

**AGENDA**  
**SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT**  
**REGULAR MEETING OF THE BOARD OF TRUSTEES**  
**November 10, 2021**  
**Open Session at 6:00 p.m.**  
**Closed Session immediately following conclusion of Open Session**

**In Person at 3401 CSM Drive, San Mateo, CA 94402**

**Members of the Public may also participate via Zoom.**  
**Zoom Meeting ID - <https://smccd.zoom.us/j/84414267564>**  
**Dial-In: 1-669-900-9128 – Webinar ID: 844 1426 7564**

**NOTICE ABOUT PUBLIC PARTICIPATION AT BOARD MEETINGS**

**Observing the Meeting**

Members of the public who wish to observe the meeting in-person or remotely by accessing the link or calling the following telephone number above at the beginning of the meeting.

**For individuals who attend the meeting in person, face coverings will be required while in-doors at the District Office for all individuals, regardless of COVID-19 vaccination status.**

**Providing Public Comment During the Meeting on NON-AGENDA Items**

To make a comment regarding a non-agenda item, members of the public:

- (1) If in person, may seek recognition at the speaker's lectern when called upon by the Board President, or
- (2) If remote, once in the Zoom meeting (via above link), can utilize the "raise hand" function on the bottom right corner of the screen. This will allow for the Board President to recognize members for comment and will allow staff to activate audio access to individual participants. Members of the public who "raise their hand" will be called upon in the order they appear.
- (3) Members of the public making comment are reminded of the 3-minute time limit for comment.

**Providing Public Comment During the Meeting on AGENDA Items**

To make a comment regarding an item on the agenda, members of the public:

- (1) If in person, may seek recognition at the speaker's lectern when called upon by the Board President, or
- (2) If remote, once in the Zoom meeting (via above link), can utilize the "raise hand" function on the bottom right corner of the screen. This will allow for the Board President to recognize members for comment and will allow staff to activate audio access to individual participants. Members of the public who "raise their hand" will be called upon in the order they appear.
- (3) Members of the public making comment are reminded of the 3-minute time limit for comment.

**Accommodations**

Persons with disabilities who require an accommodation or service should contact the Chancellor's Office at (650) 358-6877 at least 24 hours prior to the Board meeting.

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**OPEN SESSION**

**6:00 p.m.      Call to Order / Roll Call / Pledge of Allegiance**

**DISCUSSION OF THE ORDER OF THE AGENDA**

**MINUTES**

21-11-01

Approval of the Minutes of the October 27, 2021 Regular Meeting

**PRESENTATIONS TO THE BOARD BY PERSONS OR DELEGATIONS**

21-11-01C Joint Presentation by Associated Students of Cañada College, College of San Mateo and Skyline College *(Time Allotted: 20 minutes)*

**STATEMENTS FROM EXECUTIVES AND STUDENT REPRESENTATIVES****STATEMENTS FROM OTHER REPRESENTATIVE GROUPS**

AFT, Local 1493  
CSEA, Chapter 33  
AFSCME, AFL-CIO, Local 829, Council 57

**STATEMENTS FROM THE PUBLIC ON NON-AGENDA ITEMS****NEW BUSINESS**

21-11-01A Approval of Personnel Items: Changes in Assignment, Compensation, Placement, Leaves, Staff Allocations and Classification of Academic and Classified Personnel *(Time Allotted: 5 minutes)*

**Approval of Consent Agenda**

*All items on the consent agenda may, by unanimous vote of the Board members present, be approved by one motion after allowing Board member questions about a particular item. Prior to a motion for approval of the consent agenda, any Board member, interested student or citizen or member of the staff may request that an item be removed to be discussed in the order listed, after approval of remaining items on the consent agenda.*

21-11-01CA Approval to Renew Districtwide Natural Gas Purchase Agreement with SPURR

21-11-02CA Approval of Revision to Board Policy 2.27 – Policy on Smoking and Tobacco Use

21-11-03CA Ratification of Agreement with VisionPoint Marketing, LLC for Districtwide Agency of Record for Marketing Services

21-11-04CA Adoption of Resolution No. 21-09 to Make Findings Allowing Continued Remote Meetings Under Brown Act

21-11-05CA Setting December 15, 2021 as Date for Annual Organizational Meeting of the Board of Trustees

21-11-06CA Ratification of Student Accidental Injury Insurance Program, 2021-2022

**Other Recommendations**

21-11-101B Approval of Supplemental Funding for College Ridge Employee Housing Construction Contract *(Time Allotted: 10 minutes)*

21-11-102B Consideration of Appointment of Members to the Bond Oversight Committee *(Time Allotted: 5 minutes)*

21-11-103B Consideration of Revisions to Board Policy 2.90 Regarding Vaccination Requirements for Students and Employees *(Time Allotted: 20 minutes)*

**INFORMATION ITEMS**

- 21-11-02C Discussion of 2022 Facilities Master Plan Development  
*(Time Allotted: 75 minutes)*
- 21-11-03C Review of Renaming and Branding Activities for the San Mateo Athletic Club  
*(Time Allotted: 10 minutes)*
- 21-11-04C Discussion on Process for Development and Implementation of Administrative Procedures  
*(Time Allotted: 10 minutes)*
- 21-11-05C Update from Board Operations Subcommittee *(Time Allotted: 10 minutes)*
- 21-11-06C Review and Feedback on Proposed Op Ed Proposed by Trustee Pimentel  
*(Time Allotted: 5 minutes)*

**COMMUNICATIONS**

**STATEMENTS FROM BOARD MEMBERS**

**CLOSED SESSION *(Immediately Following Conclusion of Open Session)***

**CLOSED SESSION ITEMS FOR DISCUSSION**

1. Conference with Labor Negotiators  
Agency Designated Representative: Michael Claire and Marie Billie  
Employee Organizations: AFSCME, AFT, CSEA and Non-Represented Employees

**PUBLIC COMMENTS ON CLOSED SESSION ITEMS ONLY**

**RECESS TO CLOSED SESSION**

**RECONVENE TO OPEN SESSION**

**ANNOUNCEMENT OF REPORTABLE ACTION TAKEN IN CLOSED SESSION (if necessary)**

**ADJOURNMENT**

**Minutes of the Study Session of the Board of Trustees  
San Mateo County Community College District  
October 27, 2021 – San Mateo, CA**

This was conducted remotely via Zoom. A video recording of the meeting can be accessed at: <https://smccd.edu/boardoftrustees/meetings.php>.

The meeting was called to order at 5:06 p.m.

**Board Members**

**Present:** President Thomas A. Nuris, Vice President Richard Holober, Trustee Maurice Goodman, Trustee Lisa Petrides, Trustee John Pimentel

**ANNOUNCEMENT OF CLOSED SESSION ITEMS FOR DISCUSSION**

President Nuris stated that during Closed Session, the Board will take up items as listed on the printed agenda including: (1) Ratification of July and August 2021 Confidential District Warrants; (2) Conference with Legal Counsel – Potential Litigation: Significant exposure to litigation pursuant to Gov. Code, § 54956.9, subd. (d)(2): One Case; and (3) Conference with Labor Negotiator for Employee Organizations: AFSCME, AFT, CSEA, Unrepresented Employees

**STATEMENTS FROM THE PUBLIC ON CLOSED SESSION ITEMS ONLY**

No comments.

