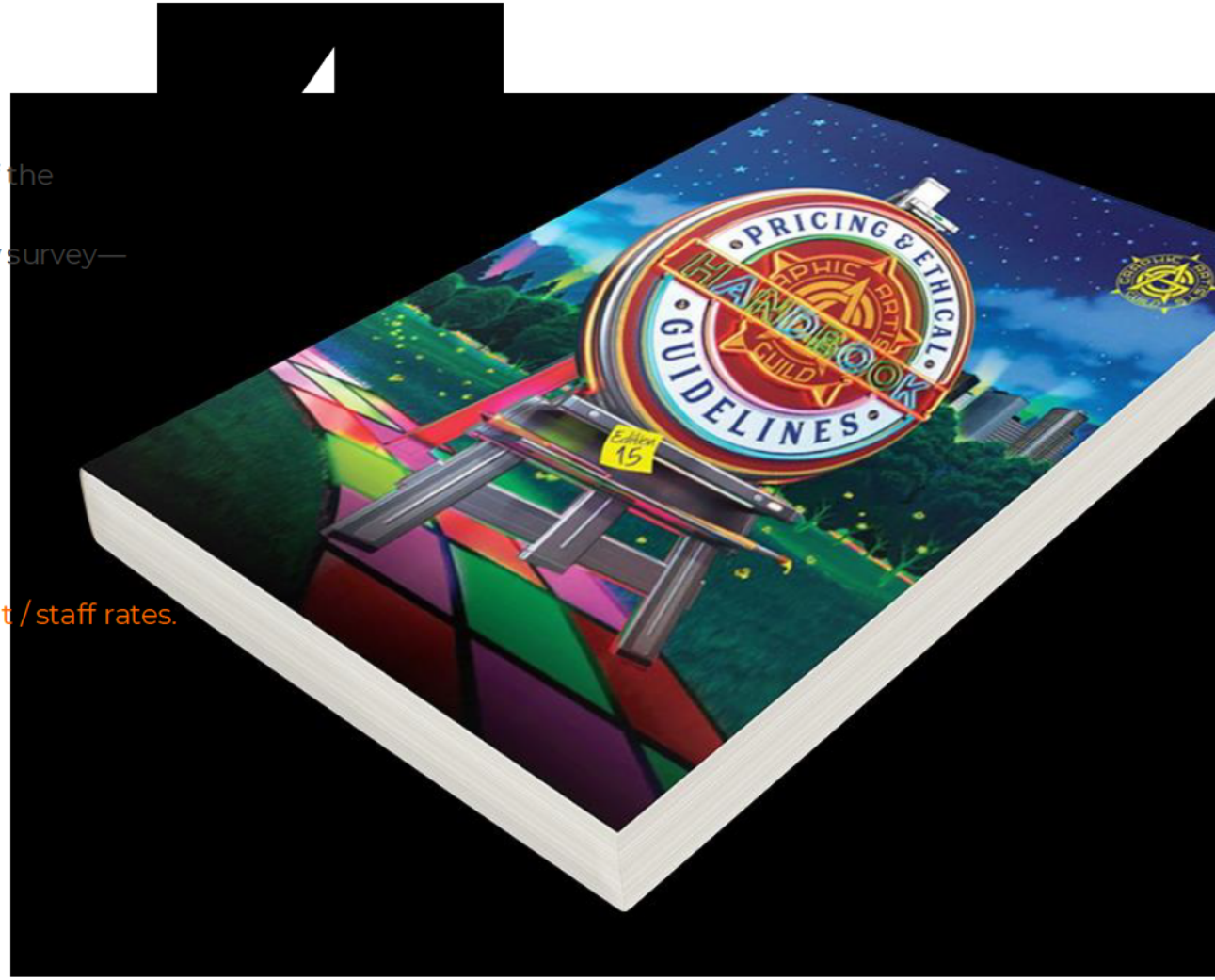
## PRICING METHODOLOGY

Our rates are based on both the annually published rates of the Graphic Artists Guild Pricing & Ethical Guidelines and the American Association of Advertising Agencies annual salary survey—of which we have been members for over 20 years.

- Our CFO served as a member of the 4A's National Finance Committee for over ten years.

Retainer vs. Project

- Project / Staff Rate sheet is published annually.
- A retainer typically offers a 10% - 15% savings on project / staff rates.






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As requested, an itemized breakdown of our anticipated costs can be found under separate cover.

We have also included a detailed breakdown of estimated hours and corresponding costs by job title and deliverable. These costs are based on what we know today, and on the needs outlined in your RFP, the phased process and deliverables outlined on previous pages of this presentation and tempered by our experience on similar projects like this.

That said, they should be considered a jumping off point for a conversation and refinement based on your feedback.


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## Well, that's our show!

We hope it gave you a good feel for how we would approach your brand's challenges as well as how excited we are to work with the University of North Carolina at Chapel Hill. We are a scrappy group of creative professionals who'll be a relentlessly committed partner that will match your energy with a boundless amount of our own.

**THANK YOU** for the opportunity and we look forward to any questions you may have.


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# THANK YOU.

NEXT

# APPENDIX.

*Staffing Approach*

*Executive Management + Bios*

*Senior Management + Bios*

Link to Table of Contents

# AGENCY STRUCTURE.



**Two by Four is well structured to meet your needs.**

We are a collaborative group of thinkers, doers, and creators. We pride ourselves on efficiently and nimbly producing a tremendous number of disruptive creative ideas. To do that at a consistent, high-quality level we deploy proven processes and and customize our staffing structure by client. Over 26 years, we've created a system that is predictable, transparent, and delivers results on-time and on-budget.

The next few pages provide an overview of how it all comes together. (It animates, so just click through.)

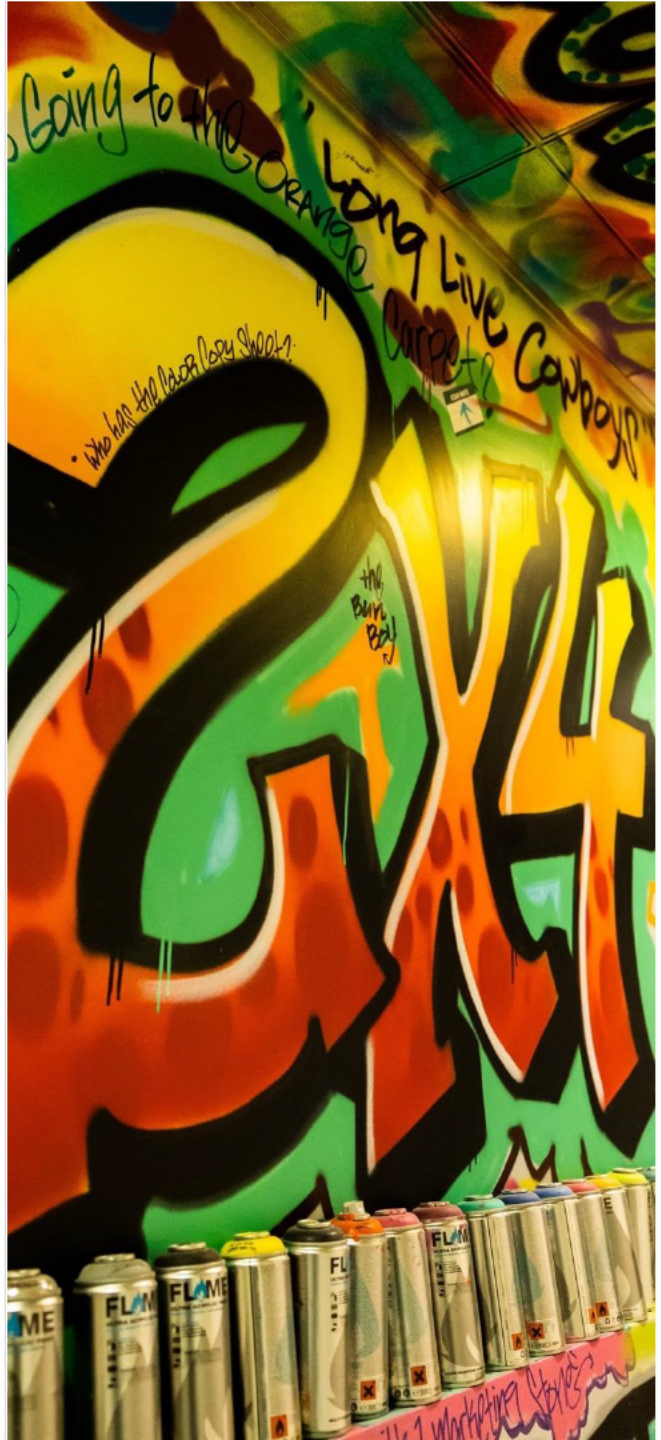


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TWO by FOUR

## HOUSE RULES FOR OUR TEAM:

1 **GREAT CREATIVE STARTS WITH A GREAT STRATEGY.**
Our work is strategically focused. Before development begins, we distill the creative strategy to a single, simple insight. From there, all is fair game. And it's ok to be off the wall as long as it's on strategy.

2 **THE CONSUMER IS NOT AN IDIOT.**
People respect brands that give them respect for possessing intelligence. If you're going to interrupt a person's otherwise pleasurable consumption of media, you'd better treat them to something awesome.

3 **BRANDS ARE PEOPLE TOO.**
They don't have a shoe size, but you can pretend they do. Brands have personalities. They have philosophies. And ideas. They might not have eye color, but they can make eye contact. Make people your priority, and you'll get the same in return.

4 **DO WHAT GETS TALKED ABOUT.**
This is no longer just sound advice for advertisers. It's a requisite. Fame sells, word of mouth rocks and advice from a trusted friend trumps an advertisement all day long.

5 **TRUTH IS THE MOST POWERFUL TOOL IN ADVERTISING.**
People expect advertising to sell them something. What they don't expect is truth. The truth disarms, engages, connects and endears. The truth outsells selling.

6 **BE AWESOME.**
If you are going to do something, do it like nothing else. When simple ideas are executed brilliantly, people become fans. This is awesomeness, and it is a very real brand differentiator.

7 **ALWAYS KEEP SCORE.**
Success isn't success if it cannot be measured in a tangible way. Sales, hits, fans, press mentions. We keep score.



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# AGENCY LEADERSHIP.

**EXECUTIVE MANAGEMENT TEAM:** Two by Four operates under the shared leadership of this group, with each department represented at the executive director level. Each brings years of experience to the team and provides our clients a wealth of expertise, advice and partnership.

And unlike many agencies, the average tenure of this team is 12.5 years.


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# AGENCY LEADERSHIP.

**SENIOR MANAGEMENT TEAM:** Two by Four prides itself on being a great place for young leaders to grow and mature. That's why they have a group called the Senior Management Team. Their chief responsibilities are to help execute the policies of the agency, to onboard and educate new staff, and to be the faithful stewards of the agency culture.

Each of these leaders are on a track to be the next executive level managers of our agency, ensuring leadership continuity for many years to come.



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THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

# Purchase Order

| | | |
|---|---|---|
| **PO Status** | **Dispatch Method**<br>Dispatch Via Email | **PO ID**<br>Y25MTS0496 |
| **Business Unit**<br>UNCCH | **Business Unit Description**<br>UNC at Chapel Hill | **PO Date**<br>12/2/2024 |
| **Business Unit Address**<br>CB 1100, 104 Airport Drive<br>Chapel Hill NC 27599-1100 | **Supplier** (0000161283)<br>TWO X FOUR LLC<br>10 N DEARBORN ST STE 1000<br>CHICAGO IL 60602-4532 | **Ship To**<br>616_233M<br>206 W Franklin St - 2nd Floor<br>Franklin Street, 206-233M<br>CHAPEL HILL NC 27516 |
| **Bill To**<br>CB 1220, 104 Airport Drive<br>Chapel Hill NC 27599-1220 | **Purchasing Contact and Phone Number**<br>Mark Sillman<br>919/962-9463 | **Freight Terms**<br>FOB Destination |
| | **Attn To**<br>Shannon DeRespino | **Ship Via**<br>BESTWAY |
| | **Payment Terms**<br>30 | **Total PO Amount**<br>$317,106.00 |

**North Carolina Sales & Use Tax Exempt #** 400028

**Header Comments**
*****UNIVERSITY'S GENERAL TERMS AND CONDITIONS*****
FOR PROCUREMENT OF SERVICES GOVERN THIS PROCUREMENT.
Terms may be found at https://finance.unc.edu/departments/purchasing/terms-services/

| Line | Qty | Unit | Item ID | Description | Unit Price | Extended Amt |
|---|---|---|---|---|---|---|
| 1 | 1.00 | LOT | | Order for the services of Marketing and Branding by Two x Four Marketing IAW IFB 3000011905 and your written proposal. | 317106.00000 | 317,106.00 |

**Comments:**

| | |
|---|---|
| **TOTAL** | $317,106.00 |

**Authorized Signature**

twoxfour

10 N Dearborn St, Suite 1000, Chicago, IL 60602 | 312.382.0100

Kamrhan Farwell
University of North Carolina: Projects
Office of University Communications
206 W. Franklin St., Suite 200
Chapel Hill, NC 27516

**Number** 43400
**Date** 01/24/25
**Job Number** UNC-29347
**PO#** Y25MTS0496
**Charge#** --

**Job Name:** Discovery & Analysis
**Agency Contact:** Julia Palmer Reynolds

| Description | Amount |
|---|---|
| Advance Billing to 50% of Estimate | $67,410.00 |
| **TOTAL:** | **$67,410.00** |

**PAYMENT TERMS:** Due Upon Receipt

twoxfour

10 N Dearborn St, Suite 1000, Chicago, IL 60602 | 312.382.0100

Kamrhan Farwell
University of North Carolina: Projects
Office of University Communications
206 W. Franklin St., Suite 200
Chapel Hill, NC 27516

| | |
|---|---|
| **Number** | 43904 |
| **Date** | 04/25/25 |
| **Job Number** | UNC-29396 |
| **PO#** | -- |
| **Charge#** | -- |

**Job Name:** UNC Immersion Travel
**Agency Contact:** Angela Drewno

| **Description** | **Amount** |
|---|---|
| Travel: Airfare | $4,423.10 |
| Travel: Food | $229.55 |
| Travel: Lodging | $777.02 |
| Travel: Transportation | $583.06 |
| **Travel Subtotal:** | **$6,012.73** |
| **TOTAL:** | **$6,012.73** |

**PAYMENT TERMS:** net 30 days

twoxfour

10 N Dearborn St, Suite 1000, Chicago, IL 60602 | 312.382.0100

Adrienne King
University of North Carolina: Projects
Office of University Communications
206 W. Franklin St., Suite 200
Chapel Hill, NC 27516

**Number** 44296
**Date** 07/15/25
**Job Number** UNC-29347
**PO#** Y25MTS0496
**Charge#** --

**Job Name:** Discovery & Analysis
**Agency Contact:** Julia Palmer Reynolds

| Description | Amount |
|---|---|
| Advance Billing to Remaining of Estimate | $67,410.00 |
| **TOTAL:** | **$67,410.00** |

**PAYMENT TERMS:** Due Upon Receipt

twoxfour

10 N Dearborn St, Suite 1000, Chicago, IL 60602 | 312.382.0100

Adrienne King
University of North Carolina: Projects
Office of University Communications
206 W. Franklin St., Suite 200
Chapel Hill, NC 27516

**Number** 44297
**Date** 07/15/25
**Job Number** UNC-29348
**PO#** Y25MTS0496
**Charge#** --

**Job Name:** Campaign Strategy
**Agency Contact:** Julia Palmer Reynolds

| Description | Amount |
|---|---|
| Advance Billing to 100% of Estimate | $30,950.00 |
| **TOTAL:** | **$30,950.00** |

**PAYMENT TERMS:** Due Upon Receipt

twoxfour

10 N Dearborn St, Suite 1000, Chicago, IL 60602 | 312.382.0100

Adrienne King
University of North Carolina: Projects
Office of University Communications
206 W. Franklin St., Suite 200
Chapel Hill, NC 27516

| | |
|---|---|
| **Number** | 44298 |
| **Date** | 07/15/25 |
| **Job Number** | UNC-29349 |
| **PO#** | Y25MTS0496 |
| **Charge#** | -- |

**Job Name:** Campaign Concepting
**Agency Contact:** Julia Palmer Reynolds

| **Description** | **Amount** |
|---|---|
| Advance Billing to 100% of Estimate | $23,885.00 |
| **TOTAL:** | **$23,885.00** |

**PAYMENT TERMS:** Due Upon Receipt

twoxfour

10 N Dearborn St, Suite 1000, Chicago, IL 60602 | 312.382.0100

Adrienne King
University of North Carolina: Projects
Office of University Communications
206 W. Franklin St., Suite 200
Chapel Hill, NC 27516

| | |
|---|---|
| **Number** | 44518 |
| **Date** | 08/28/25 |
| **Job Number** | UNC-29714 |
| **PO#** | -- |
| **Charge#** | -- |

**Job Name:** 8/14 Chancellor Meeting Travel
**Agency Contact:** Angela Drewno

| **Description** | **Amount** |
|---|---|
| Travel: Airfare | |
| Travel: Food | |
| Travel: Lodging | |
| Travel: Transportation | |
| **Travel Subtotal:** | **$1,696.81** |
| **TOTAL:** | **$1,696.81** |

**PAYMENT TERMS:** net 30 days

# twoxfour

10 N Dearborn St, Suite 1000, Chicago, IL 60602 | 312.382.0100

Adrienne King
University of North Carolina: Projects
Office of University Communications
206 W. Franklin St., Suite 200
Chapel Hill, NC 27516

| | |
|---|---|
| **Number** | 44519 |
| **Date** | 08/28/25 |
| **Job Number** | UNC-29348 |
| **PO#** | Y25MTS0496 |
| **Charge#** | -- |

**Job Name:** Campaign Strategy
**Agency Contact:** Angela Drewno

| **Description** | **Amount** |
|---|---|
| Account Leadership: Account Director | $1,800.00 |
| Account Leadership: Account Executive | $9,850.00 |
| Account Leadership: Director of Client Leadership | $1,050.00 |
| **Account Leadership Fees Subtotal:** | **$12,700.00** |
| Strategy: President of Strategy | $26,400.00 |
| Strategy: Strategy Director | $22,500.00 |
| **Strategy Fees Subtotal:** | **$48,900.00** |
| Service Fees: Hard Costs | $300.00 |
| *As indicated in the Hard Cost section of the estimate, Two by Four includes a monthly service fee of $200.00 for the duration of the SOW to cover incurred costs such as printing, postage, data storage, file transfer, and other incidental activities incurred through normal and reasonable execution of this SOW.* | |
| **Production Costs Subtotal:** | **$300.00** |
| **TOTAL:** | **$61,900.00** |
| | *-$30,950.00* |
| **BALANCE DUE:** | **$30,950.00** |

**PAYMENT TERMS:** net 30 days

# twoxfour

10 N Dearborn St, Suite 1000, Chicago, IL 60602 | 312.382.0100

Adrienne King
University of North Carolina: Projects
Office of University Communications
206 W. Franklin St., Suite 200
Chapel Hill, NC 27516

| | |
|---|---|
| **Number** | 44602 |
| **Date** | 09/23/25 |
| **Job Number** | UNC-29349 |
| **PO#** | Y25MTS0496 |
| **Charge#** | -- |

**Job Name:** Campaign Concepting
**Agency Contact:** Julia Palmer Reynolds
**Description:** This invoice includes a 10% overage in accordance with our approved estimate policy, which allows for up to 10% variance on non-commission-based work without a change order.

| **Description** | **Amount** |
|---|---|
| Account Leadership: Assistant Account Executive | $2,827.50 |
| Account Leadership: Account Director | $1,803.36 |
| Account Leadership: Account Executive | $5,981.25 |
| Account Leadership: Director of Client Leadership | $2,850.00 |
| **Account Leadership Fees Subtotal:** | **$13,462.11** |
| Creative: Art Director | $14,520.00 |
| Creative: Chief Creative Officer | $2,600.00 |
| Creative: Copywriter | $10,560.00 |
| Creative: Executive Creative Director | $6,964.89 |
| **Creative Fees Subtotal:** | **$34,644.89** |
| Production: Director of Production | $300.00 |
| Production: Video Editing | $3,975.00 |
| **Production Fees Subtotal:** | **$4,275.00** |
| Service Fees: Hard Costs<br>*As indicated in the Hard Cost section of the estimate, Two by Four includes a monthly service fee of $200.00 for the duration of the SOW to cover incurred costs such as printing, postage, data storage, file transfer, and other incidental activities incurred through normal and reasonable execution of this SOW.* | $92.50 |
| **Production Costs Subtotal:** | **$92.50** |
| Talent | $57.50 |
| **Talent Subtotal:** | **$57.50** |
| **TOTAL:** | **$52,532.00** |
| | *$23,885.00* |
| **BALANCE DUE:** | **$28,647.00** |

# twoxfour

10 N Dearborn St, Suite 1000, Chicago, IL 60602 | 312.382.0100

Kamrhan Farwell
University of North Carolina: Projects
Office of University Communications
206 W. Franklin St., Suite 200
Chapel Hill, NC 27516

| | |
|---|---|
| **Number** | 44759 |
| **Date** | 10/29/25 |
| **Job Number** | -- |
| **PO#** | -- |
| **Charge#** | -- |

**Agency Contact:** Angela Drewno
**Description:** Final Invoice

| **Description** | **Amount** |
|---|---|
| Final Invoice<br>*Final Invoice for the Two by Four Brand Initiative* | $34,080.00 |
| **TOTAL:** | **$34,080.00** |

**PAYMENT TERMS:** Due Upon Receipt

# Brand Strategy Update

Dr. Adrienne King

*Associate Vice Chancellor for Marketing*



THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

# What is it?

# Why do we need it?

# How do we create it?

BRAND STRATEGY

# Let’s first define what we mean when we say *brand*.

# Brand is…

- Not a tagline.
- Not a logo.
- Not a color.
- Not even a marketing campaign.

Those are all aspects of our brand…

**Our brand is much bigger than that.**

# Our brand is a promise we make.

# Built from the inside, radiating out.

An authentic brand position is a powerful lens to refine not just our communication (what we say) but our strategic actions (what we do).

Integrating **brand and strategy** is what creates **authentic differentiation**.

~~What is it?~~

# Why do we need it?

## Brand strategy creates differentiation and builds awareness.

Brand strategy is what allows us to differentiate ourselves by establishing a distinct and compelling identity. It highlights our unique strengths, values, and contributions we make. Differentiation leads to increased awareness, favorability and ultimately reputation.

## Why reputation matters.

Generating awareness and reputation leads to continued state support, increases in research and fundraising dollars, enrollments and recruitment and retention of the highest-caliber faculty and staff.

~~What is it?~~

~~Why do we need it?~~

**How do we create it?**

# Four Phases

- **Phase 1: Research** *(March – April)*
  - Qualitative – COMPLETED
  - Quantitative – COMPLETED
- **Phase 2: Brand Positioning** *(May – June)*
  - Research-driven
  - Competitive Landscape
- **Phase 3: Brand Expression** *(June – Sept)*
  - Strategy Framework
  - Creative Development
- **Phase 4: Execution** *(Fall 2025)*
  - Campaign Launch
  - Campus Partner Activation

# Phase 1a: Qualitative Research

## CAMPUS INTERVIEWS & FOCUS GROUPS BY THE NUMBERS

**80**
TOTAL PEOPLE INTERVIEWED

**13**
INDIVIDUAL INTERVIEWS

**11**
GROUP INTERVIEWS

**31**
TOTAL HOURS OF INTERVIEWS

# Phase 1b: Quantitative Research

## STAKEHOLDER SURVEYS – April 9-22

**7,432**

TOTAL RESPONSES

- Alumni (5,332)
- Faculty (363)
- Staff (727)
- Administration (283)
- Postdoc/GR/Prof Students (432)
- UG Students (369)
- Board Member/Volunteer (163)
- Parent (717)
- General Public (810)

# Four Phases

- **Phase 1: Research** *(March – April)*
  - Qualitative – COMPLETED
  - Quantitative – COMPLETED
- **Phase 2: Brand Positioning** *(May – June)*
  - Research-driven
  - Competitive Landscape
- **Phase 3: Brand Expression** *(June – Sept)*
  - Strategy Framework
  - Creative Development
- **Phase 4: Execution** *(Fall 2025)*
  - Campaign Launch
  - Campus Partner Activation

# Brand Strategy Update

Dr. Adrienne King
*Associate Vice Chancellor for Marketing*



THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

# Where are we?

- ☑ **Phase 1: Research** *(March – April)*
  - ❑ Qualitative – COMPLETED
  - ❑ Quantitative – COMPLETED
- ☑ **Phase 2: Brand Positioning** *(May – June)*
  - ❑ Research Driven – COMPLETED
  - ❑ Competitive Landscape - COMPLETED
- ❑ **Phase 3: Brand Expression** *(June – Sept)*
  - ❑ Strategy Framework – ONGOING
  - ❑ Creative Development – ONGOING
- ❑ **Phase 4: Execution** *(Fall 2025)*
  - ❑ UComm Integration/Adoption
  - ❑ Campaign Launch
  - ❑ Campus Partner Activation

PHASE 1

# Campus Interviews & Focus Group Numbers

**80**
TOTAL PEOPLE INTERVIEWED

**13**
INDIVIDUAL INTERVIEWS

**11**
GROUP INTERVIEWS

**31**
TOTAL HOURS OF INTERVIEWS

PHASE 1

# Stakeholder Surveys – April 9th through 22nd

# 7,432

## TOTAL RESPONSES

- Alumni (5,332)
- Faculty (363)
- Staff (727)
- Administration (283)
- Postdoc/GR/Prof Students (432)
- UG Students (369)
- Board Member/Volunteer (163)
- Parent (717)
- General Public (810)

PHASE 1 FINDINGS

# Distinct Attributes

**Carolina's distinct advantages are highly recognized, fueling our critical role in the state.**

| | | |
|---|---|---|
| **Flagship Identity** | • First operating public university in the U.S.<br>• North Carolina's intellectual and economic engine | *"The next chapter of the state is tied directly to this place."* |
| **Service-Oriented Excellence** | • Top schools in medicine, pharmacy, journalism, public health and government, with a strong applied focus<br>• Commitment to leadership and growth in all counties | *"We have the top schools of Pharmacy and Dentistry. Faculty are active in public service work.* |
| **High Quality, High Value** | • Many express deep pride in UNC being a top-tier, publicly accessible university | *"If we show academic excellence, commitment to affordability and the genuine care this place has for students, we are showing the best of who we are."* |
| **Loyalty & Legacy** | • "Irrational love" for UNC among alumni and students<br>• Strong bonds that include critique and desire to improve | *"Carolina has that passion. People love being there. They love coming back, warts and all."* |
| **Athletics as Connector** | • Global brand recognition and basketball, field hockey, soccer, football, and other sports<br>• The "front porch", an access point to the university | *"One of our best marketing vehicles is our commitment to excellence in athletics."* |

# Challenges

**Perceptions of Inaccessibility**
The top priority of any campaign must be to bridge the perception gap between prestige and accessibility.

**Political Polarization**
Carolina is a university for all Carolinians – we cannot let opposing political agendas distract from our narratives.

**Narrative Control**
UNC-Chapel Hill is a higher education leader. As such, we must lead the conversation, not react to it.

**Under-Realized Support**
While consistently state-supported, UNC could better tap into its community of passionate supporters.

From the state perspective, we need to be demystified – we are not hippies on a hill. We are of and for the state.

We have deep red rural areas and deep blue metro areas, and UNC is where all the biggest fights play out.

Ever since Silent Sam, our messaging has always been defensive in nature.

People are stunned by the number of our donors, but donors are not giving to their capacity.

# Opportunities

**When combined with the opportunities identified by affiliate audiences, we see three key areas of focus.**

**Reassert the "University of the People"**
Carolina's mission and traditions of excellence and innovation can be used to point forward.

**Elevate Brand Pillars**
Make Carolina's discoveries, students, and culture as visible statewide as its athletics and health system.

**Champion Constructive Dialogue**
Use the university's reputation to lead conversations about public responsibility and public engagement.

People don't need convincing to love UNC;
they need reassurance they have access to it.

People think about a hospital and a sports team
with a university on the side.
But I want to talk about the academic brand.

In order to support the mission of being by the people and for the people, UNC has to be a place where we can bring those backgrounds and viewpoints together.

# COMMITTED TO PUBLIC PROGRESS

## Carolina is powered by purpose – to stand with, strengthen and advance North Carolina.

As the nation's first public university, UNC-Chapel Hill was built to serve the people – and that purpose hasn't wavered. Our strength lies in our commitment to public progress: research that drives breakthroughs, education that uplifts, athletics and arts that inspire, and partnerships that solve real problems. From the mountains to the coast, Carolina's traditions light the way to what's next for our state and its residents. Our commitment has resulted in discoveries, leaders and programs with proven public value. North Carolinians help shape our priorities and direction, ensuring that Carolina reflects the needs, values and aspirations of the people we serve. Because public is not just about how we're supported – it's who we serve.











It’s one thing to be first. Yet, as impressive as that may sound, firsts don’t mean a thing – unless they make a lasting impact.

And at UNC-Chapel Hill, ours have.

We are the nation’s first public university. The first to establish a school of public health, helping underserved communities. A commitment to serving first generation students as well as generations of Tar Heels. First in athletics, countless times over.

And the first to respond, without fail, when the call for help rings out. Not just in North Carolina’s 100 counties, but in all 50 states as well.

**Because that’s what Tar Heels are all about: taking first steps that lead to momentous change. For countries, counties, communities, individuals – and the entire world.**

THE UNIVERSITY *of* NORTH CAROLINA

**FIRST. AND FOR ALL.**

# Brand Reputation



ESTABLISHED IN 1789.

REESTABLISHED EVERY DAY SINCE.

From cutting-edge research to groundbreaking scientific discoveries, UNC-Chapel Hill is relentlessly pushing progress in every field, all across the planet. With service that reaches far beyond campus, we are 400,000 Tar Heels strong – shaping the future for all.




FIRST. AND FOR ALL.

Learn more at unc.edu

THE UNIVERSITY *of* NORTH CAROLINA

**Brand Reputation**



# Brand Reputation



# Athletics



Learn more at unc.edu

## SOME PROGRAMS HAVE MORE

# BANNER YEARS THAN OTHERS.




At UNC-Chapel Hill, we're proud of our athletics teams' successes. And we don't just shout it from the rafters—we hang tributes to them there as well. Because Tar Heel squads have won an impressive total of 52 NCAA D-I national championships. Which is why they're looked up to in more ways than one.

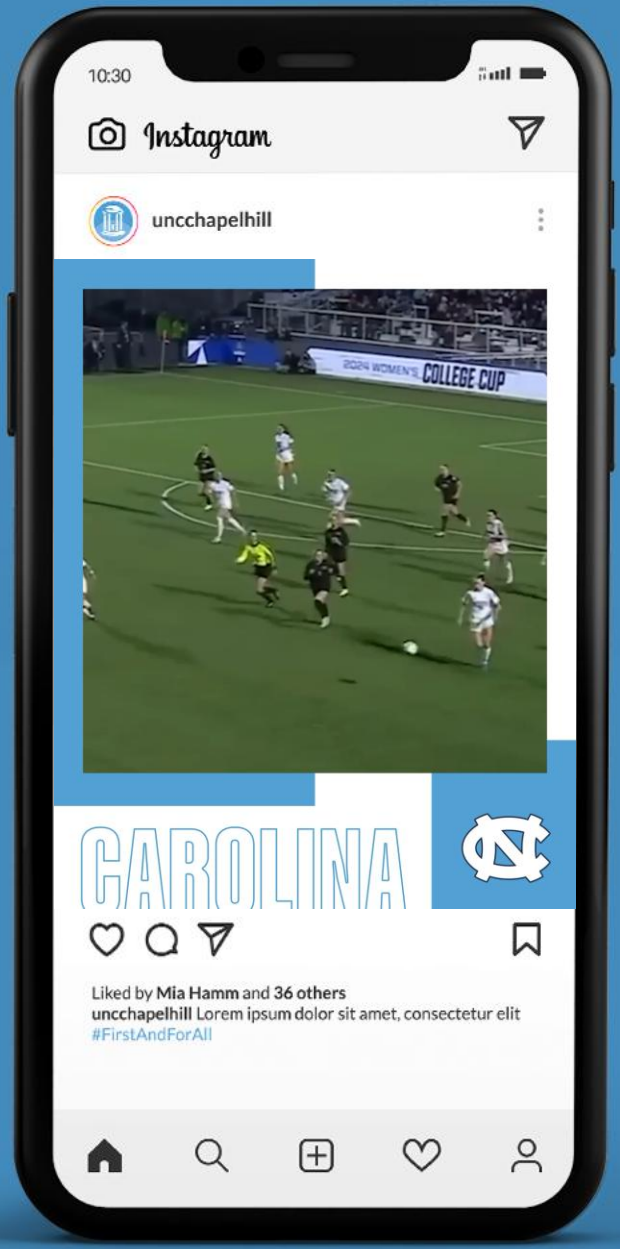
THE UNIVERSITY *of* NORTH CAROLINA

**FIRST. AND FOR ALL.**

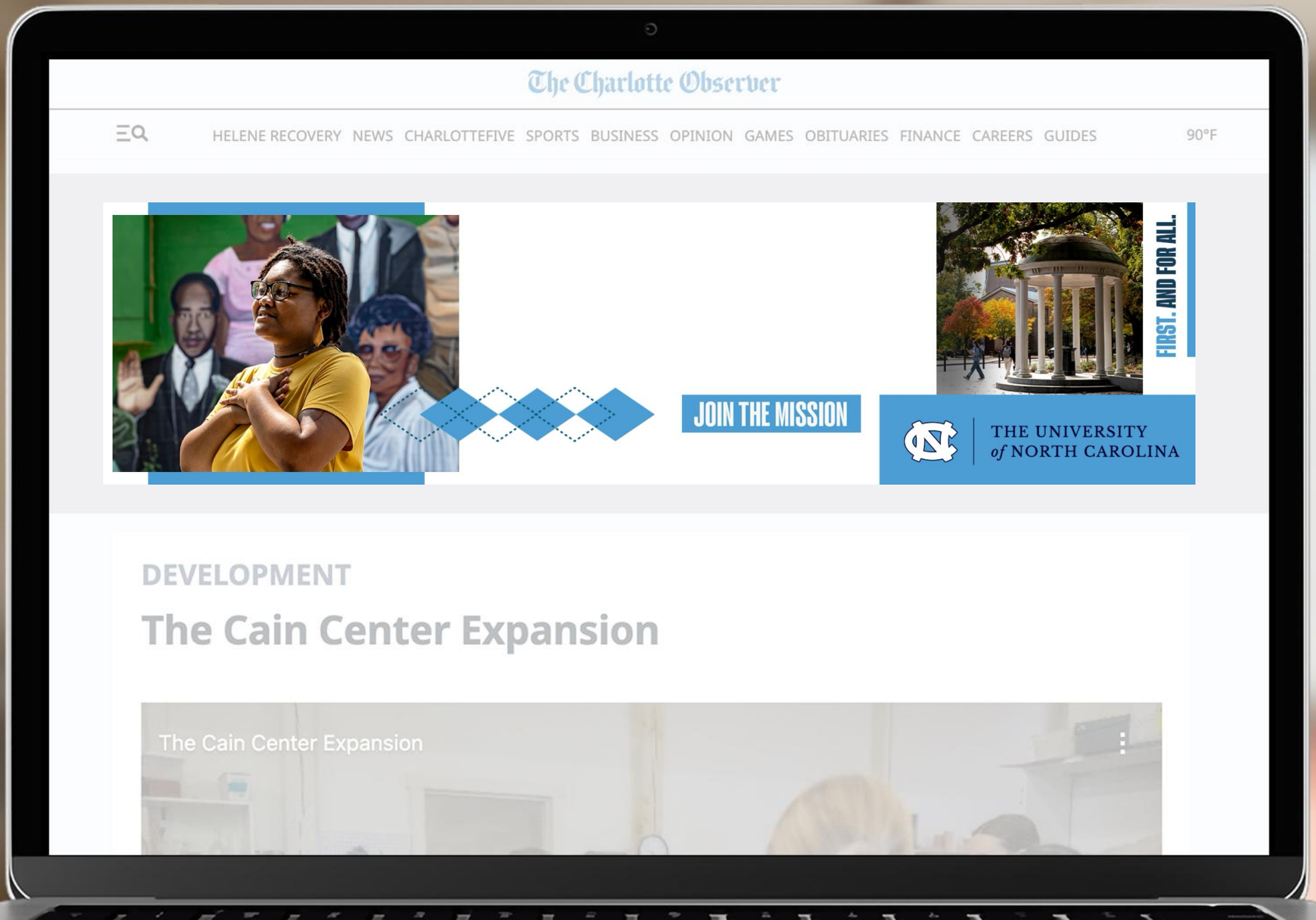
# Athletics


GoHeels.com
NISSAN
verizon
#GoHeels
FIRST AND
TENACIOUS.
FIRST. AND FOR ALL.
@GoHeels
WELLS FARGO
THE RAMS CLUB
RamsClub.com
UNIVERSITY OF NORTH CAROLINA

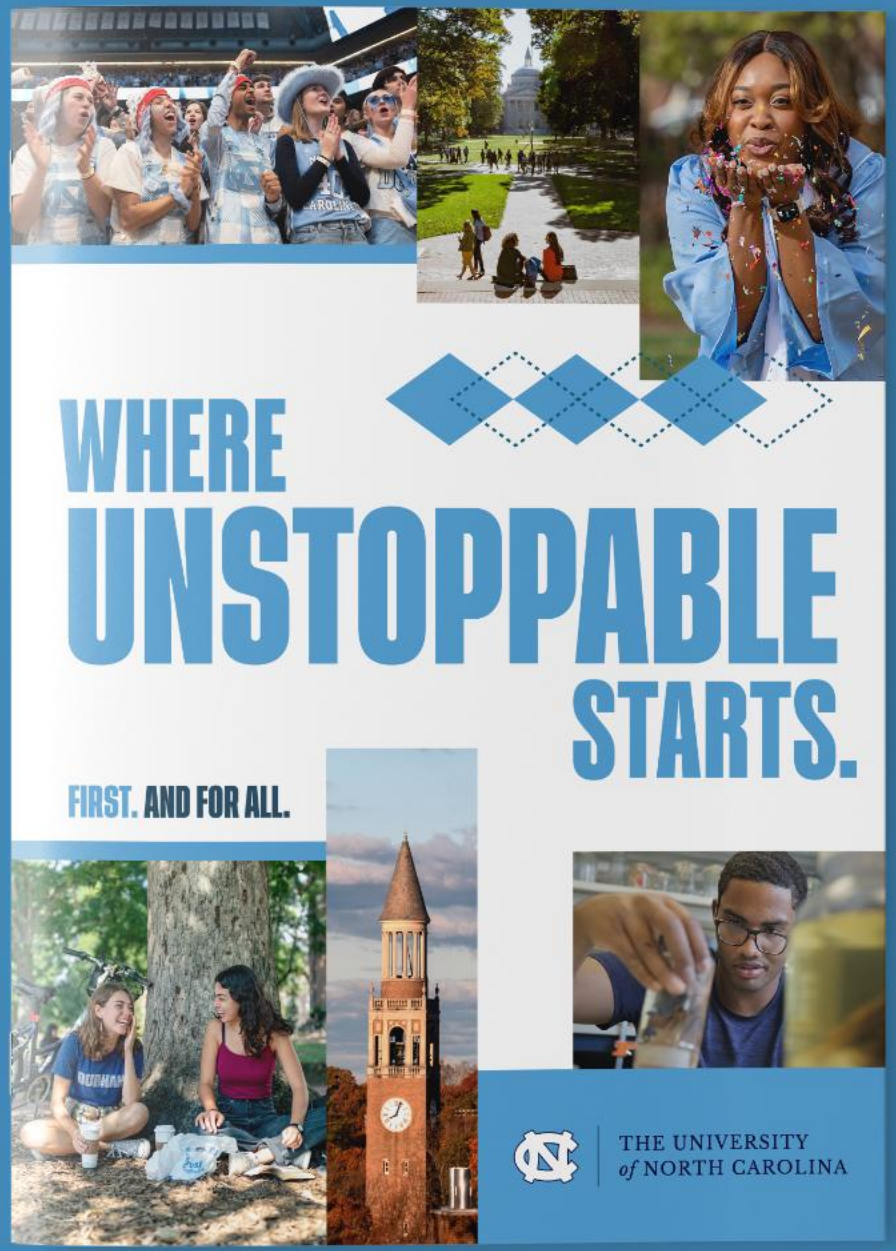
# Athletics


10:30
Instagram
uncchapelhill
2024 WOMEN'S COLLEGE CUP
CAROLINA
Liked by Mia Hamm and 36 others
uncchapelhill Lorem ipsum dolor sit amet, consectetur elit
#FirstAndForAll

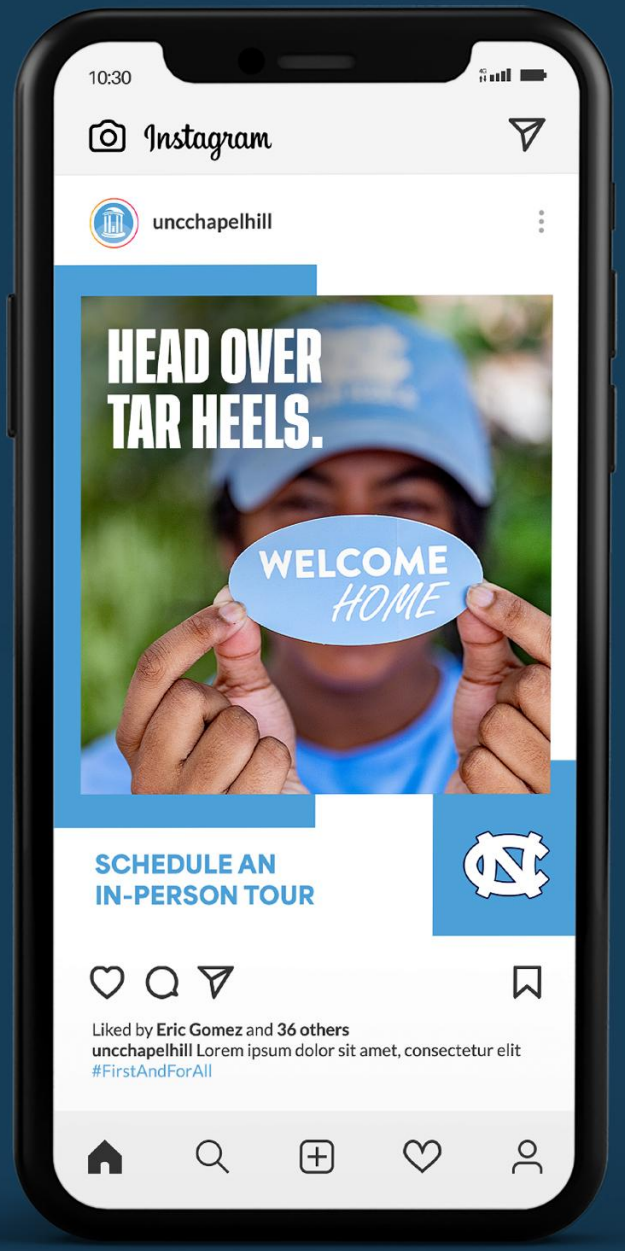
# Development



# Admissions


WHERE
UNSTOPPABLE
STARTS.
FIRST. AND FOR ALL.
THE UNIVERSITY
of NORTH CAROLINA

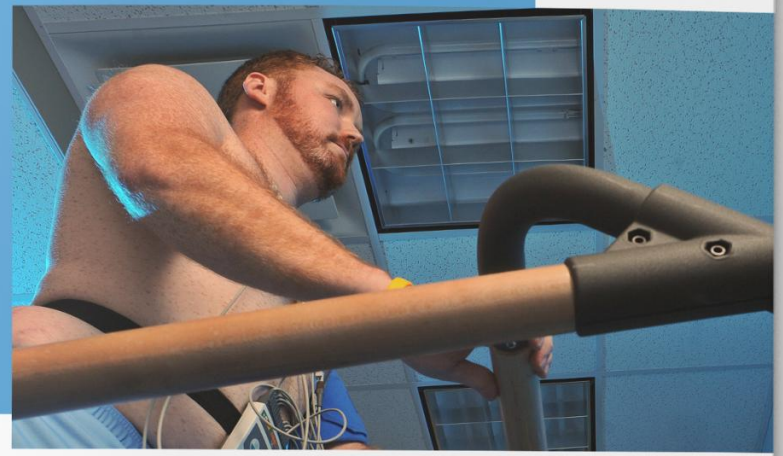
# Admissions


10:30
Instagram
uncchapelhill
HEAD OVER
TAR HEELS.
WELCOME
HOME
SCHEDULE AN
IN-PERSON TOUR
Liked by Eric Gomez and 36 others
uncchapelhill Lorem ipsum dolor sit amet, consectetur elit
#FirstAndForAll

# Health Care

tube, probably for life because
ge. We all get teary at the
t of the voluble Bear being
to talk or eat. "No, no, no," we
hat can't happen."
y tell us there will be morphine to
he air hunger if he fails once the
out. A chaplain is available. And
us: the nieces; his wife's sister,
gnificent Wissie, who has been
ng us up for days with humor and
plus the grandnieces and friends.
e ICU doctor says gently, "You
ou don't hold his life in your
You are not taking anything away
im. It's up to him." I'm not sure
eant God or Bear, but it didn't
We understood.
y take the ventilator out the next
g. Bear is sore and disoriented,
s breathing on his own. Soon, he's
g jokes about how he's so thin,
y 8 lb. away from a modeling
t. He thinks he's 62 and owns a
hat can land on water.
r is untethered from reality, but
m himself. "I hate to be an old
sticator, but my advice is, Don't
," he tells a young nurse. "The
ll come back for you." When I
im a photo of his grandnieces, he
me them but proclaims, "I love
ne in that frame!"
w he's in a subacute rehabilitation
, emphasis on facility. And this
e the statistics loom again.
weak and so thin. And all the
ons that landed him in the ICU
better—they're worse. This is the
e of a life lived with indulgence
kind of optimism that allows one
re medical warnings. Will he have
ength to walk again, or go home?
ink he's wondering too. "Now
ose dying things are finished,
next?" Bear asked me the other
"Ice cream," I said. Of course he
hospital vanilla ice cream in a
am cup.
n't know what's next now that
een granted a reprieve from
es and dying things. And I
lon't know what I'll do if I get
r call asking whether he should
bated. But I do know that I'm
o stop worrying so much about
before it falls. What a waste of
s time.


Learn more at unc.edu



HEELS GET PEOPLE
BACK ON THEIR FEET.



When it comes to healthcare, UNC-Chapel Hill gives fellow North Carolinians a leg up. Providing mobile health units to rural communities, telehealth support through UNC Project ECHO, placing new clinicians in underserved communities, and more. Leave it to Tar Heels to make great strides.

THE UNIVERSITY of NORTH CAROLINA

FIRST. AND FOR ALL.

# Health Care

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The News&Observer

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HELENE RECOVERY NEWS SPORTS BUSINESS LIVING POLITICS GAMES OBITUARIES FINANCE CLASSIFIEDS RALEIGH'S BEST 70°F




FIRST. AND FOR ALL.

LEARN MORE



School of Medicine
THE UNIVERSITY of NORTH CAROLINA




NORTH CAROLINA

Doctors told Max Johnson he could've lost his leg. Now he's in UNC's QB battle



NORTH CAROLINA

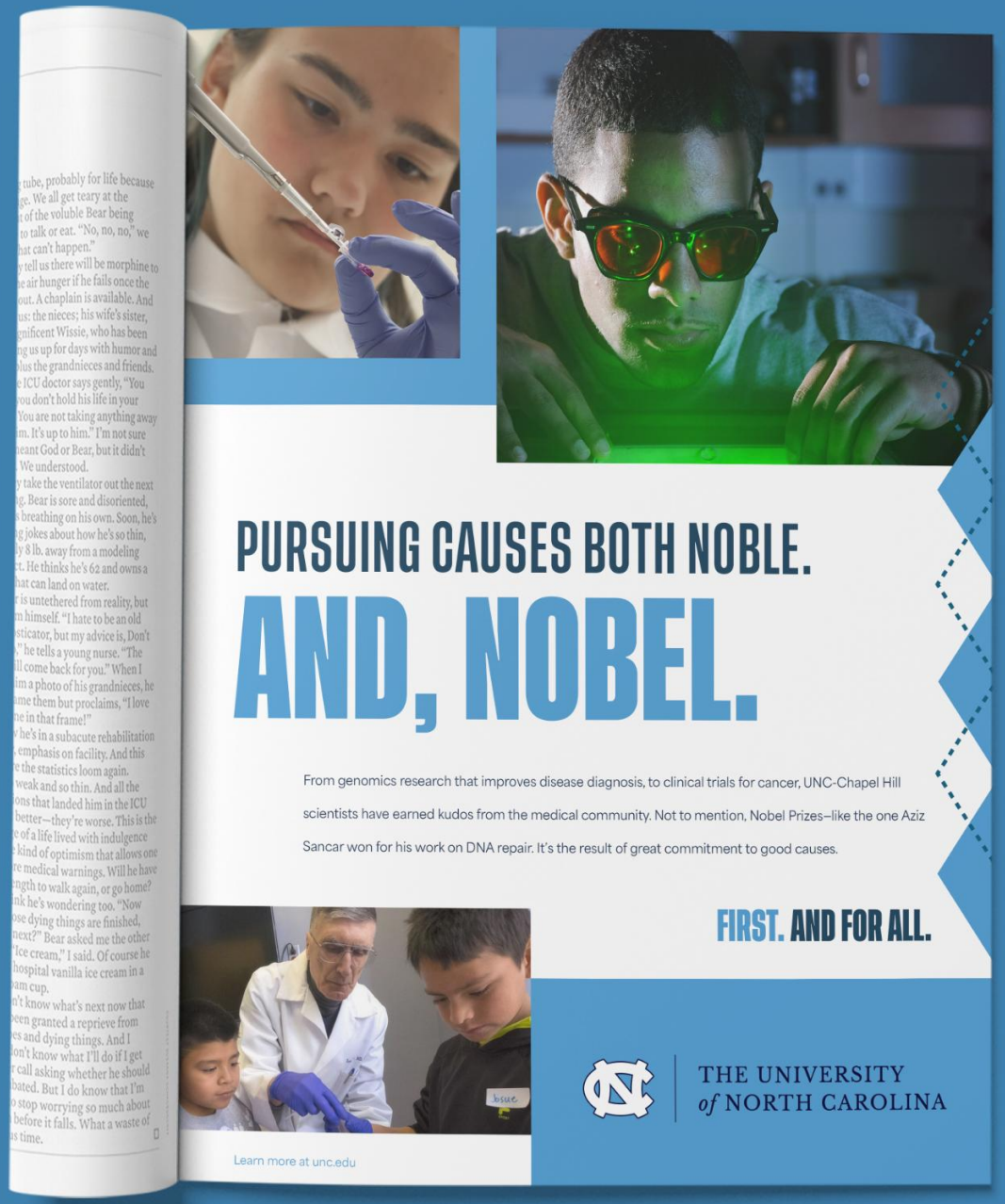
UNC football coach Bill Belichick speaks on the amount of attention focused on the Tar Heels



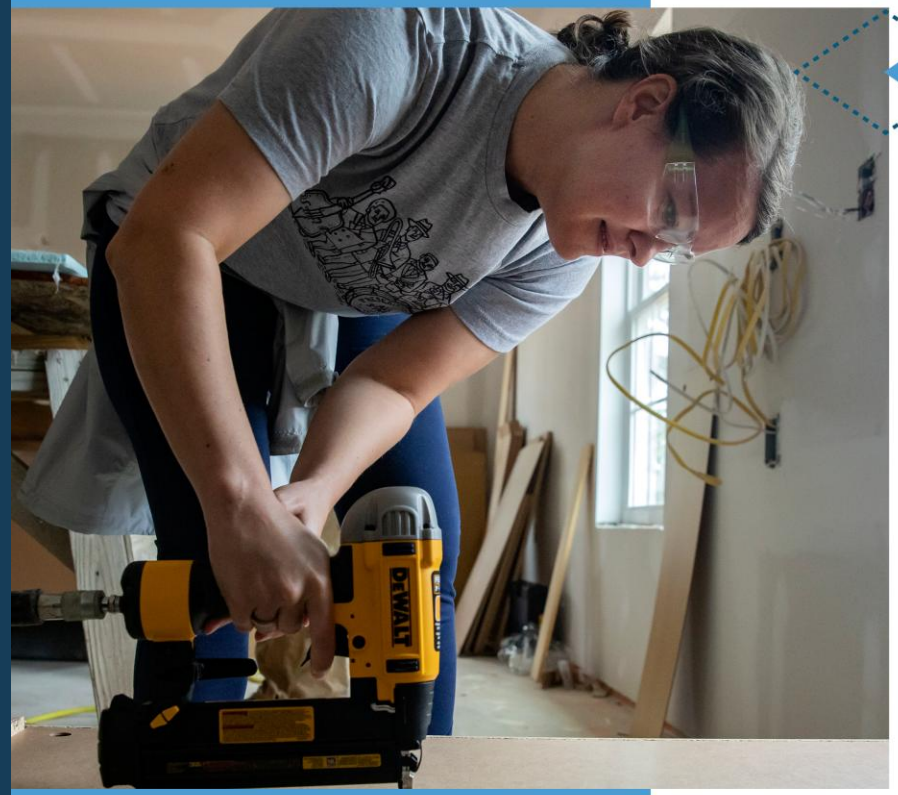
NORTH CAROLINA

North Carolina kicks off fall football practice under Belichick

# Research


tube, probably for life because
ge. We all get teary at the
t of the voluble Bear being
to talk or eat. "No, no, no," we
hat can't happen."
y tell us there will be morphine to
e air hunger if he fails once the
out. A chaplain is available. And
us: the nieces; his wife's sister,
gnificent Wissie, who has been
ng us up for days with humor and
lus the grandnieces and friends.
e ICU doctor says gently, "You
ou don't hold his life in your
You are not taking anything away
m. It's up to him." I'm not sure
eant God or Bear, but it didn't
We understood.
y take the ventilator out the next
g. Bear is sore and disoriented,
breathing on his own. Soon, he's
g jokes about how he's so thin,
y 8 lb. away from a modeling
t. He thinks he's 62 and owns a
hat can land on water.
t is untethered from reality, but
n himself. "I hate to be an old
sticator, but my advice is, Don't
," he tells a young nurse. "The
ll come back for you." When I
im a photo of his grandnieces, he
me them but proclaims, "I love
ne in that frame!"
w he's in a subacute rehabilitation
emphasis on facility. And this
e the statistics loom again.
weak and so thin. And all the
ons that landed him in the ICU
better—they're worse. This is the
e of a life lived with indulgence
kind of optimism that allows one
re medical warnings. Will he have
ngth to walk again, or go home?
nk he's wondering too. "Now
se dying things are finished,
next?" Bear asked me the other
"Ice cream," I said. Of course he
hospital vanilla ice cream in a
am cup.
n't know what's next now that
een granted a reprieve from
es and dying things. And I
on't know what I'll do if I get
r call asking whether he should
hated. But I do know that I'm
o stop worrying so much about
before it falls. What a waste of
s time.
PURSUING CAUSES BOTH NOBLE.
AND, NOBEL.
From genomics research that improves disease diagnosis, to clinical trials for cancer, UNC-Chapel Hill scientists have earned kudos from the medical community. Not to mention, Nobel Prizes–like the one Aziz Sancar won for his work on DNA repair. It's the result of great commitment to good causes.
FIRST. AND FOR ALL.
Learn more at unc.edu
THE UNIVERSITY of NORTH CAROLINA

# Outreach






## ONCE AGAIN, CAROLINA LEADS THE NATION IN ASSISTS.

**FIRST. AND FOR ALL.**



THE UNIVERSITY *of* NORTH CAROLINA

From representing marginalized communities in New York, to driving clean energy innovation in Washington state, UNC-Chapel Hill alums show up for the country. Imparting expertise in rural development, clean water access, education equality and more. Because no one has an A-team like ours.