**RECESS TO CLOSED SESSION**

The Board recessed to Closed Session at 5:08 p.m.

**RECONVENE TO OPEN SESSION**

The Board reconvened to Open Session at 6:14 p.m.

**Board Members**

**Present:** President Thomas A. Nuris, Vice President Richard Holober, Trustee Maurice Goodman, Trustee Lisa Petrides, Trustee John Pimentel, Student Trustee Ashley Garcia

**Others Present:**

Chancellor Michael Claire, Executive Vice Chancellor Richard Storti, Skyline College President Melissa Moreno, College of San Mateo President Jennifer Taylor-Mendoza, Cañada College Interim President Kim Lopez, District Academic Senate President Kate Williams Browne

**ANNOUNCEMENT OF REPORTABLE ACTION TAKEN IN CLOSED SESSION**

*[\(Time Stamp: 1:57:40\)](#)*

President Nuris stated that no reportable actions were taken in Closed Session.

**DISCUSSION OF THE ORDER OF THE AGENDA**

*[\(Time Stamp: 1:59:20\)](#)*

President Nuris stated that staff asks that Information Item 21-10-08C – Update on San Mateo Athletic Club Operational Transition be moved up in the agenda to be considered immediately prior to Item 21-10-02A – the Approval of Revision to Miscellaneous Pay Rate Salary Schedule. The Board agreed to the change and no further modifications were requested.

**Approval of the Minutes of the October 13, 2021 Study Session (21-10-02)**

*(Time Stamp: 2:00:02)*

*Motion to Approve by:* Vice President Holober

*Second by:* Trustee Goodman

*Action:* Approved unanimously, with all Trustees voting Aye.

*Summary of Edits or Corrections:* None.

**Approval of the Minutes of the October 20, 2021 Special Closed Session (21-10-03)**

*(Time Stamp: 2:00:29)*

*Motion to Approve by:* Trustee Petrides

*Second by:* Vice President Holober

*Action:* Approved unanimously, with all Trustees voting Aye.

*Summary of Edits or Corrections:* None.

**PRESENTATIONS TO THE BOARD BY PERSONS OR DELEGATIONS**

**Contemporary Conversation Regarding Race, Class, Gender, Privilege and Equity: Creating Filipinx Learning Communities (21-10-09C)**

*(Time Stamp: 2:00:54)*

Dr. Newin Orante, Dr. Liza Erpelo, Doris Garcia, and Griselda Paredes presented on the Kababayan Learning Community and provided an update on the history of the community, accomplishments and progress to date and asked for the Board's support with future efforts relating to the growth of the learning community for Filipinx students.

The Board of Trustees expressed its collective support for the Filipinx Learning Community and thanked the team for its work in developing and nurturing the programs and services that make up the community. Trustees also expressed willingness to engage their peers on area high school district boards to help with expanding the program and opportunities to Filipino students and communities.

**STATEMENTS FROM EXECUTIVES AND STUDENT REPRESENTATIVES**

*(Time Stamp: 2:18:05)*

- *Chancellor Claire* mentioned the Whistleblower Hotline is now operational; provided an updated on the hiring of the Internal Auditor; and the efforts in placing feminine and menstrual products on all college campuses, per a new state law.
- *President Moreno* acknowledged the 25-year District Service Award Celebration that was held at Skyline on Monday, October 25<sup>th</sup>.
- *President Taylor-Mendoza* stated she participated in the 5k Fun Run by the San Mateo Rotarians; she attended a board meeting of the Cabrillo Unified School District with Superintendent of Schools Nancy Magee to show support of Shawn McFictrick and the District's Equity statement and work; she wrote an editorial in response to an article about the Latinx community being least likely to succeed in Cabrillo Unified School District.

- ***Interim President Lopez*** invited everyone to attend the virtual Cañada College President's Luncheon on November 2<sup>nd</sup> at 12:00 p.m. The luncheon and all donations go to Cañada's scholarship fund and basic needs for students.
- ***District Academic Senate President Browne*** gave a brief overview about the Senate and some of the current work which includes the District Curriculum Committee and District Teaching and Learning Committee looking at credits for prior learning and course delivery. The Senate discusses some of the college president's concerns about transparency, full participation of leadership staff and students, and guidance and decision making of campuses. Lastly, the Senate held their first Board Meet and Greet of the year with Trustee Goodman.
- ***Student Trustee Garcia*** mentioned the that District Student Council met and some of the topics discussed were districtwide gender neutral restrooms, composition of hiring committees, and undocumented students representation.

### **STATEMENTS FROM OTHER REPRESENTATIVE GROUPS**

[\*\(Time Stamp: 2:29:45\)\*](#)

- ***CSEA, Chapter 33:*** Annette Perot commented on the financial impact that COVID-19 has had on faculty and staff and encouraged the Board to authorize a cost of living adjustment.
- ***AFSCME, AFL-CIO, Local 829, Council 57:*** Tina Acree advocated for a cost of living adjustment for unit members.

### **STATEMENTS FROM THE PUBLIC ON NON-AGENDA ITEMS**

[\*\(Time Stamp: 2:34:10\)\*](#)

- Candice Johnson addressed her concerns about the lack of a compensation increase for faculty and staff.
- Frank Elliott thanked the Board and District Administration for the progress and positive direction of the San Mateo Athletic Club.
- Anny Gabrielly Moreira Da Silveira, a student at Cañada College and a member of the Phi Theta Kappa Honor Society, asked for the Board's support of their annual chapter project, which this year, is to have a Fire Alert Indicator and Air Quality Indicator placed on the District's website.

### **INFORMATION ITEMS**

#### **Update on San Mateo Athletic Club Operational Transition (21-10-08C)**

[\*\(Time Stamp: 2:44:30\)\*](#)

***Summer of Discussion:*** Executive Vice Chancellor Storti provided a brief update on the operational transition of the athletic club in order to start January 1, 2022. SMAC operations will no longer be run by a third-party vendor, but within SMCCCD. The update included taking a student-centered approach, fitness/aquatics programs, staffing plan, budget and financial planning, and general operational areas.

The Board expressed its general pleasure with the progress on getting the athletic club transitioned by January 1, 2022. Trustee Holober asked about marketing for the opening, and believes it is a

good time to get started on any plan that the District is working on right now.

Trustee Petrides asked about marketing, staffing, community member involvement, and the academic piece of the student-centered approach.

*Public Comment:* None.

## **NEW BUSINESS**

### **Approval of Revision to Miscellaneous Pay Rate Salary Schedule (21-10-02A)**

[\*\(Time Stamp: 3:15:25\)\*](#)

*Motion to Approve by:* Trustee Goodman

*Second by:* Trustee Pimentel

*Action:* Approved unanimously, with all Trustees voting Aye.

*Summary of Discussion:* Trustee Pimentel asked to receive additional background on the Community Education teaching positions large pay range. Chancellor Claire and Vice Chancellor Bauer responded accordingly.

Trustee Petrides inquired about the SMAC positions pay rate being comparable to what was being paid prior. The positions pay rate being offered are slightly higher.

*Public Comment:* None.