Learn more at unc.edu

# Outreach


10:30
Instagram
uncchapelhill
THE UNIVERSITY
of NORTH CAROLINA
Liked by Vince Carter and 36 others
uncchapelhill Lorem ipsum dolor sit amet, consectetur elit
#FirstAndForAll

# Activation

I'M NOT JUST CHASING A DEGREE.

## BUT A HIGHER DEGREE OF IMPACT.

"Many communities in rural North Carolina have limited access to health resources. As a doctor, I will become a source of support and healing for people."

**BRANDON FEASTER**

MD Candidate Class of 2028



School of Medicine
THE UNIVERSITY of NORTH CAROLINA

SEE THE STORY

FIRST. AND FOR ALL.

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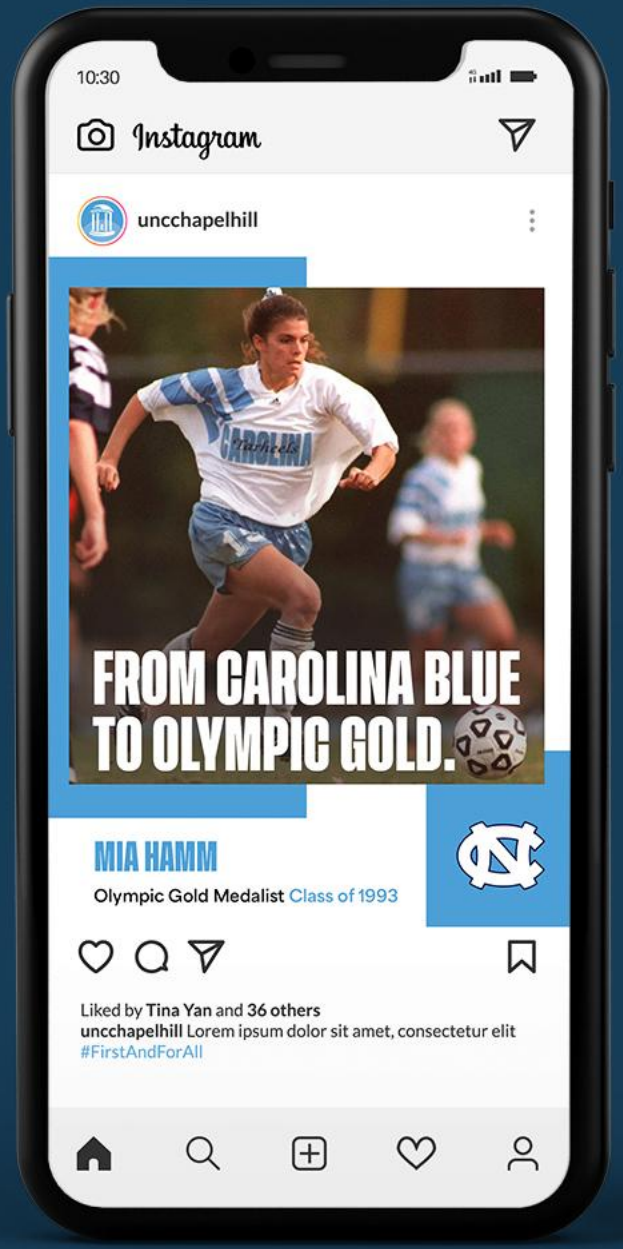
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THE UNIVERSITY
*of* NORTH CAROLINA

# Creative Concepts Proposal

**September 18, 2025**

THE UNIVERSITY OF NORTH CAROLINA

# Four Phases

☑ **Phase 1: Research** *(March – April)*
- Qualitative – COMPLETED
- Quantitative – COMPLETED

☑ **Phase 2: Brand Positioning** *(May – June)*
- Research-driven – COMPLETED
- Competitive Landscape – COMPLETED

❑ **Phase 3: Brand Expression** *(June – Sept)*
- Strategy Framework – ONGOING
- Creative Development – ONGOING

❑ **Phase 4: Execution** *(Fall 2025)*
- UComm Integration/Adoption
- Campaign Launch
- Campus Partner Activation

# COMMITTED TO PUBLIC PROGRESS

## Carolina is powered by purpose – to stand with, strengthen and advance North Carolina.

As the nation's first public university, UNC-Chapel Hill was built to serve the people – and that purpose hasn't wavered. Our strength lies in our commitment to public progress: research that drives breakthroughs, education that uplifts, athletics and arts that inspire, and partnerships that solve real problems. From the mountains to the coast, Carolina's traditions light the way to what's next for our state and its residents. Our commitment has resulted in discoveries, leaders and programs with proven public value. North Carolinians help shape our priorities and direction, ensuring that Carolina reflects the needs, values and aspirations of the people we serve. Because public is not just about how we're supported – it's who we serve.











It’s one thing to be first. Yet, as impressive as that may sound, firsts don’t mean a thing – unless they make a lasting impact.

And at UNC-Chapel Hill, ours have.

We are the nation’s first public university. The first to establish a school of public health, helping underserved communities. A commitment to serving first generation students as well as generations of Tar Heels. First in athletics, countless times over.

And the first to respond, without fail, when the call for help rings out. Not just in North Carolina’s 100 counties, but in all 50 states as well.

**Because that’s what Tar Heels are all about: taking first steps that lead to momentous change. For countries, counties, communities, individuals – and the entire world.**

The University *of* North Carolina

**FIRST. AND FOR ALL.**

# Brand Reputation



ESTABLISHED IN 1789.

REESTABLISHED EVERY DAY SINCE.

From cutting-edge research to groundbreaking scientific discoveries, UNC–Chapel Hill is relentlessly pushing progress in every field, all across the planet. With service that reaches far beyond campus, we are 400,000 Tar Heels strong — shaping the future for all.




FIRST. AND FOR ALL.

Learn more at unc.edu

The University *of* North Carolina

# Brand Reputation



SET THE
BLUE STANDARD.

The University
*of* North Carolina

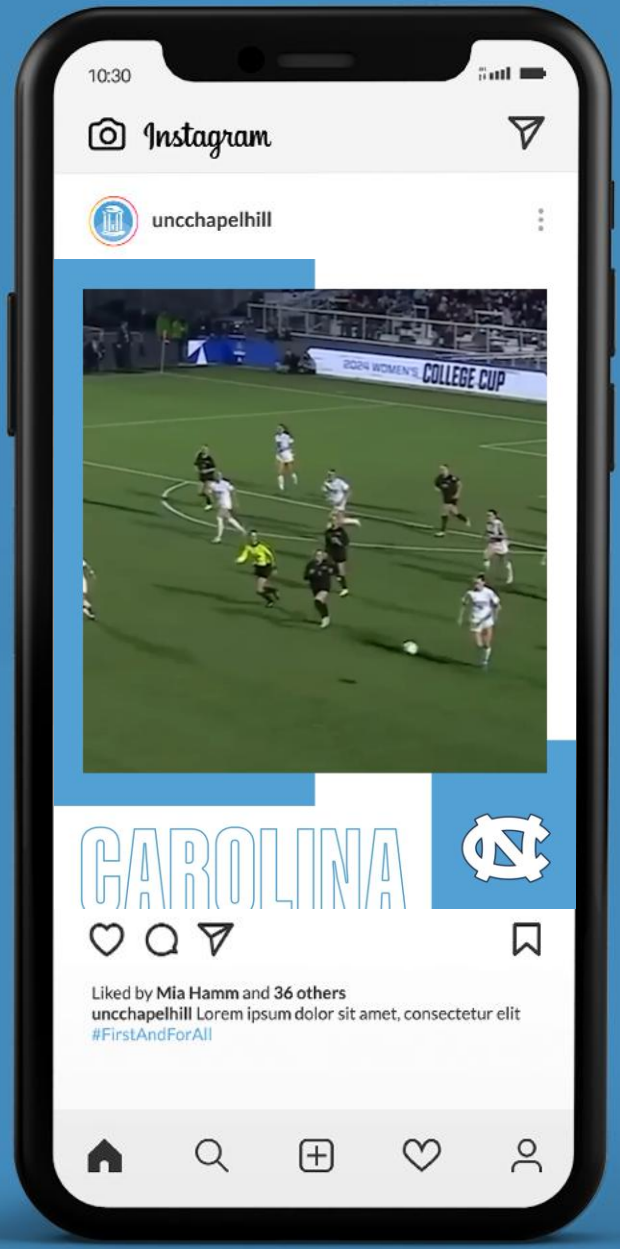
# Brand Reputation



# Athletics


GoHeels.com
NISSAN
verizon
#GoHeels
FIRST AND
TENACIOUS.
FIRST. AND FOR ALL.
@GoHeels
WELLS FARGO
THE RAMS CLUB
RamsClub.com
UNIVERSITY OF NORTH CAROLINA

# Athletics


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uncchapelhill
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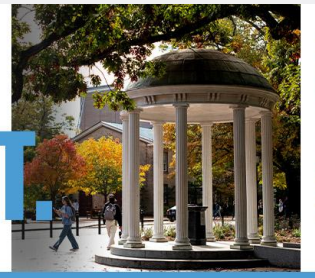
# Development

The Charlotte Observer

HELENE RECOVERY NEWS CHARLOTTEFIVE SPORTS BUSINESS OPINION GAMES OBITUARIES FINANCE CAREERS GUIDES 90°F




FROM FIRST TO
LASTING IMPACT.



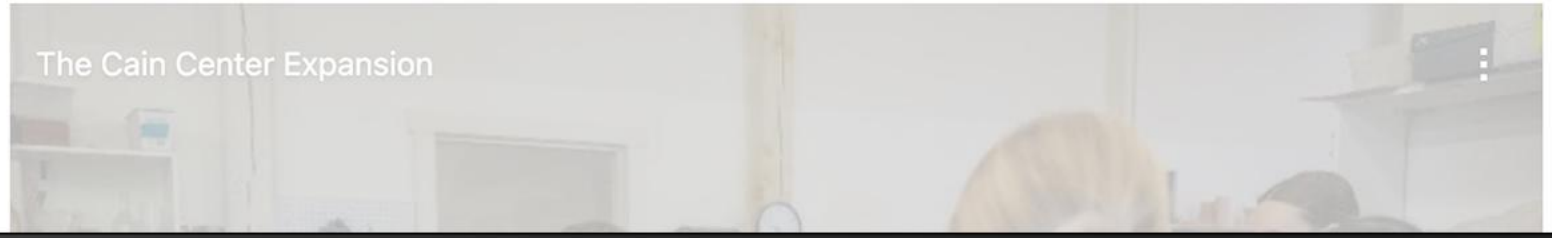
FIRST. AND FOR ALL.

JOIN THE MISSION

The University of North Carolina


DEVELOPMENT

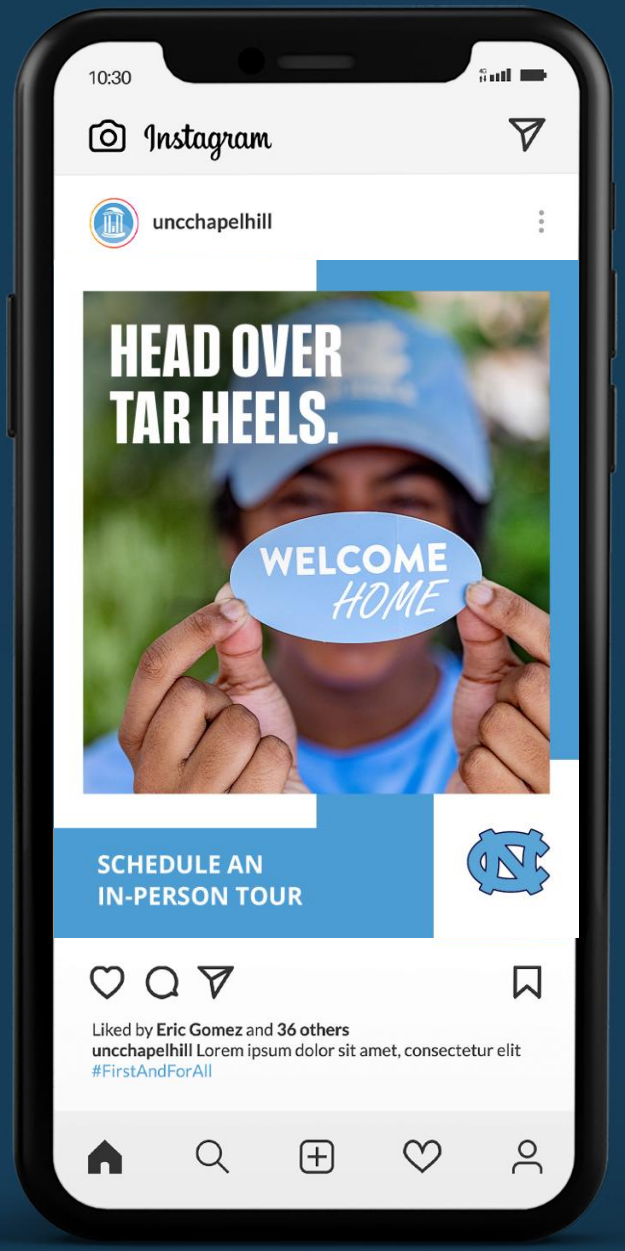
## The Cain Center Expansion



# Admissions


WHERE
UNSTOPPABLE
STARTS.
FIRST. AND FOR ALL.
The University of North Carolina

# Admissions


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Instagram
uncchapelhill
HEAD OVER
TAR HEELS.
WELCOME
HOME
SCHEDULE AN
IN-PERSON TOUR
Liked by Eric Gomez and 36 others
uncchapelhill Lorem ipsum dolor sit amet, consectetur elit
#FirstAndForAll

# Health Care


Learn more at unc.edu
HEELS GET PEOPLE
BACK ON THEIR FEET.
When it comes to healthcare, UNC-Chapel Hill gives fellow North Carolinians a leg up. Providing mobile health units to rural communities, telehealth support through UNC Project ECHO, placing new clinicians in underserved communities, and more. Leave it to Tar Heels to make great strides.
The University of North Carolina
FIRST. AND FOR ALL.

Health Care

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The News&Observer

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HELENE RECOVERY NEWS SPORTS BUSINESS LIVING POLITICS GAMES OBITUARIES FINANCE CLASSIFIEDS RALEIGH'S BEST 70°F




THE ROAD TO RECOVERY

STARTS AT CHAPEL HILL.

FIRST. AND FOR ALL.

LEARN MORE



The University of North Carolina




NORTH CAROLINA

Doctors told Max Johnson he could've lost his leg. Now he's in UNC's QB battle



NORTH CAROLINA

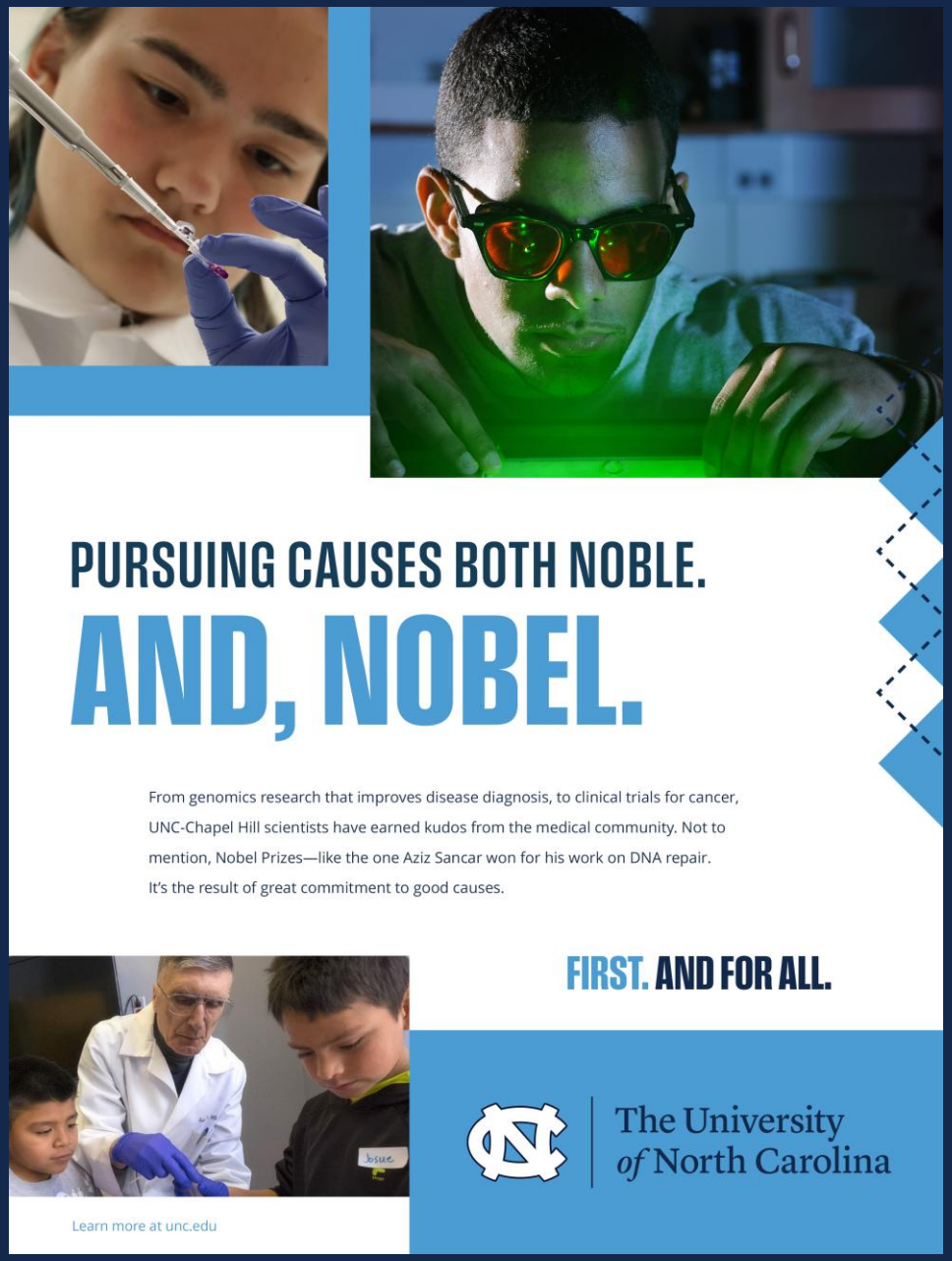
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NORTH CAROLINA

North Carolina kicks off fall football practice under Belichick

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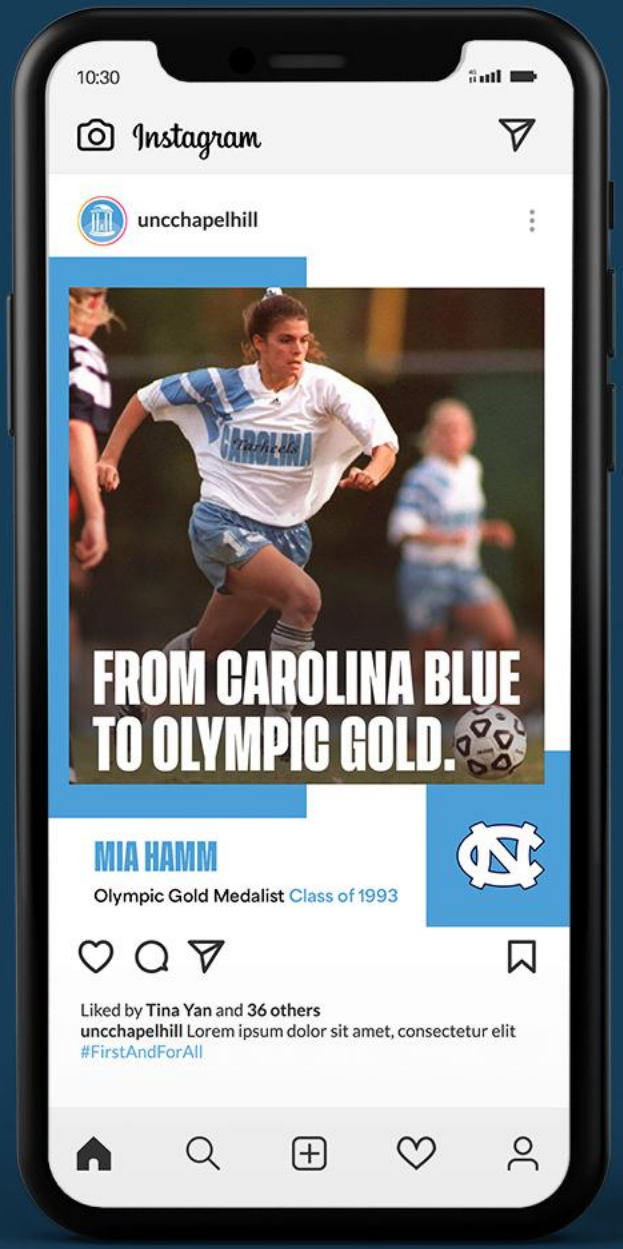
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The University
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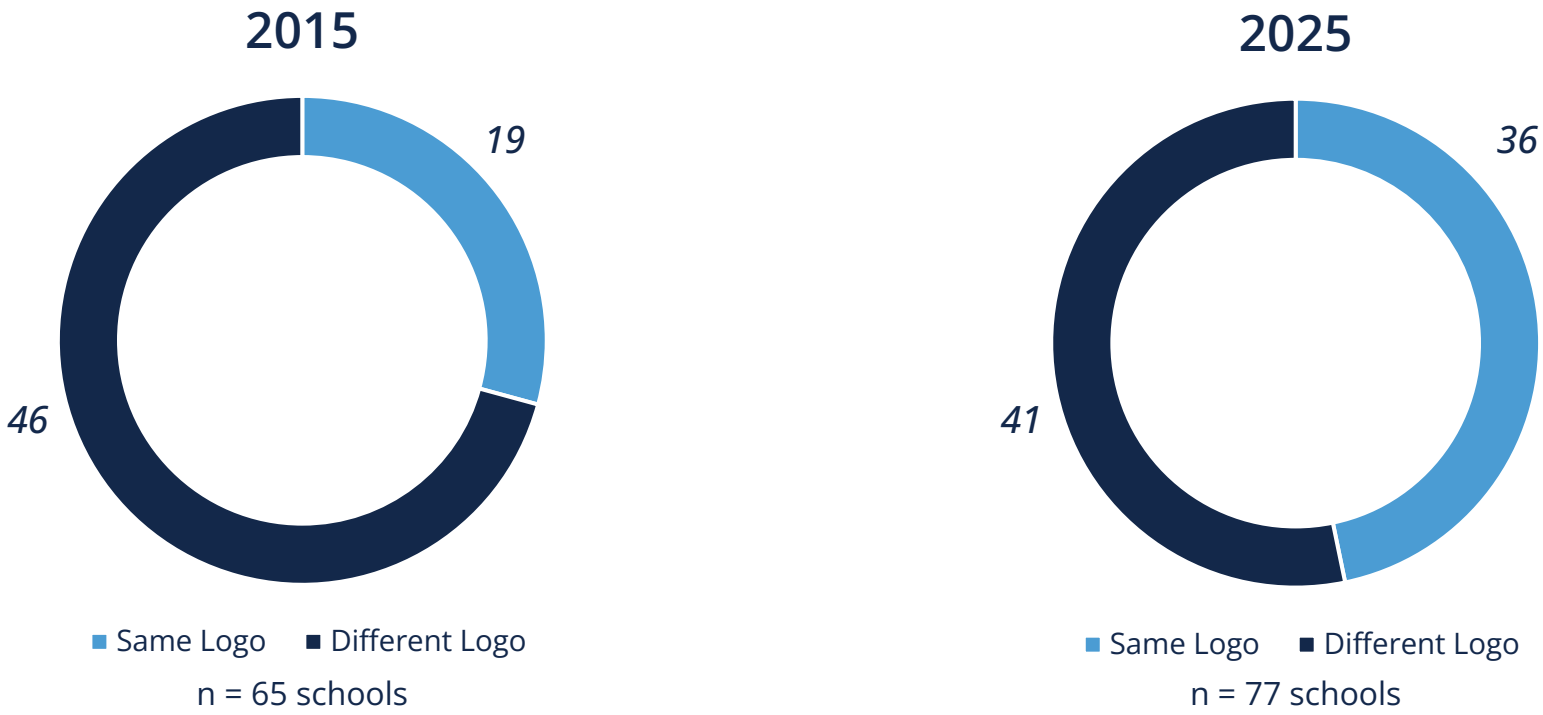
# Logo Proposal



THE UNIVERSITY OF NORTH CAROLINA

RESEARCH

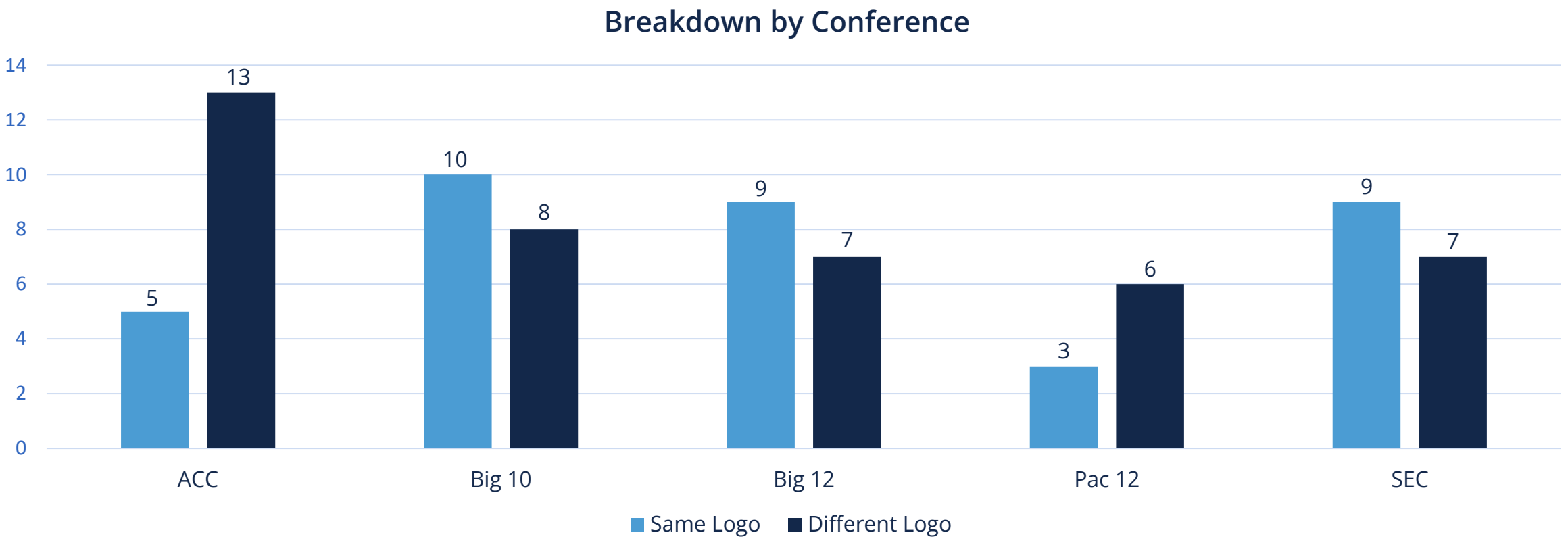
# What are other schools doing?




Out of the original 65 schools, 15 schools (23%) have started using the same logo across Academics and Athletic departments.

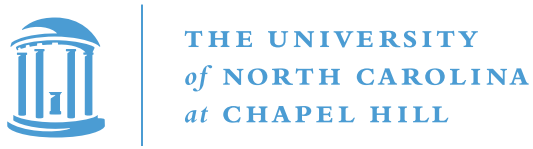
RESEARCH

# Breakdown by Conference



PROPOSED LOGO SYSTEM

# Current vs. Proposed Primary Logo












PROPOSED LOGO SYSTEM

# What Would Happen to the Old Well?

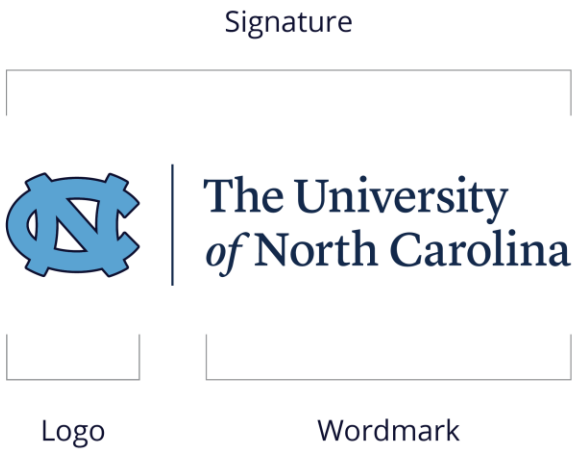
Heritage Marks






PROPOSED LOGO SYSTEM

# Proposed Logo Tier




Spirit Mark




Primary Signature




Formal Signature




School / Division Signature





The University
*of* North Carolina

# Brand Strategy

November 2025

RESEARCH

# Campus Interviews & Focus Group Numbers

**80**
TOTAL PEOPLE INTERVIEWED

**13**
INDIVIDUAL INTERVIEWS

**11**
GROUP INTERVIEWS

**31**
TOTAL HOURS OF INTERVIEWS

RESEARCH

# Stakeholder Surveys

**7,432**

**TOTAL RESPONSES**

- Alumni (5,332)
- Faculty (363)
- Staff (727)
- Administration (283)
- Postdoc/GR/Prof Students (432)
- UG Students (369)
- Board Member/Volunteer (163)
- Parent (717)
- General Public (810)

RESEARCH

# Distinct Attributes

Carolina's distinct advantages are highly recognized, fueling our critical role in the state.

1. **Flagship Identity**
2. **Service-Oriented Excellence**
3. **High Quality, High Value**
4. **Loyalty & Legacy**
5. **Athletics as Connector**

RESEARCH

# Challenges

1. Perceptions of Inaccessibility
2. Political Polarization
3. Narrative Control
4. Under-Realized Support

RESEARCH

# Opportunities

1. Reassert the “University of the People”
2. Elevate Brand Pillars
3. Champion Constructive Dialogue

POSITIONING

# Committed to Public Progress

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# Brand Campaign










# Concept Overview

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The University of North Carolina at Chapel Hill

**FIRST. AND FOR ALL.**

# Brand Campaign Examples

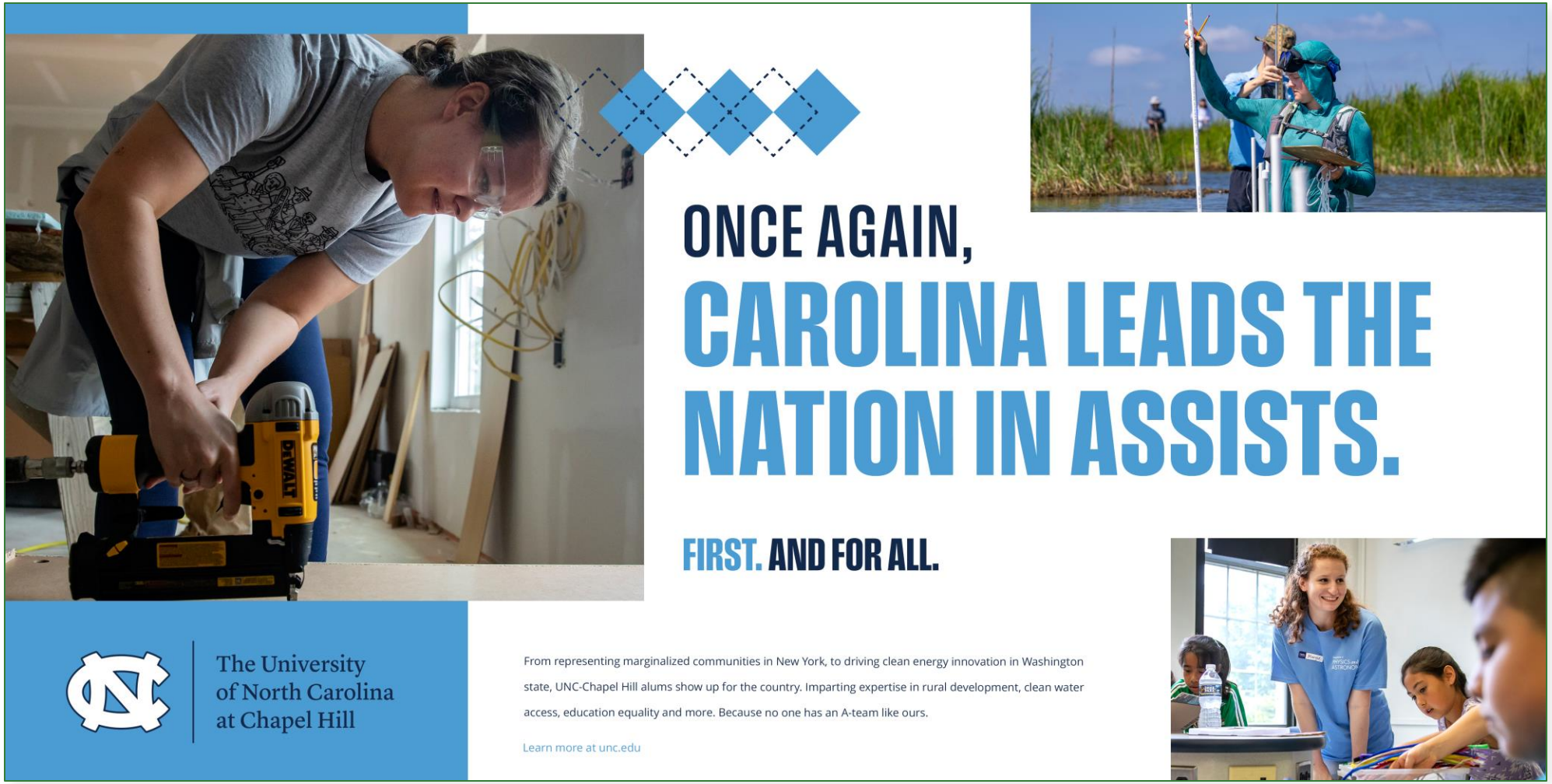


# Brand Campaign Examples

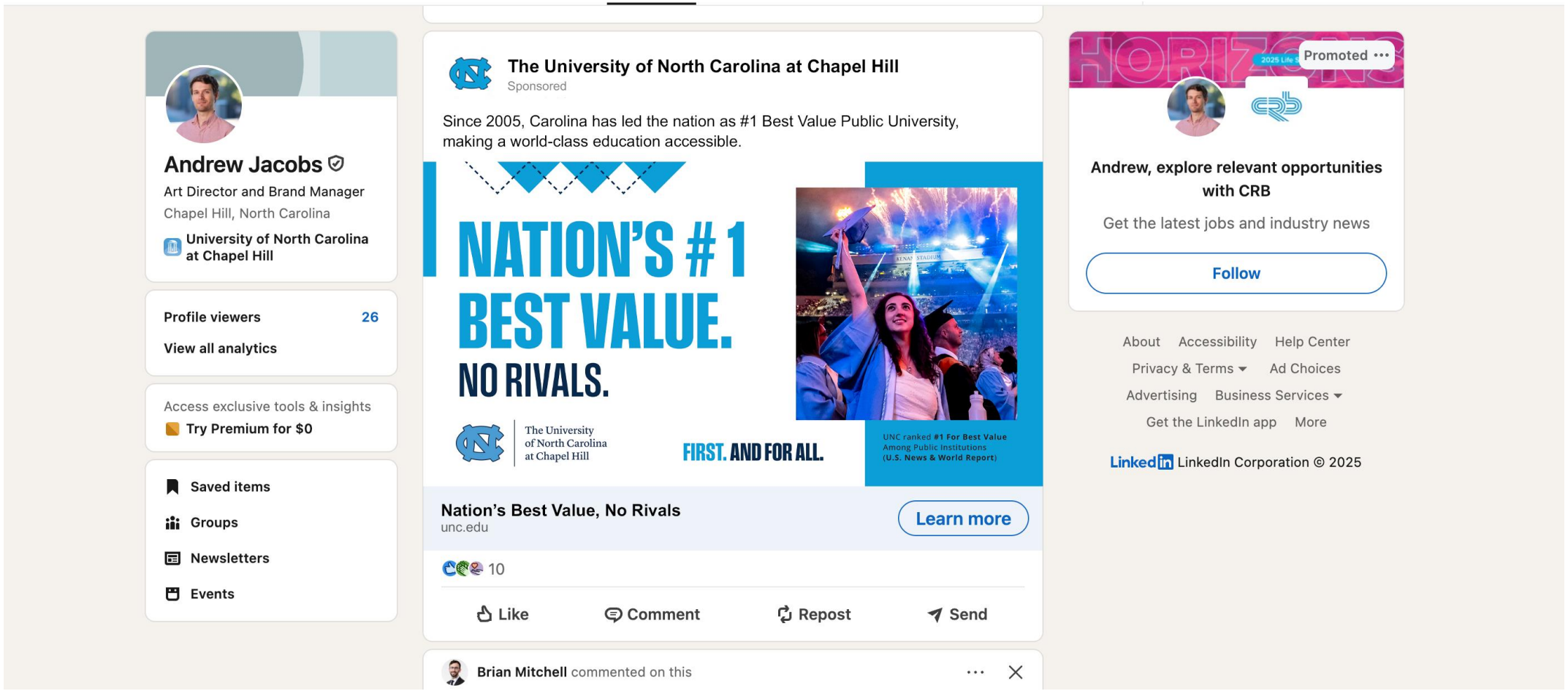




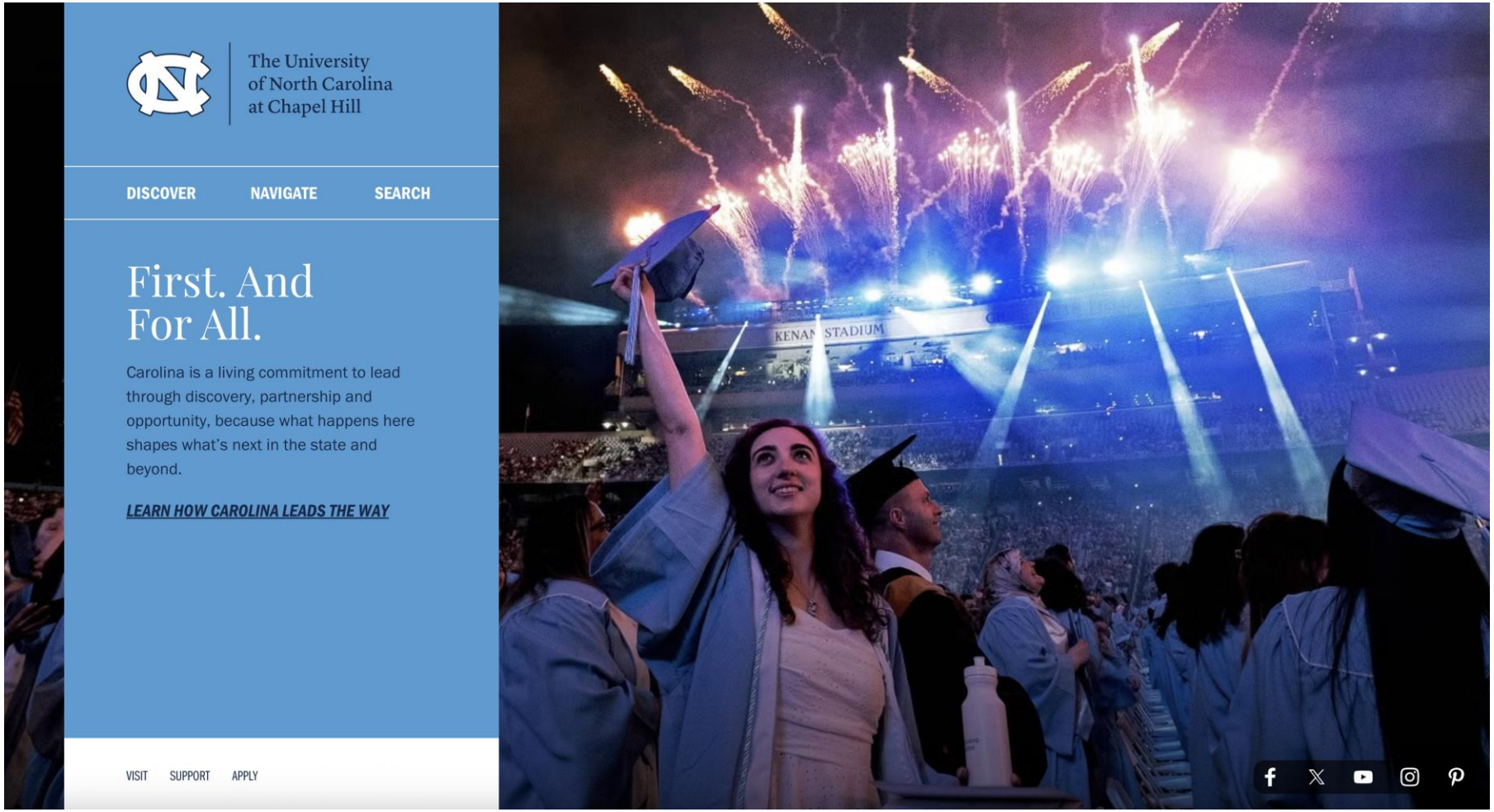

# Brand Campaign Examples



# Brand Campaign Examples



# Brand Campaign Examples



# Brand Campaign Examples

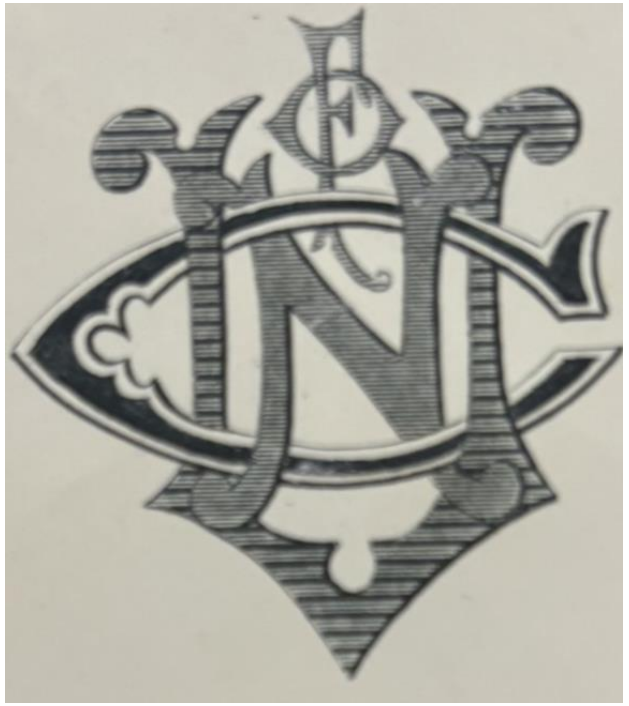


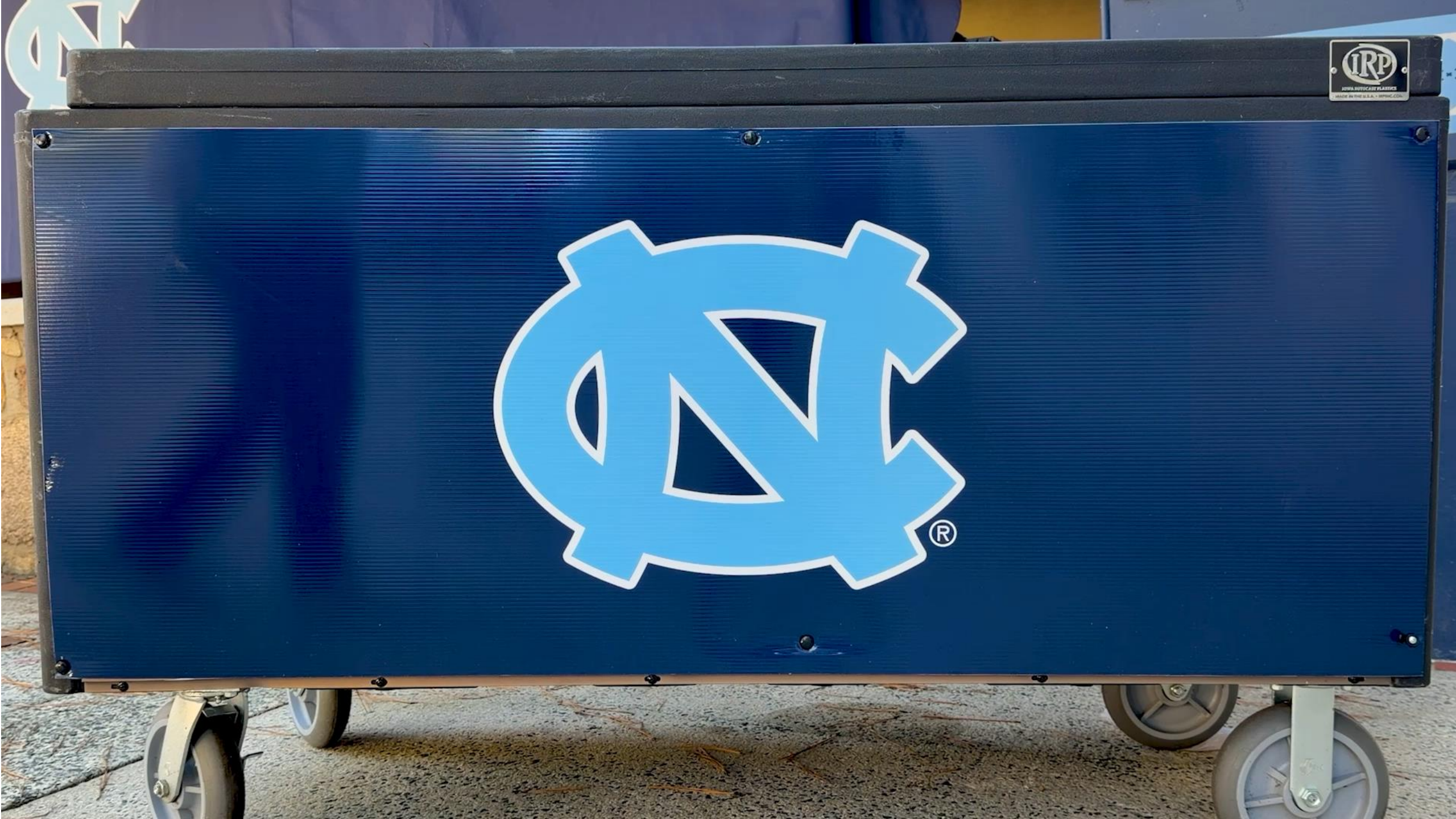
# Brand Architecture

BRAND STRATEGY

# Why, and Why Now?

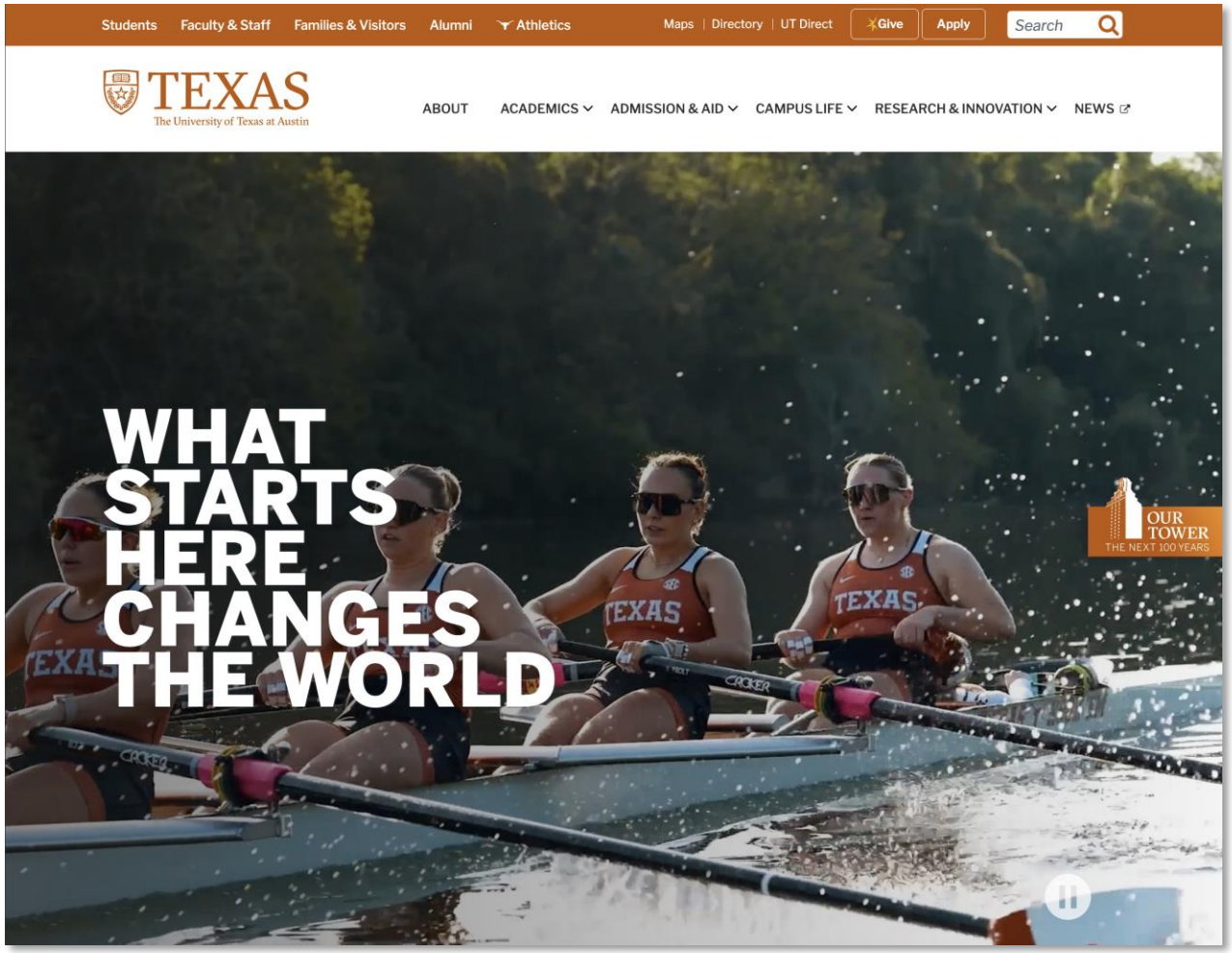
- Well-established globally recognized logo since the 1870s
- Reflects the people and the state we serve
- Leverages existing brand strength
- Unifies across the University
- Streamlines the logo system
- Increases digital accessibility and legibility
- Stands out amongst peer universities
- A unified brand strategy drives additional T&L revenue
- Aligns with the launch of the brand reputation campaign

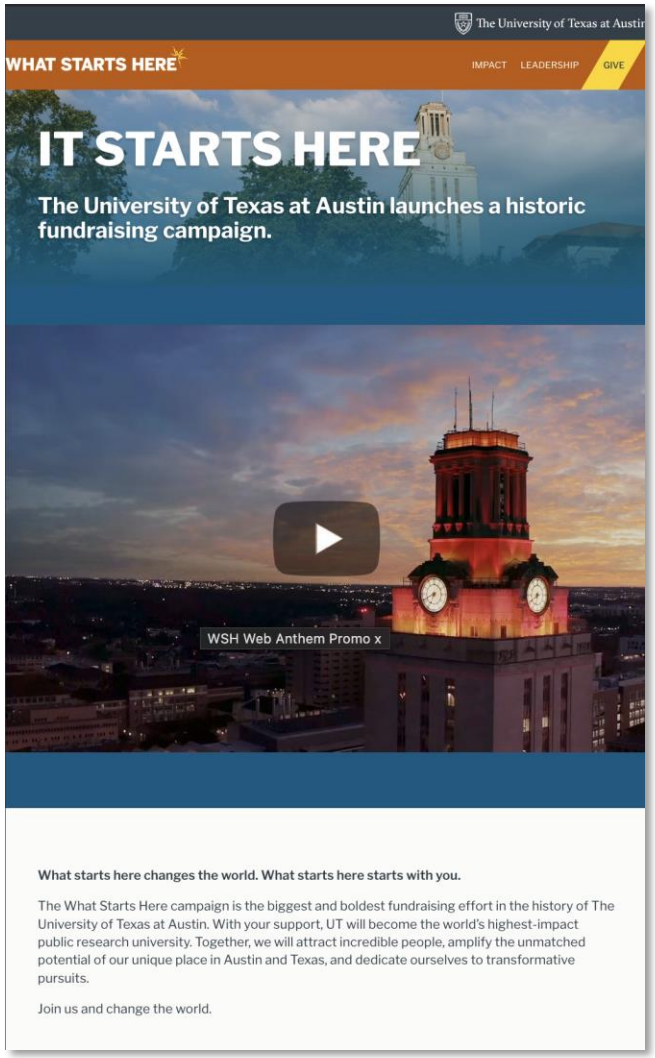



IRP

# Taglines

# UNIVERSITY OF TEXAS AT AUSTIN





FIRST. AND FOR ALL.

# Message Alignment

| BRAND ATTRIBUTES | CAMPAIGN PRIORITIES |
| --- | --- |
| **Flagship Identity/Leadership/Nation's First** | AI; Distinguished Professorships; New School/Academic Programs; Graduate Student Fellowships; Carolina Covenant |
| **Service-Oriented Excellence** | UNC Health Workforce Development; NC Botanical Garden; Carolina Performing Arts Access |
| **High Quality, High Value** | Student Recreation and Wellness Center; Library — Academic Resources |
| **"University of the People"** | UNC Health Aging Brain Health; |
| **Championing Constructive Dialogue** | SCiLL |



The University
of North Carolina
at Chapel Hill

November 2025

# Brand Strategy Campus Rollout

The University of North Carolina at Chapel Hill

# Brand Campaign

# Campaign Examples

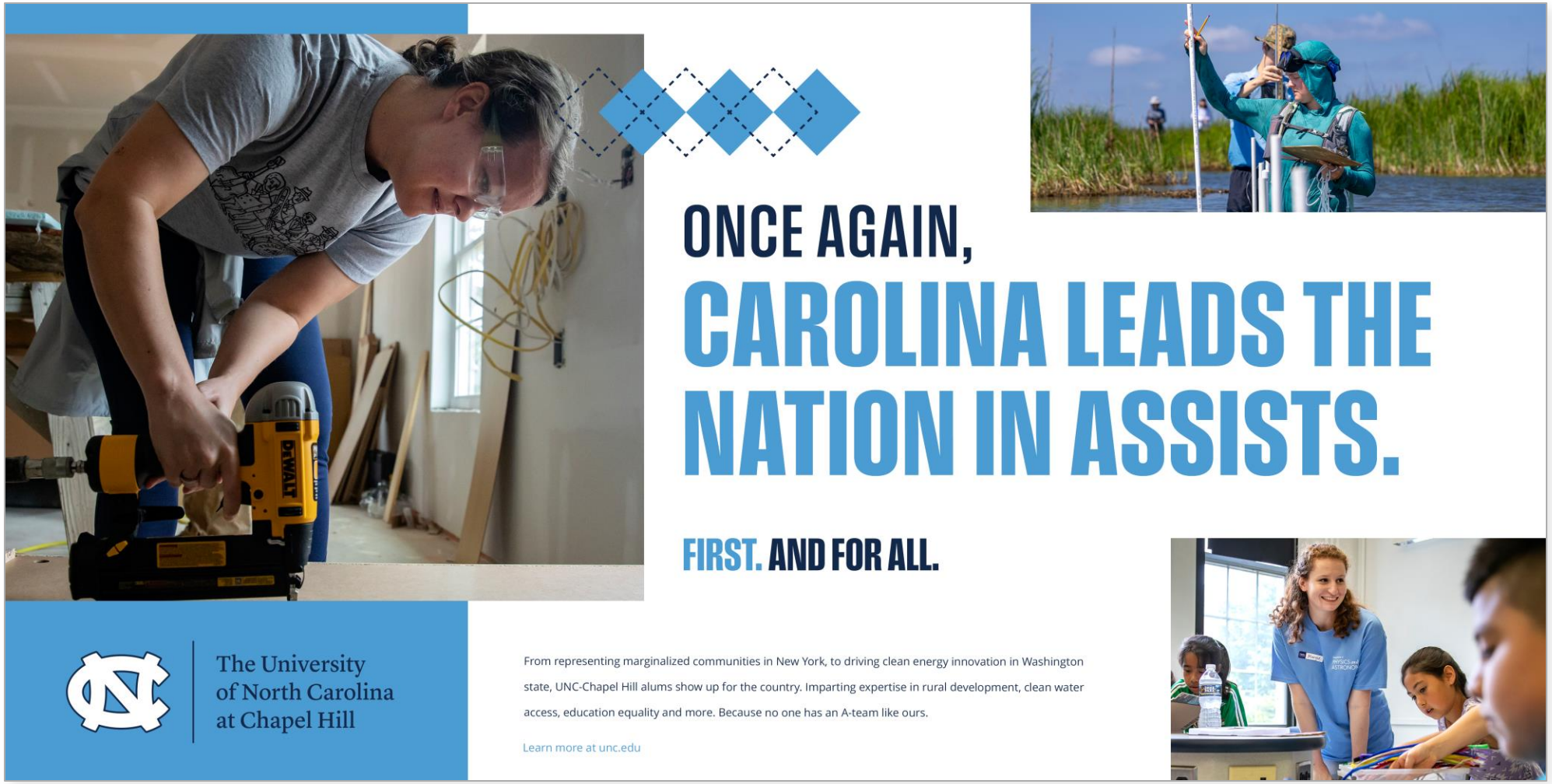


# Campaign Examples

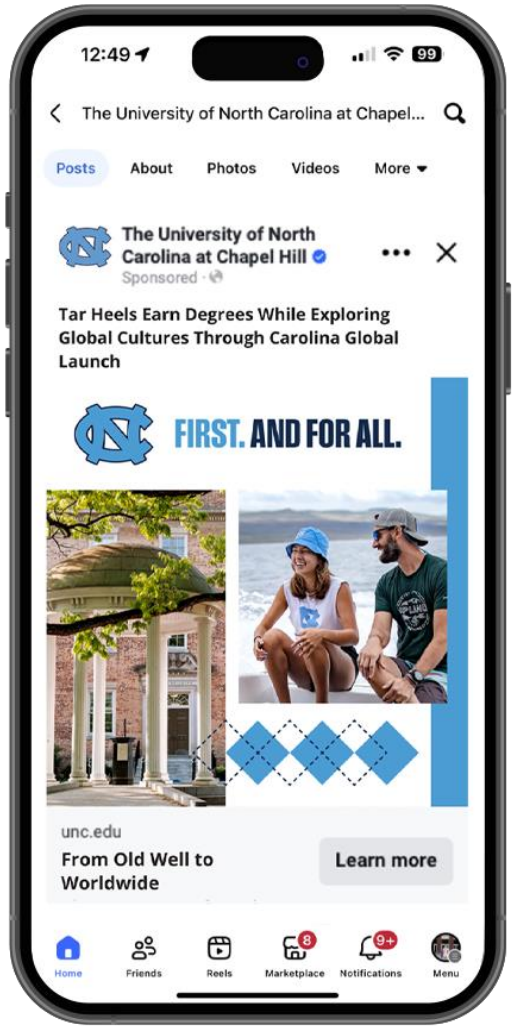


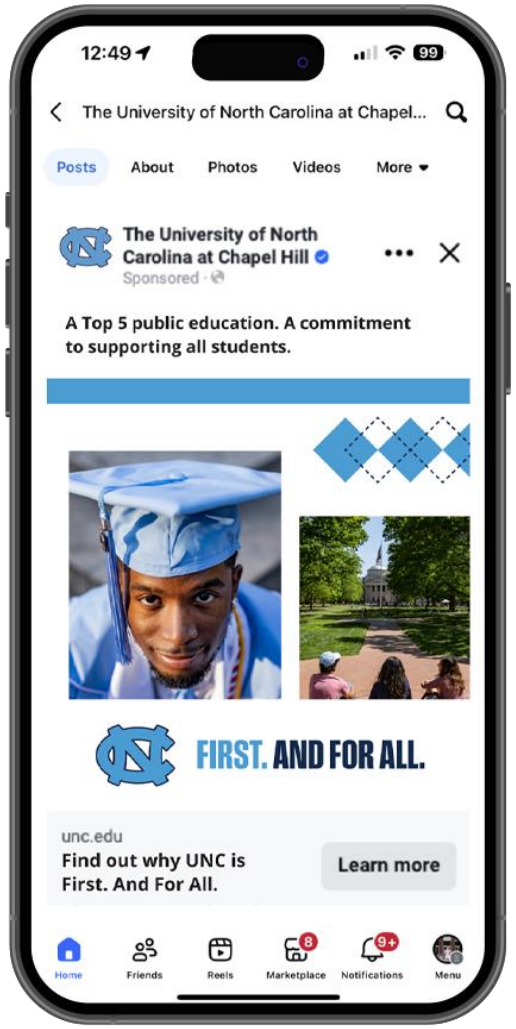



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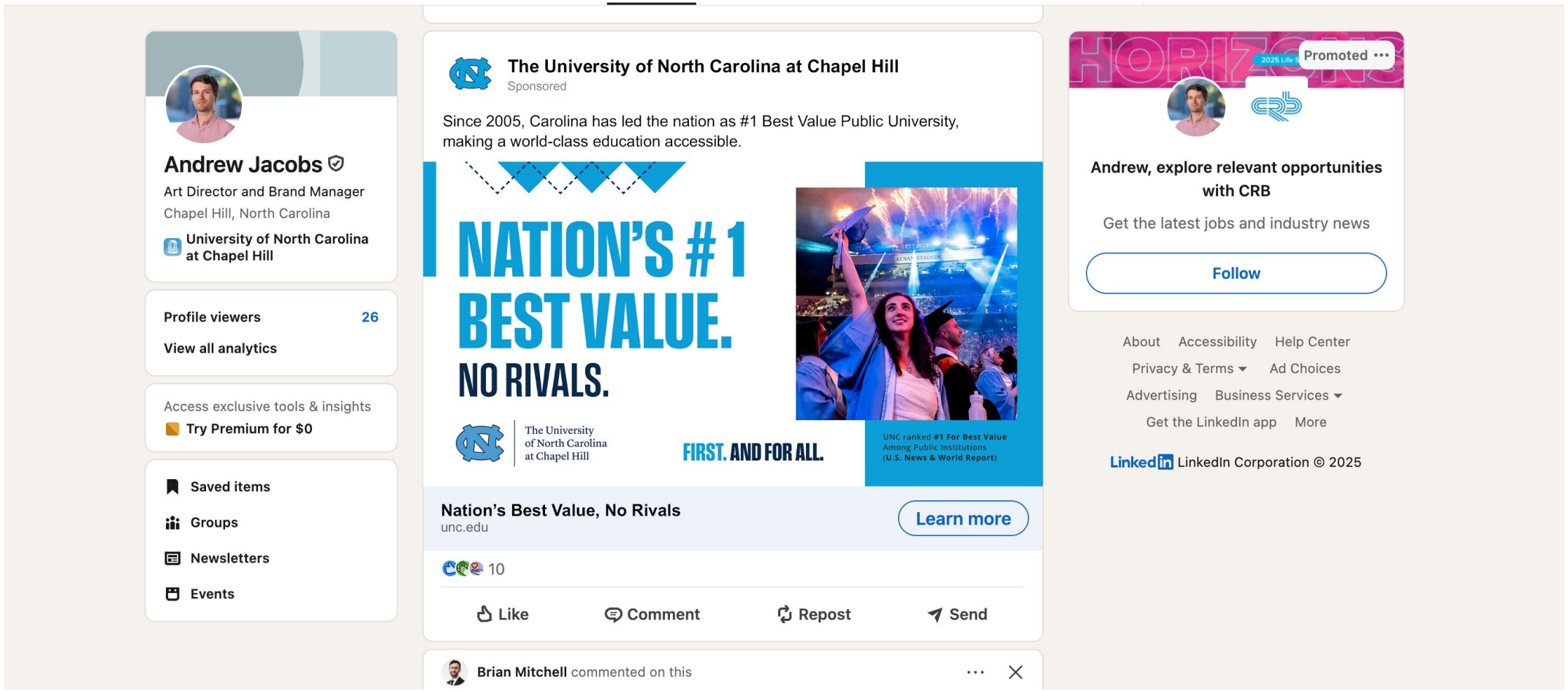


# Campaign Examples

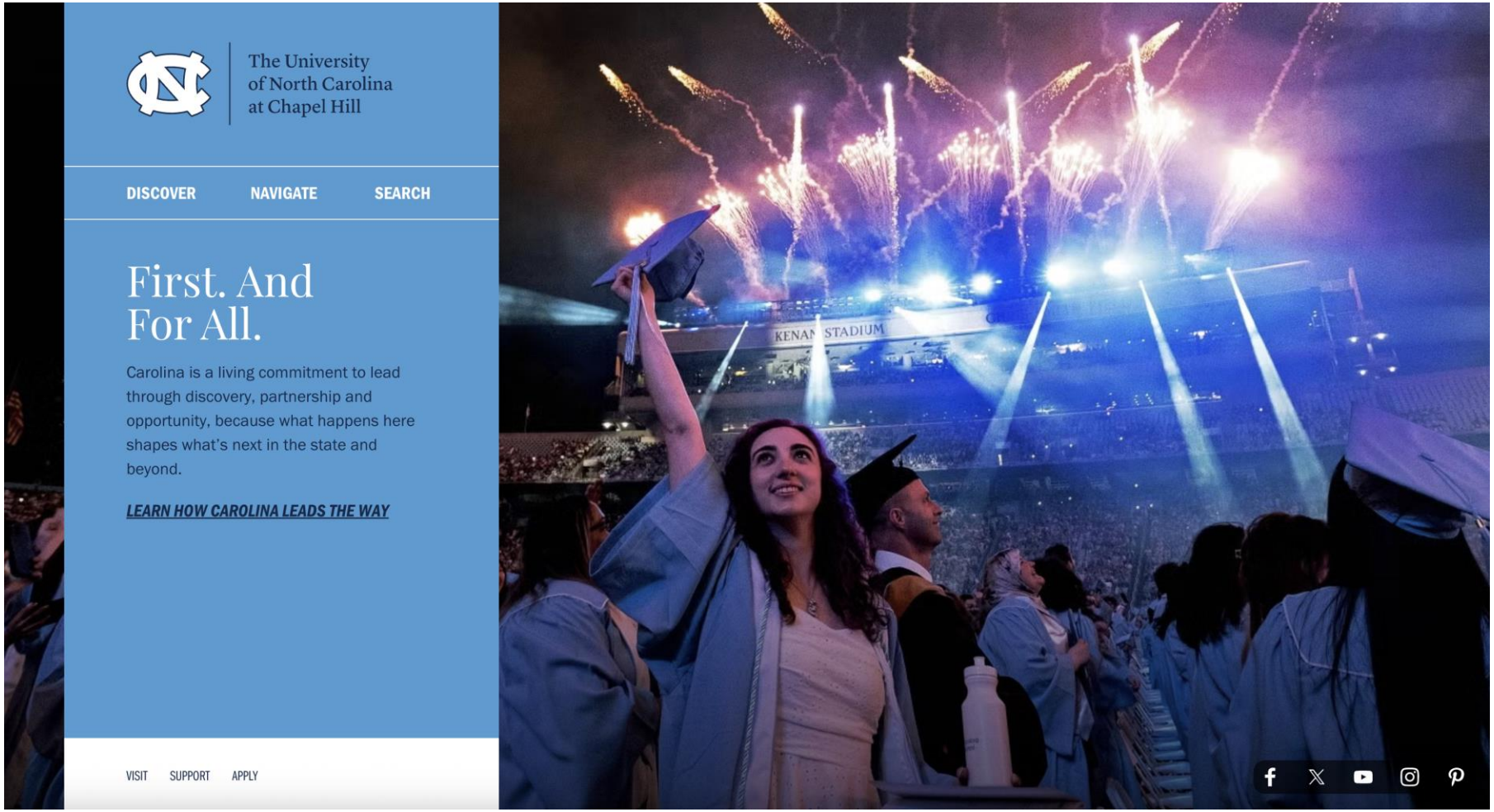


# Campaign Examples



# Campaign Examples



# Campaign Examples



# Brand Architecture

# Glossary of Terms

- **Logo:** The graphic element
- **Wordmark:** The text element
- **Signature:** The entire brand mark
- **Brand Architecture:** The structure of the system
- **Division/School:** Vice chancellor unit, vice provost unit, school, the College
- **All Other Units:** Programs, centers, institutes, departments, etc.
- **Special Marks:** University graphic elements used in select instances



# Logo







# University Signature


















# Special Marks




University Seal



Old Well




Spirit Mark

# Division/Schools

- Adams School of Dentistry
- Campus Safety
- College of Arts and Sciences
- Eshelman School of Pharmacy
- Finance and Operations
- Gillings School of Global Public Health
- Global Affairs
- The Graduate School
- Human Resources
- Hussman School of Journalism and Media
- Information Technology Services
- Innovate Carolina
- Kenan-Flagler Business School
- Lineberger Comprehensive Cancer Center
- Office of the Chancellor
- Enrollment
- Office of the Executive Vice Chancellor and Provost
- Public Affairs
- UNC Research
- School of Civic Life and Leadership
- School of Data Science and Society
- School of Education
- School of Government
- School of Information and Library Science
- School of Law
- School of Medicine
- School of Nursing
- School of Social Work
- Student Affairs
- Summer School
- UNC Police
- UNC Visitors Center
- University Communications and Marketing
- University Compliance Office
- University Counsel
- University Development
- University Library

# Division Signature











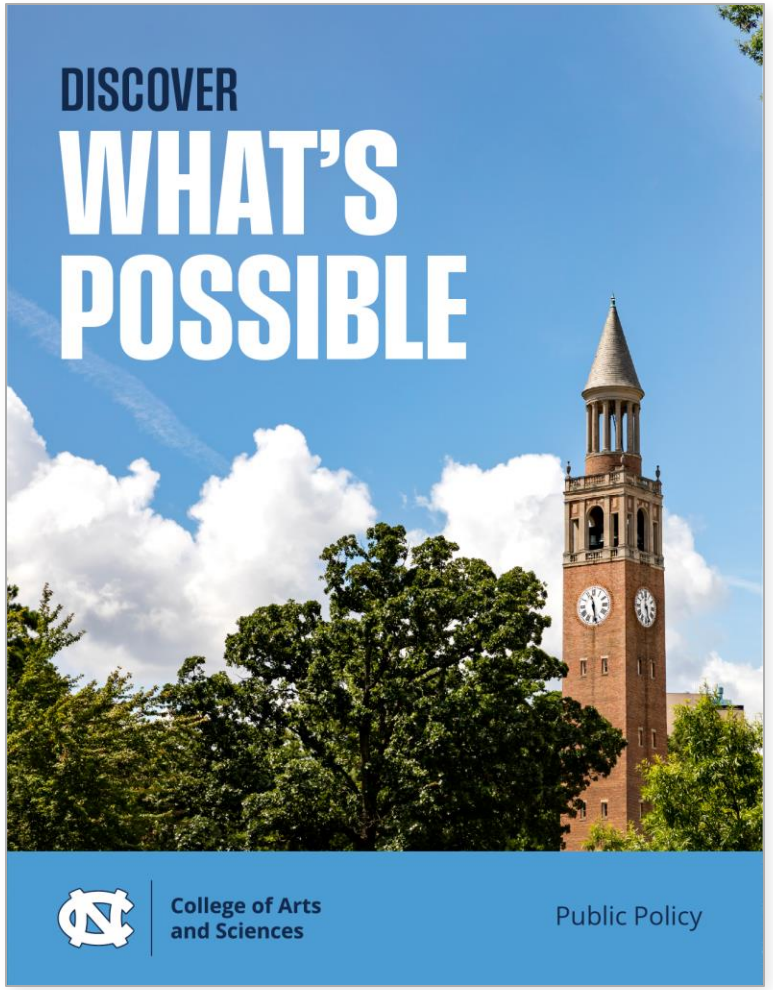







# Units/Departments



# Units/Departments



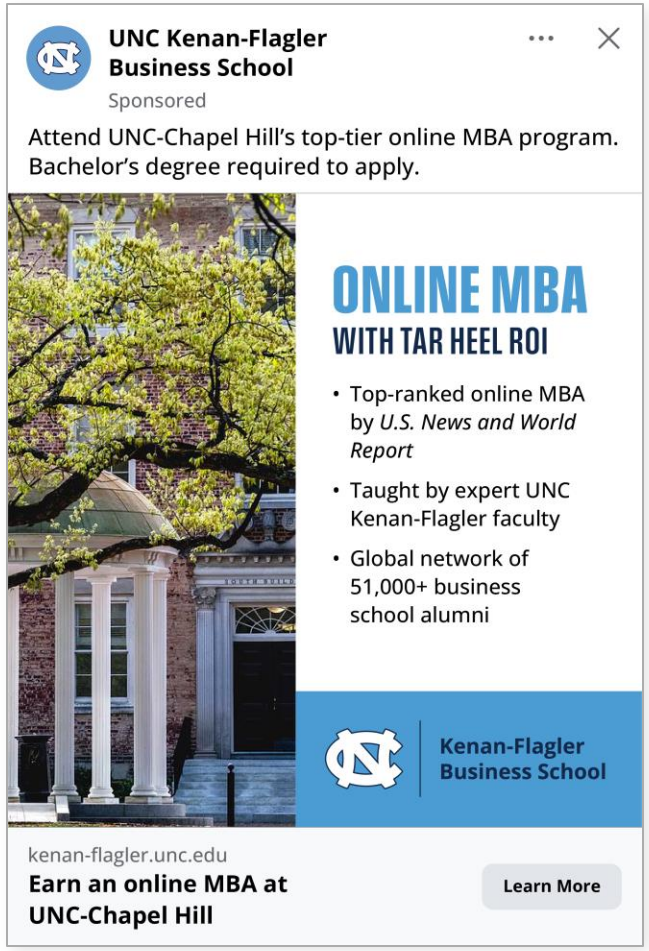

**Earth, Marine and Environmental Sciences**

Murray Hall, Office 3202
121 South Road
CB#3300
Chapel Hill, NC 27599

emes.unc.edu

College of Arts and Sciences

# Digital Ads

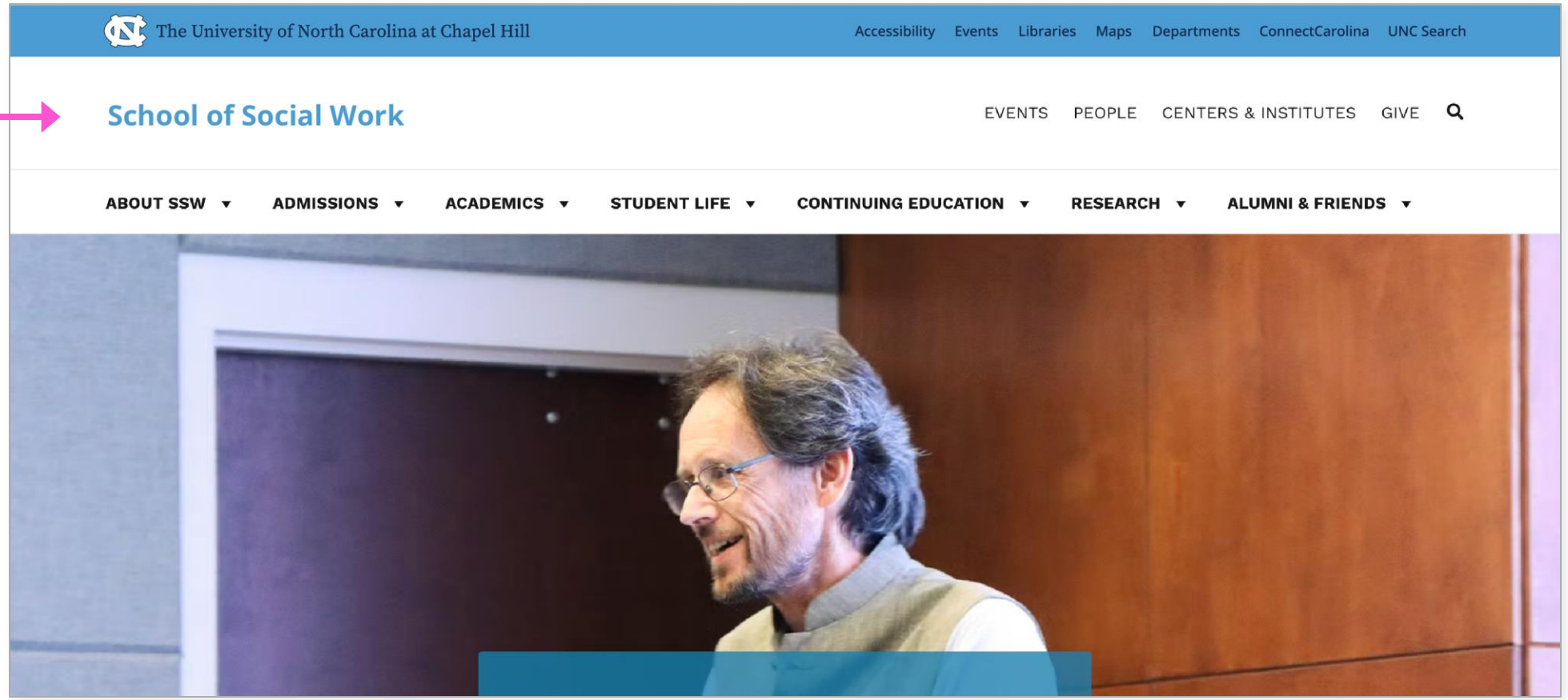

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Attend UNC-Chapel Hill's top-tier online MBA program. Bachelor's degree required to apply.
ONLINE MBA
WITH TAR HEEL ROI
• Top-ranked online MBA by U.S. News and World Report
• Taught by expert UNC Kenan-Flagler faculty
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kenan-flagler.unc.edu
Earn an online MBA at UNC-Chapel Hill
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BOOST YOUR CAREER GROWTH.
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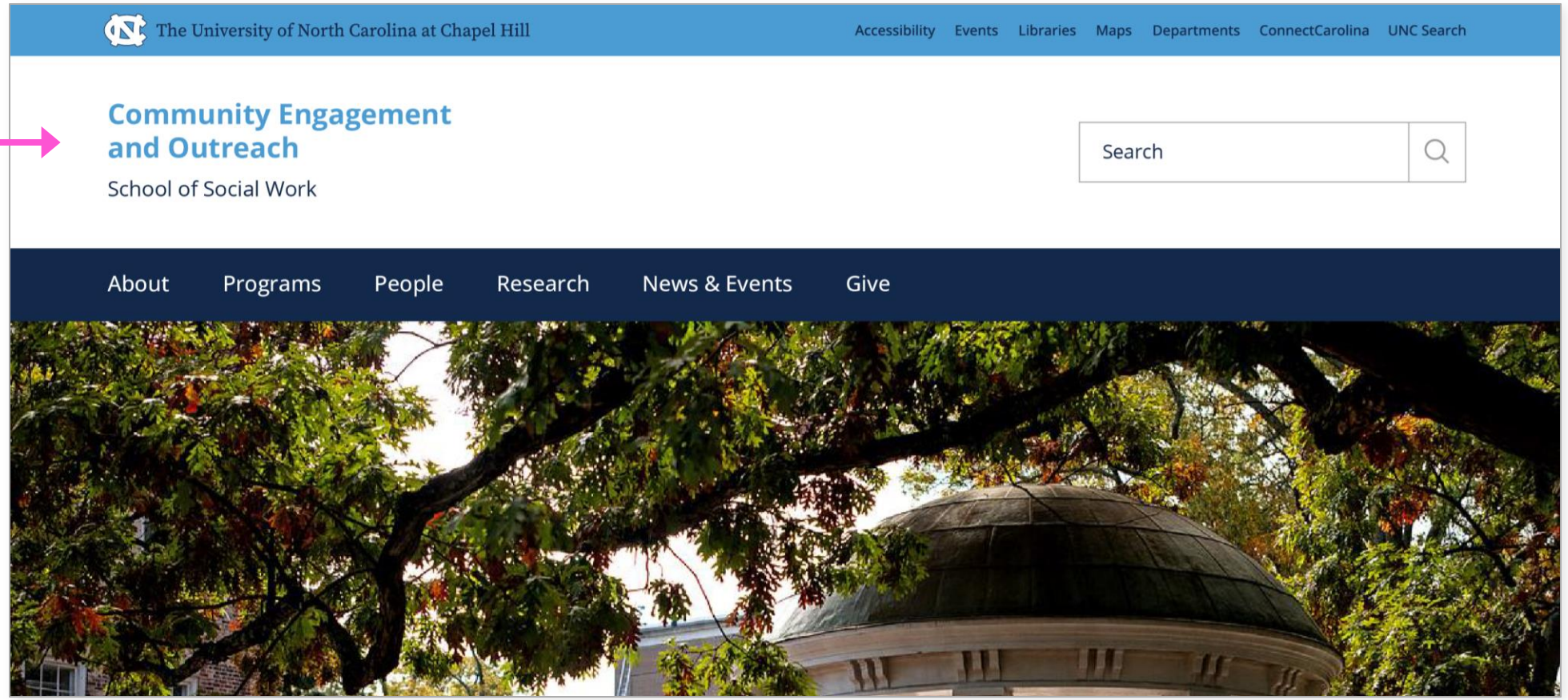
# School / Division Website Header

Digital Typeset



# Unit / Department Website Header

Digital Typeset



# Brand Assets

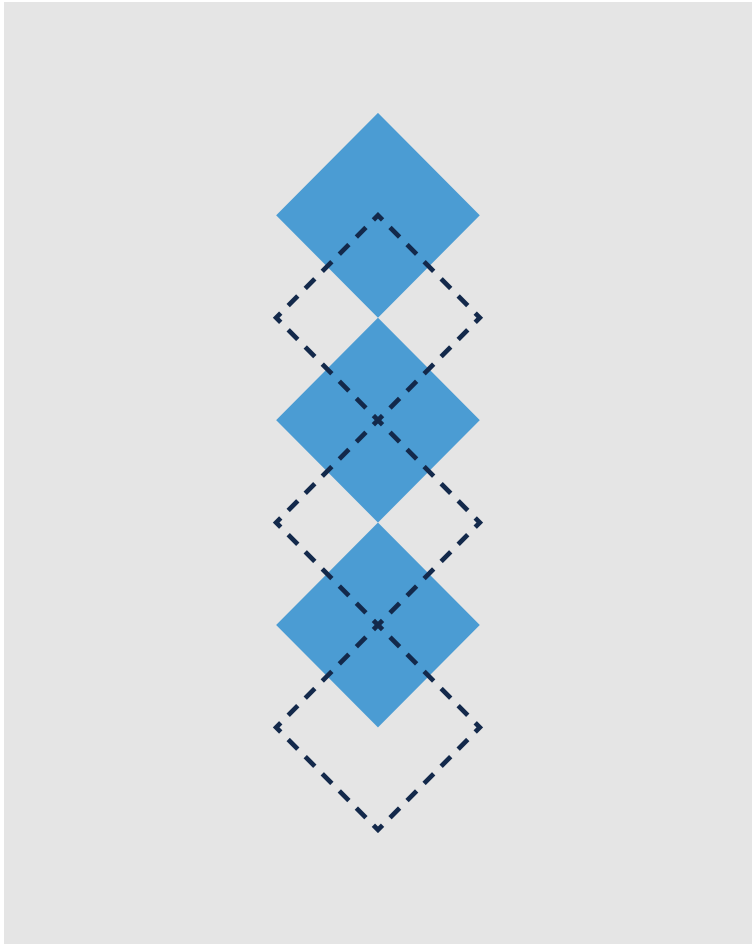
# Typography

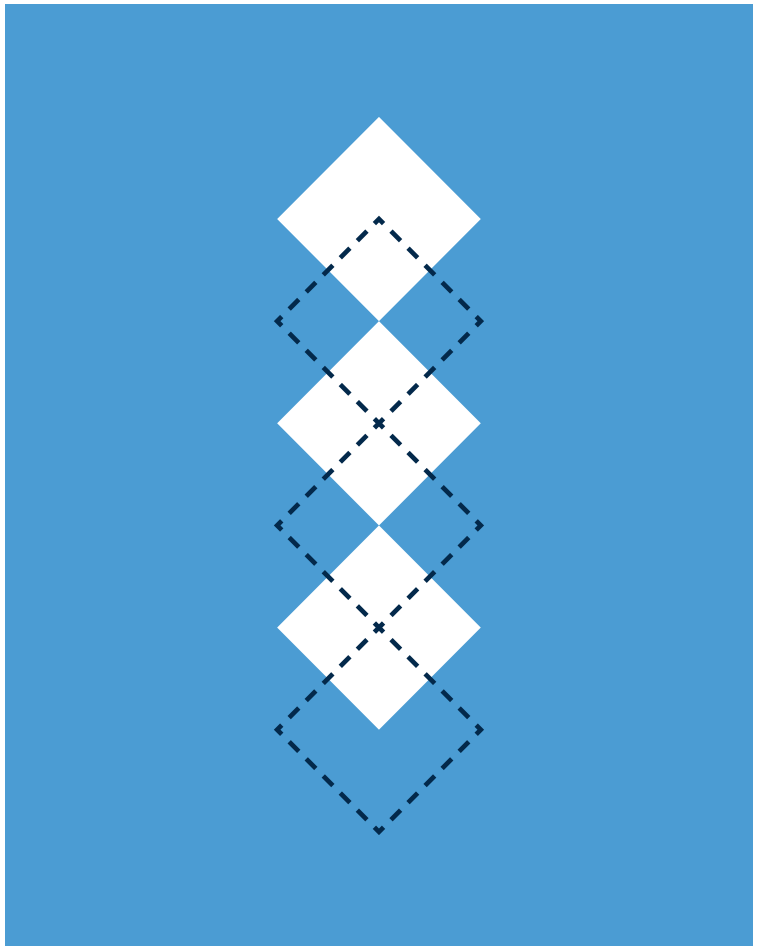
FIELD GOTHIC NARROW

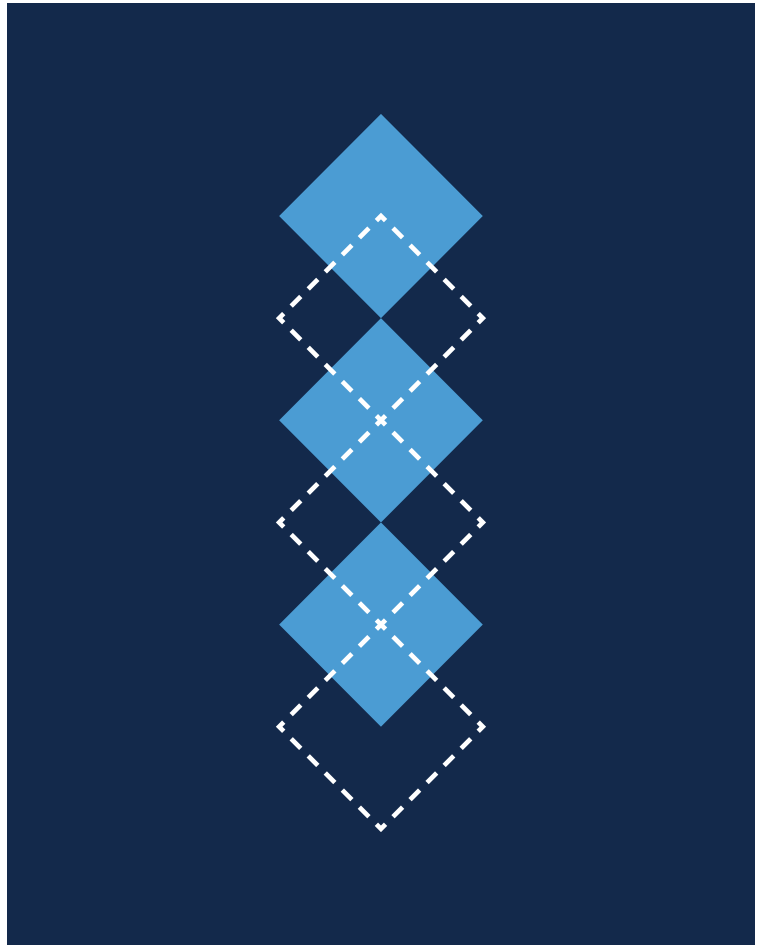
Source Serif

Open Sans

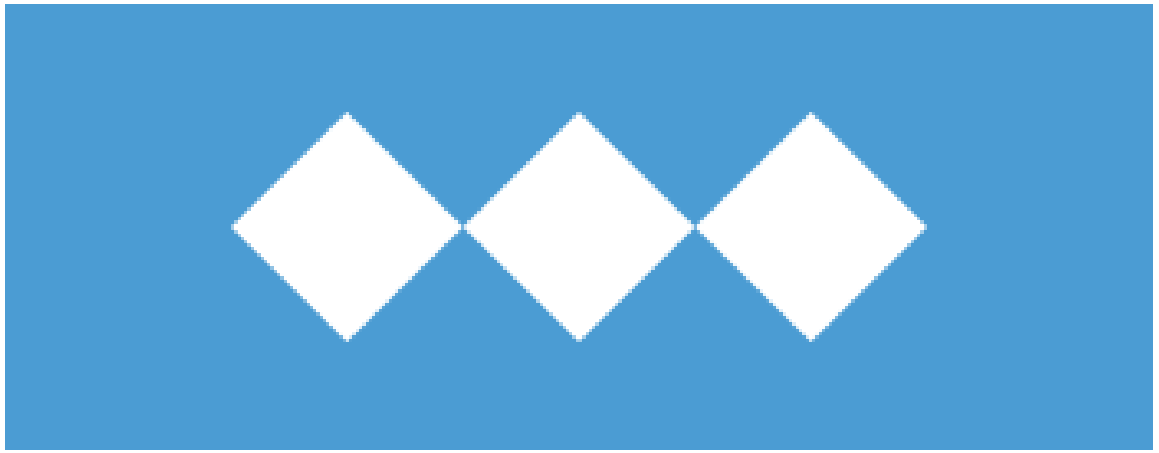
# Argyle

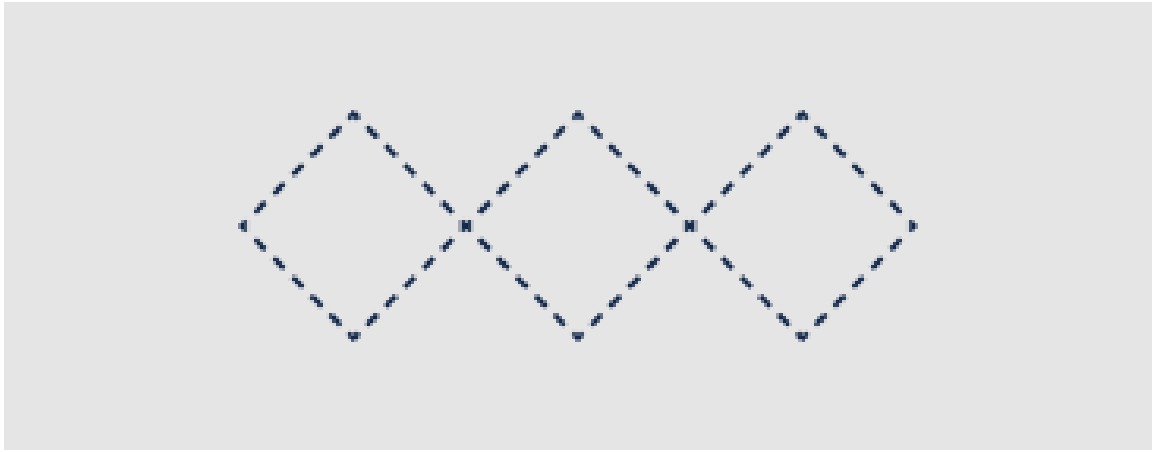






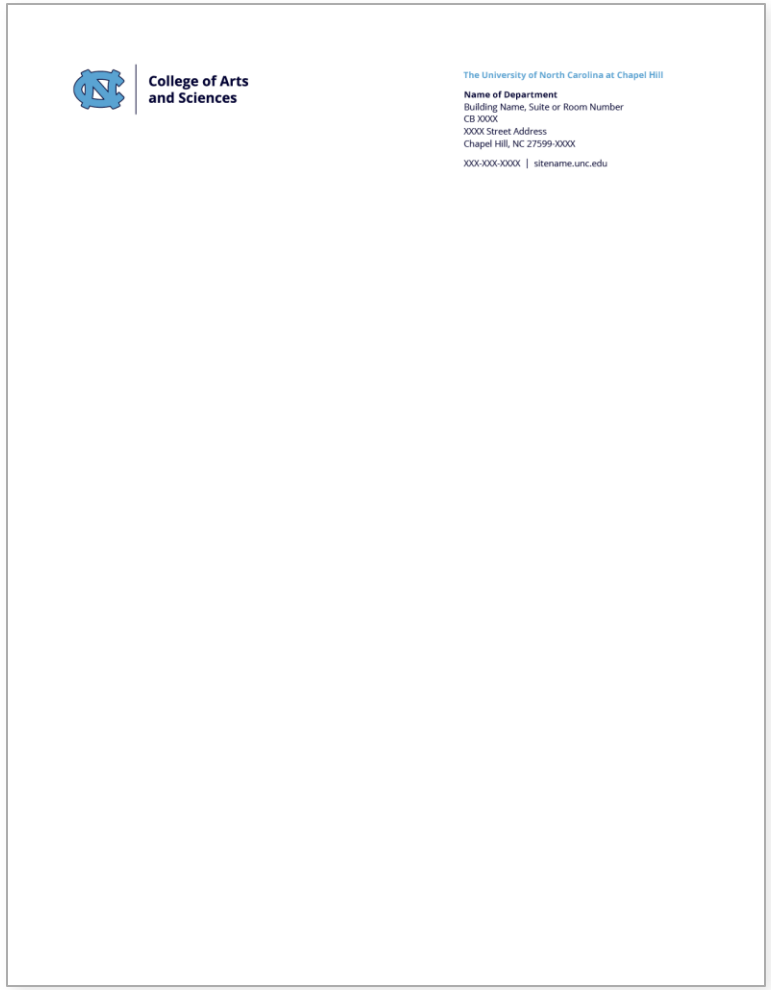
# Graphic Elements



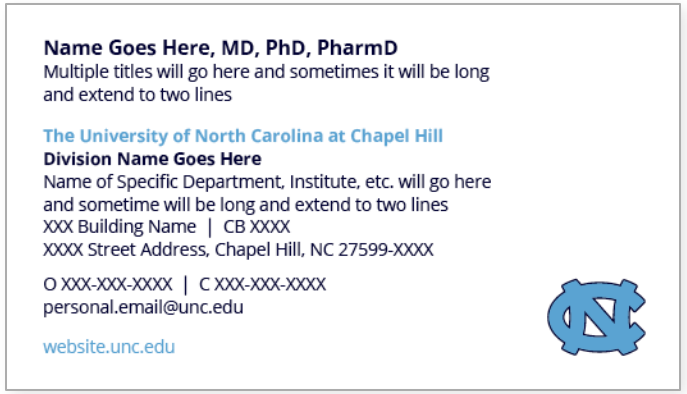




# Stationery


College of Arts
and Sciences
The University of North Carolina at Chapel Hill
Name of Department
Building Name, Suite or Room Number
CB XXXX
XXXX Street Address
Chapel Hill, NC 27599-XXXX
XXX-XXX-XXXX | sitename.unc.edu


College of Arts
and Sciences


Name Goes Here, MD, PhD, PharmD
Multiple titles will go here and sometimes it will be long
and extend to two lines
The University of North Carolina at Chapel Hill
Division Name Goes Here
Name of Specific Department, Institute, etc. will go here
and sometime will be long and extend to two lines
XXX Building Name | CB XXXX
XXXX Street Address, Chapel Hill, NC 27599-XXXX
O XXX-XXX-XXXX | C XXX-XXX-XXXX
personal.email@unc.edu
website.unc.edu


The University of North Carolina at Chapel Hill
Name of School / Division Goes Here
Name of department goes here and will sometimes be
long and take up two lines
Building Name, Suite or Room Number
Campus Box XXXX
XXXX Street Address
Chapel Hill, NC 27599-XXXX
College of Arts
and Sciences

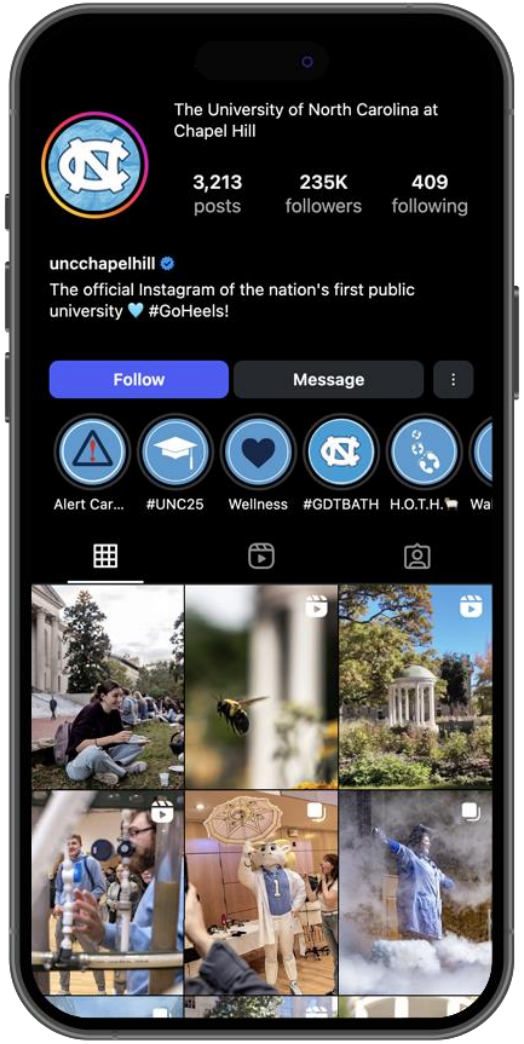
# Social Media









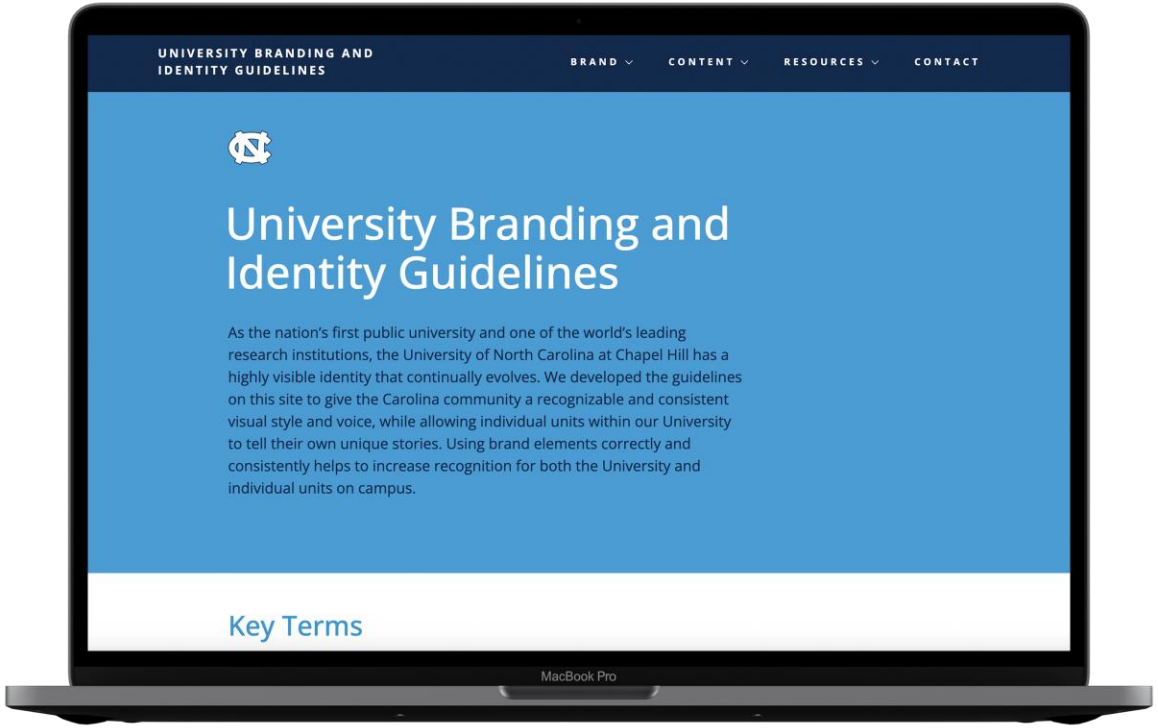
# Identity Website

**Available Now**

- Logo and Signature Files
- Tagline
- Argyle and Graphic Elements
- PowerPoint
- Zoom Background

**Coming Soon**

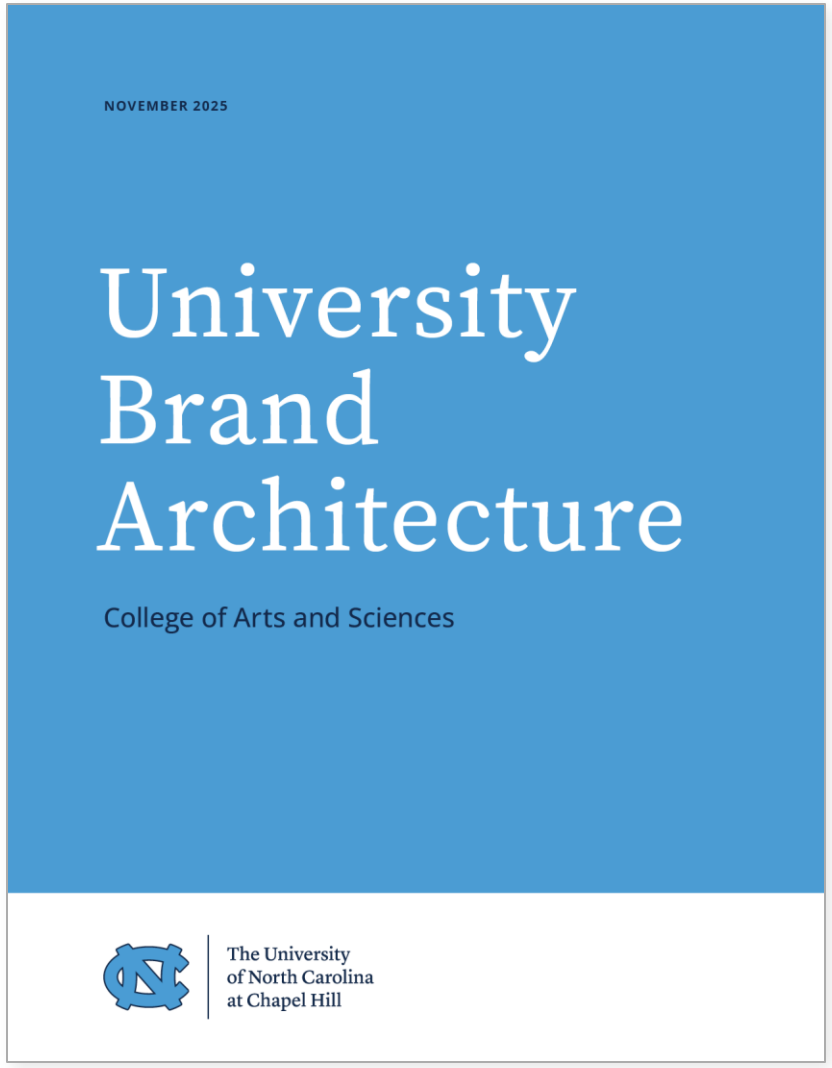
- Updated Color Palette
- Additional Graphic Elements and Patterns
- Digital- and Print-Ready Templates
- Video Assets



# Brand Guidebooks

**University Brand Strategy and Logo Architecture**

- Letter from Dean Stoyer
- Key benefits of the new brand strategy
- Old vs. new signature
- University signature
- University signature colors
- Other marks
- School / division signature
- School / division signature colors
- Other units
- Unit examples
- Website headers
- Website header examples
- Social media
- Stationery



# Timeline

# Timeline

**November**

- Share custom brand books with each dean, vice chancellor and vice provost (share with each lead communicator as well)
- Send out all signature files
- Update identity.unc.edu website with new guidelines and downloadable resources
- Office hours

**December**

- Meet with schools/divisions to answer questions or give presentations
- Let UCM know if you need support or resources updating any materials
- Launch new website toolbar

**2026-2027**

- Feb. 28 – All websites and digital materials are expected to be updated
- March-May – Host brand camp training sessions
- Feb. 28, 2026-June 30, 2027 – All print materials and campus signage are expected to use the new logo when items are ready to be reprinted or reproduced
- July 2027 – Annual brand audit

# Questions

# Contact

**Dr. Adrienne King**
Associate Vice Chancellor for Marketing
University Communications and Marketing
dradking@unc.edu

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**Riley Phillips**
Director of Social Media
University Communications and Marketing
rileyap@unc.edu

**Hilary Culbertson**
Director of Marketing Strategy
University Communications and Marketing
hilary@unc.edu

# Brand Strategy



THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

# COMMITTED TO PUBLIC PROGRESS

## Carolina is powered by purpose – to stand with, strengthen and advance North Carolina.

As the nation's first public university, UNC-Chapel Hill was built to serve the people – and that purpose hasn't wavered. Our strength lies in our commitment to public progress: research that drives breakthroughs, education that uplifts, athletics and arts that inspire, and partnerships that solve real problems. From the mountains to the coast, Carolina's traditions light the way to what's next for our state and its residents. Our commitment has resulted in discoveries, leaders and programs with proven public value. North Carolinians help shape our priorities and direction, ensuring that Carolina reflects the needs, values and aspirations of the people we serve. Because public is not just about how we're supported – it's who we serve.