### **Approval of Personnel Items: Changes in Assignment, Compensation, Placement, Leaves, Staff Allocations and Classification of Academic and Classified Personnel (21-10-03A)**

[\*\(Time Stamp: 3:18:40\)\*](#)

*Motion to Approve by:* Vice President Holober

*Second by:* Trustee Goodman

*Action:* Approved unanimously, with all Trustees voting Aye.

*Summary of Discussion:* Trustee Pimentel inquired about the reassignment and reclassification processes. Chancellor Claire explained the difference between the two.

Trustee Holober suggested that the Board and District Administration take another look at the reclassification process.

Trustee Pimentel asked about the Passport Acceptance Facility Staff positions at Skyline College. President Moreno explained that this position serves the Study Aboard Program, with a focus on underserved students.

*Public Comment:* None.

## **NEW BUSINESS: Approval of Consent Agenda**

[\*\(Time Stamp: 3:25:30\)\*](#)

### **Ratification of District Warrants for July and August 2021 (21-10-01CA)**

**Disposition of District Records (21-10-02CA)**

**Approval of Curricular Additions, Deletions, and Modifications Cañada College, College of San Mateo, and Skyline College (21-10-03CA)**

**Amendment of 2020-2021, 2021-2022, and 2022-2023 Academic Calendars to Include the Observance of the Juneteenth Holidays (21-10-04CA)**

**Acceptance of Grant Funds from the Silicon Valley Community Foundation to Support the Development of an Early Childhood Apprenticeship Program at Skyline College (21-10-05CA)**

**Acceptance of Title V Developing Hispanic Serving Institutions Program Grant from the U.S. Department of Education (21-10-06CA)**

**Acceptance of Gifts and Donations by the District: Fire Equipment from the Central County Fire Department (21-10-07CA)**

**Approval of College and Career Access Pathways Dual Enrollment Partnership Agreement with La Honda-Pescadero Unified School District (21-10-08CA)**

*Motion to Approve by:* Trustee Pimentel

*Second by:* Vice President Holober

*Action:* Approved unanimously, with all Trustees voting Aye.

*Summary of Discussion:* Trustees asked for additional context and analysis in regards to the District Warrants, as well as the Disposition of Records, for future reports.

**NEW BUSINESS: Other Recommendations**

**Approval of Contract Award for Districtwide Agency of Record for Marketing Services to Vision Point Marketing (21-10-102B)**

[\*\(Time Stamp: 3:28:23\)\*](#)

*Motion to Approve by:* Vice President Holober

*Second by:* Trustee Petrides

*Action:* Approved unanimously, with all Trustees voting Aye.

*Summary of Discussion:* Vice Chancellor Bailey noted that the item presented for consideration to by the Board was in direct alignment with the Board's study session in July relating to marketing and outreach, and with the Board's interest in supporting efforts to bolster student enrollment. Mr. Bailey noted that the agency of record would assist with the development of a long-term, comprehensive marketing strategy. He noted that marketing, in and of itself, was not a singular fix for enrollment declines. He noted the agency of record contract was for three years, with two one-year options to renew, while the subsequent request for \$1.15 million for advertising was for the next 12 month period.

Trustees asked about the strategy and structure that will be used to reach the populations (hyper marginalized students) the District is trying to engage, once determined; and with the goal to increase enrollment, questioned if the colleges are ready to receive the influx of students. Trustees

also asked that a more detailed plan regarding the advertising spending be brought back for Board review and input.

*Public Comment:* None.

**Approval of Partnership Agreement with Notre Dame de Namur University (NDNU) for Bachelor's Degree Completion Pathway (21-10-103B)**

[\(Time Stamp: 3:52:36\)](#)

*Motion to Approve by:* Trustee Goodman

*Second by:* Vice President Holober

*Action:* Approved (3 – 0), with President Nuris, Vice President Holober and Trustee Goodman voting Aye, Trustee Petrides abstaining from the vote, and Trustee Pimentel not present during the vote.

*Summary of Discussion:* Trustee Goodman asked if there are any implications of Stanford's efforts of acquiring the NDNU campus and will students benefit from this pathway. It was noted by staff that the recent acquisition was a positive development for the University.

*Public Comment:* None.

**Consideration of Quotes for Demographer Services for Board Trustee Areas Map Review (21-10-104B)** [\(Time Stamp: 3:55:18\)](#)

*Motion to Approve by:* Trustee Goodman

*Second by:* Vice President Holober

*Action:* Approved, by unanimous vote, engaging Davis Demographics.

*Summary of Discussion:* Vice Chancellor Bailey and Attorney William Tunick provided the Board with an overview of its responsibilities in assessing demographic changes in their trustee area map based on data from the 2020 Census and presented a quote from a demographer for the Board's consideration. The Board elected to move forward and.

*Public Comment:* None.

**INFORMATION ITEMS**

**Review of District Application Framework for State Student Housing Funds (21-10-03C)**

[\(Time Stamp: 4:03:20\)](#)

*Summary of Discussion:* Vice Chancellor Bailey and Executive Vice Chancellor Storti provided an update on the application being completed to receive State Student Housing Funds. Mr. Bailey and Dr. Storti noted that the District application would request \$98.5 million in state funding, with a \$10 million contribution of local funds from the District, to construct a 144,000 square foot facility, serving 495 students throughout the District and be located on the College of San Mateo campus.

Trustee Goodman asked if a narrative will be provided, by way of presenting prior District work on this project, and explaining the commitment to support students, not simply seek state dollars.

Vice President Holober commended District Administration and staff for pulling together to meet the application deadline for the grant of October 31. He stated this is not the norm of running a government agency, but the District is on a timeline and he is glad the Board directed to move forward.

It was acknowledged by the Board and staff that no decisions have been made regarding how the \$10 million District contribution to the project would be used; though use for part-time students was suggested, no formal recommendation or Board discussion has occurred and the use of those funds will be presented to the Board for approval should the project be funded.

*Public Comment:* None.

### **RECESSED TO BREAK**

8:38 p.m.

### **RECONVENED TO OPEN SESSION**

8:46 p.m.

### **Update on Spring Semester 2022 Return to Work and Operations (21-10-04C)**

[\(Time Stamp: 4:29:25\)](#)

*Summary of Discussion:* Chancellor Claire provided an update on operations (student scheduling, vaccinations, and COVID testing) for faculty, staff, and students returning to campus in the Spring Semester from the perspective of having the students and their needs in mind. He noted that registration starts November 1, 2021 for the Spring Semester 2022.

Vice President Holober asked about the percentage of student scheduling in regards to in-person courses versus remote learning courses.

Trustee Goodman mentioned the marketing aspect to have students come back to SMCCCD, but what are they coming back to – in-person or remote learning.

College presidents advised that scheduling is student-driven and based off of those preferences and noted that students are wanting to have the greatest flexibility in attending their courses.

*Public Comment:*

- Dr. Jeremiah Sims questioned the need to insist on bringing people back on campus.
- Peter Wyatt asked if those who have contracted COVID-19 and have antibodies are being considered are being considered for exemption from vaccinations.

### **Consideration of Amendment to Board Policy No. 2.90 Relating to Employee and Student Vaccination Requirements (21-10-05C)**

[\(Time Stamp: 5:29:00\)](#)

*Summer of Discussion:* Chancellor Claire provided the Board with possible amended language to the policy which would clarify a number of issues and would also potentially remove the religious exemption for students. He noted that the proposed amendments are a result of discussions with various stakeholder groups across the District, and that not all groups or members of groups are in complete agreement.

In relation to the removal of the student exemptions, Trustee Goodman noted that, “Just because you could, doesn’t mean you should.” He asked if students were involved in the amendment of the policy, as there are students that believe strongly in their religious beliefs in being vaccinated or not.

Trustees understand and know how difficult this topic is when it comes to mandatory vaccinations and provisions relating religious exemptions. Trustees cautioned about having different standards for employees and students.

Student Trustee Garcia stated she does not know of any students that are requesting a Religious Exemption.

***Public Comment:***

- Dr. Jeremiah Sims spoke against removing the religious exemption for students.

**Review of Proposed New Board Policy Relating to Non-Resident Tuition Waiver Eligibility (21-10-06C)** [\*\(Time Stamp: 5:50:17\)\*](#)

***Summer of Discussion:*** Vice Chancellor McVean presented a proposed draft policy to support the District’s undocumented students. He noted that the proposed policy is aligned with the values of the SMCCCD and the focus of the District Strategic Plan. A non-resident tuition waiver that meets the proposed criteria will result in a potential loss of future revenue, but will also remove a substantial barrier to accessing higher education for the undocumented communities served by the District.

Vice President Holober mentioned a technical correction was needed to reconcile the notations of sub-paragraphs in the last section that do not exist.

***Public Comment:*** None.

**Review of Proposed Revisions to Board Policy 2.27 – Policy on Smoking (21-10-07C)** [\*\(Time Stamp: 6:01:34\)\*](#)

***Summer of Discussion:*** Rika Yonemura-Fabian, Mark Heringer, Autumn Albers, and Frida Arguello presented information supporting the revision to the District’s policy regarding smoking, noting the need for consistency in application across the three colleges and the public health benefit to members of the campus community.

***Public Comment:***

- Janet Herbst expressed support for the policy changes.

**COMMUNICATIONS** [\*\(Time Stamp: 6:13:34\)\*](#)

Chancellor Claire mentioned the communications received from community members in favor of continuing the Crystal Spring Cross Country Course, as well as communications regarding the Religious Exemptions for students.

**STATEMENTS FROM BOARD MEMBERS**

*(Time Stamp: 6:14:17)*

*President Nuris:* Congratulated Vice President Holober on being a new grandfather.

*Vice President Holober:* None.

*Trustee Goodman:* None.

*Trustee Petrides:* None.

*Trustee Pimentel:* Wrote an opinion piece on free community college, which he would like to share with local newspapers; suggested the District not have confidential warrants, unless there is a specified reason; met with a faculty member regarding in-person and online learning, of which he mentioned to perhaps take the learning to the community or an outside entity as satellite campuses.

*Student Trustee Garcia:* None.

President Nuris stated that the next board meeting will be November 10, 2021.

**RECONVENE TO CLOSED SESSION**

*(Time Stamp: 6:18:20)*

The Board recessed to Closed Session at 10:34 p.m.

**RECONVENE TO OPEN SESSION**

The Board reconvened to Open Session at 11:45 p.m.

**ANNOUNCEMENT OF REPORTABLE ACTION TAKEN IN CLOSED SESSION**

President Nuris announced that the Board took action on one item in Closed Session.

**ADJOURNMENT**

Meeting adjourned at 11:46 p.m.

Submitted by

Michael Claire, Secretary

San Mateo County Community College District

November 10, 2021

**BOARD REPORT NO. 21-11-01C**

TO: Members of the Board of Trustees  
FROM: Michael Claire, Chancellor  
PREPARED BY: Mitchell Bailey, Vice Chancellor/Chief of Staff

**JOINT PRESENTATION BY ASSOCIATED STUDENTS OF  
CAÑADA COLLEGE, COLLEGE OF SAN MATEO AND SKYLINE COLLEGE**

The leaders of the Associated Students of Cañada College, College of San Mateo and Skyline College will provide the Board of Trustees with updates about activities and priorities of their respective student bodies for fall semester 2021.

**BOARD REPORT NO. 21-11-01A**

TO: Members of the Board of Trustees

FROM: Michael Claire, Chancellor

PREPARED BY: Marie Billie, Interim Chief Human Resources Officer  
David Feune, Director, Human Resources

**APPROVAL OF PERSONNEL ITEMS**

New employment; changes in assignment, compensation, and placement; leaves of absence; changes in staff allocation and classification of academic and classified personnel; retirements, phase-in retirements, and resignations; equivalence of minimum qualifications for academic positions; and short-term temporary classified positions.

**A. ADMINISTRATIVE APPOINTMENT, REAPPOINTMENT, ASSIGNMENT, AND REASSIGNMENT**

**Cañada College**

**David Vera\*** Director of Financial Aid Enrollment Services

New classified supervisory (exempt) employment (Grade 192E of the Academic-Classified Exempt Supervisory Salary Schedule 35; Salary Range: \$122,688 - \$155,388), effective November 29, 2021, replacing Andrea Garcia-Rittgers.

**District Office**

**Wan Han Cheung\*** Accountant Administrative Services

New classified supervisory (exempt) employment (Grade 190E of the Academic-Classified Exempt Supervisory Salary Schedule 35; Salary Range: \$111,264 - \$140,928), effective November 29, 2021, replacing Larisa Howes who will be resigning.

**Skyline College**

**Dino Nomicos** Interim Dean of Kinesiology, Athletics, Dance Kinesiology, Athletics, Dance

Reassigned from Faculty (Faculty Salary Schedule 80) into this interim administrative role (Grade AD of the Management Salary Schedule 20; Salary Range: \$169,668 - \$215,580), effective November 11, 2021, replacing Joseph Morello who was reassigned.

**B. PUBLIC EMPLOYMENT****Cañada College**

**Kristi Longoria\*** Program Services Coordinator Enrollment Services  
(Veterans Resource and Opportunity Center)

New full-time, 12-month classified employment (Grade 27 of the Classified Salary Schedule 60; Salary Range: \$68,580 - \$87,504), effective November 11, 2021, replacing Rosa Moncada who resigned.

**1. Re-Employment****C. REASSIGNMENT THROUGH THE HIRING PROCESS****District Office**

**Cristian Heredia** Utility Engineer Facilities

Reassigned from a full-time Groundskeeper (Grade BA of the Buildings and Grounds Salary Schedule 70; Salary Range: \$53,820 - \$66,972) into this full-time 12-month position (Grade DD of the same salary schedule; Salary Range: \$61,908 - \$76,944), effective November 11, 2021, replacing Hugo Zarco Vargas who was reassigned.

**Skyline College**

**Nancy Argarin** Financial Analyst Administrative Services

Reassigned from a full-time Senior Accounting Coordinator (Grade 31A of the Classified Salary Schedule 60; Salary Range: \$76,404 - \$97,620) into this full-time 12-month position (Grade 195S of the Classified Professional/Supervisory Salary Schedule 40; Salary Range: \$93,588 - \$119,520), effective November 15, 2021, replacing Barbara Lamson who will be retiring.

**Elisabeth Osai** Financial Aid Technician Enrollment Services

Reassigned from a full-time Financial Aid Assistant (Grade 22A of the Classified Salary Schedule 60; Salary Range: \$61,152 - \$78,468) into this full-time 12-month position (Grade 26A of the same salary schedule; Salary Range: \$67,596 - \$86,376), effective November 11, 2021, replacing Patricia Mendoza who resigned.