# Concept Overview

It's one thing to be first. Yet, as impressive as that may sound, firsts don't mean a thing – unless they make a lasting impact.

And at UNC-Chapel Hill, ours have.

We are the nation's first public university. The first to establish a school of public health, helping underserved communities. A commitment to serving first generation students as well as generations of Tar Heels. First in athletics, countless times over.

And the first to respond, without fail, when the call for help rings out. Not just in North Carolina's 100 counties, but in all 50 states as well.

**Because that's what Tar Heels are all about: taking first steps that lead to momentous change. For countries, counties, communities, individuals – and the entire world.**

The University of North Carolina at Chapel Hill

**FIRST. AND FOR ALL.**

OUT-OF-HOME


The University
of North Carolina
at Chapel Hill
UNC.EDU
FIRST. AND FOR ALL.
BREAKTHROUGHS DON'T WAIT.
NEITHER DO WE.

# CAMPUS ACTIVATION

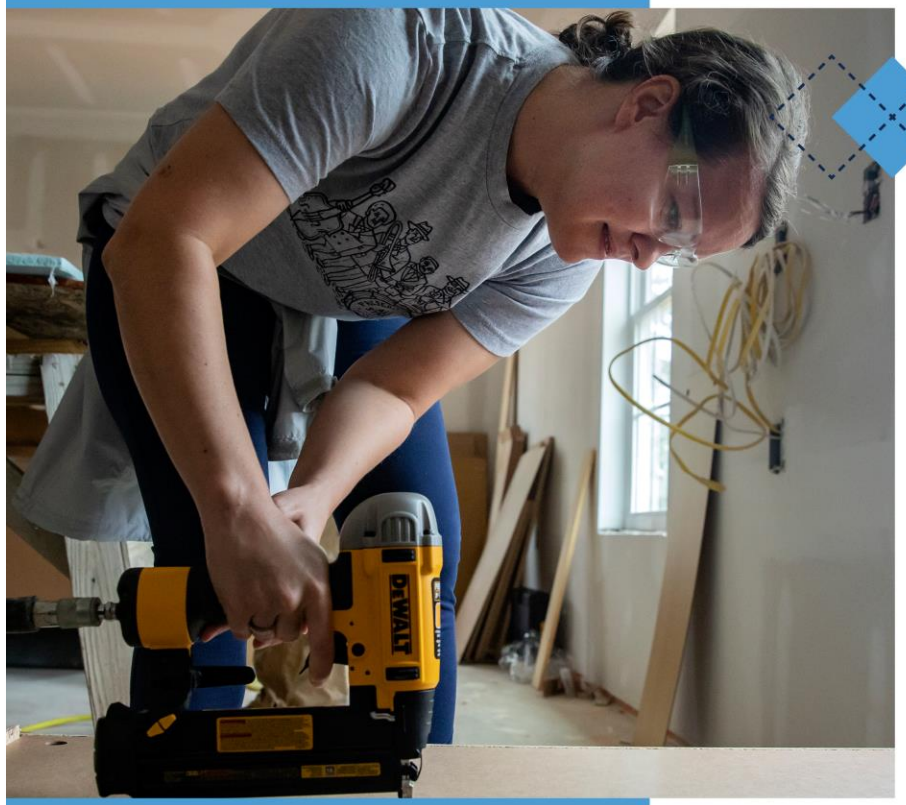





# CAMPUS ACTIVATION



# PRINT ADS






## ONCE AGAIN,

# CAROLINA LEADS THE NATION IN ASSISTS.

## FIRST. AND FOR ALL.



The University of North Carolina at Chapel Hill

From representing marginalized communities in New York, to driving clean energy innovation in Washington state, UNC-Chapel Hill alums show up for the country. Imparting expertise in rural development, clean water access, education equality and more. Because no one has an A-team like ours.

Learn more at unc.edu

# DIGITAL AD

Search

Home | My Network | Jobs | Messaging | Notifications | Me | For Business | Try Premium for $0

**Andrew Jacobs**
Art Director and Brand Manager
Chapel Hill, North Carolina
University of North Carolina at Chapel Hill

Profile viewers 26
View all analytics

Access exclusive tools & insights
Try Premium for $0

Saved items
Groups
Newsletters
Events

**The University of North Carolina at Chapel Hill**
Sponsored

Since 2005, Carolina has led the nation as #1 Best Value Public University, making a world-class education accessible.




**Nation's Best Value, No Rivals**
unc.edu
Learn more

10

Like | Comment | Repost | Send

**Brian Mitchell** commented on this

**Maurizio Leschiutta** · 3rd+
Director of Motorsports
1d ·
+ Follow

The Automobili Lamborghini GTP Team concludes its IMSA WeatherTech




**Andrew, explore relevant opportunities with CRB**

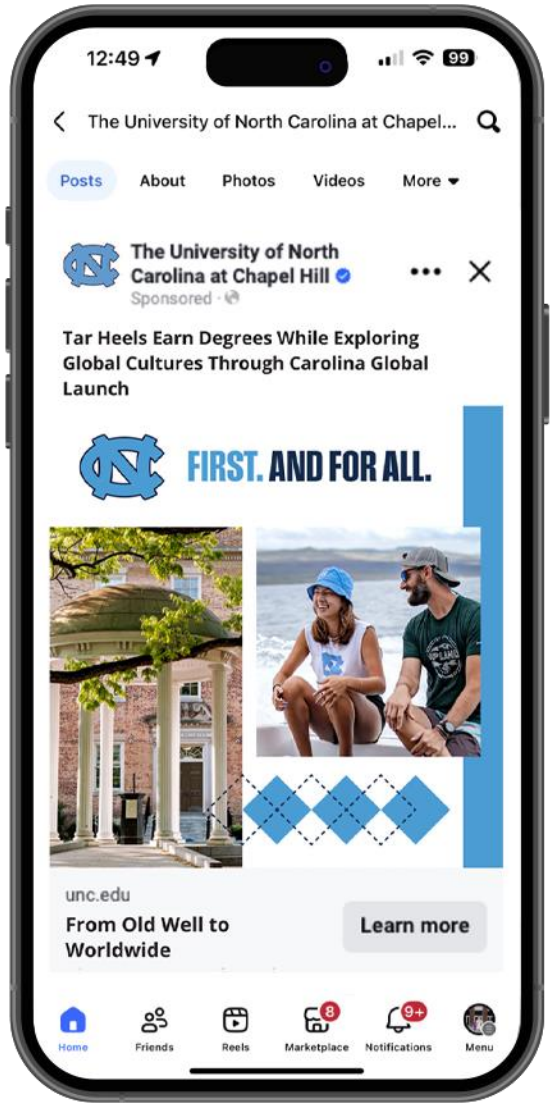
Get the latest jobs and industry news

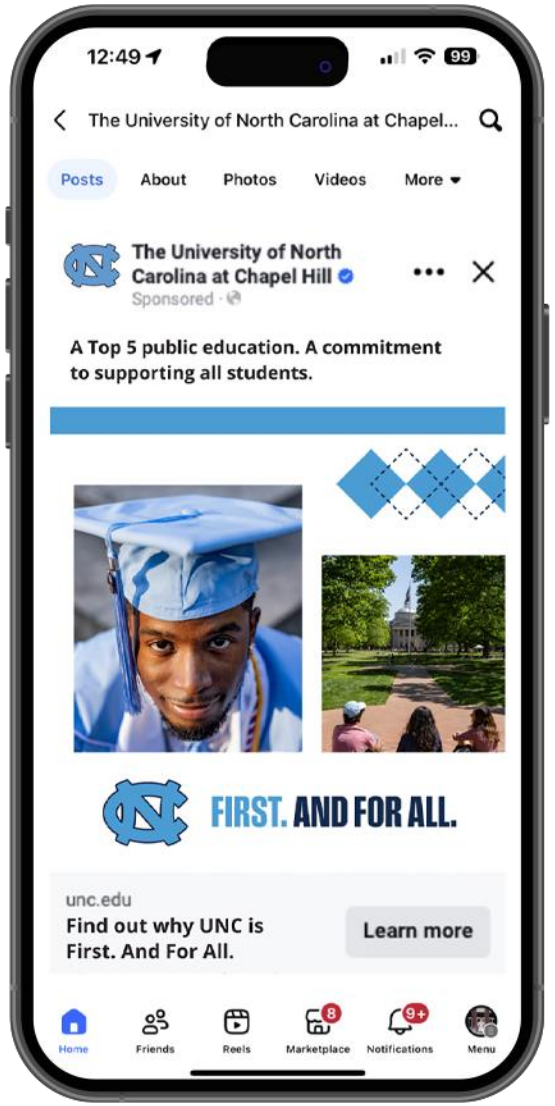
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# DIGITAL ADS


12:49
99
The University of North Carolina at Chapel...
Posts
About
Photos
Videos
More
The University of North Carolina at Chapel Hill
Sponsored
Tar Heels Earn Degrees While Exploring Global Cultures Through Carolina Global Launch
FIRST. AND FOR ALL.
unc.edu
From Old Well to Worldwide
Learn more
Home
Friends
Reels
Marketplace
Notifications
Menu


12:49
99
The University of North Carolina at Chapel...
Posts
About
Photos
Videos
More
The University of North Carolina at Chapel Hill
Sponsored
A Top 5 public education. A commitment to supporting all students.
FIRST. AND FOR ALL.
unc.edu
Find out why UNC is First. And For All.
Learn more
Home
Friends
Reels
Marketplace
Notifications
Menu

# SOCIAL ACTIVATION





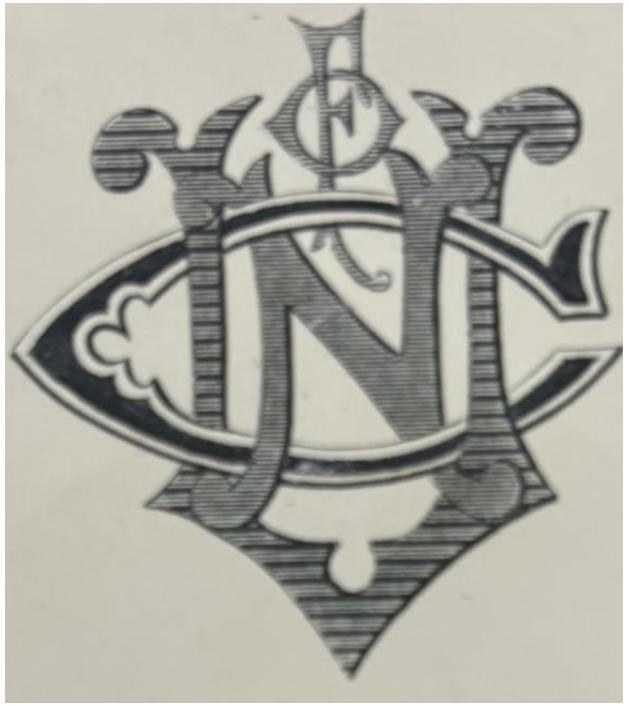

BRAND STRATEGY

# University Logo

BRAND STRATEGY

# Why, and Why Now?

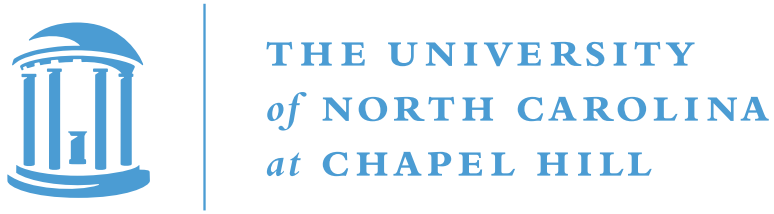
- Well-established globally recognized logo since the 1870s
- Reflects the people and the state we serve
- Leverages existing brand strength
- Unifies across the University
- Streamlines the logo system
- Increases digital accessibility and legibility
- Stands out amongst peer universities
- A unified brand strategy drives additional T&L revenue
- Aligns with the launch of the brand reputation campaign



BRAND STRATEGY

# University Signatures

Old







New






BRAND ARCHITECTURE

# Division/School Signatures

Old

UNC | COLLEGE OF ARTS AND SCIENCES

UNC

COLLEGE OF ARTS AND SCIENCES

New

College of Arts and Sciences

College of Arts and Sciences

# Special Marks




*University Seal*



*Old Well*

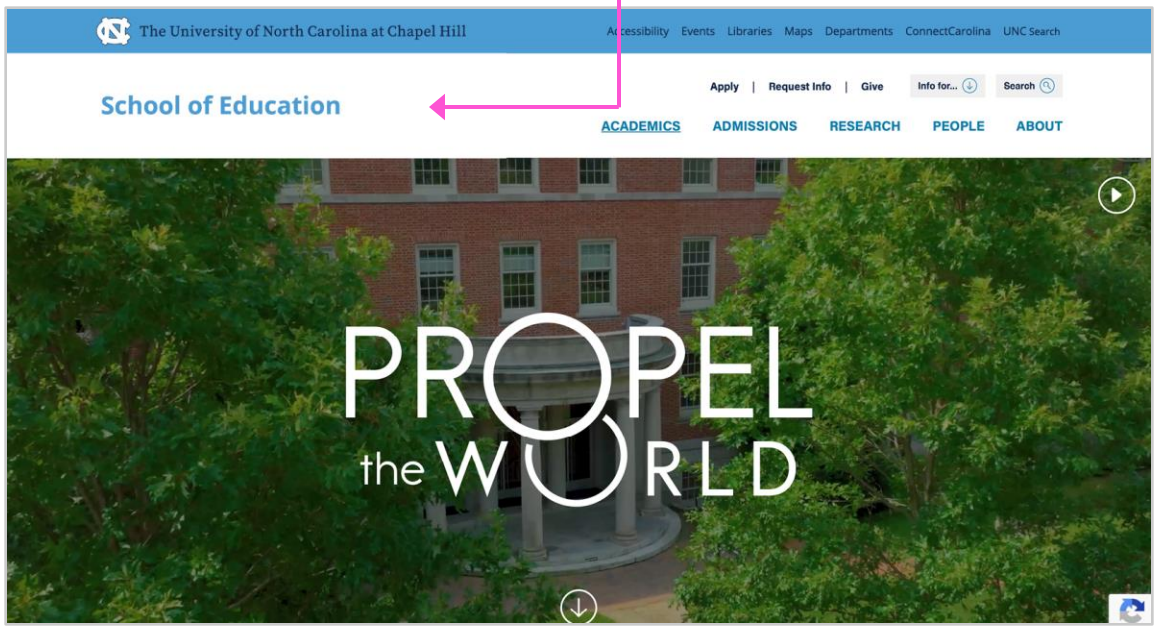
The Old Well graphic will continue to be used for key campus events and celebrations, as well as to commemorate University anniversaries and milestones.

Carolina will retain the trademark for the Old Well mark.

# Websites

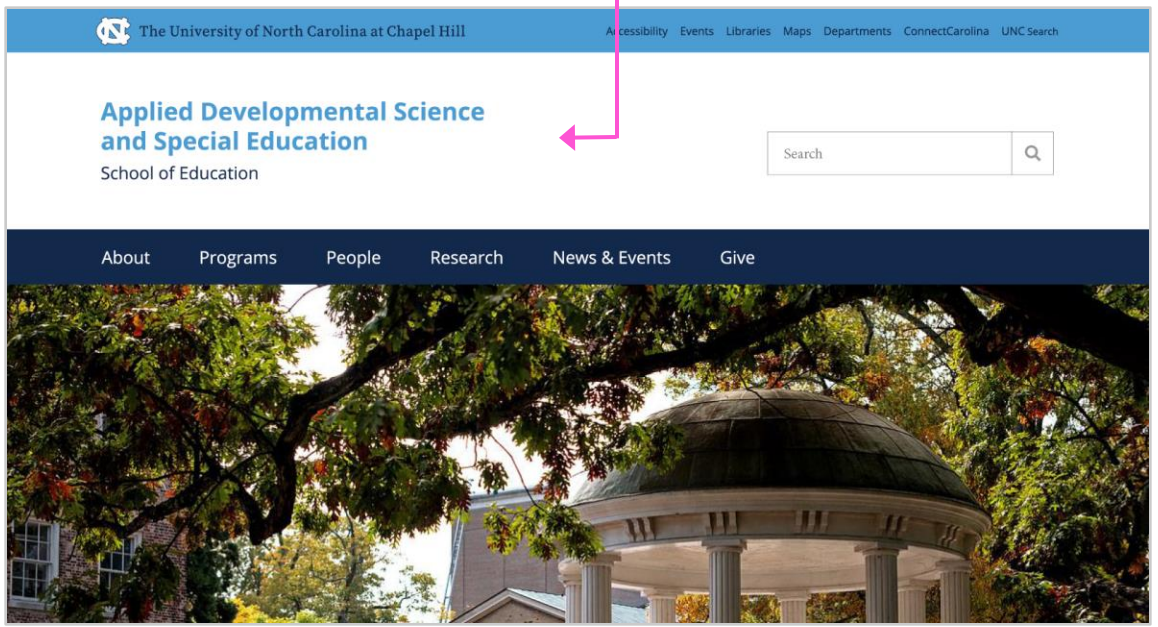
Updated Toolbar

Digital Typeset




Updated Toolbar

Digital Typeset



# Brand Strategy Update

Dr. Adrienne King

*Associate Vice Chancellor for Marketing*



THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

BRAND STRATEGY

# Let’s first define what we mean when we say *brand*.

# What is it?

# Why do we need it?

# How do we create it?

# Brand is…

- Not a tagline.
- Not a logo.
- Not a color.
- Not even a marketing campaign.

Those are all aspects of our brand…

**Our brand is much bigger than that.**

# Our brand is a promise we make.

# Built from the inside, radiating out.

An authentic brand position is a powerful lens to refine not just our communication (what we say) but our strategic actions (what we do).

Integrating **brand and strategy** is what creates **authentic differentiation**.

~~What is it?~~

# Why do we need it?

## Brand strategy creates differentiation and builds awareness.

Brand strategy is what allows us to differentiate ourselves by establishing a distinct and compelling identity. It highlights our unique strengths, values, and contributions we make. Differentiation leads to increased awareness, favorability and ultimately reputation.

## Why reputation matters.

Generating awareness and reputation leads to continued state support, increases in research and fundraising dollars, enrollments and recruitment and retention of the highest-caliber faculty and staff.

~~What is it?~~

~~Why do we need it?~~

**How do we create it?**

# Four Phases

- Phase 1: Research
- Phase 2: Brand Development
- Phase 3: Brand Expression
- Phase 4: Execution

# Phase 1: Research

| All timelines are tentative and subject to change based on approvals. | March | | | | | April | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 3-Mar | 10-Mar | 17-Mar | 24-Mar | 31-Mar | 7-Apr | 14-Apr | 21-Apr | 28-Apr | 5-May |
| **DISCOVERY & BRAND FOUNDATION** | | | | | | | | | | |
| High-level Immersion Read Out Sent: 3/10 | | ■ | | | | | | | | |
| Online Study - Questionnaire Development | ■ | ■ | | | | | | | | |
| Online Study - Questionnaire Review, Revisions and Approval (by 3/28) | | ■ | ■ | ■ | | | | | | |
| Online Study - Programming | | | | | ■ | | | | | |
| Online Study - Fielding | | | | | | ■ | | | | |
| Online Study - Tabulation | | | | | | | ■ | | | |
| Strategic Analysis | | | | | | | ■ | ■ | | |
| Discovery and Analysis Presentation (Core Team): 5/1 | | | | | | | | | ■ | |
| Discovery and Analysis Presentation (week of 5/5) | | | | | | | | | | ■ |

Key Dates:

- 3/28: Survey instrument approved
- 3/31: Qualitative research completed
- 4/7: Survey deployed

# Phase 1a: Qualitative Research

## CAMPUS INTERVIEWS & FOCUS GROUPS BY THE NUMBERS

**79**
TOTAL PEOPLE INTERVIEWED

**12**
INDIVIDUAL INTERVIEWS

**11**
GROUP INTERVIEWS

**31**
TOTAL HOURS OF INTERVIEWS

# Phase 2: Brand Development

| All timelines are tentative and subject to change based on approvals. | May | | | | June | | | |
|---|---|---|---|---|---|---|---|---|
| | 5-May | 12-May | 19-May | 26-May | 2-Jun | 9-Jun | 16-Jun | 23-Jun |
| **BRAND DEVELOPMENT** | | | | | | | | |
| **Positioning** | | | | | | | | |
| Positioning Development | ■ | | | | | | | |
| Positioning Work Session (Core Team) | | ■ | | | | | | |
| **Positioning Platform** | | | | | | | | |
| Positioning Platform Development | | ■ | ■ | | | | | |
| Positioning Platform Presentation (Core Team) | | | ■ | | | | | |
| Positioning Platform R1 Presentation | | | | ■ | | | | |
| Positioning Platform R1 feedback needed from UNC Team | | | | ■ | | | | |
| Positioning Platform R2 Presentation (if needed) | | | | | ■ | | | |
| Positioning Platform R2 feedback needed from UNC Team | | | | | | ■ | | |
| Positioning Platform R2 Revisions | | | | | | ■ | | |
| **Messaging Development** | | | | | | | | |
| Messaging Development | | ■ | ■ | | | | | |
| Messaging R1 Presentation | | | ■ | | | | | |
| Messaging R1 feedback needed from UNC Team | | | | ■ | | | | |
| Messaging R2 Presentation | | | | | ■ | | | |
| Messaging R2 feedback needed from UNC Team | | | | | | ■ | | |
| Messaging R2 Revisions | | | | | | | ■ | |
| **Creative Briefs** | | | | | | | | |
| Creative Brief Development | | | | | ■ | | | |
| Creative Brief approval needed from UNC Team | | | | | | ■ | | |

# Phase 3: Brand Expression

| All timelines are tentative and subject to change based on approvals. | June | | | | | July | | | | August | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2-Jun | 9-Jun | 16-Jun | 23-Jun | 30-Jun | 7-Jul | 14-Jul | 21-Jul | 28-Jul | 4-Aug | 11-Aug | 18-Aug | 25-Aug | 1-Sep | 8-Sep |
| **BRAND EXPRESSION** | | | | | | | | | | | | | | | |
| **Creative Concepts** | | | | | | | | | | | | | | | |
| Campaign Concept Development | | ■ | ■ | | | | | | | | | | | | |
| Creative Concept Presentation (Core Team) | | | | ■ | | | | | | | | | | | |
| Creative Concept R1 feedback needed from UNC Team (engage internal entities) | | | | | ■ | ■ | | | | | | | | | |
| Creative Concept Presentation (Leadership Team) | | | | | | | ■ | | | | | | | | |
| Creative Concept R2 feedback needed from UNC Team | | | | | | | | ■ | | | | | | | |
| Creative Concept R2 Revision Presentation | | | | | | | | | ■ | | | | | | |
| **Media Planning** | | | | | | | | | | | | | | | |
| Media/Communications Plan Development | ■ | ■ | ■ | ■ | | | | | | | | | | | |
| R1 Media Presentation | | | | ■ | | | | | | | | | | | |
| Media/Communications Plan feedback needed from UNC Team | | | | | ■ | | | | | | | | | | |
| R2 Media Planning | | | | | ■ | ■ | ■ | | | | | | | | |
| Media/Communications Recommendation Presentation | | | | | | | | ■ | | | | | | | |
| **Brand Style Guide** | | | | | | | | | | | | | | | |
| Brand Style Guide Development | | | | | | | | | ■ | ■ | | | | | |
| Brand Style Guide Presentation | | | | | | | | | | ■ | | | | | |
| Brand Style Guide Presentation Feedback Needed | | | | | | | | | | | ■ | | | | |
| R2 Brand Guideline Development | | | | | | | | | | | ■ | ■ | ■ | | |
| R2 Brand Guidelines Due to Client | | | | | | | | | | | | | ■ | | |
| Production of Brand Guidelines | | | | | | | | | | | | | | ■ | ■ |

# Phase 4: Execution

| All timelines are tentative and subject to change based on approvals. | August | | | | September | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 4-Aug | 11-Aug | 18-Aug | 25-Aug | 1-Sep | 8-Sep | 15-Sep | 22-Sep | 29-Sep |
| **EXECUTION** | | | | | | | | | |
| Asset Production (Produce certain assets earlier, pending approval) | | | | | | | | | |
| Delivery of Final Assets | | | | | | | | | |
| Launch Media Campaign(Date pending client discussion, but likely mid-September) | | | | | v | | | | |

Key Dates:

- Mid-September: Campaign Launch
- Fall Semester: Campus Partner Activation

# Core Team

- Adrienne King
- Beth Keith
- Tanya Moore
- Amanda Zettervall
- Chelsey Holts
- Director of Marketing

# Brand Expression Team

Core Team +

- Robby Poore
- Riley Phillips
- Tommy Hamzik
- John Roberts

# Senior Leadership Team

- Chancellor Lee Roberts
- Chris McClure
- Chris Clemens
- Nate Knuffman
- Mike Andreasen
- Christi Hurt
- Lucy Dunderdale Cate



THE UNIVERSITY
*of* NORTH CAROLINA
*at* CHAPEL HILL

# Brand Strategy

**October 2025**

THE UNIVERSITY OF NORTH CAROLINA

# COMMITTED TO PUBLIC PROGRESS

## Carolina is powered by purpose – to stand with, strengthen and advance North Carolina.

As the nation's first public university, UNC-Chapel Hill was built to serve the people – and that purpose hasn't wavered. Our strength lies in our commitment to public progress: research that drives breakthroughs, education that uplifts, athletics and arts that inspire, and partnerships that solve real problems. From the mountains to the coast, Carolina's traditions light the way to what's next for our state and its residents. Our commitment has resulted in discoveries, leaders and programs with proven public value. North Carolinians help shape our priorities and direction, ensuring that Carolina reflects the needs, values and aspirations of the people we serve. Because public is not just about how we're supported – it's who we serve.










# Concept Overview

It's one thing to be first. Yet, as impressive as that may sound, firsts don't mean a thing – unless they make a lasting impact.

And at UNC-Chapel Hill, ours have.

We are the nation's first public university. The first to establish a school of public health, helping underserved communities. A commitment to serving first generation students as well as generations of Tar Heels. First in athletics, countless times over.

And the first to respond, without fail, when the call for help rings out. Not just in North Carolina's 100 counties, but in all 50 states as well.

**Because that's what Tar Heels are all about: taking first steps that lead to momentous change. For countries, counties, communities, individuals – and the entire world.**

The University *of* North Carolina *at* Chapel Hill

**FIRST. AND FOR ALL.**

OUT-OF-HOME


The University
of North Carolina
at Chapel Hill
UNC.EDU
FIRST. AND FOR ALL.
BREAKTHROUGHS DON'T WAIT.
NEITHER DO WE.

# CAMPUS ACTIVATION

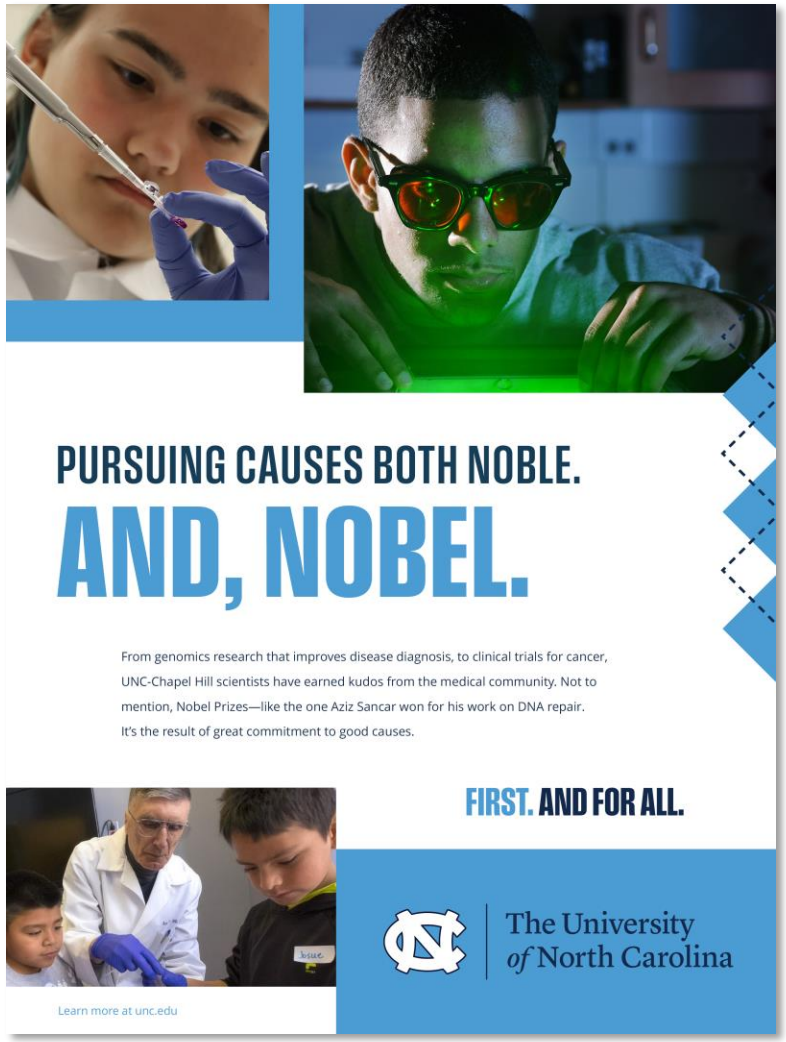


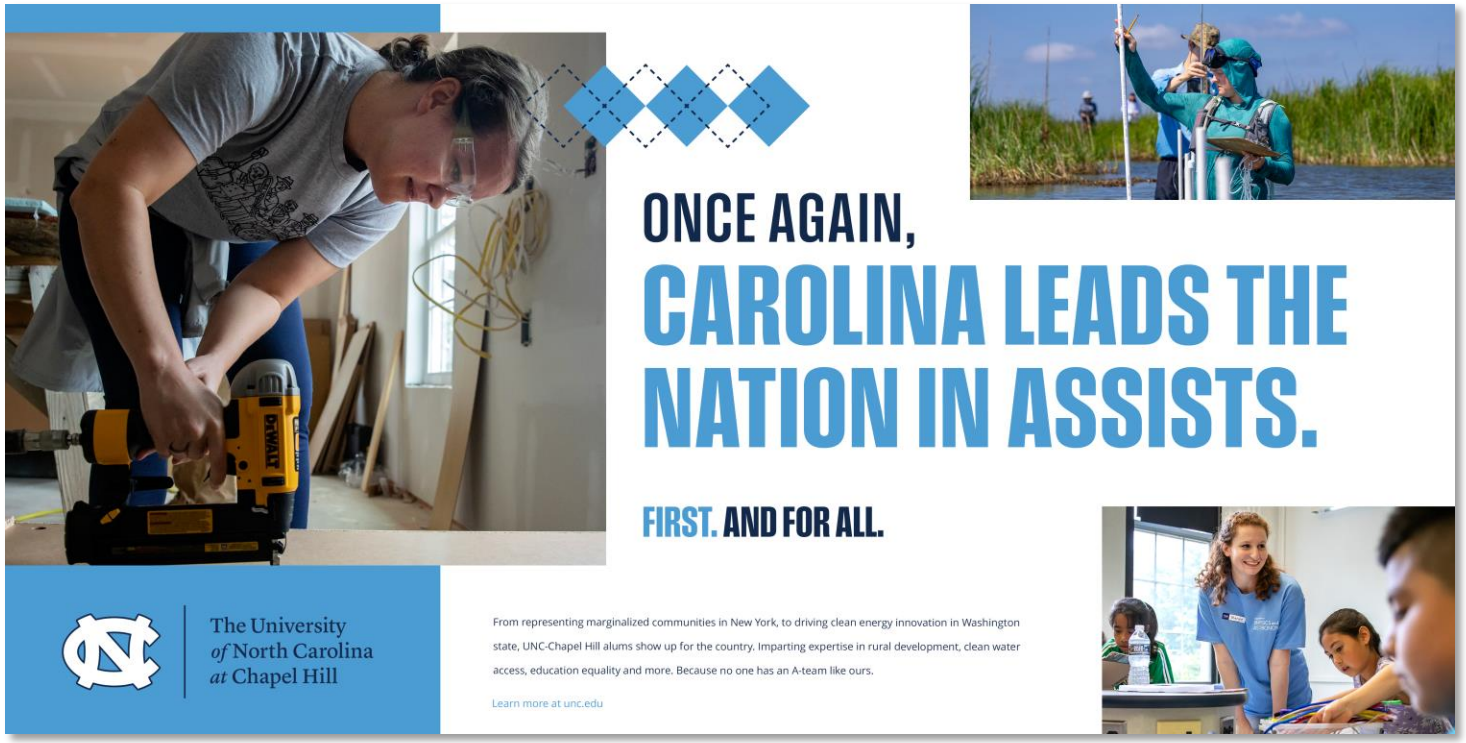


# CAMPUS ACTIVATION



# PRINT ADS


PURSUING CAUSES BOTH NOBLE.
AND, NOBEL.
From genomics research that improves disease diagnosis, to clinical trials for cancer, UNC-Chapel Hill scientists have earned kudos from the medical community. Not to mention, Nobel Prizes—like the one Aziz Sancar won for his work on DNA repair. It's the result of great commitment to good causes.
FIRST. AND FOR ALL.
The University of North Carolina
Learn more at unc.edu


ONCE AGAIN,
CAROLINA LEADS THE NATION IN ASSISTS.
FIRST. AND FOR ALL.
The University of North Carolina at Chapel Hill
From representing marginalized communities in New York, to driving clean energy innovation in Washington state, UNC-Chapel Hill alums show up for the country. Imparting expertise in rural development, clean water access, education equality and more. Because no one has an A-team like ours.
Learn more at unc.edu

# DIGITAL AD

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**Andrew Jacobs**
Art Director and Brand Manager
Chapel Hill, North Carolina
University of North Carolina at Chapel Hill

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Access exclusive tools & insights
Try Premium for $0

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Groups
Newsletters
Events

**The University of North Carolina at Chapel Hill**
Sponsored

Since 2005, Carolina has led the nation as #1 Best Value Public University, making a world-class education accessible.




**Nation's Best Value, No Rivals**
unc.edu
Learn more

10

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Brian Mitchell commented on this

**Maurizio Leschiutta** · 3rd+
Director of Motorsports
1d ·
+ Follow

The Automobili Lamborghini GTP Team concludes its IMSA WeatherTech




**Andrew, explore relevant opportunities with CRB**

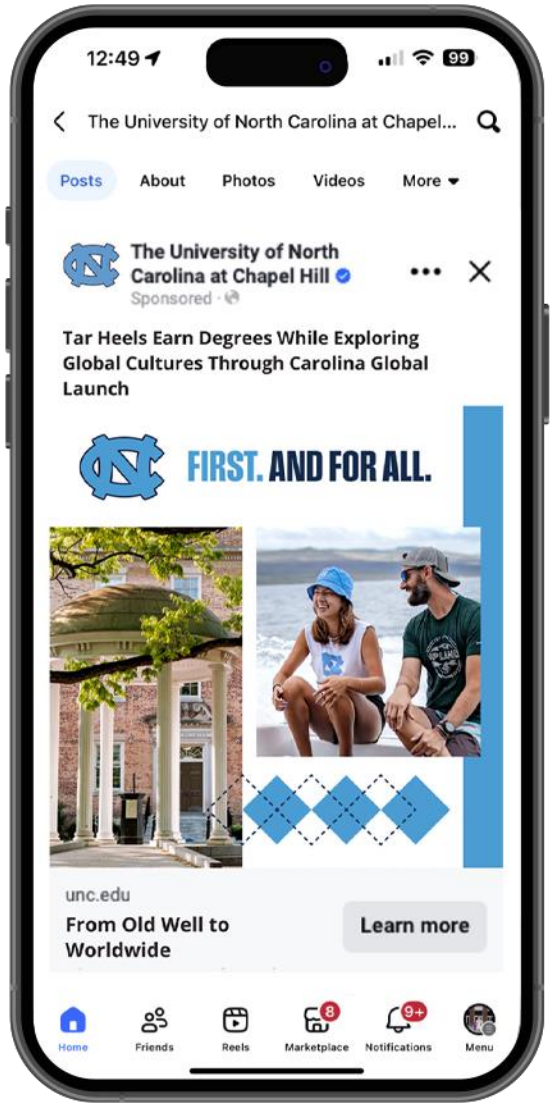
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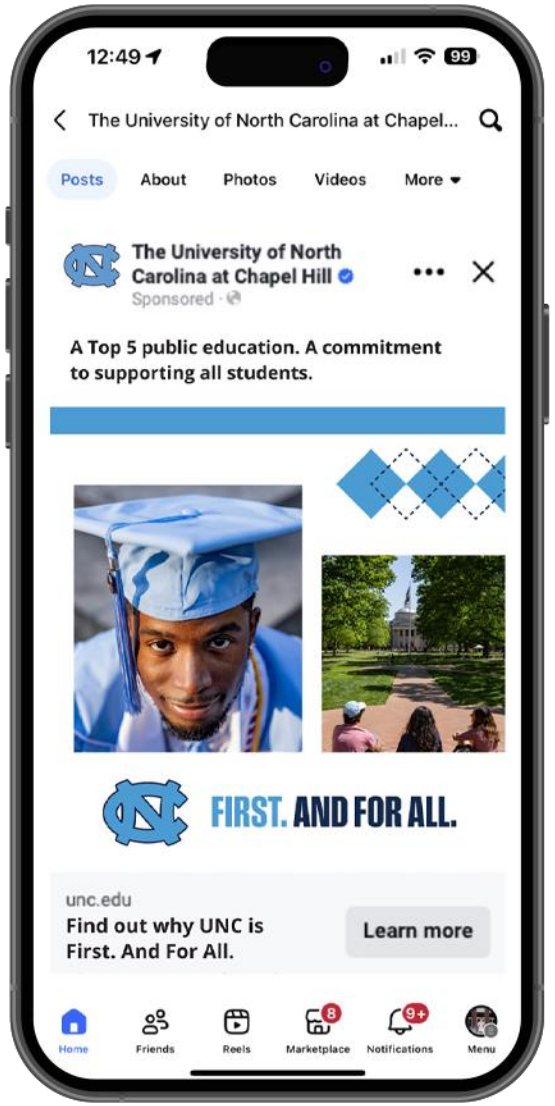
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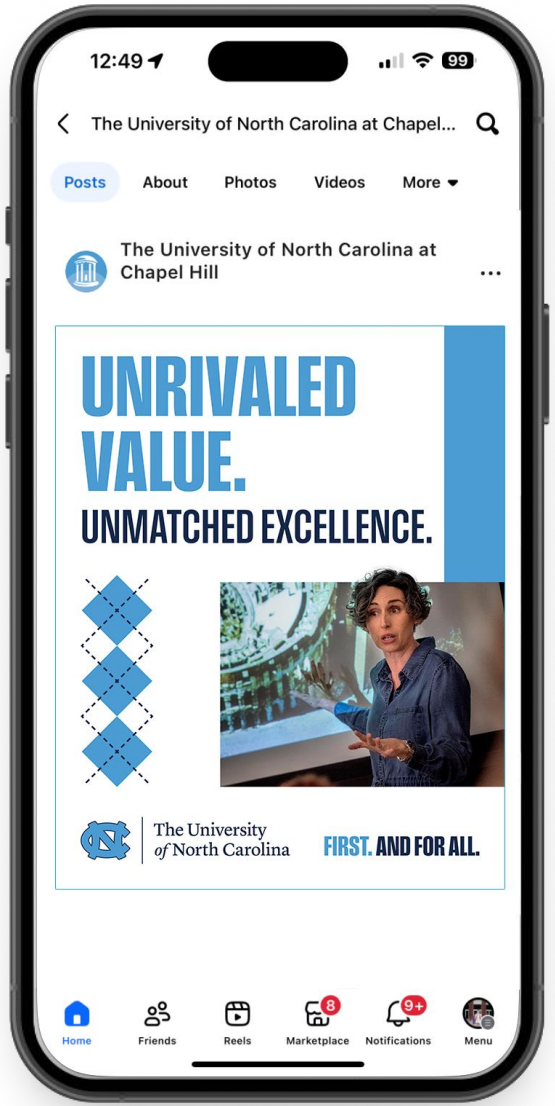
LinkedIn Corporation © 2025

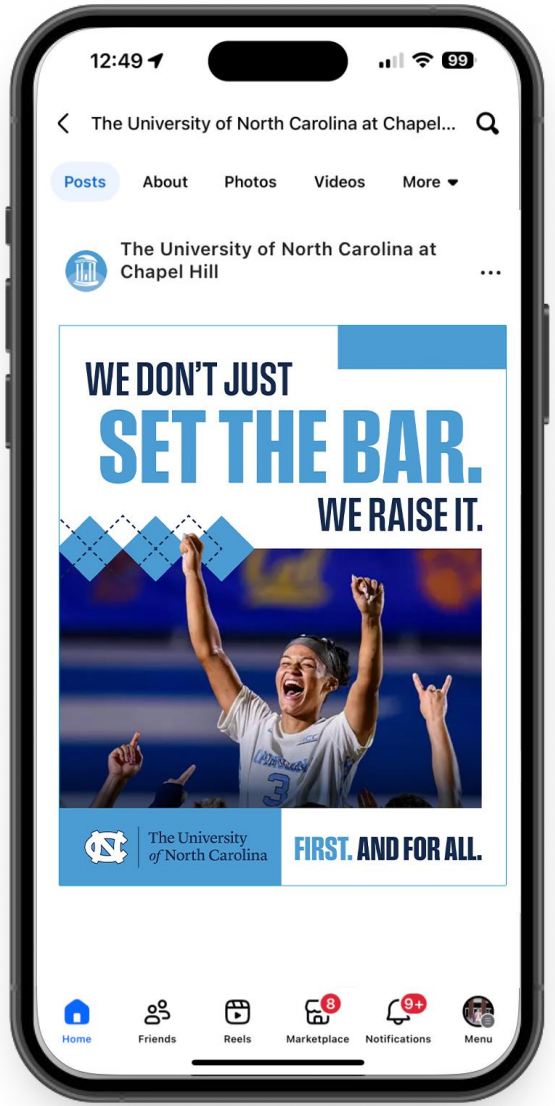
# DIGITAL ADS


12:49
99
The University of North Carolina at Chapel...
Posts
About
Photos
Videos
More
The University of North Carolina at Chapel Hill
Sponsored
Tar Heels Earn Degrees While Exploring Global Cultures Through Carolina Global Launch
FIRST. AND FOR ALL.
unc.edu
From Old Well to Worldwide
Learn more
Home
Friends
Reels
Marketplace
Notifications
Menu


12:49
99
The University of North Carolina at Chapel...
Posts
About
Photos
Videos
More
The University of North Carolina at Chapel Hill
Sponsored
A Top 5 public education. A commitment to supporting all students.
FIRST. AND FOR ALL.
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Find out why UNC is First. And For All.
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12:49
99
The University of North Carolina at Chapel...
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The University of North Carolina at Chapel Hill
UNRIVALED VALUE.
UNMATCHED EXCELLENCE.
The University of North Carolina
FIRST. AND FOR ALL.
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12:49
99
The University of North Carolina at Chapel...
Posts
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More
The University of North Carolina at Chapel Hill
WE DON'T JUST
SET THE BAR.
WE RAISE IT.
The University of North Carolina
FIRST. AND FOR ALL.
Home
Friends
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DIGITAL AD

The Charlotte Observer

CAROLINA PANTHERS

## Questionable calls and a colossal Panthers collapse, but — ultimately — gratitude



Part 4 of 4: How was that not a catch? Why didn't Cam jump on the fumble? What went wrong in the press conference? We'll answer all of this, and still provide an improbably happy ending.

Updated July 17, 2025 9:27 AM


The University of North Carolina

NATIONS #1 BEST VALUE. NO RIVALS.