**D. TRANSFER/ADMINISTRATIVE REASSIGNMENT****Skyline College**

**Amber Gougis** Retention Specialist (Middle College) Strategic Partnership  
& Workforce Development

Transferred from a Retention Specialist – HSI Grant (Grade 24 of the Classified Salary Schedule 60; Salary Range: \$63,840 - \$81,636) at Skyline College into this full-time 12-month position at Skyline College at the same grade of the same salary schedule, effective November 15, 2021, replacing Carmen Towler who resigned.

**E. NON-REPRESENTED EMPLOYEES ADDITIONAL DUTIES ASSIGNMENT**

None

**F. CHANGES IN STAFF ALLOCATION**

None

**G. PHASE-IN RETIREMENT**

None

**G. LEAVE OF ABSENCE**

None

**H. PUBLIC EMPLOYEE RETIREMENT AND RESIGNATION**

**1. Retirement**

None

**2. Post-Retirement**

None

**3. Resignation**

**College of San Mateo**

**Tabitha Conaway**

Instructional Aide II

Academic Support and Learning Technologies

Resignation effective November 11, 2021, with 6 years of District service.

**I. ESTABLISHMENT OF EQUIVALENCY TO MINIMUM QUALIFICATIONS**

None

**J. PROFESSIONAL EXPERT/CONTRACT POSITIONS**

<i>Location</i>	<i>Division / Department</i>	<i>No. of Pos.</i>	<i>Start and End Date</i>		<i>Services to be performed</i>
Cañada College	Business, Design, and Workforce (ECE)	5	01/03/2022	06/30/2022	<b>ECE Practicum Mentor:</b> <i>Previously Requested Position</i> These positions will facilitate a Community of Practice (CoP) each week while they are in the class. They will meet with their CoP at a time that they and their assigned students agree upon. During the CoP meetings, the practicum mentors and the students will

					review assignments that may be written, self-videos, or other activities that will be pre-organized by the primary course instructor. Requesting Manager: Hyla Lacefield.
Skyline College	Strategic Partnerships & Workforce Development	4	01/03/2022	06/30/2022	<b>Consultant (Non-Instructional): Program Development Project:</b> To support our ability to be responsive and inclusive of industry input in new program development in key Workforce Areas. These positions will support projects related to the specific meta-majors: Arts, Language & Communication, Business Entrepreneurship & Management, Society & Education, and Science Technology & Health. Requesting Manager: Andrea Vizenor
Skyline College	Strategic Partnerships & Workforce Development	1	11/11/2021	06/30/2022	<b>Consultant (Non-Instructional):</b> Perform the review, analysis, and consultation for specific events/ and/or projects requiring specialized knowledge or expertise. To include a Success Summit and other similar events. Work is completed with a high degree of discretion and independent judgment. Requesting Manager: Andrea Vizenor
Skyline College	BEPP / ECE	5	01/01/2022	05/31/2022	<b>ECE Practicum Mentor:</b> <i>Previously Requested Position</i> Practicum Mentors will facilitate a Community of Practice (CoP) each week with student teachers. They will meet with their CoP at a time that they and their assigned students agree upon, and conduct team meetings during the Practicum Seminar pre-organized by the primary course instructor. During the CoP meetings, the practicum mentors and the students will review assignments such as weekly discussion posts, self-videos of curriculum planning & teaching applications, and other activities that will be pre-organized by the primary course instructor. Requesting Manager: Michael Kane

**K. SHORT-TERM, NON-CONTINUING POSITIONS**

<i>Location</i>	<i>Division / Department</i>	<i>No. of Pos.</i>	<i>Start and End Date</i>		<i>Services to be performed</i>
Cañada College	Financial Aid / Student Services	1	01/01/2022	06/30/2022	<p><b>Program Services Coordinator:</b> This position will assist in the coordination and delivery of student grant aid under Federal HEERF regulations, and provide high touch, personalized contacts with target populations. The purpose of this position will be to engage former Cañada College students that may have withdrawn from college due to the impacts of COVID-19, as well as with current Cañada College students that may be hesitant to remain in college and prospective students that may be hesitant to enroll in Cañada College due to COVID-19. Requesting Manager: Wissem Bennani</p>
Cañada College	Business, Design, and Workforce – Fashion Design	2	01/18/2022	06/30/2022	<p><b>Fashion Design Program Assistant:</b> <i>Previously Requested Position</i> Job duties consist of recruitment in Fashion Design and Merchandising Department at the high schools in San Mateo County, performing clerical duties, including email to students, creation of documents, and marketing materials. Greet new and continuing clients, assist in the classroom, repair sewing machines, etc. This grant does not allow the department to supplant a permanent part-time nor full-time employee of the District. These positions require highly technical skills and training in all aspects of fashion design and merchandising. Requesting Manager: Hyla Lacefield.</p>
Cañada College	VPSS / TRiO Student Support Services	1	11/15/2021	06/30/2022	<p><b>Retention Specialist:</b> This position is to support the low-income, first-generation, and at-risk students as they transition from virtual campus to in-person courses and services. TRiO students are struggling with online life and need additional follow-through in the transition to in-person work. This position will work closely with faculty, program staff, and</p>

					additional support programs to help retain TRiO students during uncertain and challenging times. Requesting Manager: Manuel Perez / Maria Huning
Cañada College	VPSS / Trio Upward Bound	1	01/13/2022	06/30/2022	<b>Retention Specialist:</b> <i>Previously Requested Position</i> This position is to support low-income, first-generation, and at-risk high school students as they transition into concurrently enrolled classes virtually. TRiO UB students are struggling in concurrent enrollment coursed online and need additional follow-through as their home high schools transition back to in-person work while Cañada courses remain virtual. This position will work closely with faculty, program staff, and additional support programs to help retain TRiO UB students. Requesting Manager: Manuel Perez / Maria Huning
College of San Mateo	Kinesiology / Athletics / Dance	1	01/18/2022	05/27/2022	<b>Instructional Aide II:</b> Under the close direction and supervision of CSM yoga instructors, demonstrates subject-matter skills, directs students in yoga practices, and confers with students on problem areas of the subject matter. Assists faculty with students regarding test results, completion of assigned work, curriculum, and manual and modules of the yoga certification training. Requesting Manager: Andreas Wolf
Skyline College	Enrollment Services - Veterans	1	11/11/2021	06/30/2022	<b>Office Assistant II:</b> To assist the Program Services Coordinator of the Veteran Resource Center with day-to-day operations; including checking-in of visitors, collecting paperwork, leading student employees, assisting Veteran students as needed. Responds to problems/complaints as directed. Requesting Manager: William Minnich

**BOARD REPORT NO. 21-11-01CA**

TO: Members of the Board of Trustees

FROM: Michael Claire, Chancellor

PREPARED BY: José D. Nuñez, Vice-Chancellor, Facilities Planning, Maintenance & Operations  
Yanelly Pulido, Director, General Services

**APPROVAL TO RENEW DISTRICTWIDE NATURAL GAS  
PURCHASE AGREEMENT WITH SPURR**

The Board approved Adoption of Resolution No. 90-15 (Board Report No. 90-7-109B; updated with Board Report No. 07-5-4CA), approving membership in School Project for Utility Rate Reduction (SPURR), a California joint powers agency pursuant to California Government Code 6500 et sq., comprised of public education agencies. SPURR was created to provide its members with reduced electricity and natural gas rates. To continue participating in this membership, the Board authorized the Executive Vice Chancellor to contract with SPURR (Board Report Nos. 08-3-101B, 08-8-105B, 09-7-103B, 10-7-102B, 11-6-103B, 12-3-103B, and 17-1-9CA) for purchase of natural gas for all of its natural gas accounts.