LEARN WHY


LATEST

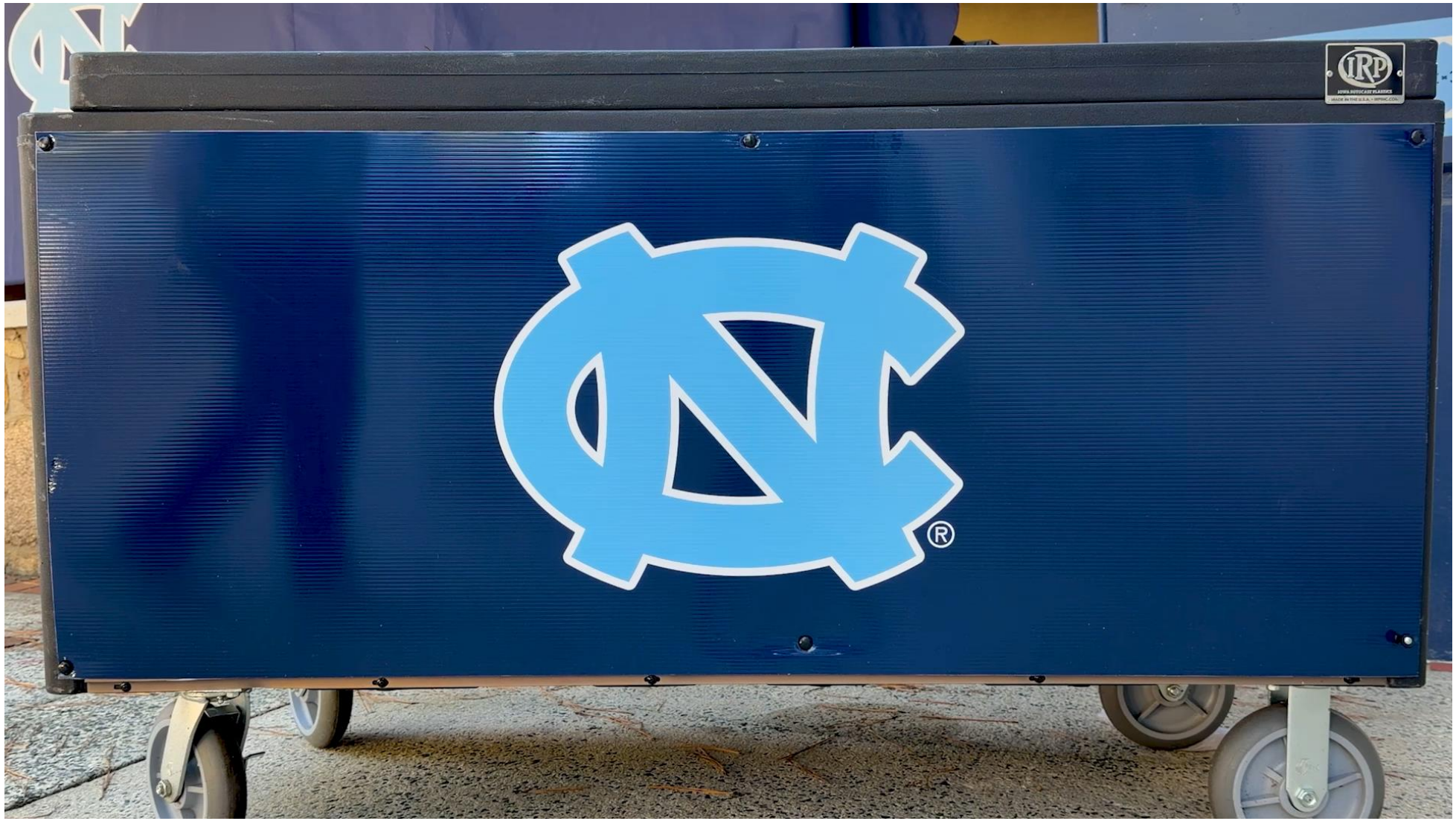
How Collin Sexton is rapidly casting

# SOCIAL ACTIVATION






# LOGO ROLLOUT



# Brand Strategy Update

Dr. Adrienne King
*Associate Vice Chancellor for Marketing*



THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

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| | | |
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| **Service-Oriented Excellence** | • Top schools in medicine, pharmacy, journalism, public health and government, with a strong applied focus<br>• Commitment to leadership and growth in all counties | *"We have the top schools of Pharmacy and Dentistry. Faculty are active in public service work.* |
| **High Quality, High Value** | • Many express deep pride in UNC being a top-tier, publicly accessible university | *"If we show academic excellence, commitment to affordability and the genuine care this place has for students, we are showing the best of who we are."* |
| **Loyalty & Legacy** | • "Irrational love" for UNC among alumni and students<br>• Strong bonds that include critique and desire to improve | *"Carolina has that passion. People love being there. They love coming back, warts and all."* |
| **Athletics as Connector** | • Global brand recognition in basketball, field hockey, soccer, football, and other sports<br>• The "front porch", an access point to the university | *"One of our best marketing vehicles is our commitment to excellence in athletics."* |

PHASE 1 FINDINGS

# Challenges

**Perceptions of Inaccessibility**
The top priority of any campaign must be to bridge the perception gap between prestige and accessibility.

**Political Polarization**
Carolina is a university for all Carolinians – we cannot let opposing political agendas distract from our narratives.

**Narrative Control**
UNC-Chapel Hill is a higher education leader. As such, we must lead the conversation, not react to it.

**Under-Realized Support**
While consistently state-supported, UNC could better tap into its community of passionate supporters.

From the state perspective, we need to be demystified – we are not hippies on a hill. We are of and for the state.

We have deep red rural areas and deep blue metro areas, and UNC is where all the biggest fights play out.

Ever since Silent Sam, our messaging has always been defensive in nature.

People are stunned by the number of our donors, but donors are not giving to their capacity.

# Opportunities

**When combined with the opportunities identified by affiliate audiences, we see three key areas of focus.**

**Reassert the "University of the People"**
Carolina's mission and traditions of excellence and innovation can be used to point forward.

**Elevate Brand Pillars**
Make Carolina's discoveries, students, and culture as visible statewide as its athletics and health system.

**Champion Constructive Dialogue**
Use the university's reputation to lead conversations about public responsibility and public engagement.

People don't need convincing to love UNC;
they need reassurance they have access to it.

People think about a hospital and a sports team
with a university on the side.
But I want to talk about the academic brand.

In order to support the mission of being by the people and for the people, UNC has to be a place where we can bring those backgrounds and viewpoints together.

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THE UNIVERSITY *of* NORTH CAROLINA

**FIRST. AND FOR ALL.**

# Brand Reputation



SET THE
BLUE STANDARD.

THE UNIVERSITY of NORTH CAROLINA

FIRST. AND FOR ALL.

# Brand Reputation



# Athletics



Learn more at unc.edu

## SOME PROGRAMS HAVE MORE

# BANNER YEARS THAN OTHERS.




At UNC-Chapel Hill, we're proud of our athletics teams' successes. And we don't just shout it from the rafters—we hang tributes to them there as well. Because Tar Heel squads have won an impressive total of 52 NCAA D-I national championships. Which is why they're looked up to in more ways than one.

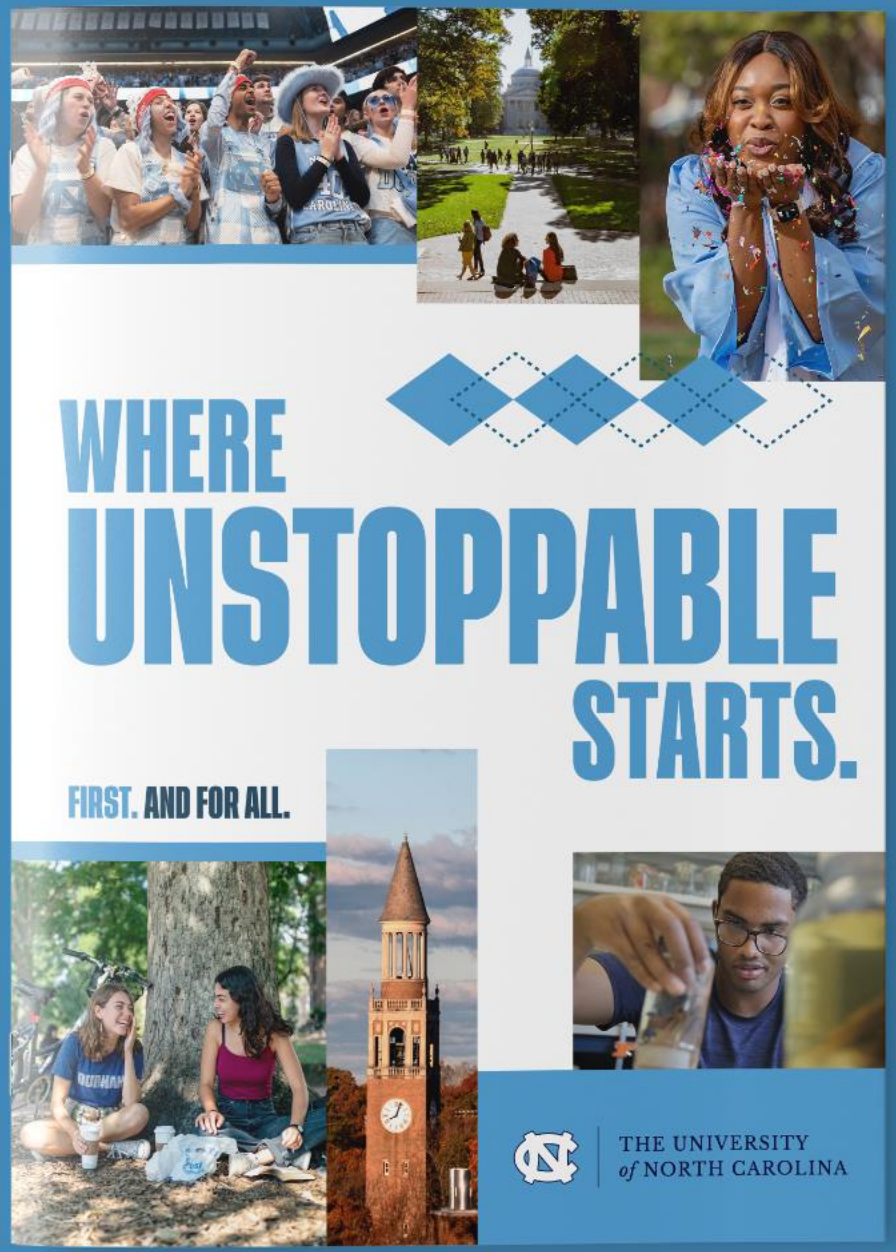
THE UNIVERSITY *of* NORTH CAROLINA

**FIRST. AND FOR ALL.**

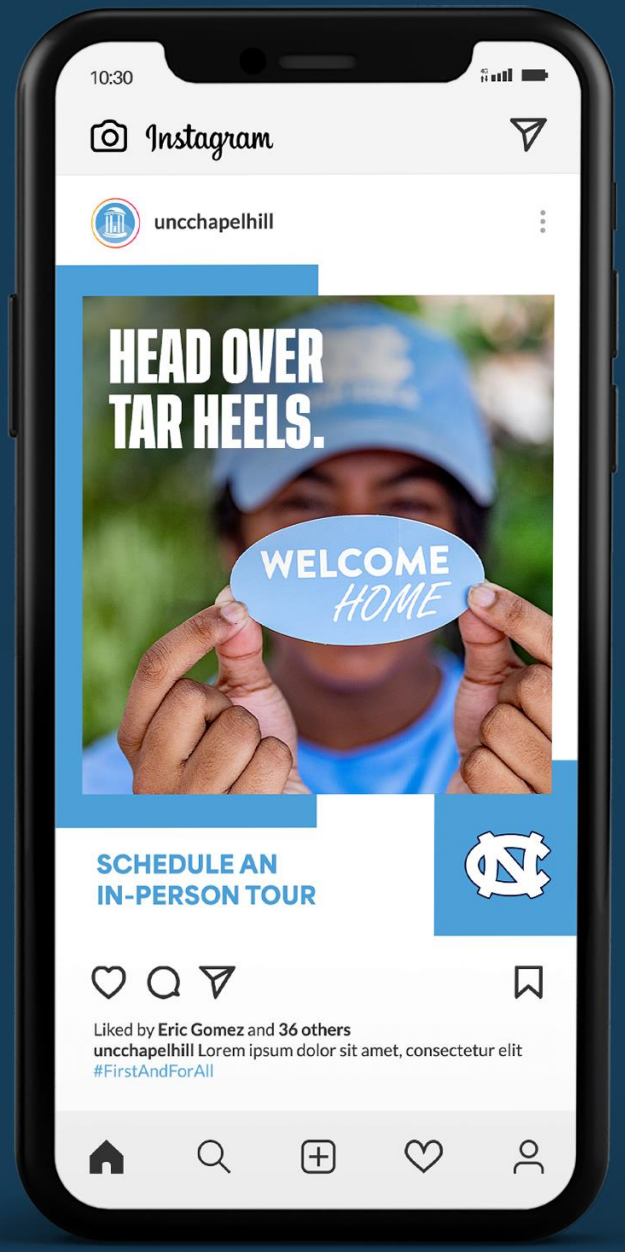
# Athletics


GoHeels.com
NISSAN
verizon
#GoHeels
FIRST AND
TENACIOUS.
FIRST. AND FOR ALL.
@GoHeels
WELLS FARGO
THE RAMS CLUB
RamsClub.com
UNIVERSITY OF NORTH CAROLINA

# Admissions


WHERE
UNSTOPPABLE
STARTS.
FIRST. AND FOR ALL.
THE UNIVERSITY
of NORTH CAROLINA

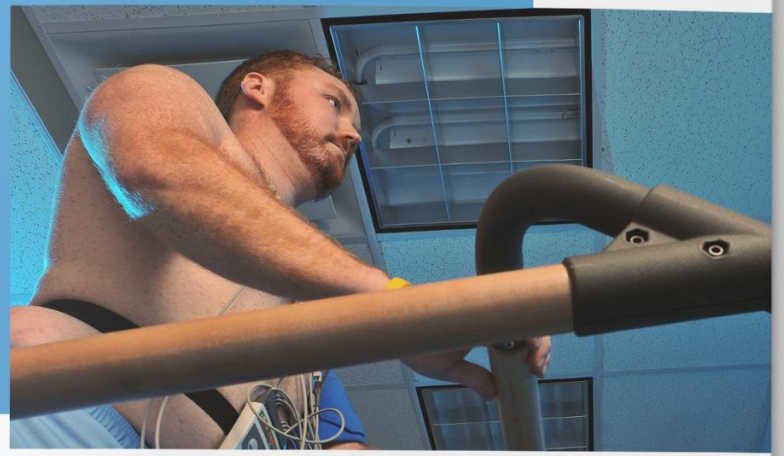
# Admissions


10:30
Instagram
uncchapelhill
HEAD OVER
TAR HEELS.
WELCOME
HOME
SCHEDULE AN
IN-PERSON TOUR
Liked by Eric Gomez and 36 others
uncchapelhill Lorem ipsum dolor sit amet, consectetur elit
#FirstAndForAll

# Health Care

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Learn more at unc.edu



HEELS GET PEOPLE
BACK ON THEIR FEET.

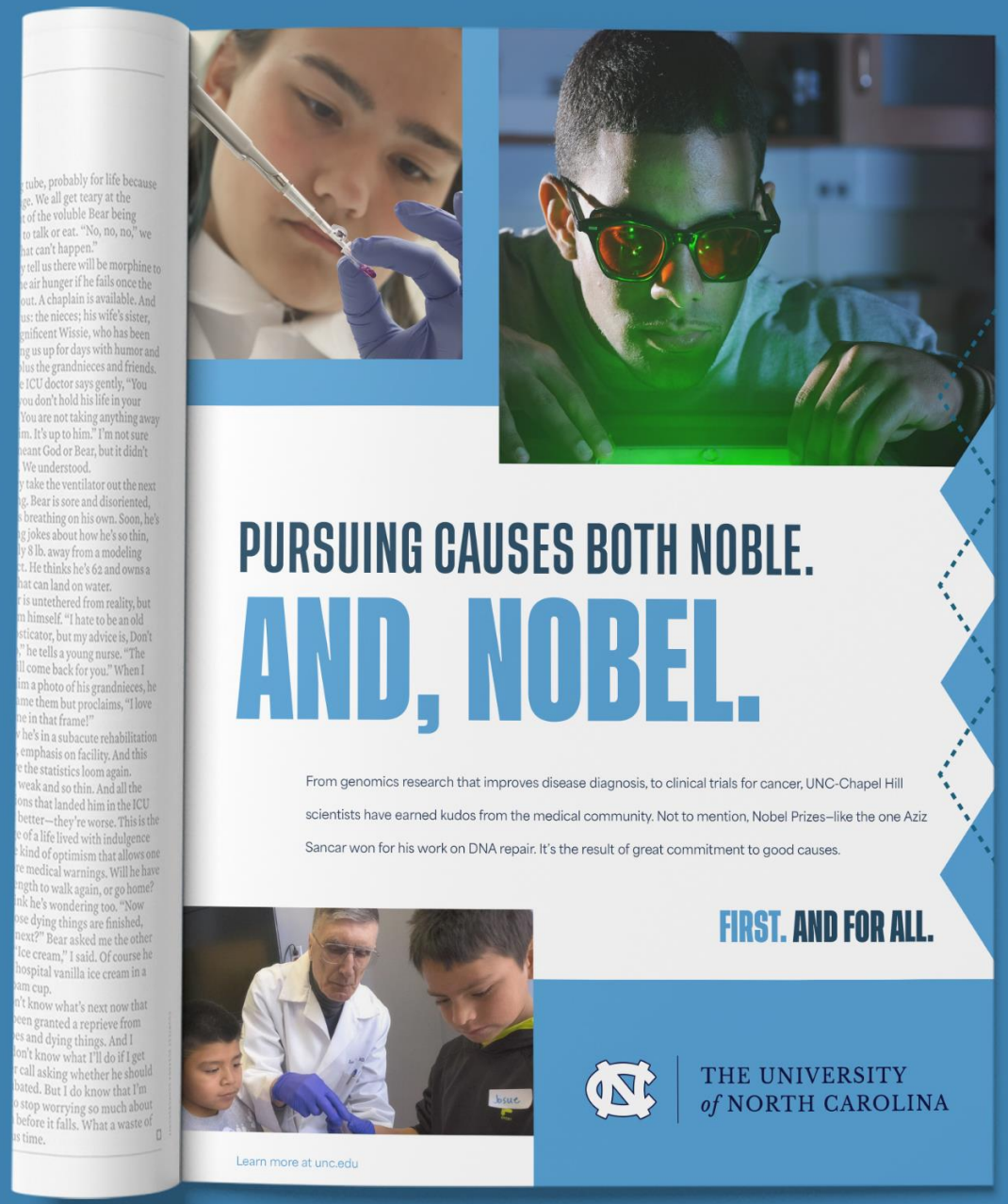


When it comes to healthcare, UNC-Chapel Hill gives fellow North Carolinians a leg up. Providing mobile health units to rural communities, telehealth support through UNC Project ECHO, placing new clinicians in underserved communities, and more. Leave it to Tar Heels to make great strides.

THE UNIVERSITY of NORTH CAROLINA

FIRST. AND FOR ALL.

# Research


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THE UNIVERSITY of NORTH CAROLINA

# Activation


I'M NOT JUST CHASING A DEGREE.
BUT A HIGHER DEGREE OF IMPACT.
“Many communities in rural North Carolina have limited access to health resources. As a doctor, I will become a source of support and healing for people.”
BRANDON FEASTER
MD Candidate Class of 2028
School of Medicine
THE UNIVERSITY of NORTH CAROLINA
SEE THE STORY
FIRST. AND FOR ALL.

# Activation

EPIC STORIES,

# INKED IN CAROLINA BLUE.



"It's somewhere you want to spend time. Carolina is a place that supports and fosters young people's dreams."

**JENNY HAN**

Author of "The Summer I Turned Pretty" Class of 2002

THE UNIVERSITY *of* NORTH CAROLINA

SEE THE STORY

FIRST. AND FOR ALL.

# Activation


10:30
Instagram
uncchapelhill
FROM CAROLINA BLUE
TO OLYMPIC GOLD.
MIA HAMM
Olympic Gold Medalist Class of 1993
Liked by Tina Yan and 36 others
uncchapelhill Lorem ipsum dolor sit amet, consectetur elit
#FirstAndForAll


10:30
Instagram
uncchapelhill
ONE HEEL.
ONE GIANT LEAP.
ZENA CARDMAN
Astronaut Class of 2010
Liked by Tina Yan and 36 others
uncchapelhill Lorem ipsum dolor sit amet, consectetur elit
#FirstAndForAll



THE UNIVERSITY
*of* NORTH CAROLINA

# Brand Strategy Update

Dr. Adrienne King
*Associate Vice Chancellor for Marketing*



THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

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| **Loyalty & Legacy** | • "Irrational love" for UNC among alumni and students<br>• Strong bonds that include critique and desire to improve | *"Carolina has that passion. People love being there. They love coming back, warts and all."* |
| **Athletics as Connector** | • Global brand recognition in basketball, field hockey, soccer, football, and other sports<br>• The "front porch", an access point to the university | *"One of our best marketing vehicles is our commitment to excellence in athletics."* |

PHASE 1 FINDINGS

# Challenges

**Perceptions of Inaccessibility**
The top priority of any campaign must be to bridge the perception gap between prestige and accessibility.

**Political Polarization**
Carolina is a university for all Carolinians – we cannot let opposing political agendas distract from our narratives.

**Narrative Control**
UNC-Chapel Hill is a higher education leader. As such, we must lead the conversation, not react to it.

**Under-Realized Support**
While consistently state-supported, UNC could better tap into its community of passionate supporters.

From the state perspective, we need to be demystified – we are not hippies on a hill. We are of and for the state.

We have deep red rural areas and deep blue metro areas, and UNC is where all the biggest fights play out.

Ever since Silent Sam, our messaging has always been defensive in nature.

People are stunned by the number of our donors, but donors are not giving to their capacity.

# Opportunities

**When combined with the opportunities identified by affiliate audiences, we see three key areas of focus.**

**Reassert the "University of the People"**
Carolina's mission and traditions of excellence and innovation can be used to point forward.

**Elevate Brand Pillars**
Make Carolina's discoveries, students, and culture as visible statewide as its athletics and health system.

**Champion Constructive Dialogue**
Use the university's reputation to lead conversations about public responsibility and public engagement.

People don't need convincing to love UNC;
they need reassurance they have access to it.

People think about a hospital and a sports team
with a university on the side.
But I want to talk about the academic brand.

In order to support the mission of being by the people and for the people, UNC has to be a place where we can bring those backgrounds and viewpoints together.

# COMMITTED TO PUBLIC PROGRESS

## Carolina is powered by purpose – to stand with, strengthen and advance North Carolina.

As the nation's first public university, UNC-Chapel Hill was built to serve the people – and that purpose hasn't wavered. Our strength lies in our commitment to public progress: research that drives breakthroughs, education that uplifts, athletics and arts that inspire, and partnerships that solve real problems. From the mountains to the coast, Carolina's traditions light the way to what's next for our state and its residents. Our commitment has resulted in discoveries, leaders and programs with proven public value. North Carolinians help shape our priorities and direction, ensuring that Carolina reflects the needs, values and aspirations of the people we serve. Because public is not just about how we're supported – it's who we serve.

# Concept Overview

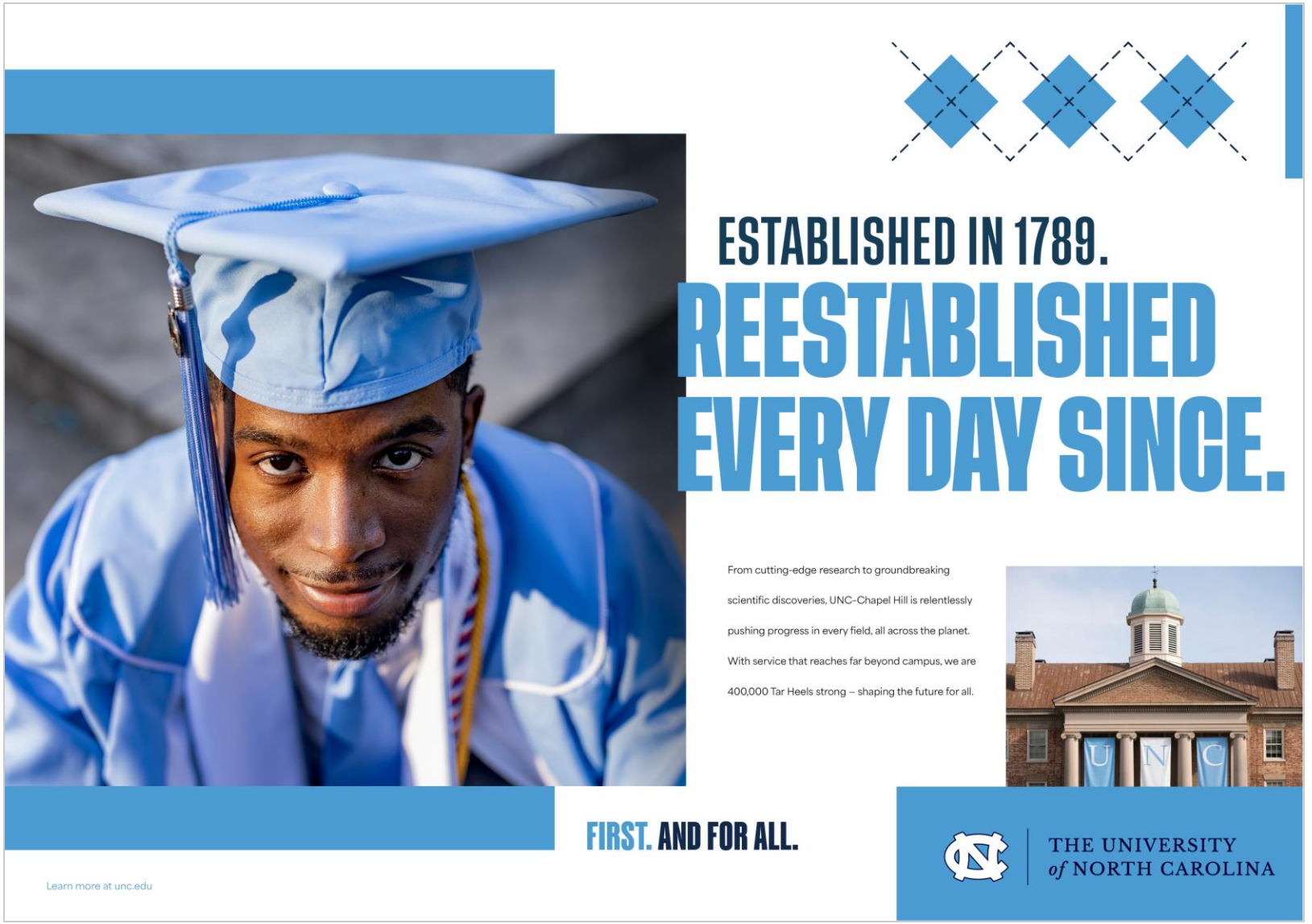
It’s one thing to be first. Yet, as impressive as that may sound, firsts don’t mean a thing—unless they make a lasting impact. And at UNC-Chapel Hill, ours have.

We are the nation’s first public university. The first to establish a school of public health, helping underserved communities. A commitment to serving first generation students as well as generations of Tar Heels. First in athletics, countless times over.

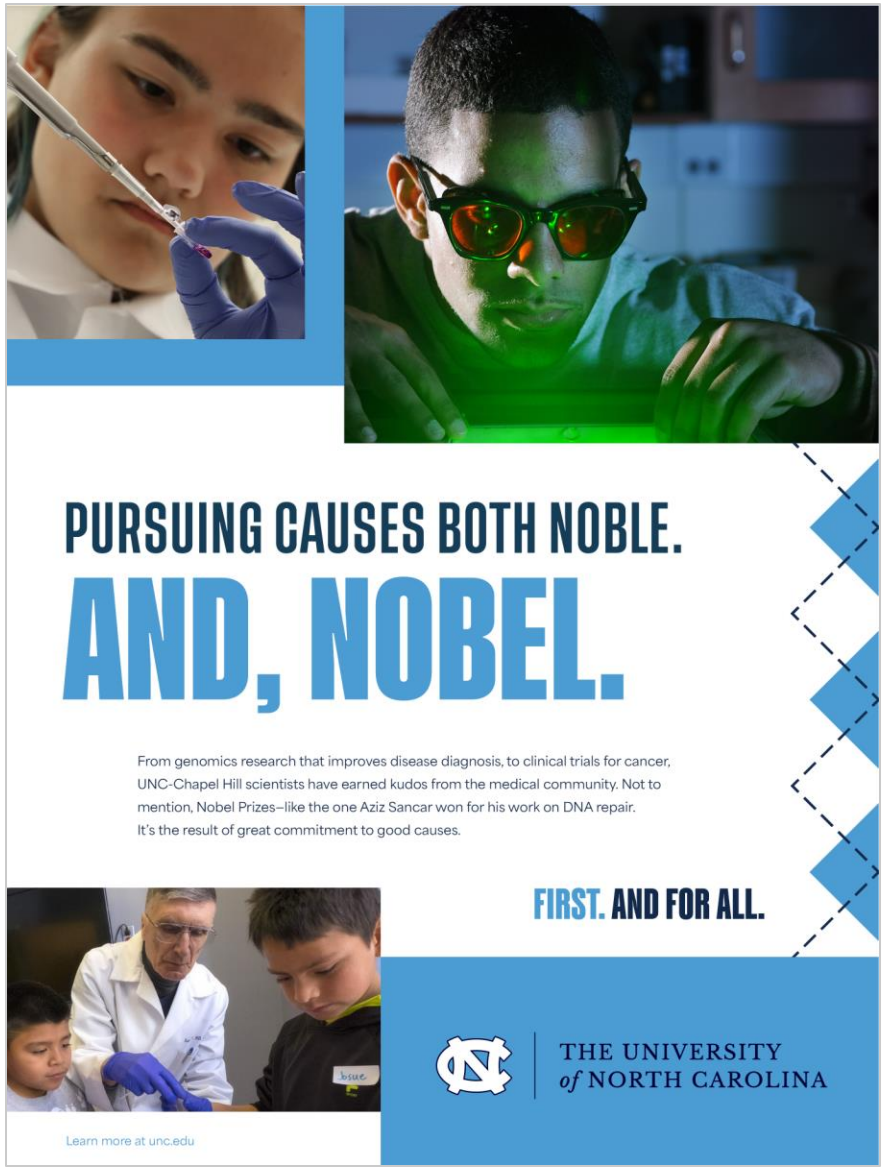
And the first to respond, without fail, when the call for help rings out. Not just in North Carolina’s 100 counties, but in all 50 states as well.

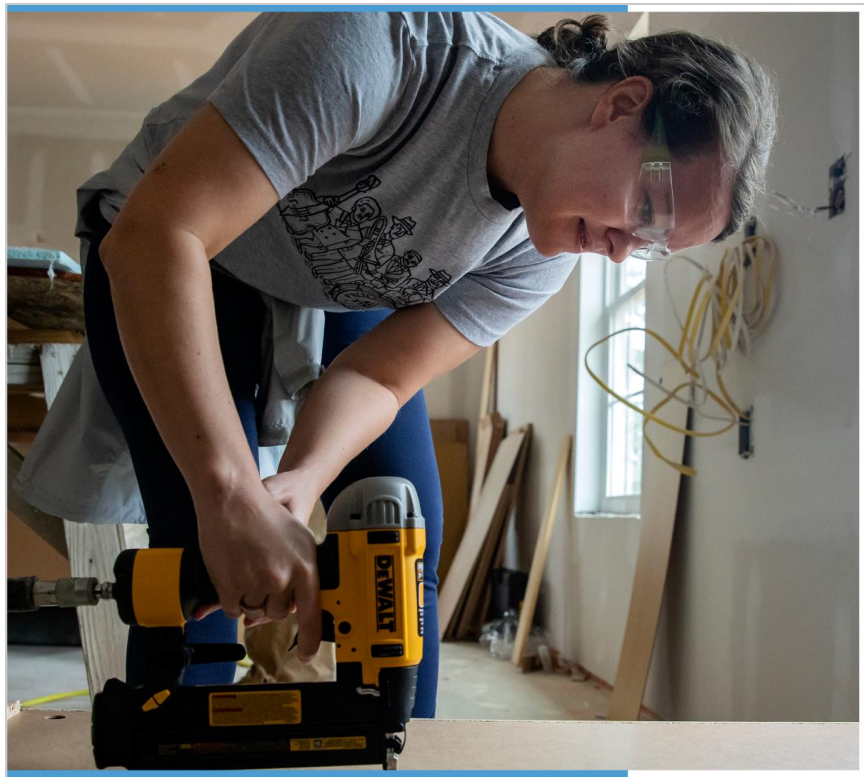
Because that’s what Tar Heels are all about: taking first steps that lead to momentous change. For countries, counties, communities, individuals—and the entire world.

PRINT AD


ESTABLISHED IN 1789.
REESTABLISHED
EVERY DAY SINCE.
From cutting-edge research to groundbreaking scientific discoveries, UNC-Chapel Hill is relentlessly pushing progress in every field, all across the planet. With service that reaches far beyond campus, we are 400,000 Tar Heels strong – shaping the future for all.
U N C
FIRST. AND FOR ALL.
THE UNIVERSITY of NORTH CAROLINA
Learn more at unc.edu

## PRINT AD


PURSUING CAUSES BOTH NOBLE.
AND, NOBEL.
From genomics research that improves disease diagnosis, to clinical trials for cancer, UNC-Chapel Hill scientists have earned kudos from the medical community. Not to mention, Nobel Prizes–like the one Aziz Sancar won for his work on DNA repair. It's the result of great commitment to good causes.
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# ONCE AGAIN, CAROLINA LEADS THE NATION IN ASSISTS.

## FIRST. AND FOR ALL.



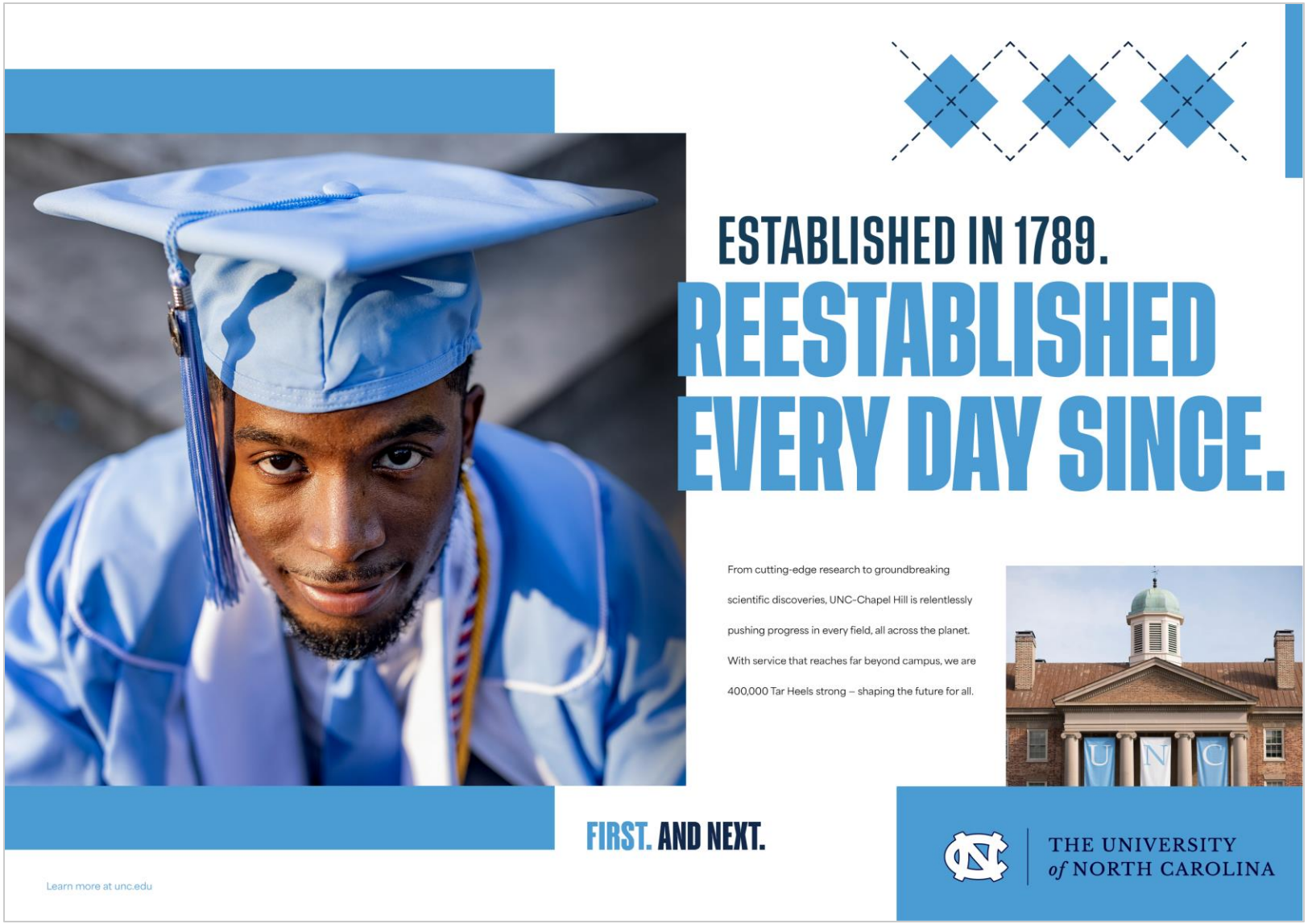
THE UNIVERSITY of NORTH CAROLINA

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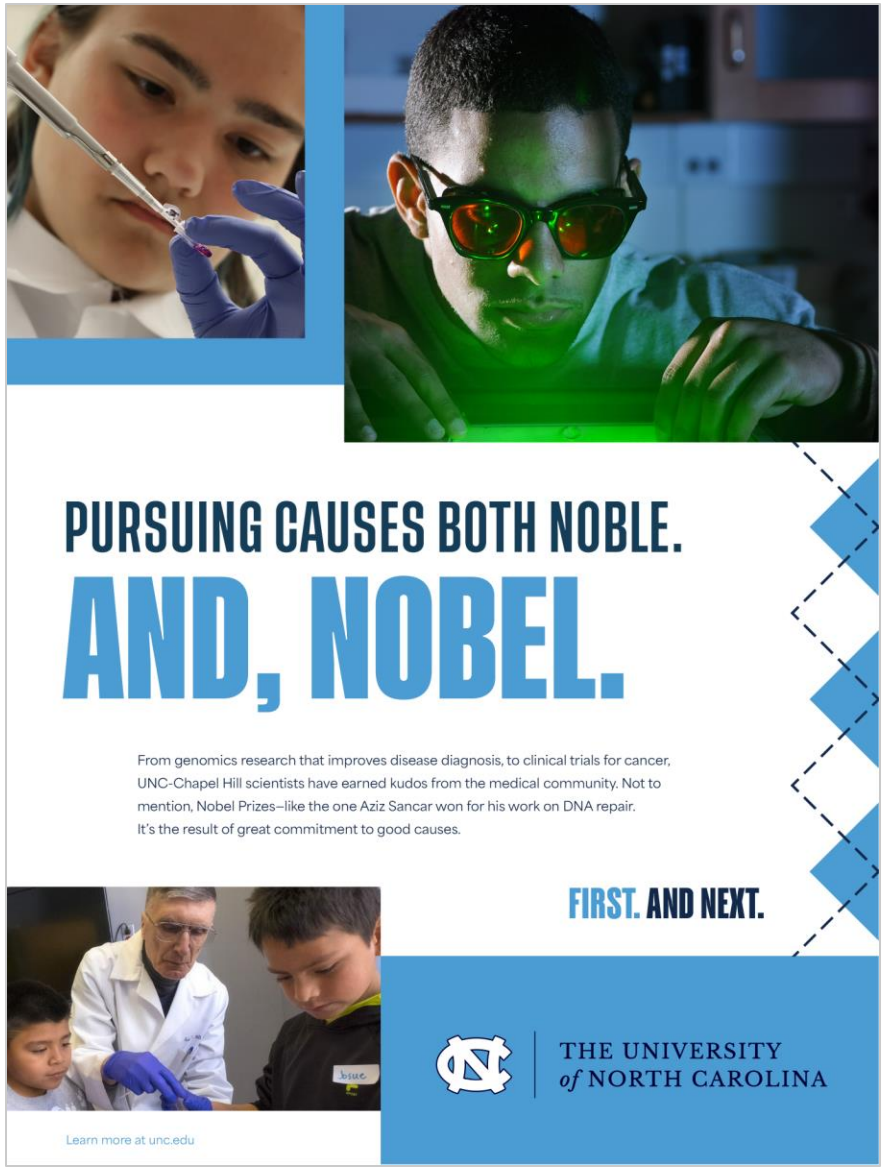
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SET THE
BLUE STANDARD.
THE UNIVERSITY
of NORTH CAROLINA
FIRST. AND FOR ALL.


I'M NOT JUST CHASING A DEGREE.
BUT A HIGHER DEGREE OF IMPACT.
Many communities in rural North Carolina have limited access to health resources. As a doctor, I will become a source of support and healing for people.
BRANDON FEASTER
MD Candidate Class of 2028
School of Medicine
THE UNIVERSITY of NORTH CAROLINA
SEE THE STORY
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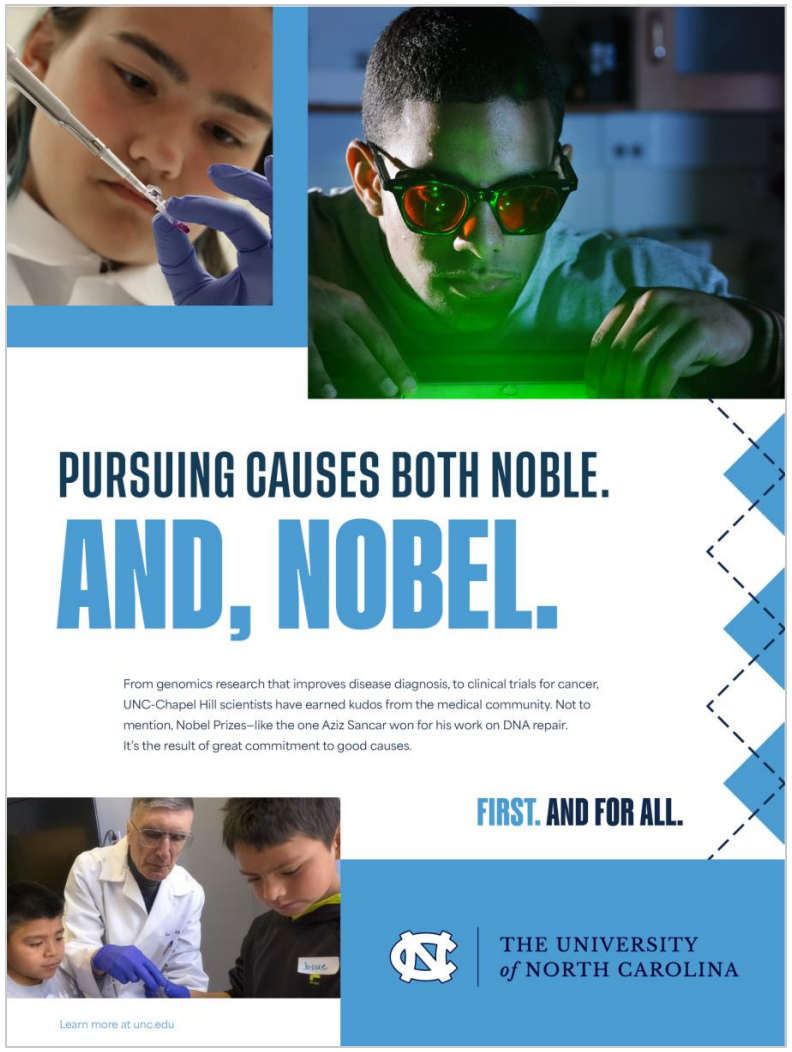
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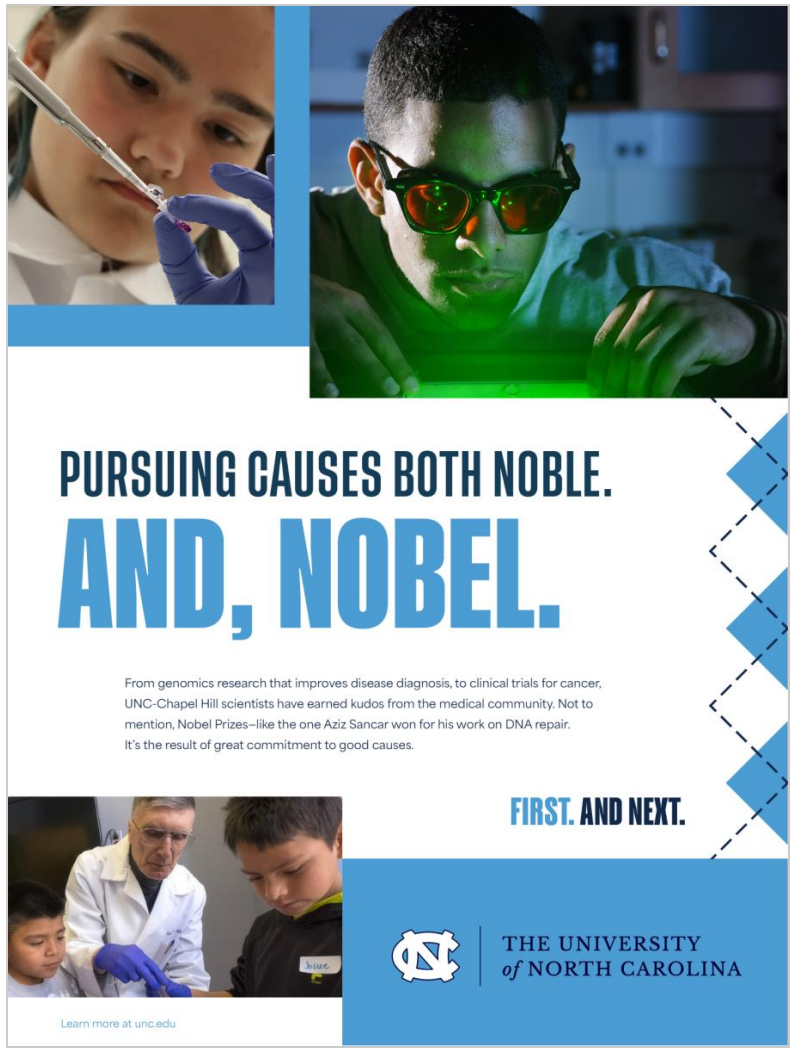
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# SIDE BY SIDE


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THE UNIVERSITY
*of* NORTH CAROLINA

# University Logo

**October 2025**



THE UNIVERSITY OF NORTH CAROLINA

UNIVERSITY LOGO

01

# Rollout Plan and Brand Presence

LOGO ROLLOUT

# Presentations: September-October 2025

- **Sept.** – Chancellor Roberts
- **Sept.** – Chancellor’s leadership team
- **Sept.** – Provost Dean
- **Sept.** – Dean’s Team
- **Sept.** – UNC System
- **Oct.** – Communications Cabinet
- **Oct.** – Communications Council
- **Oct.** – 542 Club
- **Oct.** – Board of Visitors

LOGO ROLLOUT

# Brand Launch: November 2025

- **Nov. 3-5** – Create custom brand books for each dean, vice chancellor and vice provost (share with each lead communicator as well)
- **Nov. 3-5** – Send out all logo files
- **Nov. 3-5** – Update identity.unc.edu website with new guidelines and downloadable resources
  - PowerPoint templates, email signature template, Zoom backgrounds, social media profile image template
- **Nov. 6** – The Well will use the new brand in the template and in story visuals
- **Nov. 17** – Send new stationery files to The Print Stop
- **Nov. 17-18** – Special Communications Cabinet meetings about brand architecture
- **Nov. 19-21** – Office hours
- **Dec.** – Proactively meet with schools/divisions, accept any invitation to present or answer any questions
- **Dec.** – Launch new website toolbar

LOGO ROLLOUT

# Establishing Brand Presence: 2026-2027

- **Jan. 30** – All websites and digital materials are expected to be updated
- **Feb.-May** – Host brand camp training sessions
- **July 2026** – Brand audit
- **Jan. 30, 2026-June 30, 2027** – All print materials and campus signage are expected to use the new logo when items are ready to be reprinted or reproduced
- **July 2027** – Brand audit

02

UNIVERSITY LOGO

# Resources and Support

UNIVERSITY LOGO

# Resources and Support

- **General Assets**
  - Argyle
  - Tagline
  - Interlocking NC
  - Favicon
  - Color swatches
  - Diamond element
- **Print Templates**
  - Flyer
  - Postcard
  - Standing banner
  - Hanging banner
  - Invitation
  - Thank you card
  - Brochure
  - Poster
  - Print ad suite
- **Digital Templates**
  - Email header
  - PowerPoint presentation
  - Zoom backgrounds
  - Excel spreadsheet
  - Digital ad suite
- **Video**
  - Transition effects
  - Animated logo
  - Lower thirds
- **Social Media**
  - Blue Sky
  - LinkedIn
  - Instagram
  - Facebook
  - X
  - Tik Tok
  - YouTube
  - Vimeo
  - Social media profile templates
- **Request form for website header**



The University
*of* North Carolina

# Brand Strategy

**October 2025**

THE UNIVERSITY OF NORTH CAROLINA

BRAND STRATEGY

# Creative Concept

OUT-OF-HOME


The University
of North Carolina
at Chapel Hill
UNC.EDU
FIRST. AND FOR ALL.
BREAKTHROUGHS DON'T WAIT.
NEITHER DO WE.