The District's current natural gas agreement which is good through June 30, 2022, is at variable rates with SPURR. During the past five years, spot market prices for natural gas have experienced continued volatility, including price declines at the start of the pandemic and steep increases in recent months as energy demand has spiked. SPURR aggregates supply needs of all their program participants at the wholesale level, to obtain pricing and to offer rate plan options for budgetary certainty. Having the flexibility to amend pricing options with the District's natural gas suppliers would allow us to take advantage of dips in natural gas prices during the coming years and possibly lock in rates at opportune times to have more budget certainty. The SPURR agreement renewal for participation from July 1, 2022 through June 30, 2027 is due December 17, 2021. It is in the District's best interest to remain in the JPA as well as to renew the contract. Should more advantageous opportunities arise for the purchase of natural gas, the District has the option to terminate the agreement, for any or all accounts, effective June 30 of any year by giving SPURR notice on or before March 1<sup>st</sup> of that year.

**RECOMMENDATION**

It is recommended that the Board authorize the Chancellor, or his designee, to renew the agreement with SPURR, for provision of natural gas during the period of July 1, 2022 through June 30, 2027.

**BOARD REPORT NO. 20-11-02CA**

**TO:** Members of the Board of Trustees  
**FROM:** Michael Claire, Chancellor  
**PREPARED BY:** Dr. Aaron McVean, Vice Chancellor of Educational Services and Planning

**APPROVAL OF REVISION TO BOARD POLICY NO. 2.27 – POLICY ON SMOKING AND TOBACCO USE**

The District Participatory Governance Council (DPGC) has recommended a revision to Board Policy (BP) 2.27 – Policy on Smoking. The DPGC and Chancellor recommend expanding the scope of the policy to include all tobacco products and any other substance that is smoked or vaped, and to eliminate any designated smoking areas from District property.

**RECOMMENDATION**

It is recommended that the Board of Trustees approve the revised BP 2.27 – Policy on Smoking and Tobacco Use.

**CHAPTER 2: Administration and General Institution  
BOARD POLICY NO. 2.27 (BP 3570 and 6800)**

**BOARD POLICY  
San Mateo County Community College District**

**Subject:** BP 2.27 Policy on Smoking and Tobacco Use

**Revision Date:** 7/10; 5/14; XX

**Policy References:** Government Code Sections 7596, 7597, 7598; Labor Code Section 6404.5; Title 8 Section 5148

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It is the policy of San Mateo County Community College District to provide a safe and healthy learning and working environment for both students, and employees, and visitors. ~~It is recognized that smoke from cigarettes pipes and/or cigars is hazardous to health. There is also evidence that vapor from e-cigarettes may be harmful. Therefore, it is the intent of the District to provide a smoke-free environment to the greatest extent possible.~~ In light of evidence that the use of tobacco and nicotine as well as exposure to secondhand smoke and aerosol (commonly referred to as “vapor”) from electronic smoking devices pose significant health and environmental hazards, the District has established a smoke, vapor, and tobacco-free environment. ~~To achieve this goal, the District will limit smoking on District property to outdoor areas only, at a minimum of twenty (20) feet away from any doorway, entrance to an indoor facility, or fresh air intake vent.~~

Smoking of any kind, including use of electronic devices, and all uses of tobacco are prohibited on all property and in all indoor and outdoor spaces owned, leased, licensed, or otherwise controlled by the District, and in all District-owned vehicles. Smoking of any plant, oils, or chemical product(s) is also prohibited.

**Definitions**

1. “Smoking” means inhaling, exhaling, burning, or carrying any lighted, heated, or ignited cigar, cigarette, cigarillo, pipe, hookah, electronic device, or any other device that delivers nicotine or other substances to a person.
2. “Tobacco Product” means any product containing, made, or derived from tobacco or nicotine that is intended for human consumption, whether smoked, heated, chewed, absorbed, dissolved, inhaled, snorted, sniffed, or ingested by any other means, including, but not limited to cigarettes, cigars, little cigars, chewing tobacco, pipe tobacco, snuff; and any electronic device that delivers nicotine or other substances to the person inhaling from the device, including, but not limited to, an electronic cigarette, electronic cigar, electronic pipe, or electronic hookah.
1. ~~“Smoking” means engaging in an act that generates smoke or vapor, such as possessing a lit pipe, a lit hookah pipe, electronic cigarettes or other imitation cigarette devices, a lit cigar, or a lit cigarette of any kind.~~
2. ~~This policy shall apply to all owned or leased District facilities and all owned or leased District vehicles.~~
3. ~~Smoking is prohibited in all indoor locations within the District.~~
4. ~~Smoking is prohibited within a distance of twenty (20) feet from any District or College doorway, entrance to an interior area or fresh air intake vent. The College President, in conjunction with the College Council, has the discretion to set campus smoking regulations as long as smoking is prohibited within a distance of at least 20 feet from any District or College doorway, entrance to an interior area or fresh air intake vent.~~
5. District managers are responsible for publicizing the policy to students, employees and visitors, and are

responsible for the posting of signs. International no smoking signs will be posted as appropriate. Notification about the policy on smoking will be included in employee and student publications, newsletters and in other written materials as appropriate. In addition, materials that are used to publicize District public events will include policy notification to the public.

6. To assist in the implementation of this policy, the District will provide education and training in the areas of smoking dangers and smoking cessation.
7. It is the responsibility of all students and employees to observe the policy and guidelines on smoking. Failure to comply with the policy on smoking will be treated in the same manner as other violations of District Rules and Regulations and may result in disciplinary action. **Enforcement of this policy is outlined in Administrative Procedure 2.27.1.**
- ~~8. It is the responsibility of College and District Office managers to enforce the policy on smoking. Disputes over the interpretation of the policy or complaints about individuals violating the policy should be brought to the attention of the person's supervisor, the Vice President of Student Services at the College level, or the Vice Chancellor of Human Resources and Employee Relations head of Human Resources in the District Office. When the evidence is non-persuasive on either side, such disputes will be settled in favor of the nonsmoker(s) in recognition of the policy of the District to provide a smoke-free environment. Such disputes shall be settled at the lowest management level.~~
- ~~9. This policy does not supersede more restrictive policies which may be in force in compliance with State or Federal regulations or which are imposed by one of the Colleges.~~
10. The District's employee housing program is not subject to this policy. However, the San Mateo College Educational Housing Corporation may adopt similar policies as it sees fit.