# CAMPUS ACTIVATION

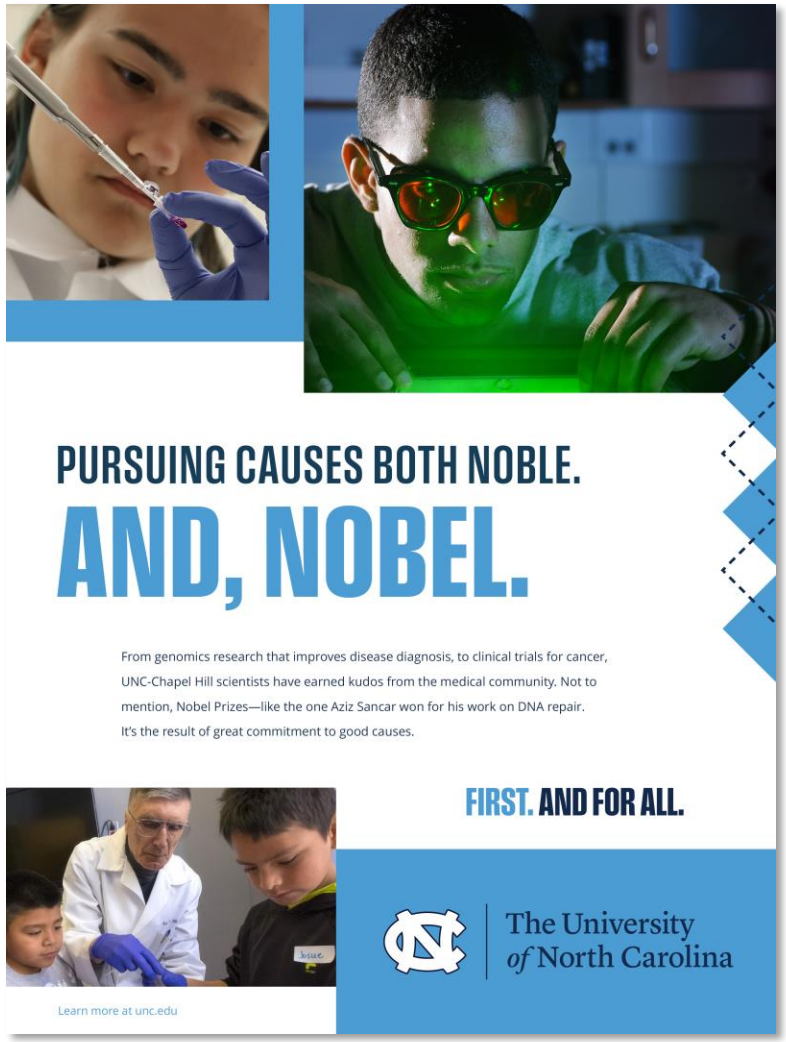


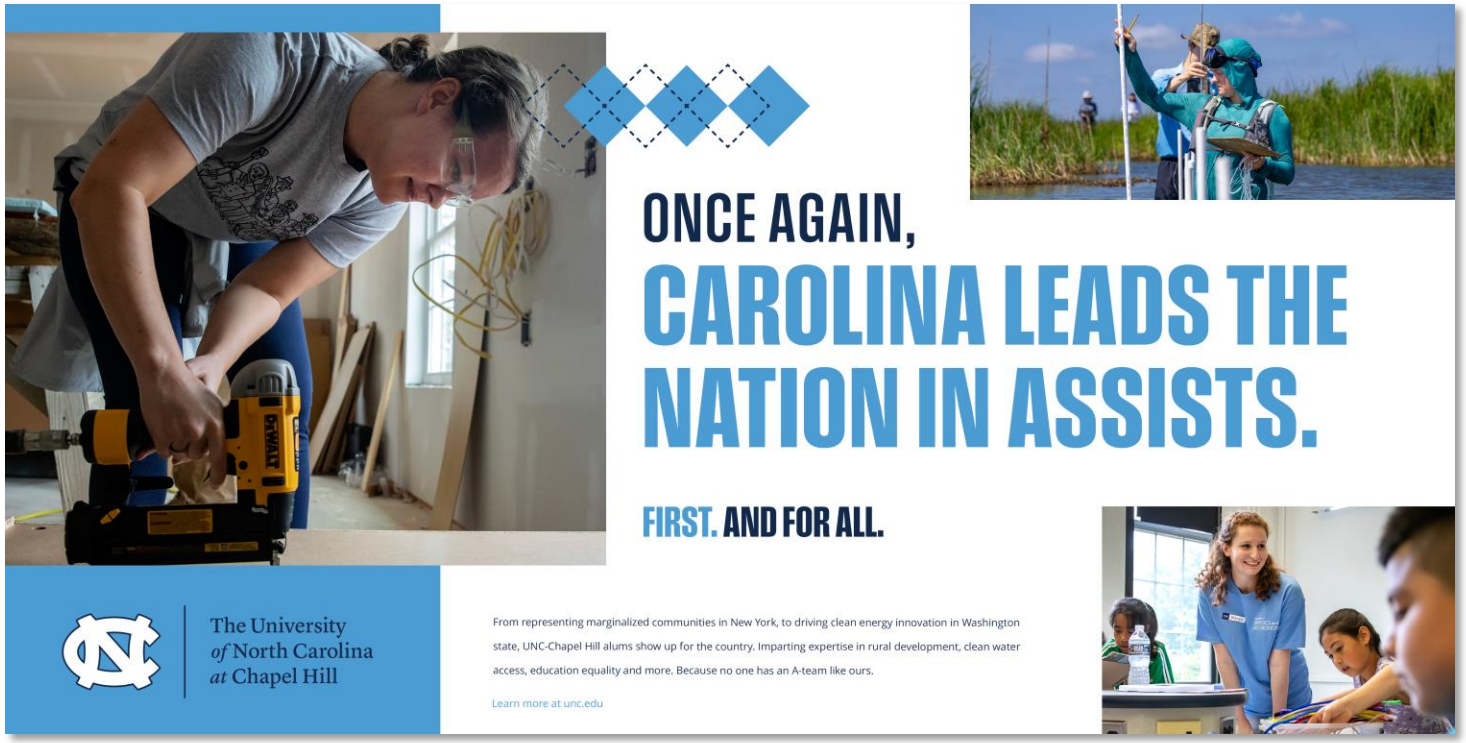


# CAMPUS ACTIVATION



# PRINT ADS


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# DIGITAL AD

Search

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**Andrew Jacobs**
Art Director and Brand Manager
Chapel Hill, North Carolina
University of North Carolina at Chapel Hill

Profile viewers 26
View all analytics

Access exclusive tools & insights
Try Premium for $0

Saved items
Groups
Newsletters
Events

**The University of North Carolina at Chapel Hill**
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unc.edu
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10

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Brian Mitchell commented on this

**Maurizio Leschiutta** · 3rd+
Director of Motorsports
1d ·
+ Follow

The Automobili Lamborghini GTP Team concludes its IMSA WeatherTech




**Andrew, explore relevant opportunities with CRB**

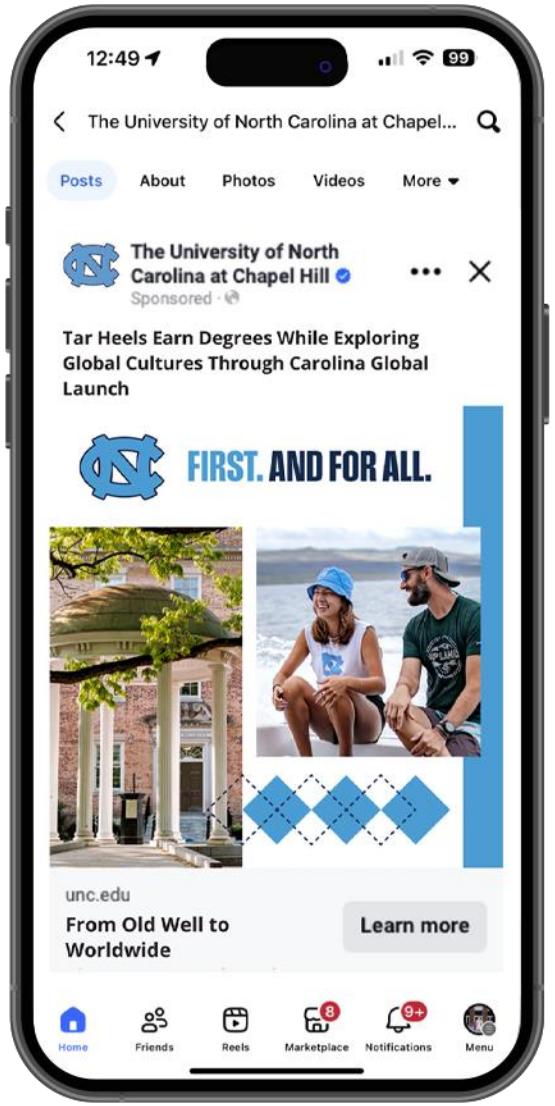
Get the latest jobs and industry news

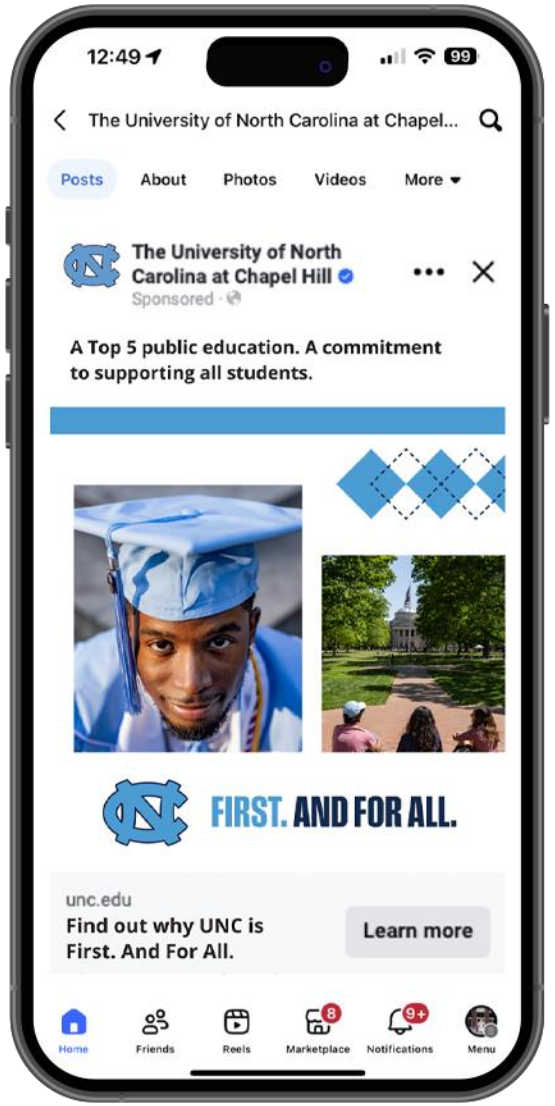
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# DIGITAL ADS


12:49
99
The University of North Carolina at Chapel...
Posts
About
Photos
Videos
More
The University of North Carolina at Chapel Hill
Sponsored
Tar Heels Earn Degrees While Exploring Global Cultures Through Carolina Global Launch
FIRST. AND FOR ALL.
unc.edu
From Old Well to Worldwide
Learn more
Home
Friends
Reels
Marketplace
Notifications
Menu


12:49
99
The University of North Carolina at Chapel...
Posts
About
Photos
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More
The University of North Carolina at Chapel Hill
Sponsored
A Top 5 public education. A commitment to supporting all students.
FIRST. AND FOR ALL.
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Find out why UNC is First. And For All.
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Menu

DIGITAL AD

The Charlotte Observer

HELENE RECOVERY NEWS CHARLOTTEFIVE SPORTS BUSINESS OPINION GAMES OBITUARIES FINANCE CAREERS GUIDES 90°F




FROM FIRST TO
LASTING IMPACT.



FIRST. AND FOR ALL.

JOIN THE MISSION

The University of North Carolina


DEVELOPMENT

## The Cain Center Expansion



# SOCIAL ACTIVATION





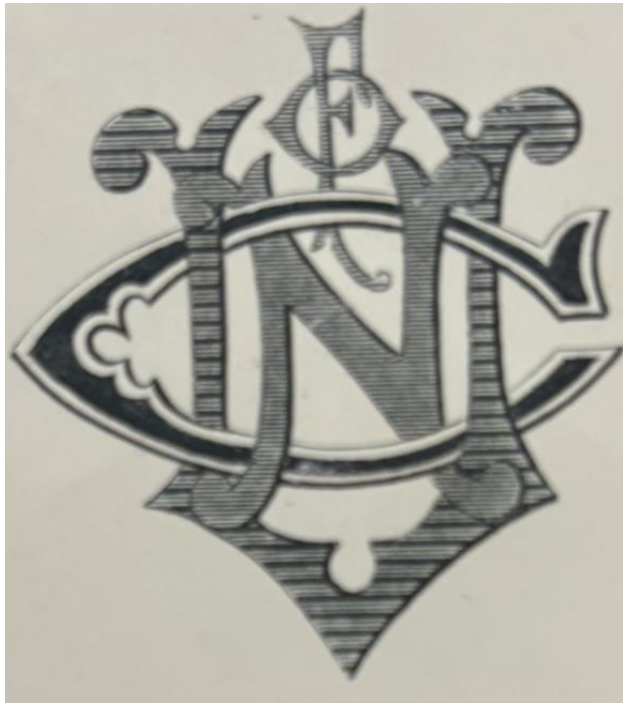

BRAND STRATEGY

# University Logo

BRAND STRATEGY

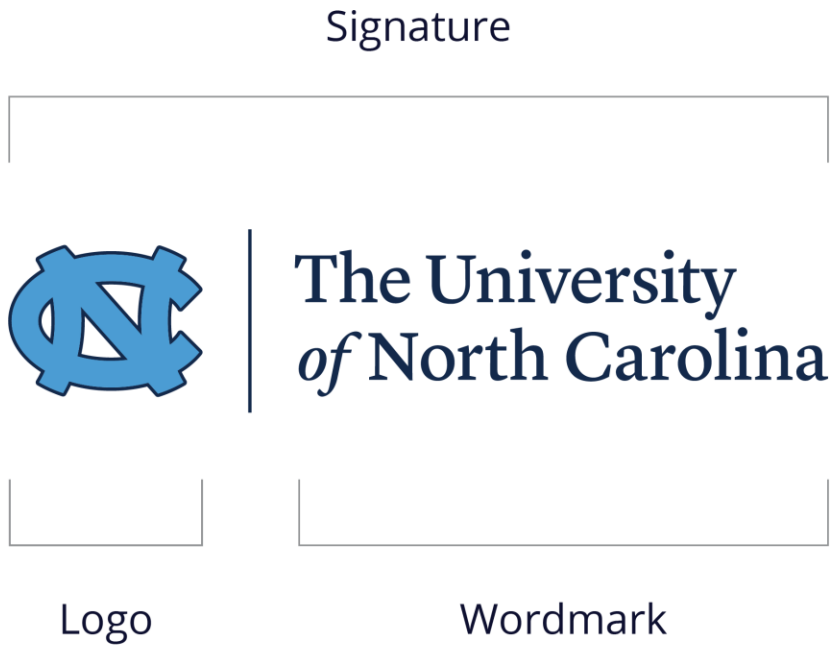
# Why, and Why Now?

- Well-established globally recognized logo since the 1870s
- Reflects the people and the state we serve
- Leverages existing brand strength
- Unifies across the University
- Streamlines the logo system
- Increases digital accessibility and legibility
- Stands out amongst peer universities
- A unified brand strategy drives additional T&L revenue
- Aligns with the launch of the brand reputation campaign



# Glossary of Terms

- **Logo:** The graphic element
- **Wordmark:** The text element
- **Signature:** The entire brand mark
- **Brand Architecture:** The structure of the system
- **Division/School:** Vice chancellor unit, vice provost unit, school, the College
- **All Other Units:** Programs, centers, institutes, departments, etc.
- **Special Marks:** University graphic elements used in select instances



BRAND ARCHITECTURE

# Current and Primary Signatures

## Current







## Primary







## Primary






PROPOSED LOGO SYSTEM

# Color Options


















BRAND ARCHITECTURE

# Division/School Signatures

Current

UNC | COLLEGE OF ARTS AND SCIENCES

UNC

COLLEGE OF ARTS AND SCIENCES

Proposed

College of Arts and Sciences
The University *of* North Carolina

College of Arts and Sciences
The University *of* North Carolina

BRAND ARCHITECTURE

# Division/School Signatures

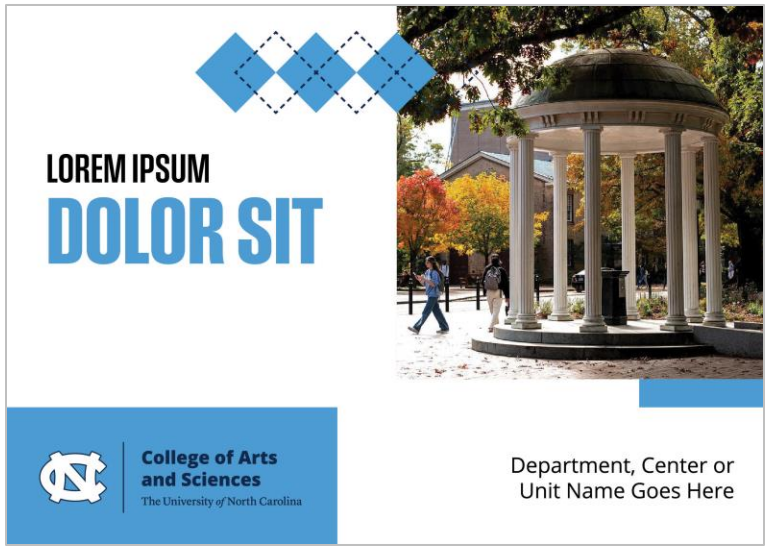
- Adams School of Dentistry
- Campus Safety
- College of Arts and Sciences
- Eshelman School of Pharmacy
- Finance and Operations
- Gillings School of Global Public Health
- Global Affairs
- The Graduate School
- Human Resources
- Hussman School of Journalism and Media
- Information Technology Services
- Innovate Carolina
- Kenan-Flagler Business School
- Lineberger Comprehensive Cancer Center
- Office of the Chancellor
- Office of Enrollment
- Office of the Executive Vice Chancellor and Provost
- Public Affairs
- Research
- School of Civic Life and Leadership
- School of Data Science and Society
- School of Education
- School of Government
- School of Information and Library Science
- School of Law
- School of Medicine
- School of Nursing
- School of Social Work
- Student Affairs
- Summer School
- UNC Police
- UNC Visitors Center
- University Communications and Marketing
- University Compliance Office
- University Counsel
- University Development
- University Libraries

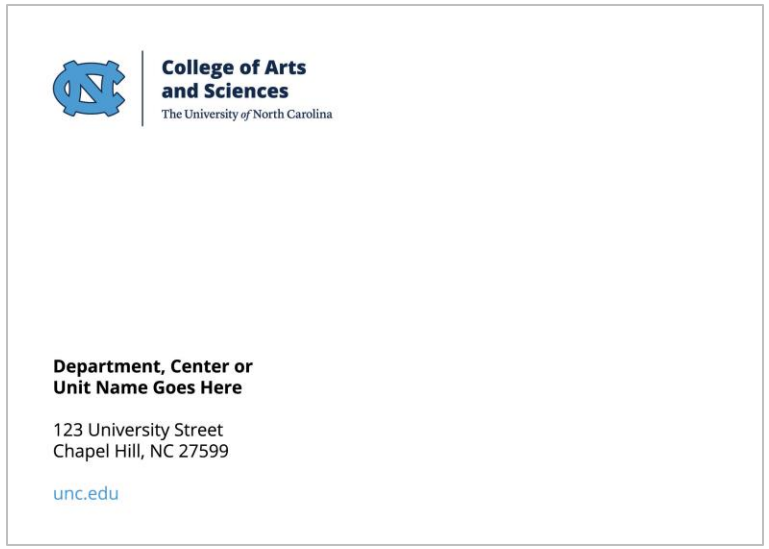
BRAND ARCHITECTURE

# Other Unit Examples

Division/School Signature

Department, Center or Unit Name







Division/School Signature

Department, Center or Unit Name

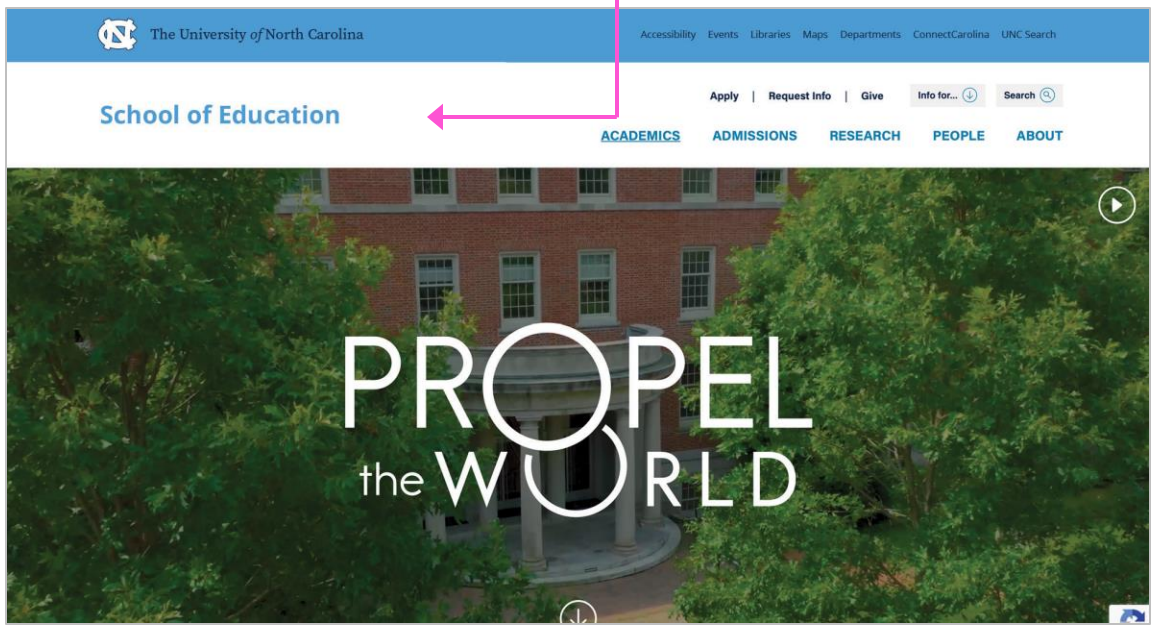
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Division/School Signature

# Websites

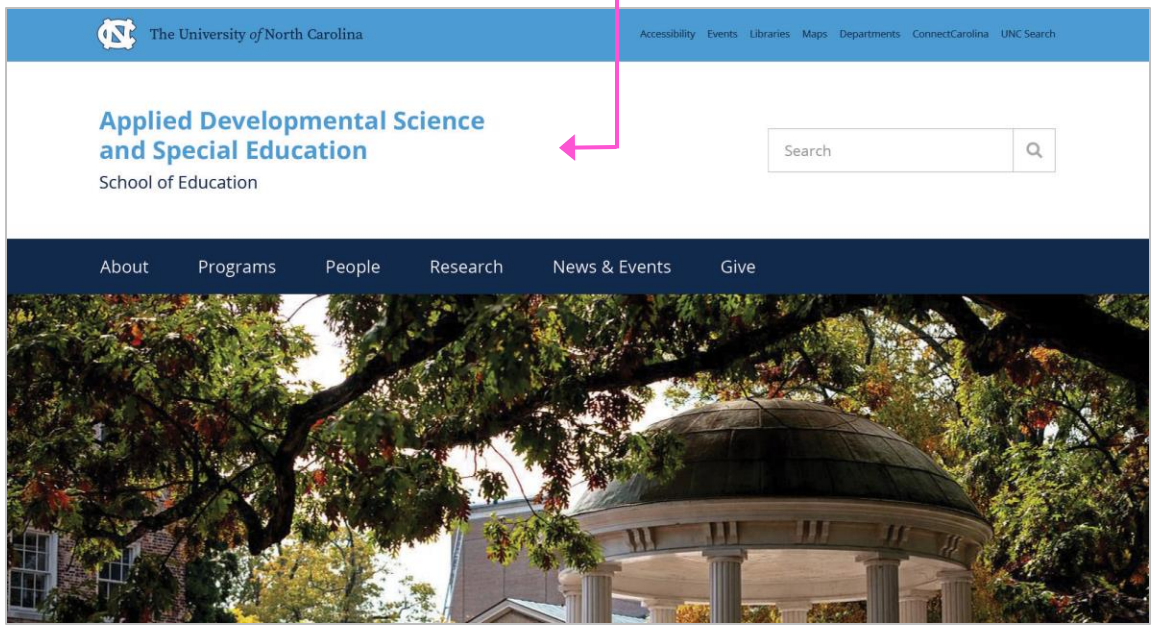
Updated Toolbar

Digital Typeset




Updated Toolbar

Digital Typeset



# Special Marks








# Budget Considerations

- Division/School design files
- Letterhead for schools and units
- Websites and social media
- Magazines/newsletters
- Collateral/giveaways
- Campus/building signage

ROLLOUT

# Rollout Timeline and Support

- University Signature files will be shared in the next few weeks
- Updating digital materials and websites will be a priority over the next three months
- Print materials will be produced as needed over the next year and a half
- Support will be offered all along the way
  - Office hours
  - Dedicated meetings with Schools/Divisions
  - Training sessions
  - Resources and templates



The University
*of* North Carolina

# Brand Strategy

**October 2025**

THE UNIVERSITY OF NORTH CAROLINA

PHASE 1 FINDINGS

# Distinct Attributes

**Carolina's distinct advantages are highly recognized, fueling our critical role in the state.**

| | | |
|---|---|---|
| **Flagship Identity** | • First operating public university in the U.S.<br>• North Carolina's intellectual and economic engine | *"The next chapter of the state is tied directly to this place."* |
| **Service-Oriented Excellence** | • Top schools in medicine, pharmacy, journalism, public health and government, with a strong applied focus<br>• Commitment to leadership and growth in all counties | *"We have the top schools of Pharmacy and Dentistry. Faculty are active in public service work.* |
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As the nation's first public university, UNC-Chapel Hill was built to serve the people – and that purpose hasn't wavered. Our strength lies in our commitment to public progress: research that drives breakthroughs, education that uplifts, athletics and arts that inspire, and partnerships that solve real problems. From the mountains to the coast, Carolina's traditions light the way to what's next for our state and its residents. Our commitment has resulted in discoveries, leaders and programs with proven public value. North Carolinians help shape our priorities and direction, ensuring that Carolina reflects the needs, values and aspirations of the people we serve. Because public is not just about how we're supported – it's who we serve.

01

BRAND STRATEGY

# Creative Concept










# Concept Overview

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NEITHER DO WE.

# CAMPUS ACTIVATION

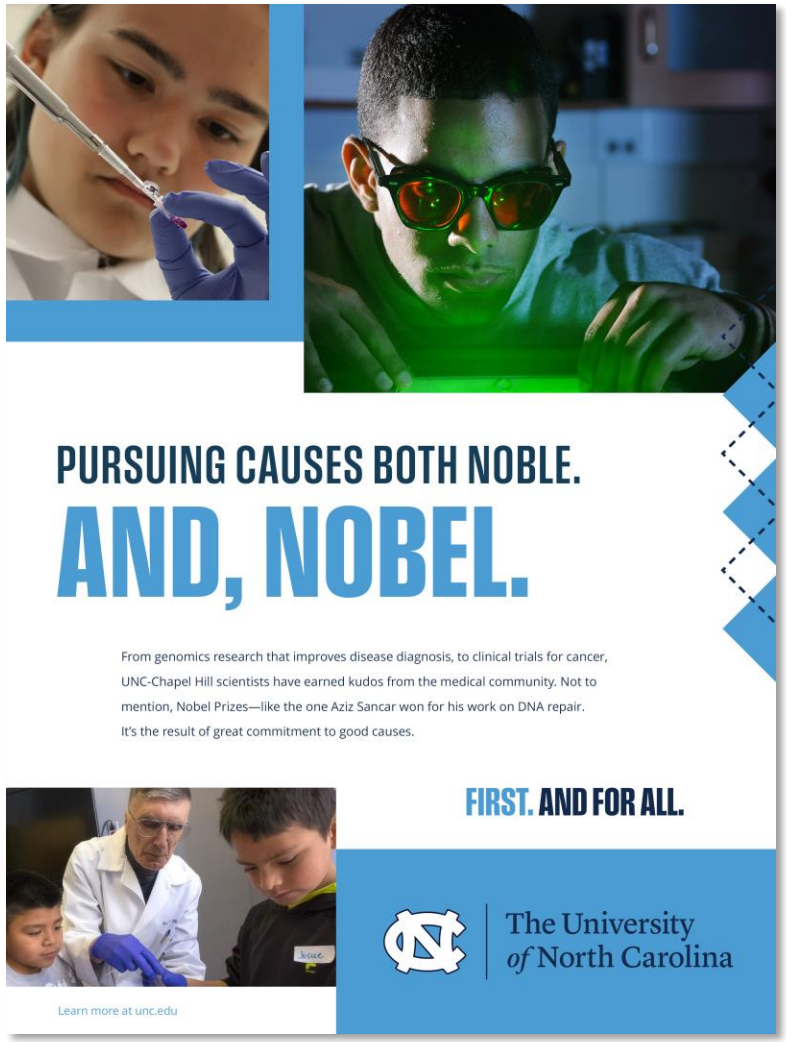


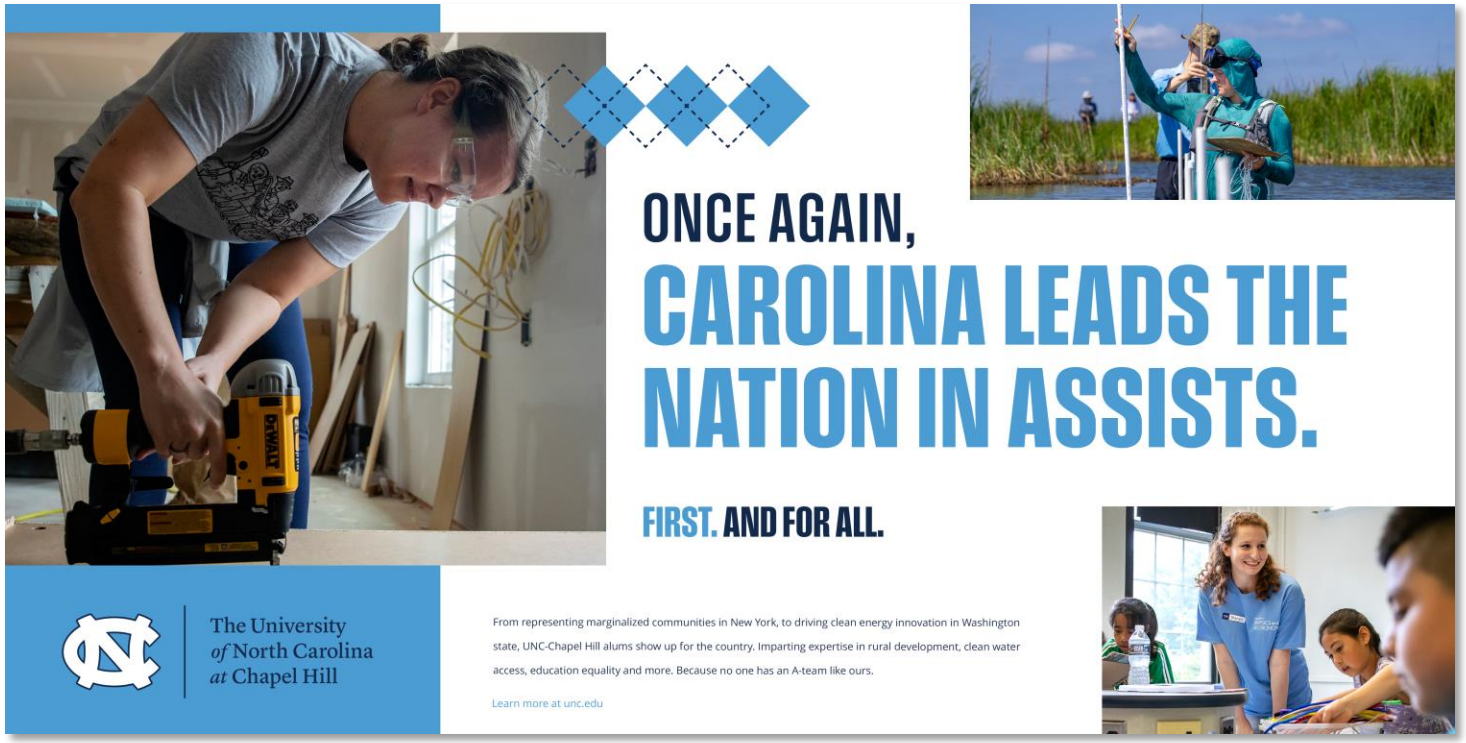



# CAMPUS ACTIVATION



# PRINT ADS


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Chapel Hill, North Carolina
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**Andrew, explore relevant opportunities with CRB**

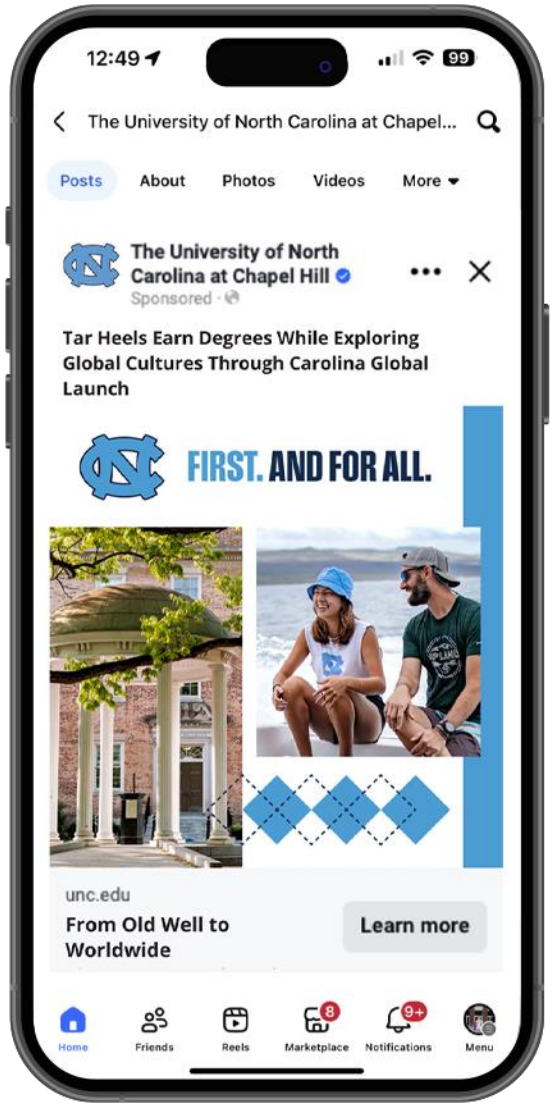
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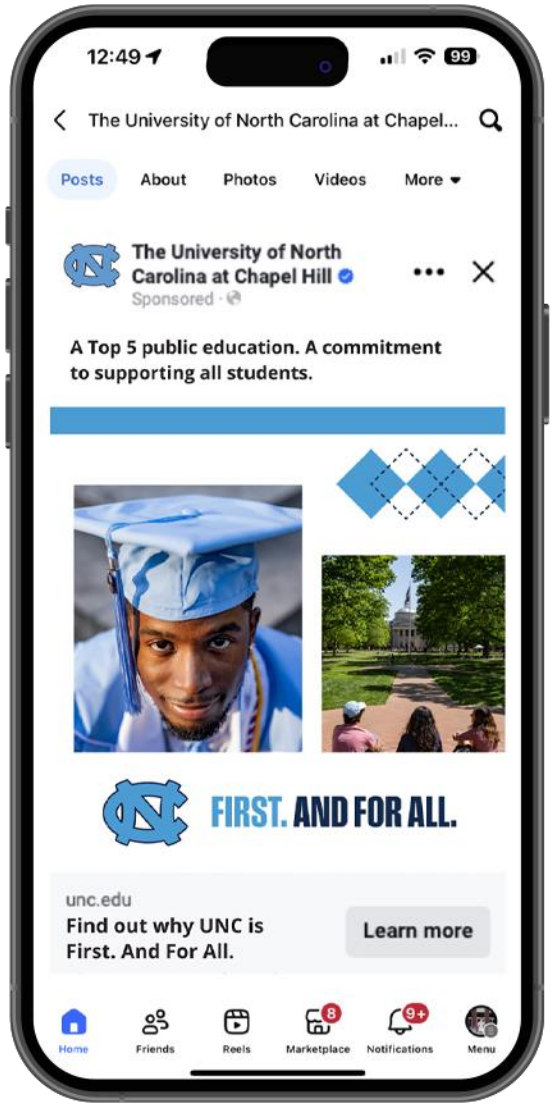
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The Charlotte Observer

HELENE RECOVERY NEWS CHARLOTTEFIVE SPORTS BUSINESS OPINION GAMES OBITUARIES FINANCE CAREERS GUIDES 90°F




FROM FIRST TO
LASTING IMPACT.



FIRST. AND FOR ALL.

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The University of North Carolina


DEVELOPMENT

## The Cain Center Expansion



# CAMPUS ACTIVATION



# SOCIAL ACTIVATION






02

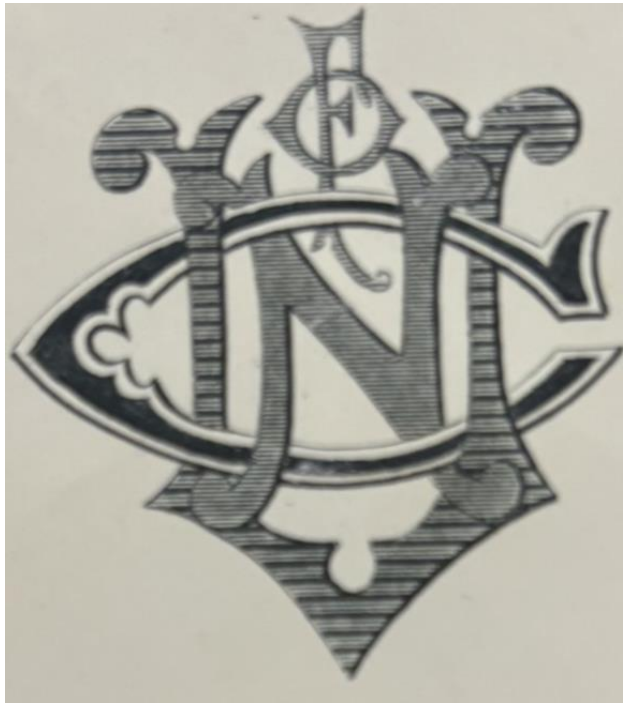
BRAND STRATEGY

# University Logo

BRAND STRATEGY

# Why, and Why Now?

- Well-established globally recognized logo since the 1870s
- Reflects the people and the state we serve
- Leverages existing brand strength
- Unifies across the University
- Streamlines the logo system
- Increases digital accessibility and legibility
- Stands out amongst peer universities
- A unified brand strategy drives additional T&L revenue
- Aligns with the launch of the brand reputation campaign



BRAND STRATEGY

# Logo



The University
*of* North Carolina
*at* Chapel Hill

# Special Marks










The University
*of* North Carolina

# University Logo

**September 2025**



THE UNIVERSITY OF NORTH CAROLINA

01

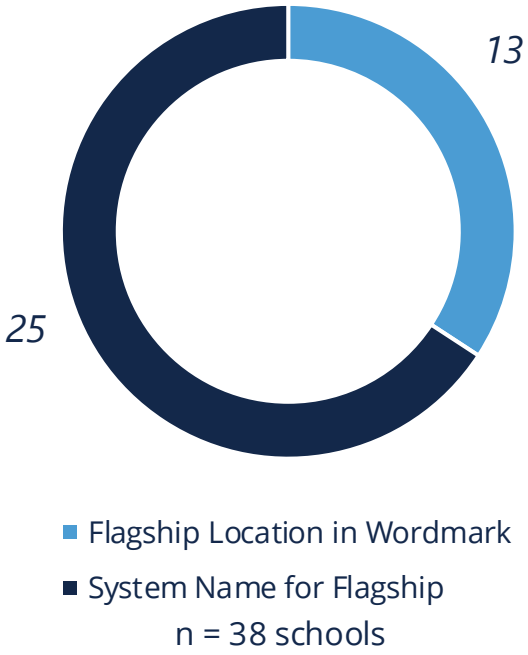
THE UNIVERSITY OF NORTH CAROLINA

# Research

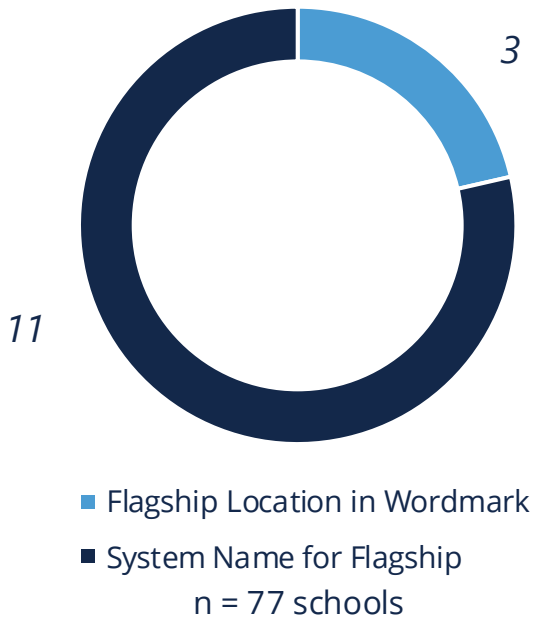
RESEARCH – FLAGSHIP LOCATION USAGE

# What Other Schools are Doing

## U.S. State System Schools




## Peer Institutions




For this section, we first analyzed comparable state systems across the U.S. Then we benchmarked across UNC-Chapel Hill's designated peer institutions, as well as the U.S. News & World Report Top 25 Public Institutions.

RESEARCH – FLAGSHIP LOCATION USAGE

# Examples of Note

## University of Illinois – campus name and no-name options

ILLINOIS

*Primary*

UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN

*Secondary*

UIC UNIVERSITY OF ILLINOIS CHICAGO

UNIVERSITY OF ILLINOIS SPRINGFIELD

*IU System Schools*

## University of Oregon

UNIVERSITY OF OREGON

UNIVERSITY OF OREGON PORTLAND

## University of Michigan

UNIVERSITY OF MICHIGAN

UNIVERSITY OF MICHIGAN-DEARBORN

## The Ohio State University

THE OHIO STATE UNIVERSITY

THE OHIO STATE UNIVERSITY MARION

## University of Maryland

UNIVERSITY OF MARYLAND

Bowie State University · Coppin State University · Frostburg State University · Salisbury University · Towson University · University of Maryland Baltimore · UMBC · University of Maryland Center for Environmental Science · University of Maryland · University System of Maryland · University of Maryland Eastern Shore · University of Maryland Global Campus · University of Baltimore · The Universities at Shady Grove · USMH · USMSM

02

THE UNIVERSITY OF NORTH CAROLINA

# Proposed Logo System

PROPOSED LOGO SYSTEM

# What's New

- One primary logo mark for all areas of the University
- Number of logos reduced by 94%
- Increased responsibility from campus partners for brand management in their areas
- More oversight for custom logos
- Consistency across print and digital materials

PROPOSED LOGO SYSTEM

# Current vs. Proposed Primary Logo





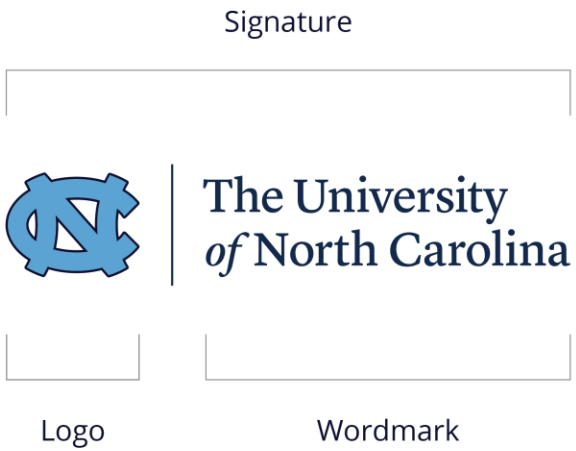







PROPOSED LOGO SYSTEM

# Proposed Logo Tier




Spirit Mark




Primary Signature




Formal Signature




School / Division Signature



PROPOSED LOGO SYSTEM

# Color Options


















PROPOSED LOGO SYSTEM

# Benefits

- Reflects the people and the state we serve
- Leverages existing brand strength
- Unifies across the University
- Streamlines the logo system
- Increases digital accessibility and legibility
- Stands out amongst peer universities
- A unified brand strategy drives additional T&L revenue

THE UNIVERSITY OF NORTH CAROLINA

04

# Usage Examples

# PRINT AD


ESTABLISHED IN 1789.
REESTABLISHED
EVERY DAY SINCE.
From cutting-edge research to groundbreaking scientific discoveries, UNC–Chapel Hill is relentlessly pushing progress in every field, all across the planet. With service that reaches far beyond campus, we are 400,000 Tar Heels strong — shaping the future for all.
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The University of North Carolina

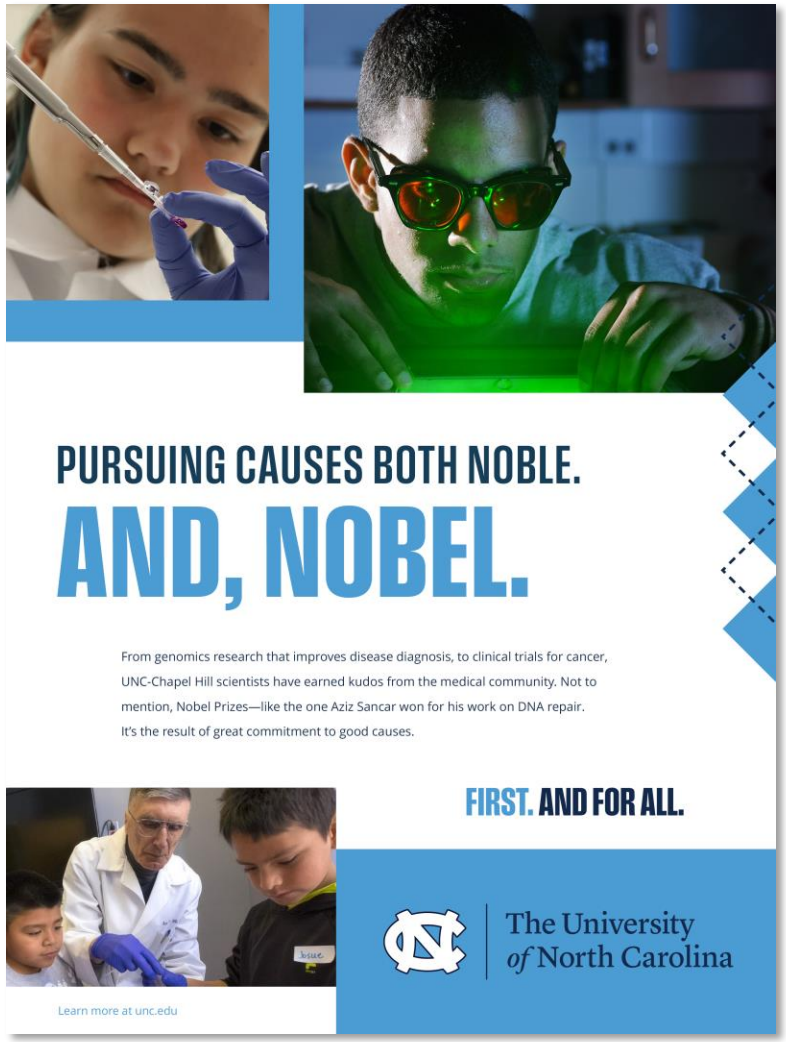
OUT-OF-HOME

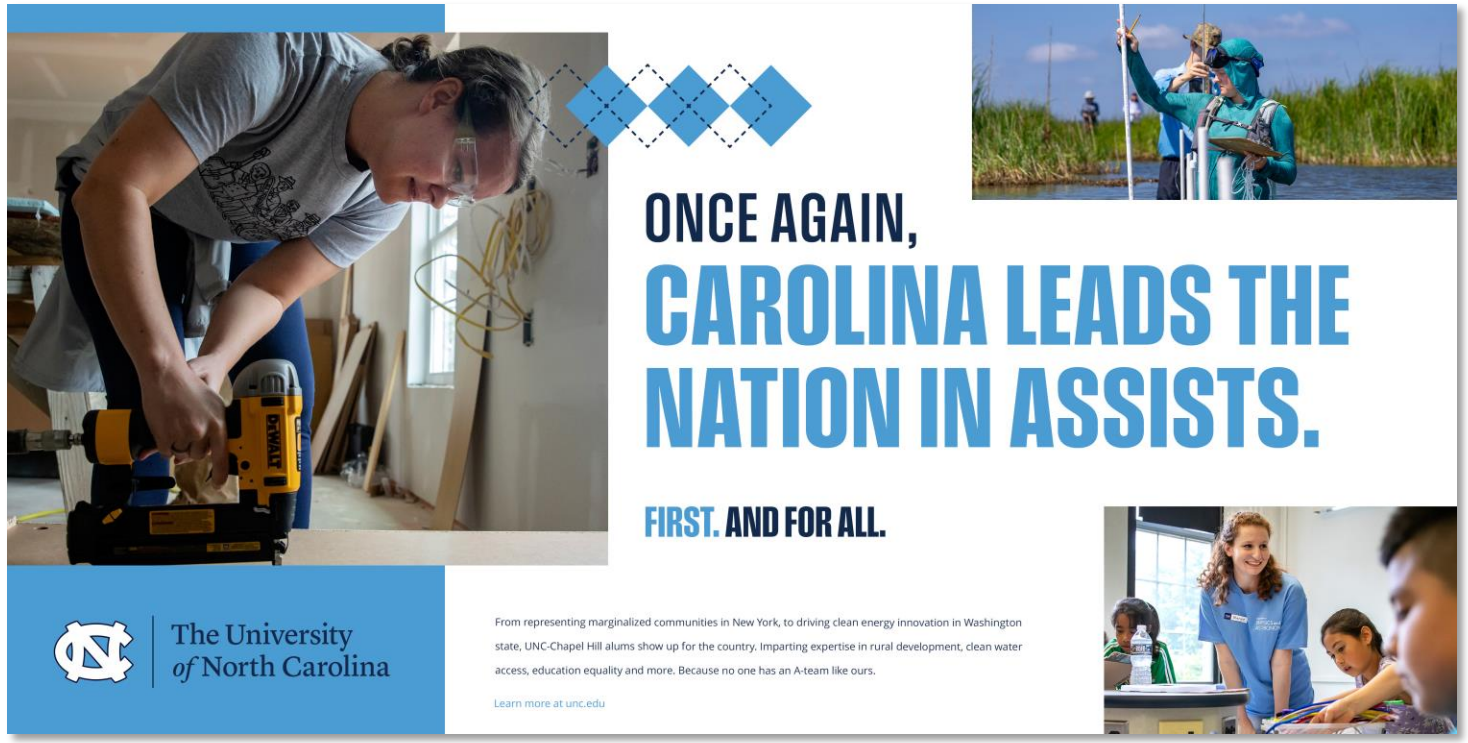


# SET THE BLUE STANDARD.

The University *of* North Carolina

# PRINT AD


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From genomics research that improves disease diagnosis, to clinical trials for cancer, UNC-Chapel Hill scientists have earned kudos from the medical community. Not to mention, Nobel Prizes—like the one Aziz Sancar won for his work on DNA repair. It's the result of great commitment to good causes.
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FROM FIRST TO
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JOIN THE MISSION

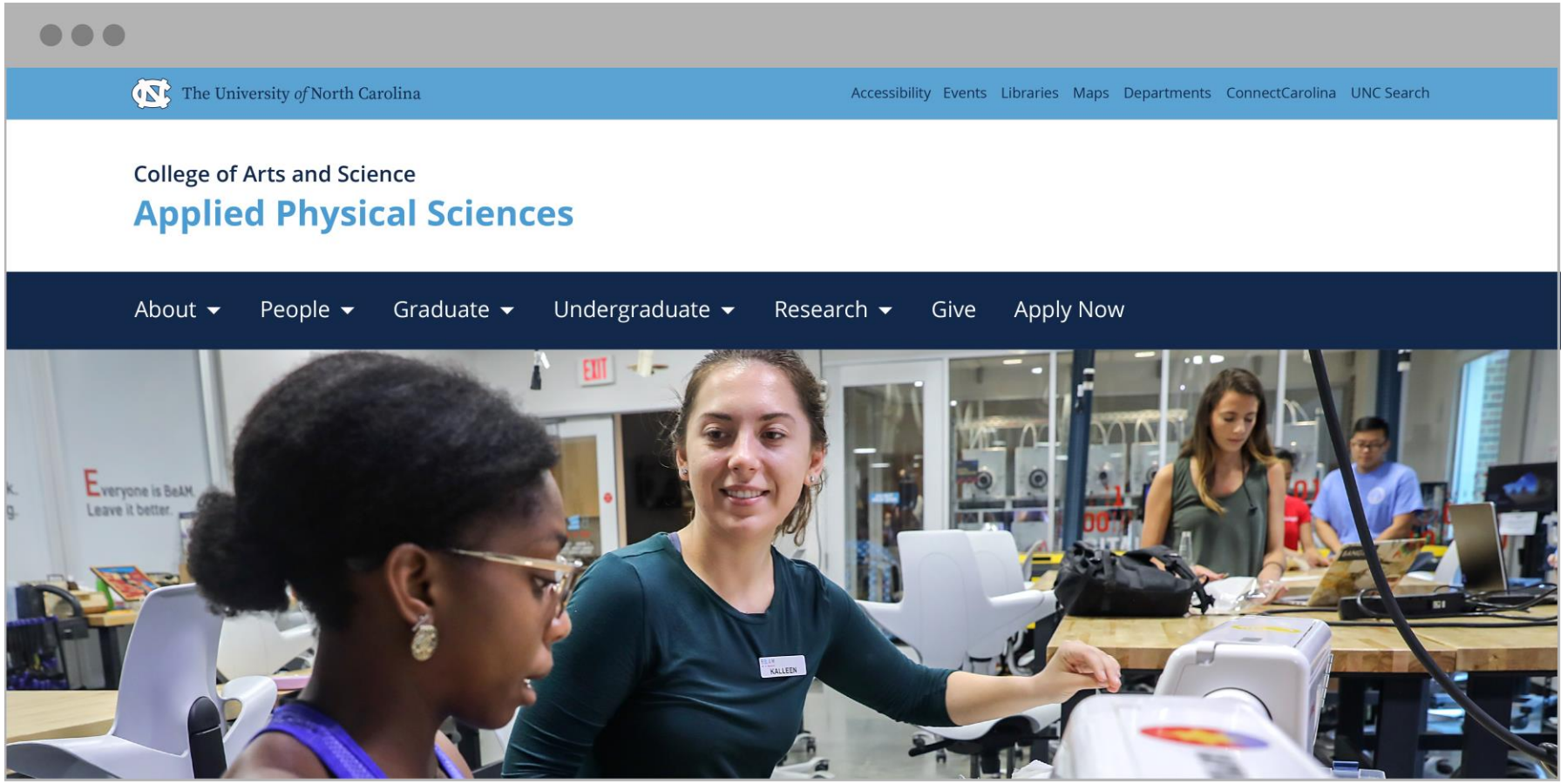
The University of North Carolina


DEVELOPMENT

## The Cain Center Expansion



# UNIVERSITY WEBSITES



# ACTIVATION

I'M NOT JUST CHASING A DEGREE.

## BUT A HIGHER DEGREE OF IMPACT.

Many communities in rural North Carolina have limited access to health resources. As a doctor, I will become a source of support and healing for people.

**BRANDON FEASTER**

MD Candidate Class of 2028



School of Medicine
The University *of* North Carolina

SEE THE STORY

FIRST. AND FOR ALL.

03

THE UNIVERSITY OF NORTH CAROLINA

# Budget

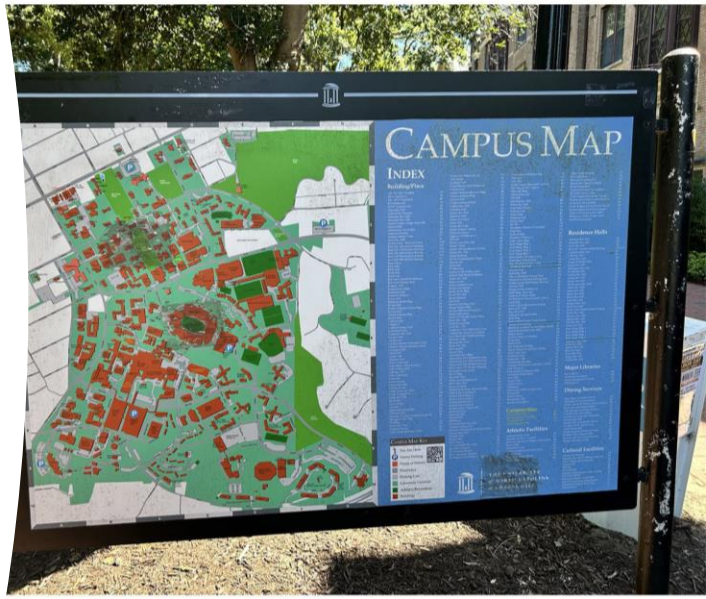
PROPOSED LOGO SYSTEM

# Anticipated Costs

- Establishing trademarks
  - **$5,000**
- Updating letterhead for schools and units
  - **$3,500** + printing costs (will depend on quantity)
- Campus/building signage
  - **$250,000** (ballpark estimate)
- Website development
  - **$20,000** (ballpark estimate, billed at $75/hour, 7-month rollout with ITS's executive support)

**EST. TOTAL = $278,500**





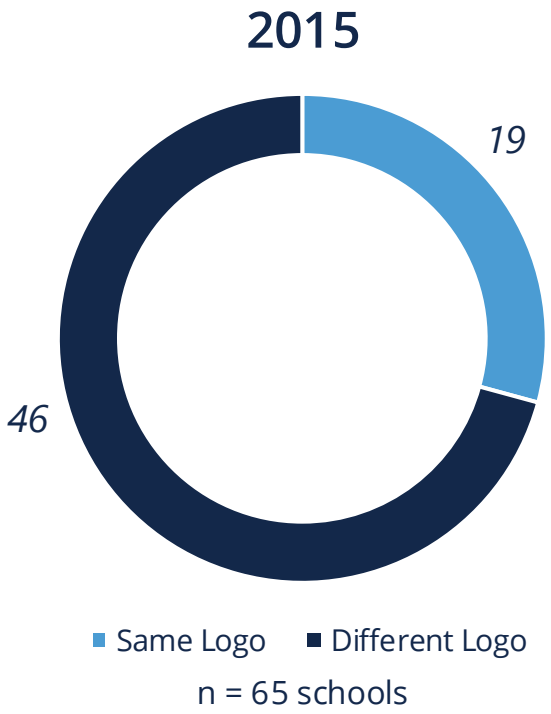

THE UNIVERSITY OF NORTH CAROLINA

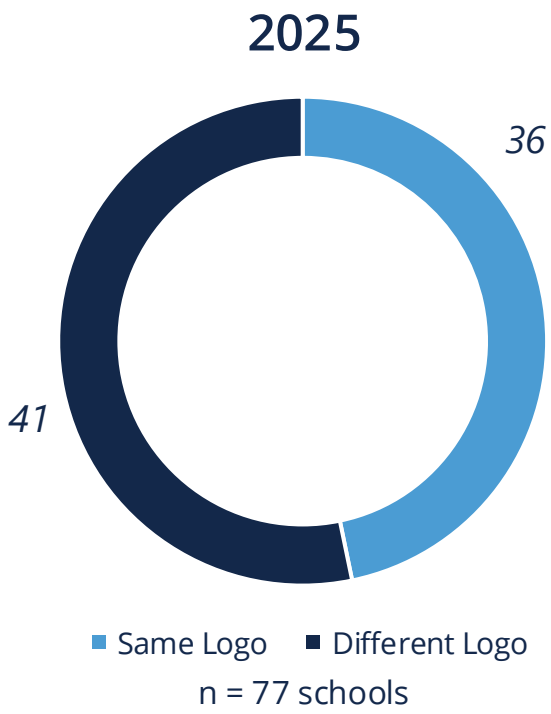
05

# Appendix

RESEARCH – LOGO ALIGNMENT

# What Other Schools are Doing

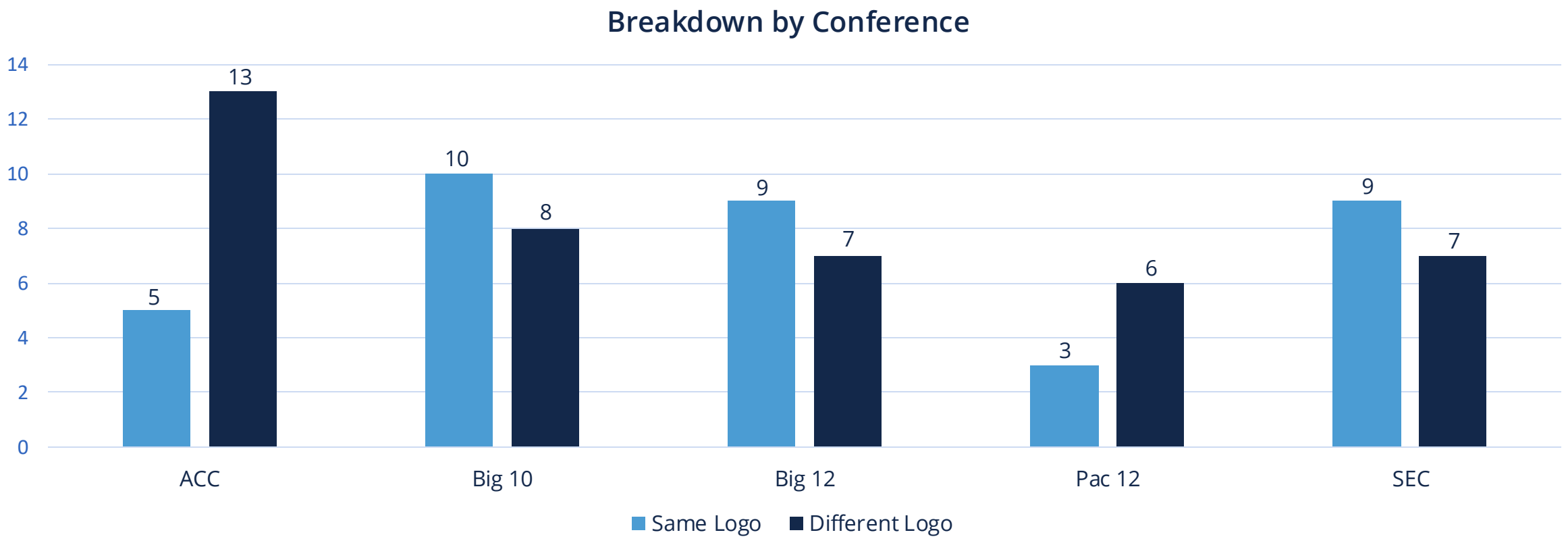



Out of the original 65 schools, 15 schools (23%) have started using the same logo across Academics and Athletic departments.

RESEARCH – LOGO ALIGNMENT

# Breakdown by Conference





The University
*of* North Carolina

# Brand Strategy

**October 2025**

THE UNIVERSITY OF NORTH CAROLINA

BRAND STRATEGY

# Where are we?

- ☑ **Phase 1: Research** *(March – April)*
  - ❑ Qualitative – COMPLETED
  - ❑ Quantitative – COMPLETED
- ☑ **Phase 2: Brand Positioning** *(May – June)*
  - ❑ Research Driven – COMPLETED
  - ❑ Competitive Landscape - COMPLETED
- ☑ **Phase 3: Brand Expression** *(June – Sept)*
  - ❑ Strategy Framework – COMPLETED
  - ❑ Creative Development – COMPLETED
- ❑ **Phase 4: Execution** *(Fall 2025)*
  - ❑ UComm Integration/Adoption
  - ❑ Campaign Launch
  - ❑ Campus Partner Activation

PHASE 1 FINDINGS

# Distinct Attributes

**Carolina's distinct advantages are highly recognized, fueling our critical role in the state.**

| | | |
|---|---|---|
| **Flagship Identity** | • First operating public university in the U.S.<br>• North Carolina's intellectual and economic engine | *"The next chapter of the state is tied directly to this place."* |
| **Service-Oriented Excellence** | • Top schools in medicine, pharmacy, journalism, public health and government, with a strong applied focus<br>• Commitment to leadership and growth in all counties | *"We have the top schools of Pharmacy and Dentistry. Faculty are active in public service work.* |
| **High Quality, High Value** | • Many express deep pride in UNC being a top-tier, publicly accessible university | *"If we show academic excellence, commitment to affordability and the genuine care this place has for students, we are showing the best of who we are."* |
| **Loyalty & Legacy** | • "Irrational love" for UNC among alumni and students<br>• Strong bonds that include critique and desire to improve | *"Carolina has that passion. People love being there. They love coming back, warts and all."* |
| **Athletics as Connector** | • Global brand recognition in basketball, field hockey, soccer, football, and other sports<br>• The "front porch", an access point to the university | *"One of our best marketing vehicles is our commitment to excellence in athletics."* |

# COMMITTED TO PUBLIC PROGRESS

## Carolina is powered by purpose – to stand with, strengthen and advance North Carolina.

As the nation's first public university, UNC-Chapel Hill was built to serve the people – and that purpose hasn't wavered. Our strength lies in our commitment to public progress: research that drives breakthroughs, education that uplifts, athletics and arts that inspire, and partnerships that solve real problems. From the mountains to the coast, Carolina's traditions light the way to what's next for our state and its residents. Our commitment has resulted in discoveries, leaders and programs with proven public value. North Carolinians help shape our priorities and direction, ensuring that Carolina reflects the needs, values and aspirations of the people we serve. Because public is not just about how we're supported – it's who we serve.

BRAND STRATEGY

# Creative Concept










# Concept Overview

It's one thing to be first. Yet, as impressive as that may sound, firsts don't mean a thing – unless they make a lasting impact.

And at UNC-Chapel Hill, ours have.

We are the nation's first public university. The first to establish a school of public health, helping underserved communities. A commitment to serving first generation students as well as generations of Tar Heels. First in athletics, countless times over.

And the first to respond, without fail, when the call for help rings out. Not just in North Carolina's 100 counties, but in all 50 states as well.

**Because that's what Tar Heels are all about: taking first steps that lead to momentous change. For countries, counties, communities, individuals – and the entire world.**

The University *of* North Carolina *at* Chapel Hill

**FIRST. AND FOR ALL.**

OUT-OF-HOME


The University
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at Chapel Hill
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FIRST. AND FOR ALL.
BREAKTHROUGHS DON'T WAIT.
NEITHER DO WE.

# CAMPUS ACTIVATION

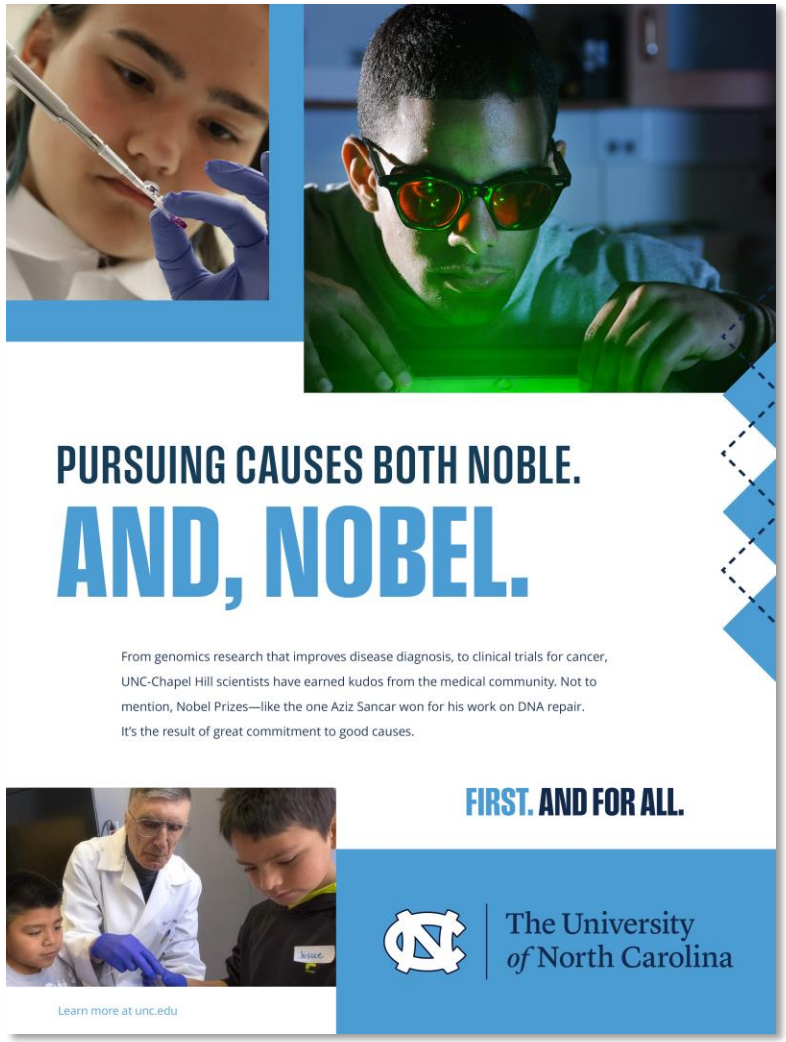


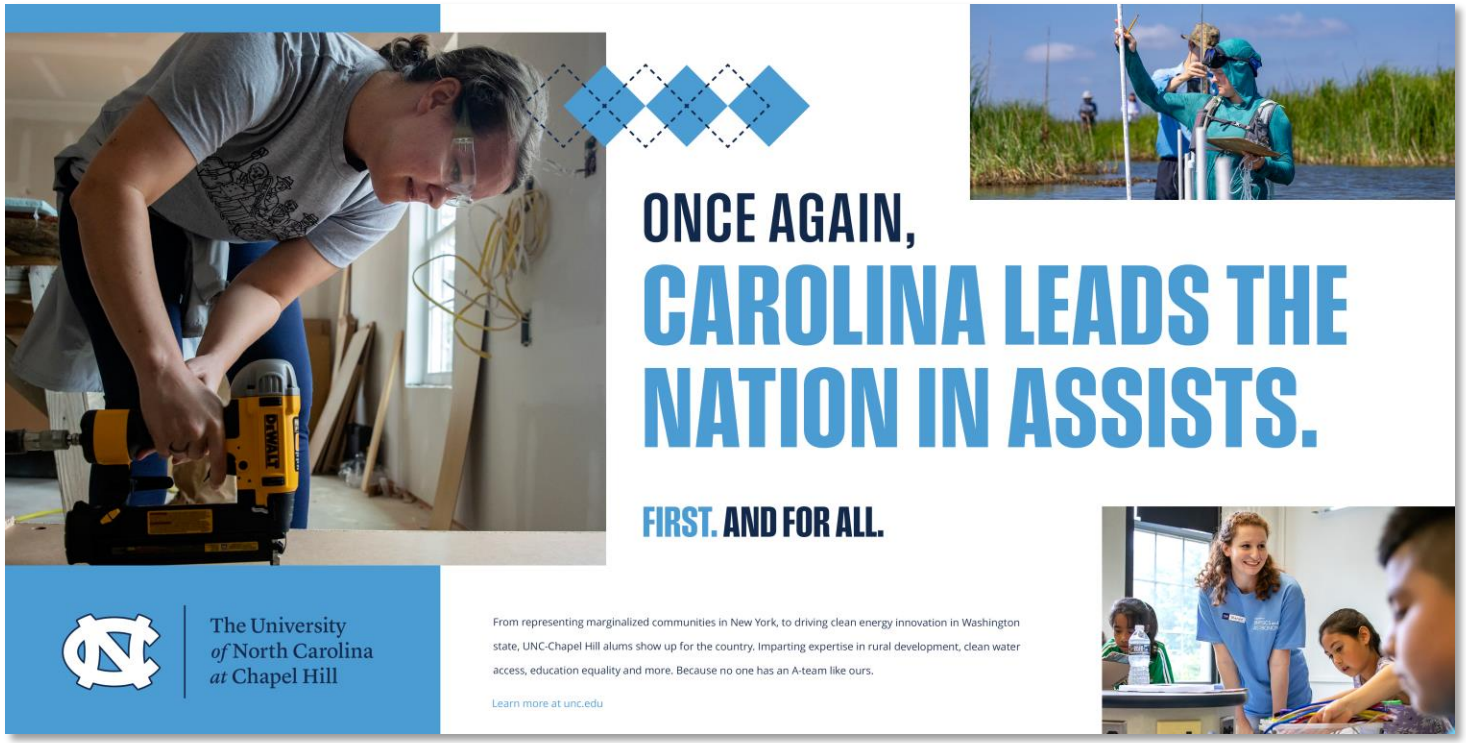


# CAMPUS ACTIVATION



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**Andrew, explore relevant opportunities with CRB**

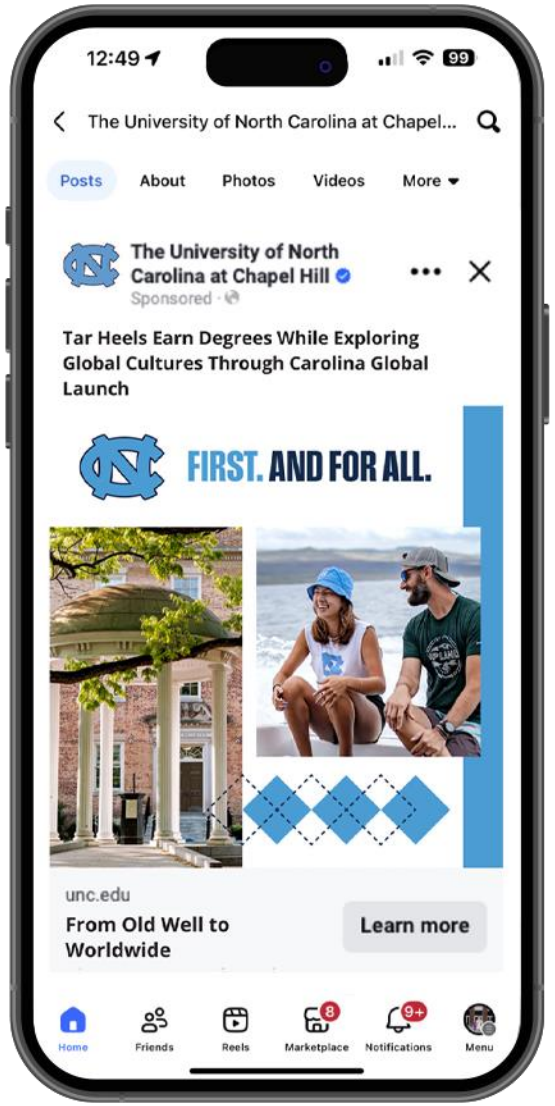
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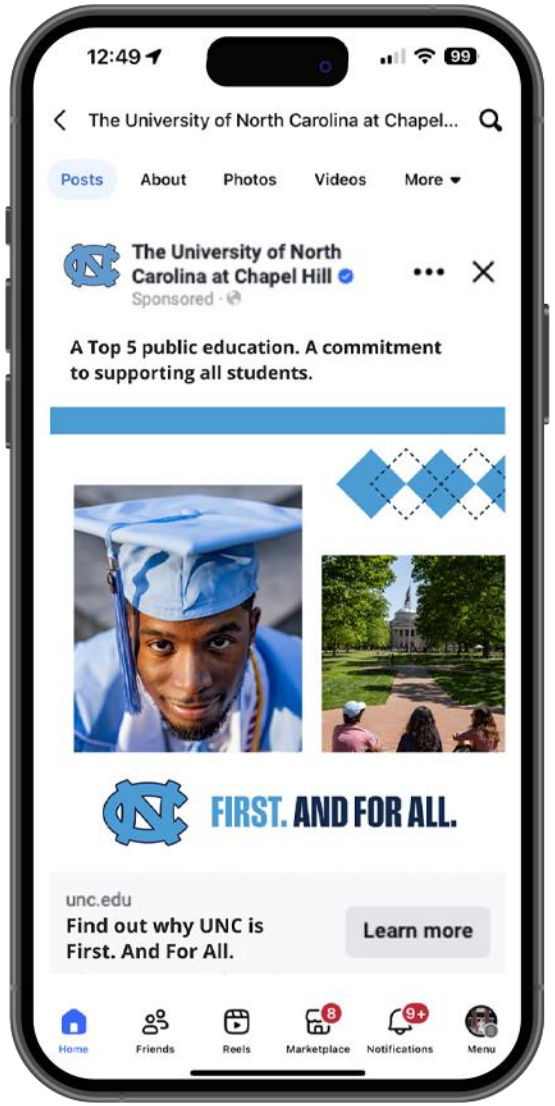
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# SOCIAL ACTIVATION





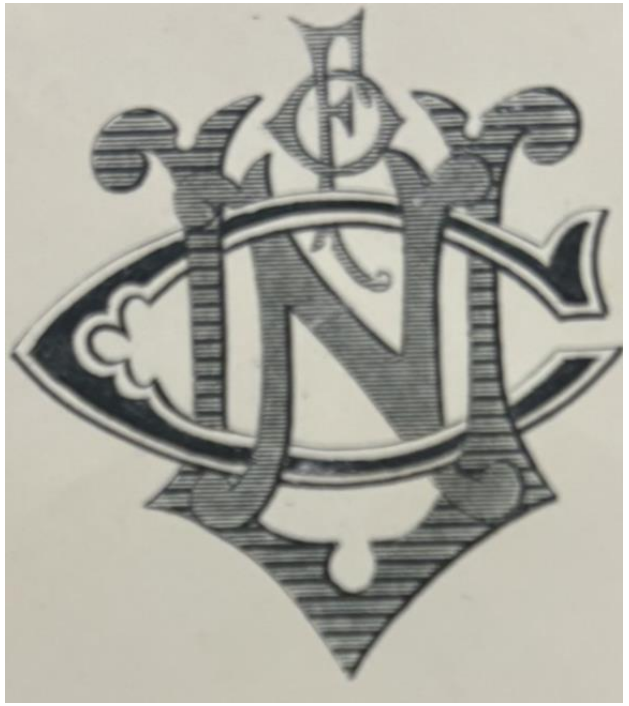

BRAND STRATEGY

# University Logo

BRAND STRATEGY

# Why, and Why Now?

- Well-established globally recognized logo since the 1870s
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- Aligns with the launch of the brand reputation campaign



PROPOSED LOGO SYSTEM

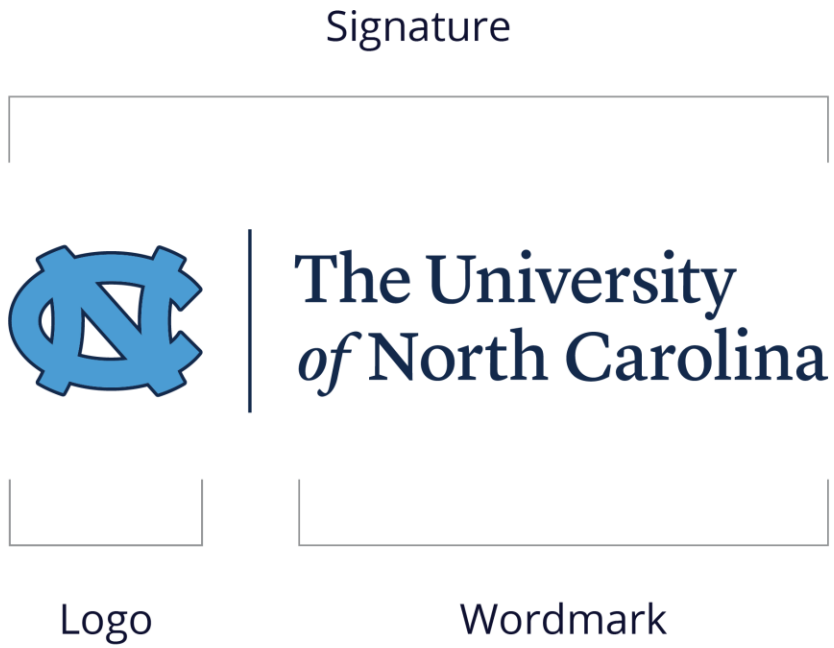
# Benefits

- One primary logo mark for all areas of the University
- Simplified architecture reduces number of logo files by 94%
- Increased ownership by campus partners of brand management in their areas
- More oversight by Divisions/Schools for custom logos
- Consistency and cost efficiency across print and digital materials

BRAND STRATEGY

# Glossary of Terms

- **Logo:** The graphic element
- **Wordmark:** The text element
- **Signature:** The entire brand mark
- **Brand Architecture:** The structure of the system
- **Division/School:** Vice chancellor unit, vice provost unit, school, the College
- **All Other Units:** Programs, centers, institutes, departments, etc.
- **Special Marks:** University graphic elements used in select instances



BRAND ARCHITECTURE

# Current and Primary Signatures

## Current







## Primary







## Primary






BRAND ARCHITECTURE

# Division/School Signatures

Current

UNC | COLLEGE OF ARTS AND SCIENCES

UNC

COLLEGE OF ARTS AND SCIENCES

Proposed

College of Arts and Sciences
The University *of* North Carolina

College of Arts and Sciences
The University *of* North Carolina

BRAND ARCHITECTURE

# Division/School Signatures

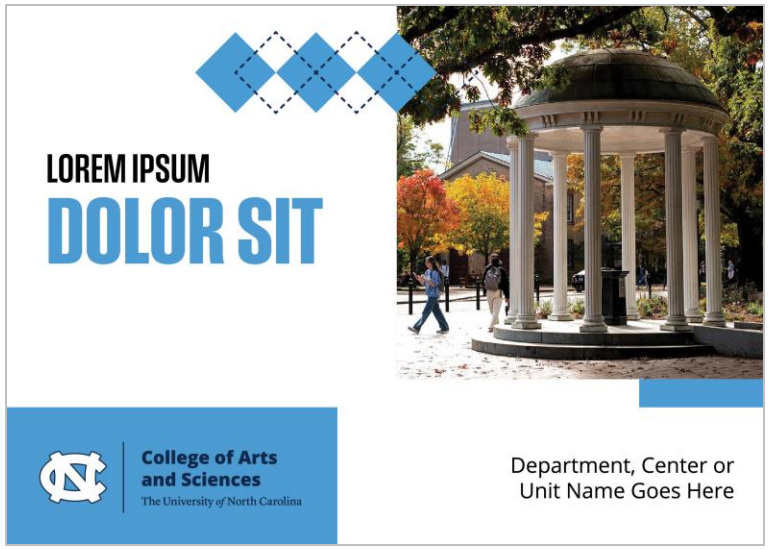
- Adams School of Dentistry
- Campus Safety
- College of Arts and Sciences
- Eshelman School of Pharmacy
- Finance and Operations
- Gillings School of Global Public Health
- Global Affairs
- The Graduate School
- Human Resources
- Hussman School of Journalism and Media
- Information Technology Services
- Innovate Carolina
- Kenan-Flagler Business School
- Lineberger Comprehensive Cancer Center
- Office of the Chancellor
- Office of Enrollment
- Office of the Executive Vice Chancellor and Provost
- Public Affairs
- Research
- School of Civic Life and Leadership
- School of Data Science and Society
- School of Education
- School of Government
- School of Information and Library Science
- School of Law
- School of Medicine
- School of Nursing
- School of Social Work
- Student Affairs
- Summer School
- UNC Police
- UNC Visitors Center
- University Communications and Marketing
- University Compliance Office
- University Counsel
- University Development
- University Libraries

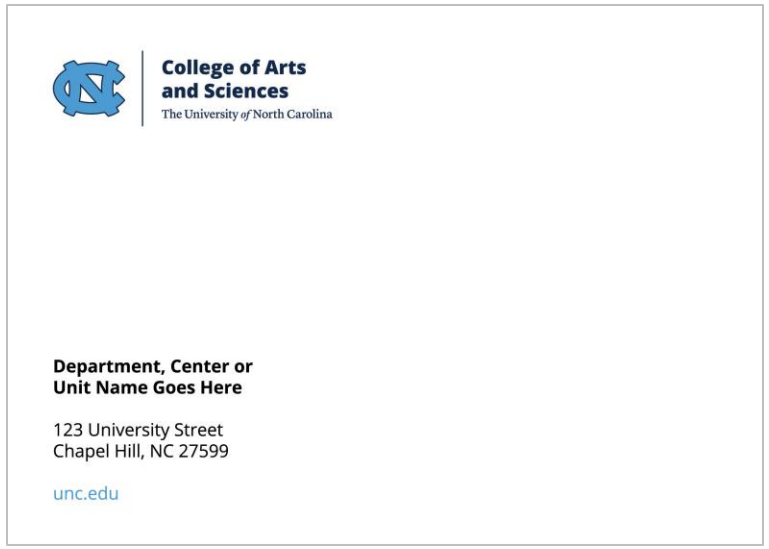
BRAND ARCHITECTURE

# Other Unit Examples

Division/School Signature

Department, Center or Unit Name







Division/School Signature

Department, Center or Unit Name

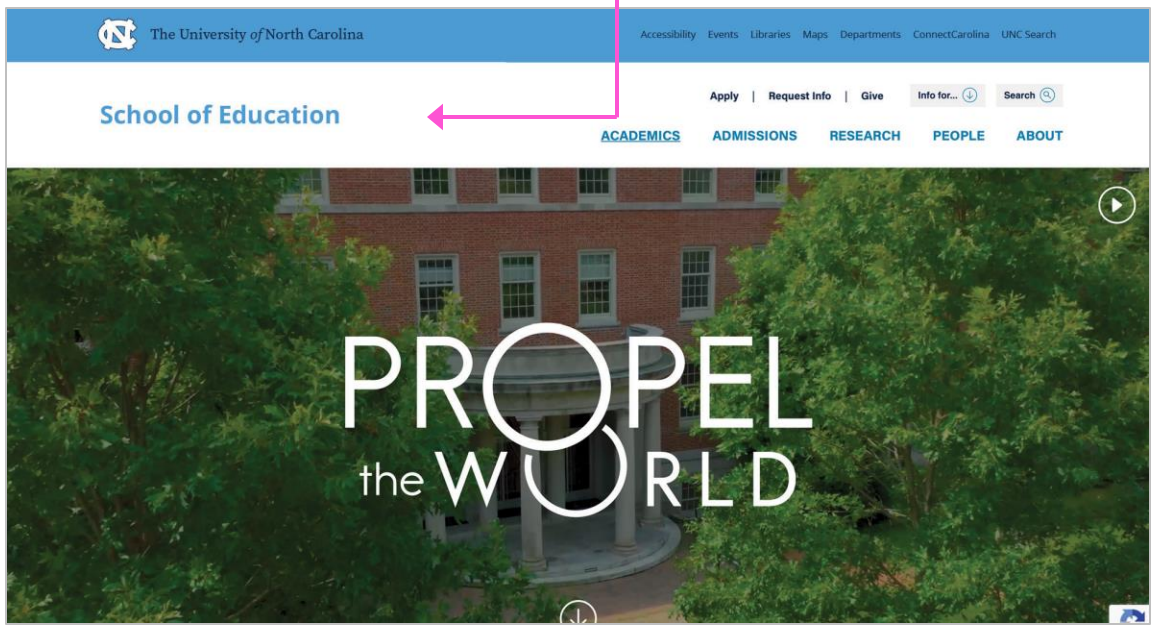
Department, Center or Unit Name

Division/School Signature

# Websites

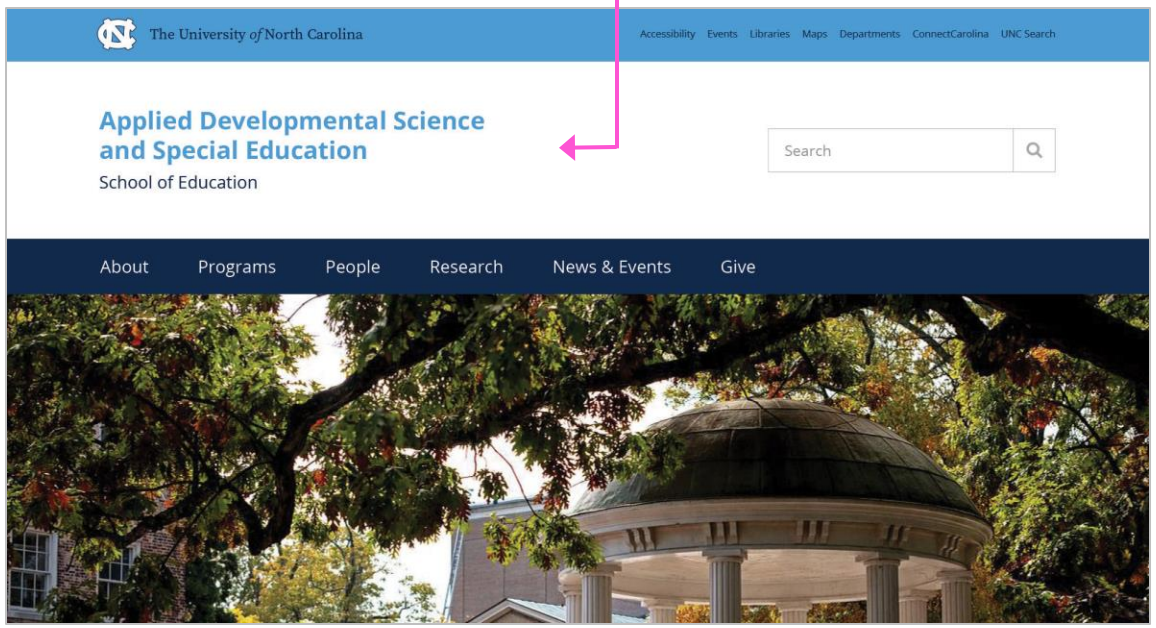
Updated Toolbar

Digital Typeset




Updated Toolbar

Digital Typeset



# Special Marks








# Budget Considerations

- Division/School design files
- Letterhead for schools and units
- Websites and social media
- Magazines/newsletters
- Collateral/giveaways
- Campus/building signage

ROLLOUT

# Rollout Timeline and Support

- University Signature files will be shared in the next few weeks
- Updating digital materials and websites will be a priority over the next three months
- Print materials will be produced as needed over the next year and a half
- Support will be offered all along the way
  - Office hours
  - Dedicated meetings with Schools/Divisions
  - Training sessions
  - Resources and templates



The University
*of* North Carolina

# Brand Strategy

**October 2025**

THE UNIVERSITY OF NORTH CAROLINA

BRAND STRATEGY

# Where are we?

- ☑ **Phase 1: Research** *(March – April)*
  - ❑ Qualitative – COMPLETED
  - ❑ Quantitative – COMPLETED
- ☑ **Phase 2: Brand Positioning** *(May – June)*
  - ❑ Research Driven – COMPLETED
  - ❑ Competitive Landscape - COMPLETED
- ☑ **Phase 3: Brand Expression** *(June – Sept)*
  - ❑ Strategy Framework – COMPLETED
  - ❑ Creative Development – COMPLETED
- ❑ **Phase 4: Execution** *(Fall 2025)*
  - ❑ UComm Integration/Adoption
  - ❑ Campaign Launch
  - ❑ Campus Partner Activation

PHASE 1

# Campus Interviews & Focus Group Numbers

**80**

TOTAL PEOPLE INTERVIEWED

**13**

INDIVIDUAL INTERVIEWS

**11**

GROUP INTERVIEWS

**31**

TOTAL HOURS OF INTERVIEWS

PHASE 1

# Stakeholder Surveys – April 9th through 22nd

# 7,432

## TOTAL RESPONSES

- Alumni (5,332)
- Faculty (363)
- Staff (727)
- Administration (283)
- Postdoc/GR/Prof Students (432)
- UG Students (369)
- Board Member/Volunteer (163)
- Parent (717)
- General Public (810)

PHASE 1 FINDINGS

# Distinct Attributes

**Carolina's distinct advantages are highly recognized, fueling our critical role in the state.**

| | | |
|---|---|---|
| **Flagship Identity** | • First operating public university in the U.S.<br>• North Carolina's intellectual and economic engine | *"The next chapter of the state is tied directly to this place."* |
| **Service-Oriented Excellence** | • Top schools in medicine, pharmacy, journalism, public health and government, with a strong applied focus<br>• Commitment to leadership and growth in all counties | *"We have the top schools of Pharmacy and Dentistry. Faculty are active in public service work.* |
| **High Quality, High Value** | • Many express deep pride in UNC being a top-tier, publicly accessible university | *"If we show academic excellence, commitment to affordability and the genuine care this place has for students, we are showing the best of who we are."* |
| **Loyalty & Legacy** | • "Irrational love" for UNC among alumni and students<br>• Strong bonds that include critique and desire to improve | *"Carolina has that passion. People love being there. They love coming back, warts and all."* |
| **Athletics as Connector** | • Global brand recognition in basketball, field hockey, soccer, football, and other sports<br>• The "front porch", an access point to the university | *"One of our best marketing vehicles is our commitment to excellence in athletics."* |

PHASE 1 FINDINGS

# Challenges

**Perceptions of Inaccessibility**
The top priority of any campaign must be to bridge the perception gap between prestige and accessibility.

**Political Polarization**
Carolina is a university for all Carolinians – we cannot let opposing political agendas distract from our narratives.

**Narrative Control**
UNC-Chapel Hill is a higher education leader. As such, we must lead the conversation, not react to it.

**Under-Realized Support**
While consistently state-supported, UNC could better tap into its community of passionate supporters.

From the state perspective, we need to be demystified – we are not hippies on a hill. We are of and for the state.

We have deep red rural areas and deep blue metro areas, and UNC is where all the biggest fights play out.

Ever since Silent Sam, our messaging has always been defensive in nature.

People are stunned by the number of our donors, but donors are not giving to their capacity.

PHASE 1 FINDINGS

# Opportunities

**When combined with the opportunities identified by affiliate audiences, we see three key areas of focus.**

**Reassert the "University of the People"**
Carolina's mission and traditions of excellence and innovation can be used to point forward.

People don't need convincing to love UNC;
they need reassurance they have access to it.

**Elevate Brand Pillars**
Make Carolina's discoveries, students, and culture as visible statewide as its athletics and health system.

People think about a hospital and a sports team
with a university on the side.
But I want to talk about the academic brand.

**Champion Constructive Dialogue**
Use the university's reputation to lead conversations about public responsibility and public engagement.

In order to support the mission of being by the people and for the people, UNC has to be a place where we can bring those backgrounds and viewpoints together.

# COMMITTED TO PUBLIC PROGRESS

## Carolina is powered by purpose – to stand with, strengthen and advance North Carolina.

As the nation's first public university, UNC-Chapel Hill was built to serve the people – and that purpose hasn't wavered. Our strength lies in our commitment to public progress: research that drives breakthroughs, education that uplifts, athletics and arts that inspire, and partnerships that solve real problems. From the mountains to the coast, Carolina's traditions light the way to what's next for our state and its residents. Our commitment has resulted in discoveries, leaders and programs with proven public value. North Carolinians help shape our priorities and direction, ensuring that Carolina reflects the needs, values and aspirations of the people we serve. Because public is not just about how we're supported – it's who we serve.

01

BRAND STRATEGY

# Creative Concept










# Concept Overview

It's one thing to be first. Yet, as impressive as that may sound, firsts don't mean a thing – unless they make a lasting impact.

And at UNC-Chapel Hill, ours have.

We are the nation's first public university. The first to establish a school of public health, helping underserved communities. A commitment to serving first generation students as well as generations of Tar Heels. First in athletics, countless times over.

And the first to respond, without fail, when the call for help rings out. Not just in North Carolina's 100 counties, but in all 50 states as well.

**Because that's what Tar Heels are all about: taking first steps that lead to momentous change. For countries, counties, communities, individuals – and the entire world.**

The University *of* North Carolina *at* Chapel Hill

**FIRST. AND FOR ALL.**

OUT-OF-HOME


The University
of North Carolina
at Chapel Hill
UNC.EDU
FIRST. AND FOR ALL.
BREAKTHROUGHS DON'T WAIT.
NEITHER DO WE.

# CAMPUS ACTIVATION

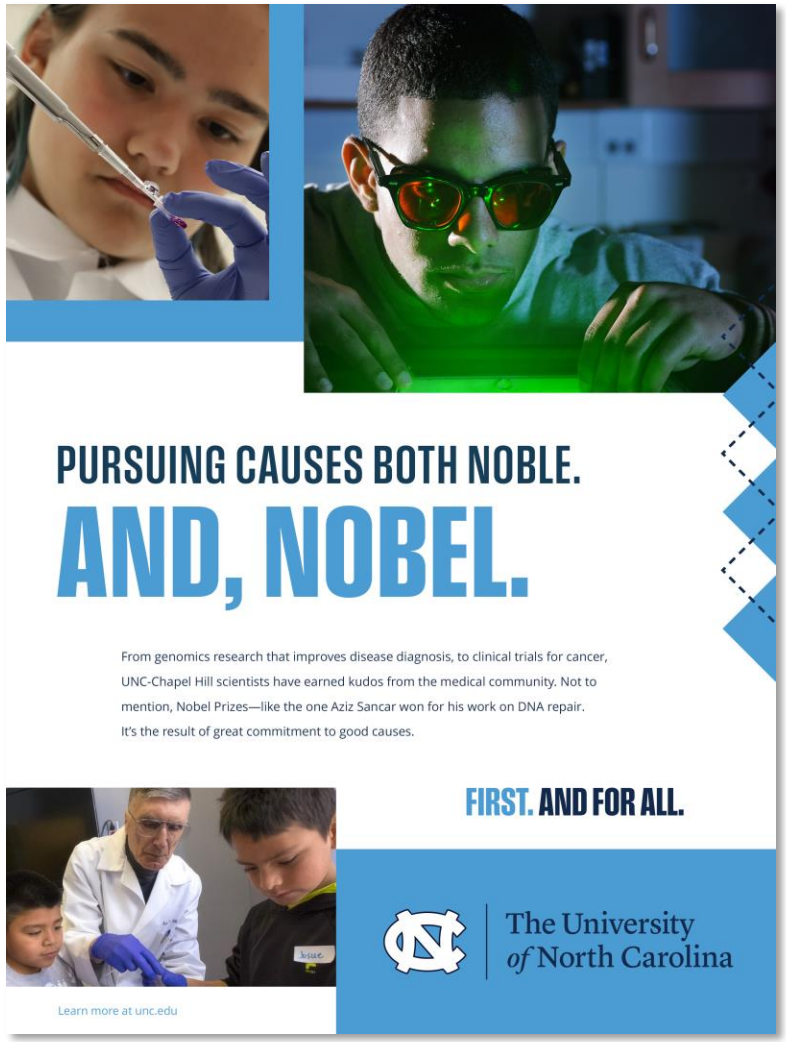


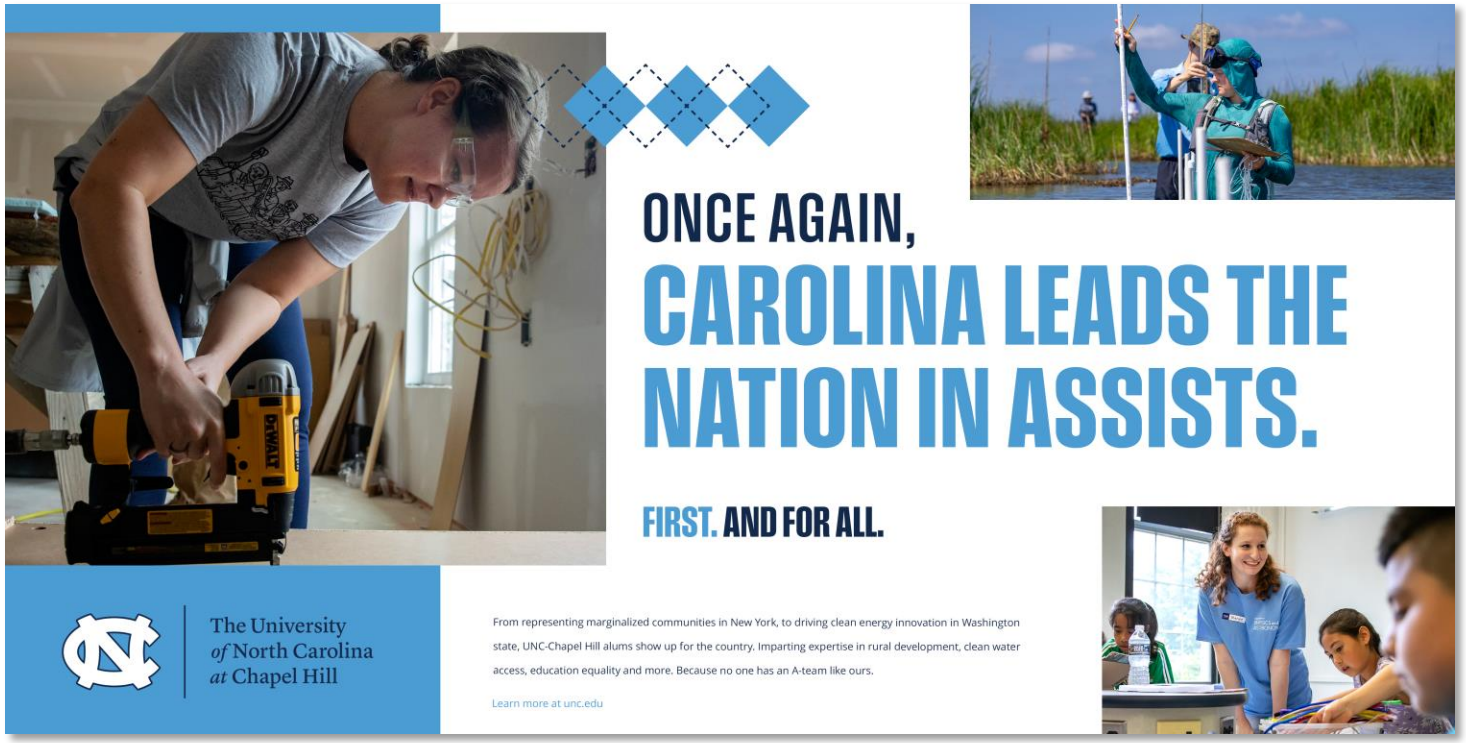


# CAMPUS ACTIVATION



# PRINT ADS


PURSUING CAUSES BOTH NOBLE.
AND, NOBEL.
From genomics research that improves disease diagnosis, to clinical trials for cancer, UNC-Chapel Hill scientists have earned kudos from the medical community. Not to mention, Nobel Prizes—like the one Aziz Sancar won for his work on DNA repair. It's the result of great commitment to good causes.
FIRST. AND FOR ALL.
The University of North Carolina
Learn more at unc.edu


ONCE AGAIN,
CAROLINA LEADS THE NATION IN ASSISTS.
FIRST. AND FOR ALL.
The University of North Carolina at Chapel Hill
From representing marginalized communities in New York, to driving clean energy innovation in Washington state, UNC-Chapel Hill alums show up for the country. Imparting expertise in rural development, clean water access, education equality and more. Because no one has an A-team like ours.
Learn more at unc.edu

# DIGITAL AD

Search

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**Andrew Jacobs**
Art Director and Brand Manager
Chapel Hill, North Carolina
University of North Carolina at Chapel Hill

Profile viewers 26
View all analytics

Access exclusive tools & insights
Try Premium for $0

Saved items
Groups
Newsletters
Events

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Since 2005, Carolina has led the nation as #1 Best Value Public University, making a world-class education accessible.




**Nation's Best Value, No Rivals**
unc.edu
Learn more

10

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Brian Mitchell commented on this

**Maurizio Leschiutta** · 3rd+
Director of Motorsports
1d ·
+ Follow

The Automobili Lamborghini GTP Team concludes its IMSA WeatherTech




**Andrew, explore relevant opportunities with CRB**

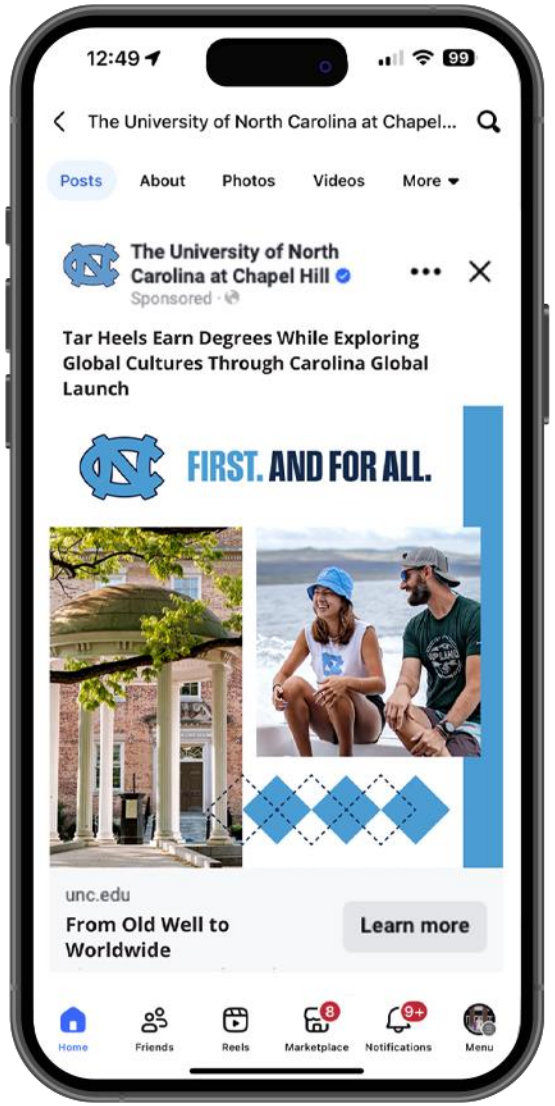
Get the latest jobs and industry news

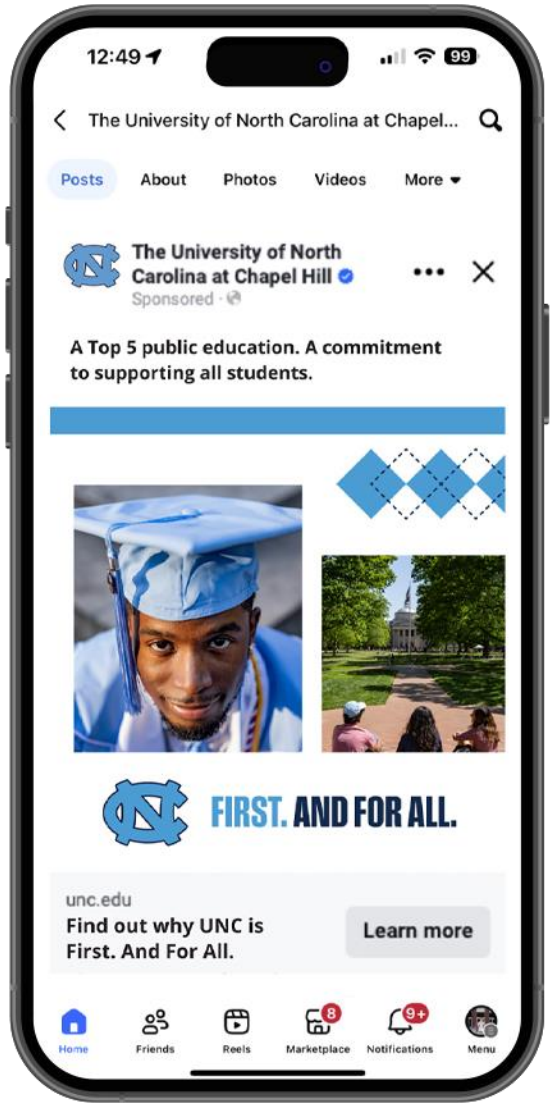
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# DIGITAL ADS


12:49
99
The University of North Carolina at Chapel...
Posts
About
Photos
Videos
More
The University of North Carolina at Chapel Hill
Sponsored
Tar Heels Earn Degrees While Exploring Global Cultures Through Carolina Global Launch
FIRST. AND FOR ALL.
unc.edu
From Old Well to Worldwide
Learn more
Home
Friends
Reels
Marketplace
Notifications
Menu


12:49
99
The University of North Carolina at Chapel...
Posts
About
Photos
Videos
More
The University of North Carolina at Chapel Hill
Sponsored
A Top 5 public education. A commitment to supporting all students.
FIRST. AND FOR ALL.
unc.edu
Find out why UNC is First. And For All.
Learn more
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DIGITAL AD

The Charlotte Observer

HELENE RECOVERY NEWS CHARLOTTEFIVE SPORTS BUSINESS OPINION GAMES OBITUARIES FINANCE CAREERS GUIDES 90°F




FROM FIRST TO
LASTING IMPACT.