**BOARD REPORT NO. 21-11-03CA**

TO: Members of the Board of Trustees  
FROM: Michael Claire, Chancellor  
PREPARED BY: Mitchell Bailey, Vice Chancellor/Chief of Staff  
Yanely Pulido, Director, General Services

**RATIFICATION OF AGREEMENT WITH VISIONPOINT MARKETING, LLC FOR  
DISTRICTWIDE AGENCY OF RECORD FOR MARKETING SERVICES**

At its meeting of October 27, 2021, the Board approved the award of a contract to VisionPoint Marketing, LLC, to serve as the marketing agency of record to provide the District and its three colleges ongoing support in strategizing, planning, coordinating, producing, and distributing integrated advertising through a variety of digital and physical distribution channels (Board Report 21-11-102B).

**RECOMMENDATION**

It is recommended that the Board of Trustees ratify the agreement with VisionPoint Marketing, LLC, effective November 8, 2021 in the amount of \$1,243,748.00.

*For SMCCCD Use Only*

Contractor Employer Identification Number (EIN) # \_\_\_\_\_

Location: (College Name or District Office) \_\_\_\_\_ iContracts # \_\_\_\_\_

**SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT  
AGREEMENT  
WITH  
VISIONPOINT MARKETING, LLC**

This Agreement is entered by and between the San Mateo County Community College District, a community college district formed and existing under the law of the State of California, having its principal address at 3401 CSM Drive, San Mateo, CA 94402 (hereinafter called "District") and VisionPoint Marketing, LLC, having its principal business address at 3210 Fairhill Drive, Suite 150, Raleigh, NC 27612 (hereinafter called "Contractor").

WHEREAS, on September 21, 2021, the District issued Request for Proposal (RFP) 86863 for Districtwide Agency of Record for Marketing Services attached hereto as Exhibit C, and by this reference made a part hereof; and

WHEREAS, Contractor submitted a proposal in response (Proposal) to the RFP, attached hereto as Exhibit B, and by this reference made a part hereof, was selected by the District to perform audit services; and

WHEREAS, Contractor's Proposal resulted in award of this Agreement, by action of its Board of Trustees on the 27<sup>th</sup> day of October, 2021; and

WHEREAS, it is necessary and desirable that Contractor be engaged by District for the purpose of performing services hereinafter described;

NOW, THEREFORE, in consideration of the payments hereinafter set forth, Contractor shall perform services for District in accordance with the terms and conditions set forth herein and in Exhibit A attached hereto and by this reference made a part hereof, and, in consideration of the services rendered in accordance with all terms and conditions set forth herein and in Exhibit A, District shall make payment to Contractor in the manner specified in Exhibit A.

1. **TERM OF CONTRACT.** This Agreement shall commence on November 8, 2021 and terminate on November 7, 2024 with an option to renew for up to two (2) additional one-year periods based on availability of funds, review of price schedules and satisfactory performance by the Contractor. Notwithstanding the foregoing, if any applicable law limits the permissible length of the term of this Agreement, then the term of this Agreement shall not extend beyond the length permitted by law.
2. **TERMINATION OF CONTRACT.** The District may, at any time from execution of Agreement, terminate this Agreement, in whole or in part, for the convenience of the District, by giving written notice specifying the effective date and scope of such termination. Termination shall be effective on a date not less than thirty days from notice. In the event of termination, all finished or unfinished documents, data, studies, maps, photographs, reports, and materials (hereafter referred to as materials) prepared by Contractor under this Agreement shall become the property of the District and shall be promptly delivered to the District. In the event of termination, Contractor shall be paid for all work satisfactorily performed until termination, except where the contracting department determines the quality or quantity of the work performed is unacceptable. Such payment shall be that portion of the full payment, which is determined by comparing the work/services completed to the work/services required by the Agreement.
3. **INDEPENDENT CONTRACTORS.** It is understood that this is an Agreement by and between independent contractors and is not intended to, and shall not be construed to, create the relationship of agent, servant, employee, partnership, joint venture of association, or any other relationship whatsoever other than that of independent contractor. Except as District may specify in writing, Contractor shall have no authority, expressed or implied, to act on behalf of District in any capacity whatsoever. Contractor shall have no authority, expressed or implied, pursuant to this Agreement to bind District to any obligation whatsoever.

4. TIME OF PERFORMANCE. Time is of the essence and Contractor shall perform the services required by this Agreement in an expeditious and timely manner so as not to unreasonably delay the purpose of this Agreement.
5. FAIR EMPLOYMENT PRACTICES/EQUAL OPPORTUNITY ACTS. District is an equal opportunity employer. By entering into this Agreement, Contractor certifies that he/she is in compliance with the Equal Employment Opportunity Requirement of Executive Order 11246, Title VII of the Civil Rights Act of 1973, the California Fair Employment Practices Act and any other Federal or State laws and regulations related to Equal Employment Opportunity. Contractor's personnel policies shall be made available to District upon request.
6. OWNERSHIP OF PROPERTY. All tangible and intangible property developed, produced and/or provided by Contractor under this Agreement shall become the sole property of District. District's ownership of property developed, produced and/or provided under this Agreement includes, but is not limited to, any specifications, drawings, sketches, models, samples, tools, computer programs, technical information, confidential business information, scripts, customer or personnel information or data, written, oral or otherwise (all hereinafter referred to as "Information"), obtained by Contractor from District or developed by Contractor hereunder or in contemplation hereof shall remain or become the sole property of District. Any copyrightable works or other intellectual property developed in connection with this Agreement shall remain or shall become the sole property of District and, in accordance with Education Code section 72207, Contractor understands that the District's governing board may secure copyrights, in the name of the District, to all such works. If Contractor desires to make use of any such District work for any purpose not related to this agreement, Contractor must first secure prior written consent of District for such use. All copies of such Information in written, graphic or other tangible form shall be returned to District upon termination of this Agreement. Information shall be kept confidential by Contractor, shall be used only in performing hereunder, and may be used for other purposes only upon prior written approval of District Executive Vice Chancellor or Designee.
7. LICENSES, PATENTS, PERMITS. Prior to commencement of work/services to be performed under this Agreement, Contractor shall apply for, obtain and maintain in current status, at his/her own expense, any license, permit or approval required from any agency for the performance of said work/services, or forfeit any right to compensation under this Agreement.
8. LIABILITY AND INSURANCE. Contractor shall be responsible for all damages to persons or properties that occur as a result of Contractor's or Contractor's employees fault or negligence in connection with the performance of this Agreement.

The Contractor shall take out and maintain during the life of this Agreement such liability insurance as shall protect him/her while performing work covered by this Agreement from any and all claims for damages and all operations under this Agreement, whether such operations be by himself/herself or by any Subcontractor or by anyone directly or indirectly employed by either of them.

**8.1 Required Coverage.** Contractor shall procure and maintain liability coverage which shall not be less than the following amounts (unless agreed in writing by the Executive Vice Chancellor or Designee's Office):

- a. Commercial General Liability and Property Damage insurance including:  
Bodily Injury Liability insurance which provides for injuries including accidental death, per any one occurrence in an amount not less than \$1,000,000 per occurrence and \$2,000,000 annual aggregate; and Property Damage insurance in an amount not less than \$1,000,000 per occurrence.
- b. Business Automobile Liability insurance in an amount not less than \$1,000,000 including coverage for owned, non-owned and hired vehicles; and
- c. Not used.

- a. Professional liability in the amount not less than \$2,000,000 per occurrence and annual aggregate.

If the Contractor maintains higher limits than the minimums shown above, the District requires and shall be entitled to coverage for the higher limits maintained. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the District.