FIRST. AND FOR ALL.

JOIN THE MISSION

The University of North Carolina


DEVELOPMENT

## The Cain Center Expansion



# SOCIAL ACTIVATION






02

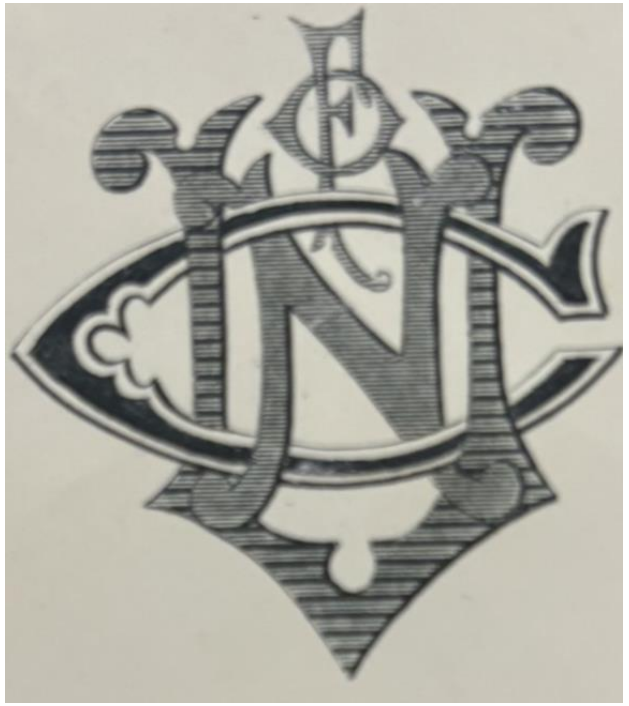
BRAND STRATEGY

# University Logo

BRAND STRATEGY

# Why, and Why Now?

- Well-established globally recognized logo since the 1870s
- Reflects the people and the state we serve
- Leverages existing brand strength
- Unifies across the University
- Streamlines the logo system
- Increases digital accessibility and legibility
- Stands out amongst peer universities
- A unified brand strategy drives additional T&L revenue
- Aligns with the launch of the brand reputation campaign



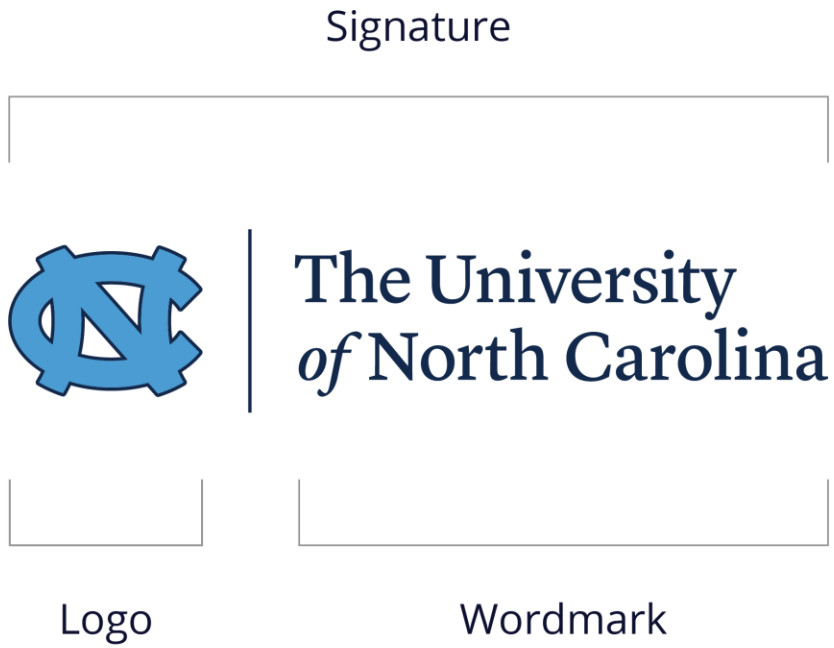
PROPOSED LOGO SYSTEM

# Benefits

- One primary logo mark for all areas of the University
- Simplified architecture reduces number of logo files by 94%
- Increased ownership by campus partners of brand management in their areas
- More oversight by Divisions/Schools for custom logos
- Consistency and cost efficiency across print and digital materials

# Glossary of Terms

- **Logo:** The graphic element
- **Wordmark:** The text element
- **Signature:** The entire brand mark
- **Brand Architecture:** The structure of the system
- **Division/School:** Vice chancellor unit, vice provost unit, school, the College
- **All Other Units:** Programs, centers, institutes, departments, etc.
- **Special Marks:** University graphic elements used in select instances



BRAND ARCHITECTURE

# Current and Primary Signatures

## Current







## Primary







## Primary






BRAND ARCHITECTURE

# Division/School Signatures

Current

UNC | COLLEGE OF ARTS AND SCIENCES

UNC

COLLEGE OF ARTS AND SCIENCES

Proposed

College of Arts and Sciences
The University *of* North Carolina

College of Arts and Sciences
The University *of* North Carolina

BRAND ARCHITECTURE

# Division/School Signatures

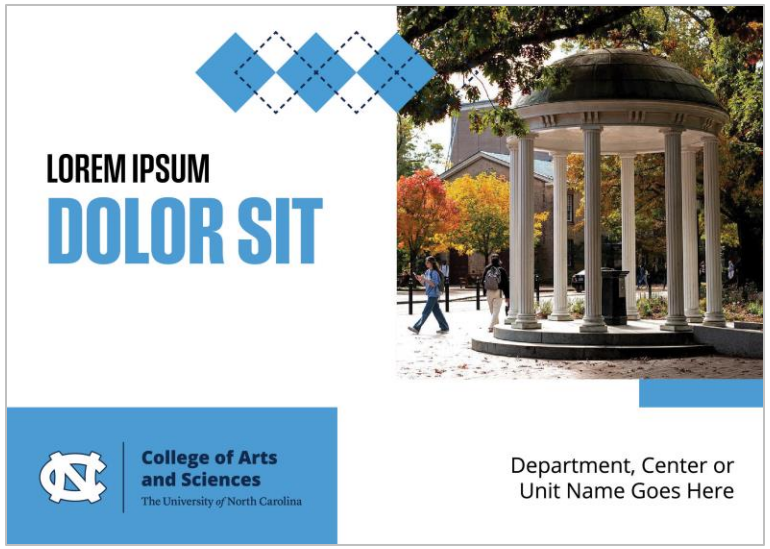
- Adams School of Dentistry
- Campus Safety
- College of Arts and Sciences
- Eshelman School of Pharmacy
- Finance and Operations
- Gillings School of Global Public Health
- Global Affairs
- The Graduate School
- Human Resources
- Hussman School of Journalism and Media
- Information Technology Services
- Innovate Carolina
- Kenan-Flagler Business School
- Lineberger Comprehensive Cancer Center
- Office of the Chancellor
- Office of Enrollment
- Office of the Executive Vice Chancellor and Provost
- Public Affairs
- Research
- School of Civic Life and Leadership
- School of Data Science and Society
- School of Education
- School of Government
- School of Information and Library Science
- School of Law
- School of Medicine
- School of Nursing
- School of Social Work
- Student Affairs
- Summer School
- UNC Police
- UNC Visitors Center
- University Communications and Marketing
- University Compliance Office
- University Counsel
- University Development
- University Libraries

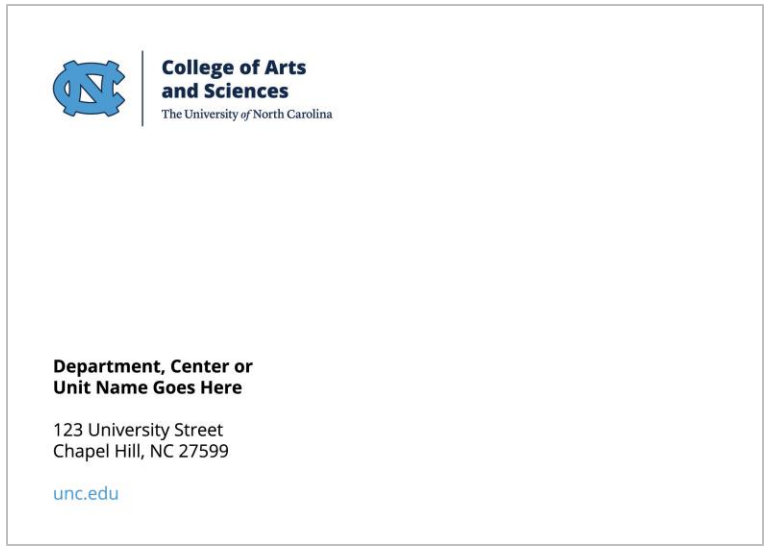
BRAND ARCHITECTURE

# Other Unit Examples

Division/School Signature

Department, Center or Unit Name







Division/School Signature

Department, Center or Unit Name

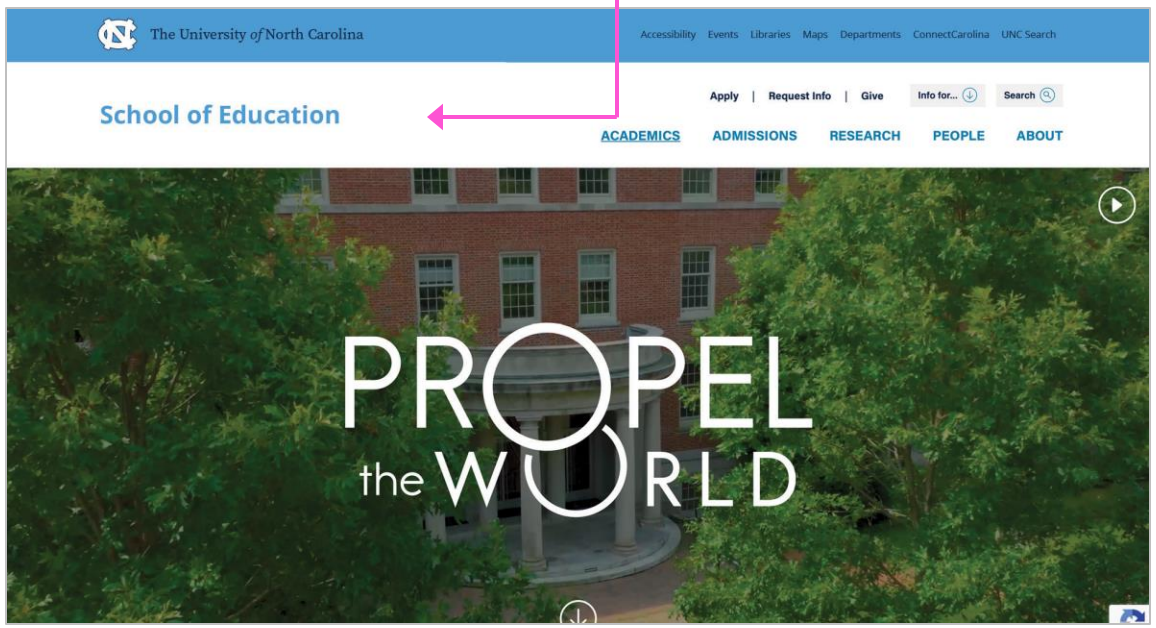
Department, Center or Unit Name

Division/School Signature

# Websites

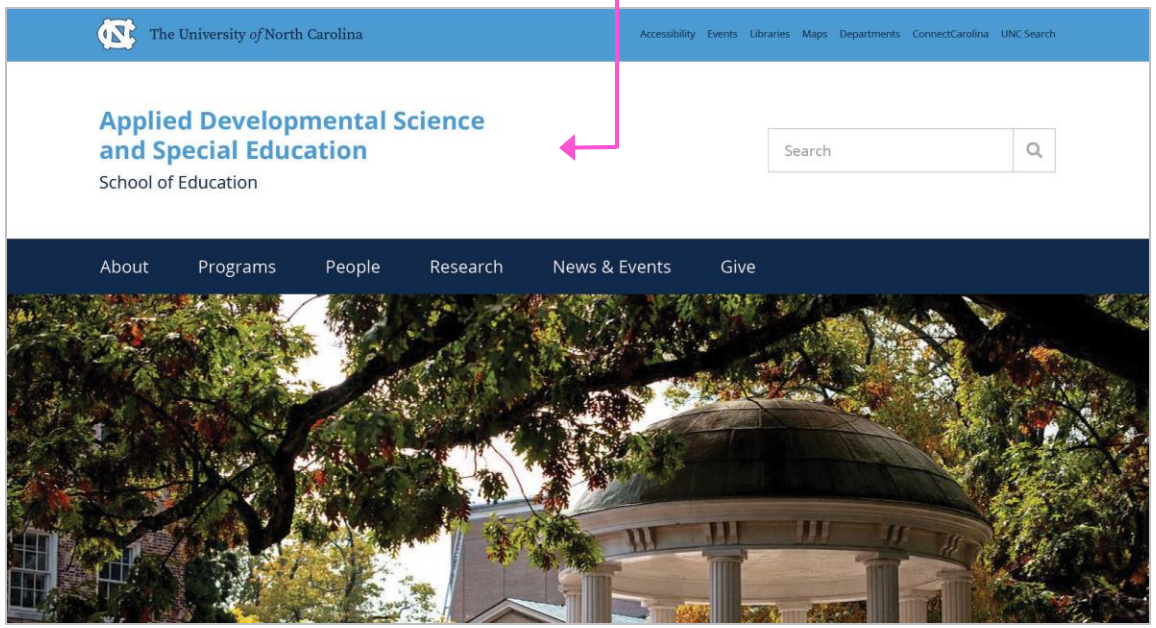
Updated Toolbar

Digital Typeset




Updated Toolbar

Digital Typeset



# Special Marks








# Budget Considerations

- Division/School design files
- Letterhead for schools and units
- Websites and social media
- Magazines/newsletters
- Collateral/giveaways
- Campus/building signage

ROLLOUT

# Rollout Timeline and Support

- University Signature files will be shared in the next few weeks
- Updating digital materials and websites will be a priority over the next three months
- Print materials will be produced as needed over the next year and a half
- Support will be offered all along the way
  - Office hours
  - Dedicated meetings with Schools/Divisions
  - Training sessions
  - Resources and templates



The University
*of* North Carolina

04

BRAND STRATEGY

# Appendix

PROPOSED LOGO SYSTEM

# Color Options

















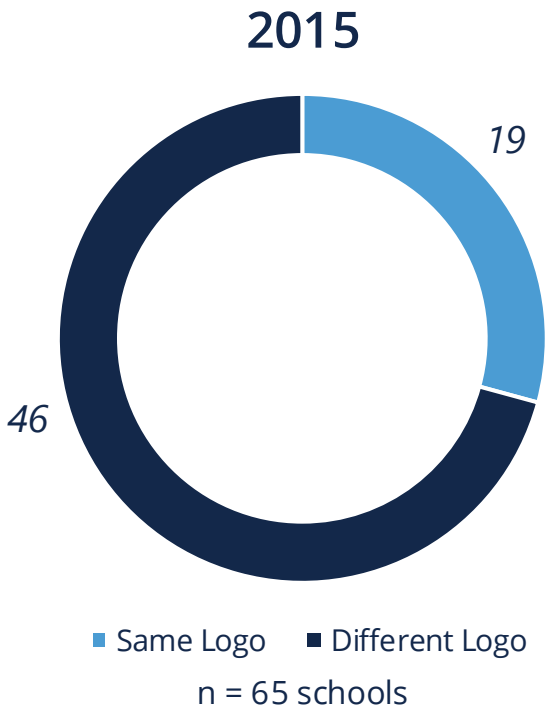

03

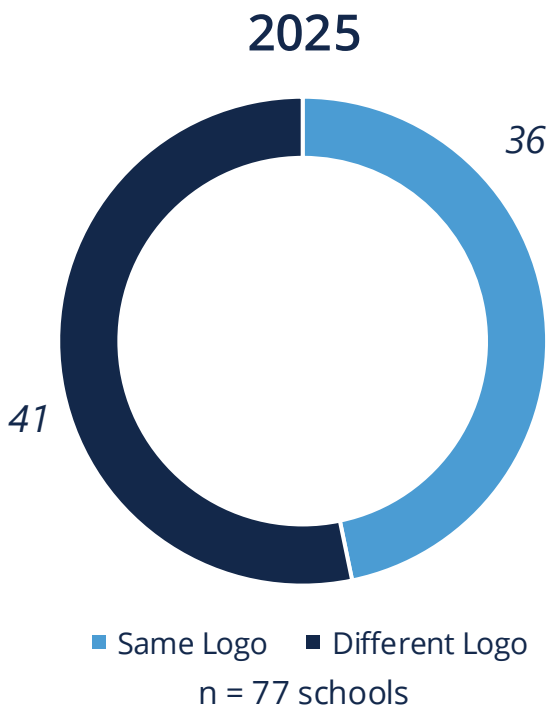
BRAND STRATEGY

# Logo Research

RESEARCH – LOGO ALIGNMENT

# What Other Schools are Doing




Out of the original 65 schools, 15 schools (23%) have started using the same logo across Academics and Athletic departments.

RESEARCH – FLAGSHIP LOCATION USAGE

# Examples of Note

ILLINOIS

***Primary***

UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN

***Secondary***

UIC UNIVERSITY OF ILLINOIS CHICAGO

UNIVERSITY OF ILLINOIS SPRINGFIELD

***IU System Schools***

---

UNIVERSITY OF OREGON

UNIVERSITY OF OREGON PORTLAND

UNIVERSITY OF MICHIGAN

UNIVERSITY OF MICHIGAN-DEARBORN

THE OHIO STATE UNIVERSITY

THE OHIO STATE UNIVERSITY MARION

---

UNIVERSITY OF MARYLAND

Bowie State University · Coppin State University · Frostburg State University · Salisbury University · Towson University · University of Maryland Baltimore · UMBC · University of Maryland Center for Environmental Science · University of Maryland · University System of Maryland · University of Maryland Eastern Shore · University of Maryland Global Campus · University of Baltimore · The Universities at Shady Grove · USMH · USMSM

# Brand Strategy Update

Dr. Adrienne King

*Associate Vice Chancellor for Marketing*



THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

# Four Phases

☑ **Phase 1: Research** *(March – April)*
- Qualitative – COMPLETED
- Quantitative – COMPLETED

☑ **Phase 2: Brand Positioning** *(May – June)*
- Research-driven – COMPLETED
- Competitive Landscape – COMPLETED

❑ **Phase 3: Brand Expression** *(June – Sept)*
- Strategy Framework – ONGOING
- Creative Development – ONGOING

❑ **Phase 4: Execution** *(Fall 2025)*
- Ucomm Integration/Adoption
- Campaign Launch
- Campus Partner Activation

# Current Timeline

| All timelines are tentative and subject to change based on approvals. | January | | | | February | | | | March | | | | | April | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 6-Jan | 13-Jan | 20-Jan | 27-Jan | 3-Feb | 10-Feb | 17-Feb | 24-Feb | 3-Mar | 10-Mar | 17-Mar | 24-Mar | 31-Mar | 7-Apr | 14-Apr | 21-Apr | 28-Apr | 5-May |
| **DISCOVERY & BRAND FOUNDATION** | | | | | | | | | | | | | | | | | | |
| Client Kickoff (1/8) | | | | | | | | | | | | | | | | | | |
| Client Document Upload to Dropbox | | | | | | | | | | | | | | | | | | |
| Peer Audit | | | | | | | | | | | | | | | | | | |
| Document Review | | | | | | | | | | | | | | | | | | |
| Interview Scheduling | | | | | | | | | | | | | | | | | | |
| Interview Discussion Guide Development (Client to provide approval) | | | | | | | | | | | | | | | | | | |
| Virtual Zoom Interviews | | | | | | | | | | | | | | | | | | |
| Campus Immersion (2 - 3 days) | | | | | | | | | | | | | | | | | | |
| High-level Immersion Read Out Sent: 3/10 | | | | | | | | | | | | | | | | | | |
| Online Study - QuestionnaireDevelopment | | | | | | | | | | | | | | | | | | |
| Online Study - Questionnaire Review, Revisions and Approval (by 3/28) | | | | | | | | | | | | | | | | | | |
| Online Study - Programming | | | | | | | | | | | | | | | | | | |
| Online Study - Fielding | | | | | | | | | | | | | | | | | | |
| Online Study - Tabulation | | | | | | | | | | | | | | | | | | |
| Strategic Analysis | | | | | | | | | | | | | | | | | | |
| Discovery and Analysis Presentation (Core Team): 5/1 | | | | | | | | | | | | | | | | | | |
| Discovery and Analysis Presentation (week of 5/5) | | | | | | | | | | | | | | | | | | |

# Current Timeline

| All timelines are tentative and subject to change based on approvals. | May | | | | June | | |
|---|---|---|---|---|---|---|---|
| | 5-May | 12-May | 19-May | 26-May | 2-Jun | 9-Jun | 16-Jun |
| **BRAND DEVELOPMENT** | | | | | | | |
| **Positioning** | | | | | | | |
| Positioning Development | | | | | | | |
| Positioning Work Session (Core Team) | | | | | | | |
| **Positioning Platform** | | | | | | | |
| Positioning Platform Development | | | | | | | |
| Positioning Platform Presentation (Core Team) | | | | | | | |
| Positioning Platform R1 Presentation | | | | | | | |
| Positioning Platform R1 feedback needed from UNC Team | | | | | | | |
| Positioning Platform R2 Presentation (if needed) | | | | | | | |
| Positioning Platform R2 feedback needed from UNC Team | | | | | | | |
| Positioning Platform R2 Revisions | | | | | | | |
| **Messaging Development** | | | | | | | |
| Messaging Development | | | | | | | |
| Messaging R1 Presentation | | | | | | | |
| Messaging R1 feedback needed from UNC Team | | | | | | | |
| Messaging R2 Presentation | | | | | | | |
| Messaging R2 feedback needed from UNC Team | | | | | | | |
| Messaging R2 Revisions | | | | | | | |
| **Creative Briefs** | | | | | | | |
| Creative Brief Development | | | | | | | |
| Creative Brief approval needed from UNC Team | | | | | | | |

# Current Timeline

| All timelines are tentative and subject to change based on approvals. | May | | | | June | | | | | July | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 5-May | 12-May | 19-May | 26-May | 2-Jun | 9-Jun | 16-Jun | 23-Jun | 30-Jun | 7-Jul | 14-Jul | 21-Jul | 28-Jul |
| **BRAND EXPRESSION** | | | | | | | | | | | | | |
| **Creative Concepts** | | | | | | | | | | | | | |
| Campaign Concept Development | | | | | | | | | | | | | |
| Creative Concept Presentation (Core Team) | | | | | | | | | | | | | |
| Creative Concept R1 feedback needed from UNC Team (engage internal entities) | | | | | | | | | | | | | |
| Creative Concept Presentation (Leadership Team) | | | | | | | | | | | | | |
| Creative Concept R2 feedback needed from UNC Team | | | | | | | | | | | | | |
| Creative Concept R2 Revision Presentation | | | | | | | | | | | | | |
| **Media Planning** | | | | | | | | | | | | | |
| Media/Communications Plan Development | | | | | | | | | | | | | |
| R1 Media Presentation | | | | | | | | | | | | | |
| Media/Communications Plan feedback needed from UNC Team | | | | | | | | | | | | | |
| R2 Media Planning | | | | | | | | | | | | | |
| Media/Communications Recommendation Presentation | | | | | | | | | | | | | |

# Proposed Revised Timeline

| All timelines are tentative and subject to change based on approvals. | June | | | | July | | | | August | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 9-Jun | 16-Jun | 23-Jun | 30-Jun | 7-Jul | 14-Jul | 21-Jul | 28-Jul | 4-Aug | 11-Aug | 18-Aug |
| **BRAND EXPRESSION** | | | | | | | | | | | |
| **Creative Concepts** | | | | | | | | | | | |
| Present Research / Strategy (Date TBD - Ken is out on PTO June 23 - June 25) | | | ■ | ■ | | | | | | | |
| Creative Concept Presentation w/ Core Team (7/9) | | | | | ■ | | | | | | |
| Creative Concept R1 feedback needed from UNC Team (7/14) | | | | | | ■ | | | | | |
| Creative Revisions | | | | | | ■ | ■ | ■ | | | |
| Creative Concept Presentation w/ Leadership Team (7/23) | | | | | | | | ■ | | | |
| Creative Concept R2 feedback needed from UNC Team (7/30) | | | | | | | | ■ | | | |
| Creative Concept R3 Presentation (8/6) | | | | | | | | | ■ | | |
| Chancellor Presentation (week of 8/11) | | | | | | | | | | | |

# Next Steps/Input Needed

- Broader UCM Engagement
- Campus Partner Engagement
- Revised Timeline: Ensure the proposed timeline still meets leadership’s expectations;
- 2x4 Additions/Budget Alignment:
- Media Plan/Buyer and Budget Alignment;
- BOT Engagement

# Brand Strategy Update

Dr. Adrienne King

*Associate Vice Chancellor for Marketing*



THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

BRAND STRATEGY

# Let’s first define what we mean when we say *brand*.

# What is it?

# Why do we need it?

# How do we create it?

# Brand is…

- Not a tagline.
- Not a logo.
- Not a color.
- Not even a marketing campaign.

Those are all aspects of our brand…

**Our brand is much bigger than that.**

# Our brand is a promise we make.

# Built from the inside, radiating out.

An authentic brand position is a powerful lens to refine not just our communication (what we say) but our strategic actions (what we do).

Integrating **brand and strategy** is what creates **authentic differentiation**.

~~What is it?~~

# Why do we need it?

## Brand strategy creates differentiation and builds awareness.

Brand strategy is what allows us to differentiate ourselves by establishing a distinct and compelling identity. It highlights our unique strengths, values, and contributions we make. Differentiation leads to increased awareness, favorability and ultimately reputation.

## Why reputation matters.

Generating awareness and reputation leads to continued state support, increases in research and fundraising dollars, enrollments and recruitment and retention of the highest-caliber faculty and staff.

~~What is it?~~

~~Why do we need it?~~

**How do we create it?**

# Four Phases

- **Phase 1: Research**
  - Qualitative – COMPLETED
  - Quantitative – Launched 4/9
- **Phase 2: Brand Positioning**
  - Research-driven
  - Competitive Landscape
- **Phase 3: Brand Expression**
  - Strategy Framework
  - Creative Development
- **Phase 4: Execution**
  - Campaign Launch
  - Campus Partner Activation

# Phase 1a: Qualitative Research

## CAMPUS INTERVIEWS & FOCUS GROUPS BY THE NUMBERS

**79**
TOTAL PEOPLE INTERVIEWED

**12**
INDIVIDUAL INTERVIEWS

**11**
GROUP INTERVIEWS

**31**
TOTAL HOURS OF INTERVIEWS

# Phase 1b: Quantitative Research

## STAKEHOLDER SURVEYS – Fielding April 9-22

- Alumni
- Faculty
- Staff
- Current Students
- NC Residents

# How can we help?

- ❑ Complete the market research survey
- ❑ Celebrate the brand strategy launch in Fall 2025!
- ❑ Join us! We need brand ambassadors.



THE UNIVERSITY
*of* NORTH CAROLINA
*at* CHAPEL HILL

# Brand Strategy Update

Dr. Adrienne King

*Associate Vice Chancellor for Marketing*



THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

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- **Phase 1: Research** *(March – April)*
  - Qualitative – COMPLETED
  - Quantitative – COMPLETED
- **Phase 2: Brand Positioning** *(May – June)*
  - Research-driven
  - Competitive Landscape
- **Phase 3: Brand Expression** *(June – Sept)*
  - Strategy Framework
  - Creative Development
- **Phase 4: Execution** *(Fall 2025)*
  - Campaign Launch
  - Campus Partner Activation

# Phase 1a: Qualitative Research

## CAMPUS INTERVIEWS & FOCUS GROUPS BY THE NUMBERS

**80** TOTAL PEOPLE INTERVIEWED

**13** INDIVIDUAL INTERVIEWS

**11** GROUP INTERVIEWS

**31** TOTAL HOURS OF INTERVIEWS

# Phase 1b: Quantitative Research

## STAKEHOLDER SURVEYS – April 9-22

**7,432**

TOTAL RESPONSES

- Alumni (5,332)
- Faculty (363)
- Staff (727)
- Administration (283)
- Postdoc/GR/Prof Students (432)
- UG Students (369)
- Board Member/Volunteer (163)
- Parent (717)
- General Public (810)

# Four Phases

- **Phase 1: Research** *(March – April)*
  - Qualitative – COMPLETED
  - Quantitative – COMPLETED
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  - Campaign Launch
  - Campus Partner Activation

OCTOBER 16, 2024

# The University of North Carolina – Chapel Hill

## Communications & Marketing Recommendations

BRUNSWICK

# Executive Summary

## Overview

Evaluate UNC-Chapel Hill's (UNC-CH) communications function to identify opportunities for better engagement with critical audiences and stakeholders. Provide recommendations to transform it into a best-in-class department that proactively promotes the University's brand and enhances its reputation.

## Approach

**01**
Strategic document review*

**02**
Internal stakeholder interviews*

**03**
Benchmarking peer institutions*

## Objectives

**Near-term**
- Positive leadership transition
- Rebuild University credibility
- Strengthen issues and crisis communications protocols

**Mid-term**
- Advance Chancellor's priorities
- Streamline decision-making for stakeholder engagement
- Shift from reactive to proactive, strategic communications
- Promote a positive and consistent narrative

**Long-term**
- Build best-in-class communications and marketing function
- Drive refreshed brand enhancing the University's reputation
- Boost engagement with critical stakeholders

## Recommendations

- Re-position and align Vice Chancellor of Communications role for greater effectiveness
- Enhance leadership communications to amplify University and Chancellor's priorities
- Create greater alignment across University communications, particularly with the schools and deans

* See Appendix

# Building the Next Generation of Carolina Communications

A best-in-class university communications and marketing function should optimize these key elements

### Brand Management:

Builds and maintains strong brand identity that reflects the University's mission, values and academic excellence across all channels.

### Stakeholder Engagement:

Builds relationships with students, deans, staff, faculty, alumni and the broader community to foster a sense of belonging and shared mission.

### Reputation Building:

Proactively manages thought leadership opportunities and public speaking engagements to build institutional credibility and influence.

### Content Creation and Storytelling:

Produces engaging content that highlights University successes, faculty expertise, student achievements and research breakthroughs.

### Media Relations:

Develops and manages media relations at the local, state and national levels by fostering relationships with key journalists and opinion leaders.

### Issues Management/Crisis Comms.:

Proactively prepares for and manages crises to ensure clear, transparent and timely communications that protect the University's reputation.

### Integrated Marketing Campaigns:

Delivers multi-channel campaigns targeting current and future students, alumni, donors and key stakeholders to strengthen Carolina's brand and values.

### Social Media + Digital Innovation:

Utilizes digital tools, trends and platforms to engage audiences in real-time, ensuring a dynamic and responsive online presence.

### Data-Driven Decision-Making:

Uses analytics and market research to guide communications strategies and measure campaign effectiveness, adjusting for optimal outcomes.

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# Reputational Landscape

Carolina has strong reputation, passionate supporters and internal and external challenges

## Strengths

- Transformational leader in education, research, technology, finance, athletics and healthcare
- Significant state investment and low cost
- Positive outcomes and demonstrable results
- Growing demand, passionate stakeholders and high national rankings

## Opportunities

- Transformational leader in education, research, technology, finance, athletics and healthcare
- Senior leadership transition
- *Ambitious agenda that will require both difficult decisions and close coordination among many units*

## Weaknesses

- Decentralized organization with diffuse priorities and cumbersome decision-making
- Highly visible academic freedom issues
- Governance controversies and executive turnover has eroded confidence in the quality and effectiveness of central University communications
- Erosion in identity of values, missions and impact

## Threats

- Polarized national environment for higher education with public concerns about cost, value, access, quality, protest and free speech
- Polarized environment in North Carolina among key stakeholders
- *Ambitious agenda that will require both difficult decisions and close coordination among many units*

***** *Statements in italics indicate both threats and opportunities; execution determines if they become liabilities or assets*

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# Stakeholder Interviews

## Carolina has lost its "Way"

### Decade of Crisis and Leadership Changes

- Ongoing controversies and leadership changes
- Weakened ability to project a positive image
- Diminished sense of purpose and shared values

> ***Over the last 10 years, there's been a degradation of what UNC stands for.***

### Media Relations is Seen as Slow and Unresponsive

- Slow response with limited information during complex crisis scenarios or routine media inquiries
- Unclear media relations infrastructure around decision-making authority that affects response times
- Reactive strategic and crisis communications

> ***Nobody is empowered or visible enough on a regular basis to represent the University.***

### The "Carolina Way" is Missing

- Lack of a clear brand identity built on an aligned sense of purpose, values and supporting messages

> ***There was an innate sense of what Carolina was and the specialness of Carolina, and what I would call a humble confidence.***

### What Does Carolina Mean to North Carolina

- Demonstrate how Carolina benefits all citizens of North Carolina to show its value and continue its legacy
- Highlight UNC-Health as a critical example

> ***I want to always make sure people are thinking about the external constituencies.***

### Telling the "Carolina" Story

- Opportunities to tell the University's story and highlight the important work and groundbreaking research on campus
- Benefit from developing deeper media relations with local papers/ reporters and statewide media outlets to help tell stories in a positive way

> ***That's a key part of this – learning how to get at what the actual human impact stories are.***

# Recommendations for Communications Structure

Addressing challenges and meeting objectives

01 Re-position and align Vice Chancellor of Communications for greater effectiveness

02 Enhance leadership communications to amplify University and Chancellor's priorities

03 Create greater alignment across University communications, particularly with the schools and deans

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# Re-Aligning the Vice Chancellor of Communications

***UNC-Chapel Hill's principal communications, marketing and reputation officer***

The Vice Chancellor of Communications **drives all communications, marketing and reputation strategies**, advising the Chancellor, Provost and Board of Trustees. This role ensures effective crisis management, clear academic messages and leads branding campaigns.

The Vice Chancellor must have the **positioning and stature to represent the University and Chancellor**, engaging media, campus leaders, the UNC system and national stakeholders.

The Vice Chancellor serves as the **primary leader for enhancing and safeguarding Carolina's reputation**. As the **Chancellor's senior communications advisor**, they drive strategic, ongoing efforts to shape and win public opinion for the University and its leadership.

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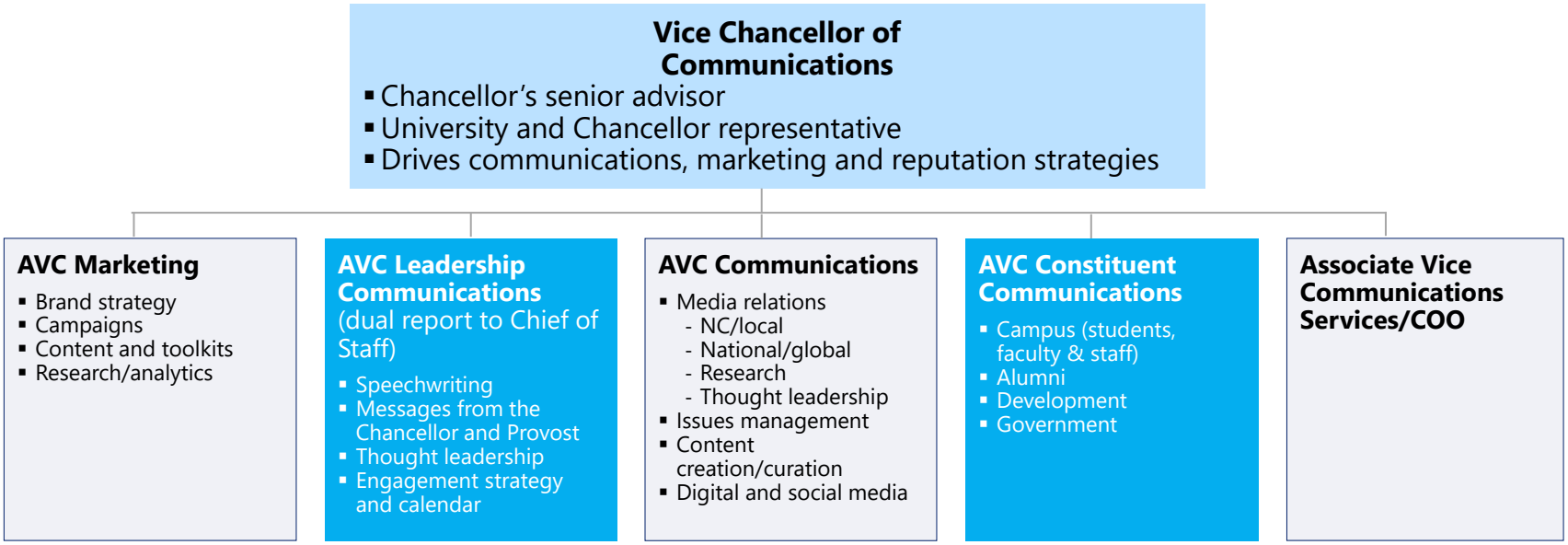
# Positioning and Structure

| | | | |
|---|---|---|---|
| **Reporting** | Direct report to the Chancellor | Office in South Building | Member of the Chancellor's senior cabinet |
| **Alignment** | ▪ Full **member of the Chancellor's senior cabinet** and senior level committees and peer relationship with deans and major unit heads<br>▪ Peer partner to the **Chief Government Relations Officer** to develop and execute policy communications<br>▪ Peer partner with the **Vice Chancellor for Development** for fundraising and stakeholder communications<br>▪ Partner with the **President of the General Alumni Association** on alumni communications strategies | | |
| **Potential Titles** | Vice Chancellor for Communications and Marketing | Vice Chancellor for Strategic Communications and Marketing | Vice Chancellor for Strategic Communications |

# Communications Structure

***Clarify roles, objectives and operations to enhance focus, streamline processes and improve outcomes***

The current UNC-CH organization structure is not atypical for a university communications department, but roles and responsibilities could be both clarified and sharpened. Key functions and direct reports to the Vice Chancellor of Communications could include:




It is recommended the roles be elevated from Director to Associate Vice Chancellor within the current communications function.

# Developing Leadership Communications

***Enhancing the University and Chancellor's messages, priorities and goals***

## Leading Carolina

Ensuring that the campus community – students, employees and friends – can fulfill Carolina's ambition to be a thriving, vibrant, well-run and inclusive institution committed to excellence in all endeavors.

## Advocating for Carolina

Serving as the chief advocate for the University with System, Legislature, donors and other key constituents to secure the resources and political support for Carolina to succeed.

## Building a state, national and global platform

Becoming a state, national and global leader in higher education policy and advocacy, with particular focus on the impact of flagship public research universities like Carolina.

## Attributes of successful leadership communications

- ❑ **Expertise**
  Deep knowledge and understanding of their field or industry
- ❑ **Credibility**
  Trustworthiness and respect earned through consistent performance and ethical behavior
- ❑ **Authenticity**
  Genuine and transparent in their interactions and messages
- ❑ **Vision**
  Clear and forward-thinking perspective on the future of their industry
- ❑ **Perspective**
  Ability to introduce new ideas, concepts or solutions
- ❑ **Adaptability**
  Flexibility to adjust strategies in response to changing trends and feedback
- ❑ **Networks**
  Building and maintaining strong connections with other thought leaders in relevant areas
- ❑ **Communications**
  Well developed channels to articulate messages across various platforms
- ❑ **Engagement**
  Active involvement with key stakeholders, encouraging dialogue and feedback

# Engagement and Alignment with Schools and Deans

***Incentivizing and encouraging schools and deans to share a vision and message***

## Desired Outcome

Creating alignment on messages so UNC-CH can amplify core values and key accomplishments across multiple channels and platforms.

## The Challenge

Trying to control the uncontrollable demands extensive effort and political capital with stakeholders whose agendas may not align with the Chancellor's priorities.

| | |
|---|---|
| Decentralized Structure | **Continue to operate within the decentralized structure** while strengthening priority areas, including crisis management, institutional messaging, Chancellor engagement, brand identity, government relations and senior communications leadership. |
| Communications Inventory | **Initiate an inventory (not an "audit")** of communications and marketing assets across the University, including staff, funding for communications and marketing services to identify areas in which collaboration can be incentivized. |
| Communications Cabinet | **Reinstate Communications Cabinet** with senior communications leaders from schools and cabinet-level units (i.e., UNC Health, Athletics) to meet monthly for networking, alignment of messages, strategies and resources and anticipating issues and opportunities. |
| Communications Council | **Strengthen Carolina Communications Council** and affinity groups for networking, professional development and talent identification. |

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# Appendix

# Peer Benchmarking (1/2)

## Communications and Marketing Functions

| Institution/ Title | Function | Structure | Internal/External Channels |
|---|---|---|---|
| Duke UNIVERSITY<br>*Vice President, Communications, Marketing & Public Affairs* | ▪ Marketing & Brand Strategy<br>▪ News & Media Relations<br>▪ Crisis Communications | ▪ Marketing is integrated into the Duke Communications and Marketing Office.<br>▪ The Marketing and Brand Strategy team is a subdivision of Duke's Communications and Marketing department.<br>▪ The President's Office has two positions dedicated to support the President's communications.<br>▪ Highly decentralized environment. Schools, departments, units, Duke Health and Athletics all have communications and marketing teams. | **Internal**: *Duke Today/Working@Duke* (a daily web publication for faculty and staff), *Working@Duke* Magazine (primary internal print publication for Duke), *Primetime* (quarterly employee forum, *Managing@Duke* (email to university managers).<br>**External**: *Duke News*, *Duke Today* articles are produced by staff and faculty across the university and health system, *Duke Daily* and the *Duke Weekly* newsletters. |
| NC STATE UNIVERSITY<br>*Communications & Marketing Officer, AVC for Communications & Marketing* | ▪ Marketing<br>▪ University Communications<br>▪ Administration<br>▪ Social Media<br>▪ Strategic Brand Management<br>▪ Crisis Communications<br>▪ Media Relations | ▪ The NC State Communications and Marketing serves the entire University, but each school has its own independent Communications team or staff.<br>▪ Communications and Marketing has a combined office.<br>▪ The Chief Communications and Marketing Officer also holds the title of Associate Vice Chancellor for Communications and Marketing and reports to the Chancellor.<br>▪ The Chancellor's Office has two roles dedicated to support the President's communications. | **Internal**: *NC State Newswire*<br>**External**: *NC State Magazine* and *NC State News*, research blog *The Abstract*. |
| UF \| UNIVERSITY of FLORIDA<br>*Vice President for Communications* | ▪ Integrated Communications & Marketing<br>▪ Media Relations<br>▪ Creative Services (incl. Videography)<br>▪ News & Content Management<br>▪ Public Affairs<br>▪ Crisis Communications | ▪ The Strategic Communications and Marketing department serves the entire University but works closely with college and unit leaders.<br>▪ The Integrated Communications & Marketing team is a subdivision of University of Florida Strategic Communications and Marketing department.<br>▪ The department provides external and internal communications support to the President and is led bythe VP of Communications. | **Internal**: *UF at Work* (an online news publication for University of Florida faculty and staff).<br>**External**: *UF News* (The University news hub, regularly distributing a newsletter). |

# Peer Benchmarking (2/2)

## Communications and Marketing Functions

| Institution/ Title | Function | Structure | Internal/External Channels |
|---|---|---|---|
| UNIVERSITY OF MICHIGAN<br>*Vice President for Communications* | ▪ Executive Communications<br>▪ HR Communications & Strategic Initiatives<br>▪ Marketing & Brand<br>▪ Media Relations<br>▪ Crisis Communications<br>▪ Digital & Social Media | ▪ The Office of the VP of Communications serves the entire University and partners with departments on all three U-M campuses.<br>▪ The Marketing and Brand team is a subdivision of the Strategic Communications and Marketing Group.<br>▪ The VP of Communications reports to the President.<br>▪ The Strategic Communications and Marketing Group has a role dedicated to support the President's communications. | **Internal**: *University Record* (both online and in print).<br>**External**: *Michigan News*, *Michigan Today*, an online magazine for Michigan alumni, *Michigan Public*, the university's National Public Radio station. |
| TEXAS<br>*Vice President for Marketing & Communications* | ▪ Administration<br>▪ University and Campus Communications<br>▪ Presidential Communications<br>▪ Strategic Priorities<br>▪ University Marketing<br>▪ Media Relations | ▪ The Marketing and Communications department serves the full University and is led by the VP and Chief Marketing and Communications Officer, who reports to the President.<br>▪ The marketing team is part of the University Marketing and Communications (UMAC) department.<br>▪ The President's Office has a Communications Coordinator role dedicated to support the President's communications. | **Internal**: No internal channels identified.<br>**External**: *UT News*, monthly Texas *eNewsletter, Texas Podcast Network*, magazines *Texas Connect* and *Texas Leader, Challenging World, Texas Leader* (bimonthly collection of impact stories from across campus). |
| UNIVERSITY of VIRGINIA<br>*Vice President for Communications & Chief Marketing Officer* | ▪ Creative and Digital<br>▪ Leadership & Media Communications<br>▪ Marketing & Brand Strategy<br>▪ University News & Content<br>▪ Crisis Communications | ▪ The Communications team serves the entire University, but all individual schools have their own communications teams or staff.<br>▪ The Department is led by VP of Communications and Chief Marketing Officer, who sits on the President's cabinet.<br>▪ The Marketing and Brand strategy team is a subdivision of the Communications department.<br>▪ The President's Office has several roles dedicated to support the President's communications. | **Internal**: No internal channels identified.<br>**External**: *UVA Today (*news feed communicates to the external community). |
| VANDERBILT UNIVERSITY<br>*Vice Chancellor for Communications & Marketing* | ▪ University Relations<br>▪ Strategic Communications<br>▪ Marketing<br>▪ Media Relations | ▪ The Communications and Marketing department serves the entire university, but the individual schools have their own communications teams or staff.<br>▪ The Marketing team is a subdivision of the Communications and Marketing department.<br>▪ The department is led by Vice Chancellor for Communications and Marketing, who reports to the Chancellor.<br>▪ Media Relations is split between Vanderbilt University, Vanderbilt Athletics and Vanderbilt University Medical Center. | **Internal**: *MyVU* (Faculty and Staff News Website and Email Newsletter)<br>**External:** *Vanderbilt News* website, *@Vanderbilt* (Research News and Events)<br>Email Newsletters: Research New @Vanderbilt, VU Today, Vanderbilt Now<br>Magazines: *Vanderbilt Magazine*, *Vanderbilt Business*, *Vanderbilt Law*, *Peabody Reflector*, *Vanderbilt Nurse* |

# Stakeholder Interviews

## Interviewee List

- **Mike Andreasen**, VC Development, UNC-CH
- **Martin H. Brinkley**, Dean of the School of Law, UNC-CH*
- **Dr. Wesley Burks**, Dean of School of Medicine, UNC-CH
- **Lucy Dunderdale Cate**, Deputy Chief of Staff, UNC-CH
- **Chris Clemens**, Provost and Chief Academic Officer, UNC-CH
- **Kamrhan Farwell**, Vice Chancellor of Communications, UN-CH
- **Veronica Flaspoehler**, President, Carolina Alumni, UNC-CH
- **Buck Goldstein**, Professor, Department of Economics, UNC-CH
- **Julia Grumbles**, Former Member of the UNC Board of Trustees
- **Christi Hurt**, Chief of Staff, UNC-CH
- **Eric Johnson**, Senior Advisor Communications & Strategy, UNC System
- **Nathan Knuffman**, Vice Chancellor for Finance and Operations and Chief Financial Officer, UNC-CH
- **Chris Lundberg**, Vice Provost for Communications & Associate Professor, UNC-CH
- **Charles Marshall**, General Counsel, UNC-CH
- **Chris McClure**, Chief Strategic Officer & Secretary, UNC-CH
- **Nancy Messonnier**, Dean of Gillings School of Public Health, UNC-CH
- **Beth Moracco**, Faculty Chair, UNC-CH
- **Raul Reis**, Dean of the School of Journalism, UNC-CH
- **Lee Roberts**, Chancellor, UNC-CH
- **Lisa Schiller**, Chief Communications and Marketing Officer, UNC Health
- **Jane Stancill**, VP Communications, UNC System

***** Interview to occur post presentation

# Internal document review

## Campus-wide Message Alignment

- APLU Top Messages Revised
- Strategy Document- Top Messages
- Top messages FINAL
- UNC External Event Guidelines - FINAL (PowerPoint)
- UNC External Events Guidelines (Word)

## Chancellor Messaging Strategy

- LHR Remarks, Faculty Council
- LHR Remarks, BOT
- Memo: Chancellor Roberts 30-60-90
- 2024 Chancellor Spring Commencement Speech
- Strategy Doc - LHR Summer-Fall
- Exec Comms Messaging Next Steps
- Lee Roberts meeting 1-3-23
- Spring 2024 Campus Protest Emails

## Communications Plans

- DEI Messaging Plan
- Demonstration Plan

## Marketing

- Marketing Proposal Costs - Expanded
- LHR Marketing Proposal
- Paid Social Media Strategy 2024
- Paid Social Performance Recap

## Overall Division Strategy

- 2023-2024 UCOMM Employee Engagement Survey
- VC Communications – Metric Tracking
- Kamrhan Farwell-Review 2024 Memo
- Lee Roberts Presentation - Updated July 2024
- My Self Review (VC Kamrhan Farwell)
- Organizational Chart - Master - 2024
- UComm Org Structure Presentation for Leaders