**8.2 Required Rating.** Insurance carriers must have a Best rating of A(-)X or better.

**8.3 Endorsements and Certificates of Insurance.** San Mateo County Community College District, its Officers, Agents and Employees must be named by endorsement on Contractor's Commercial General Liability and Property Damage Policies as co-insured or additional insured.

Certificates of Insurance and endorsements for coverages required herein shall be filed with District's Executive Vice Chancellor or Designee *prior to the commencement of work*. The certificates shall provide that if the policy or policies be canceled by the insurance company or Contractor during the term of this Agreement, thirty (30) days written notice prior to the effective date of such cancellation will be given to District's Executive Vice Chancellor or Designee. The certificates shall also show the information that the San Mateo County Community College District is named on Contractor's Commercial General Liability and Property Damage policies as co-insured or additional insured. Certificates shall clearly state that "The San Mateo County Community College District, its Officers, Agents and Employees are named as additional insured per attached endorsement" and that such insurance policy shall be primary to any insurance or self-insurance maintained by the District.

- 9. **WORKERS' COMPENSATION INSURANCE.** The Contractor shall have in effect, during the life of this Agreement that the Contractor has employees, Workers' Compensation and Employer Liability Insurance providing full statutory coverage. In signing this Agreement, Contractor certifies awareness of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for Worker's Compensation or to undertake self-insurance in accordance with the provisions of the Code, and certifies compliance with such provisions before commencing the performance of this work of the Agreement as set forth in California Labor Code section 1861.

**Initial this box if you have employees**

I am aware of the provisions of Section 3700 of the California Labor Code, which require every employer to be insured against liability for Workers' Compensation or to undertake self-insurance in accordance with the provisions of the Code, and I will comply with such provisions before commencing the performance of any work required under this Agreement with employees.

**Initial this box only if you have no employees and will not submit a Certificate of Workers' Compensation**

I have no employees and, therefore, will not submit a Certificate of Workers' Compensation.

- 10. **INDEMNIFICATION.** Contractor shall indemnify and hold harmless District, its officers, agents, and employees from all claims, suits or actions of every name, kind, description, brought for, or on account of, injuries to or death of any person or damage to property resulting from performance of any work required under this Agreement by Contractor, its officers, agents, employees and/or servants.

The duty of Contractor to indemnify and hold harmless, as set forth herein, shall include the duty to defend as set forth in Section 2778 of the California Civil Code; provided, however, that nothing herein shall be construed to require Contractor to indemnify District, its officers, agents, and employees against any responsibility or liability in contravention of Section 2782 of the Civil Code.

The indemnification and hold harmless agreement set forth above includes, but is not limited to, Contractor's

agreement at its sole expense to indemnify District, its officers, agents and employees from and defend or settle any claim or action brought against District to the extent that it is based on a claim that any services furnished hereunder infringed a patent, copyright, trademark, service mark, trade secret, or other legally protected intellectual property rights. Contractor shall pay all costs, fees (including attorneys' fees) and damages which may be incurred by District, its officers, agents and employees for any such claim or action or settlement thereof.

11. ACCESSIBILITY. Contractor hereby warrants that the products and services to be provided under this Agreement comply with the accessibility requirements of Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794d) and its implementing regulations set forth in Title 36, Code of Federal Regulations, part 1194. Contractor agrees to promptly respond to and resolve any complaint regarding accessibility of its products and services which is brought to Contractor's attention. Contractor further agrees to indemnify and hold harmless the San Mateo County Community College District, its governing board, officers, employees and agents, the California Community Colleges Chancellor's Office, and any California community college using Contractor's products and services from any claim arising out of Contractor's failure to comply with the aforesaid requirements. Failure to comply with the aforesaid requirements shall constitute a breach and shall be cause for termination of this Agreement.
12. ASSIGNABILITY. Contractor shall not assign this Agreement or any portion thereof to a third party without the prior written consent of District, and any attempted assignment without such prior written consent in violation of this paragraph 12 is null and void and automatically shall terminate this Agreement. In the event of any assignment, Contractor shall remain liable to District as principal for the performance of all obligations under this Agreement.
13. FAILURE TO PERFORM. If, at any time, in the opinion of District, Contractor fails to render services of proper quality or has failed to perform, keep, and observe any of the terms or conditions herein contained on the part of Contractor to be performed, kept, and observed, District may give Contractor written notice to correct such conditions or cure such default; and if any such condition or default shall continue for ten (10) days after said written notice, then, and in that event, this Agreement shall cease and expire. Thereupon District or its duly authorized representative may employ other parties or carry this Agreement to completion as District may deem proper.
14. FORCE MAJEURE. Neither party shall be responsible for delays or failure in performance resulting from acts beyond the control of such parties. Such acts shall include, but not be limited to, Acts of God, labor disputes, civil disruptions, acts of war, epidemics, fire, electrical power outages, earthquakes or other natural disasters.
15. DISPUTE RESOLUTION. Should any dispute arise out of this Agreement, the parties agree to meet in mediation and attempt to reach a resolution with the assistance of a mutually agreed upon mediator. The mediation process shall provide for the selection, within fifteen (15) days of either party notifying the other of the existence of a dispute, by both parties of a disinterested third person as mediator and shall be concluded within forty-five (45) days from the commencement of the mediation unless a time requirement is extended by stipulation of both parties.

If a mediated settlement is reached, neither party shall be the prevailing party for the purposes of the mediated settlement. Each party agrees to bear an equal quota of the expenses of the mediator.

A party that refuses to participate in mediation or refuses to participate in the selection of a mediator cannot file a legal action. The non-refusing party shall be permitted to file a legal action immediately upon the other party's refusal to participate in mediation or the selection of a mediator.

16. SEVERABILITY. Should any part of this Agreement be declared through a final decision by a court or tribunal of competent jurisdiction to be unconstitutional, invalid, or beyond the authority of either party to enter into or to carry out, such decision shall not affect the validity of the remainder of this Agreement, which shall continue in full force and effect, provided that the remainder of this Agreement, absent the unexercised portion, can be interpreted reasonably to give effect to the intentions of the parties.

17. AMENDMENTS. This Agreement may be amended only by written instrument signed by both District and Contractor which writing shall state expressly that it is intended by the parties to amend the terms and conditions of this Agreement.
18. GOVERNING LAW AND VENUE. This Agreement, including all exhibits attached hereto and incorporated herein by reference, shall be construed in and governed by the laws of the State of California. The parties consent to the exclusive jurisdiction and venue of the Superior Court of San Mateo County, California.
19. ENTIRE AGREEMENT. This Agreement, including all exhibits attached hereto and incorporated herein by reference, constitutes the sole agreement of the parties hereto and correctly states the rights, duties and obligations of each party. Any prior agreement, promises, negotiations, or representations between the parties not expressly stated in this document are of no force or effect. In the event of a conflict between the terms and conditions set forth herein and those in the exhibits attached hereto, the terms and conditions set forth herein shall prevail.
20. WAIVERS. No waiver of default by District of any terms or conditions hereof to be performed, kept, or observed by Contractor shall be construed to be or act as a waiver of any subsequent default of any of the terms and conditions herein contained.
21. NOTICES. All notices to be given between the parties hereto shall be in writing and may be served by commercial express/overnight courier service or by depositing the same in the United States mail, postage prepaid and certified receipt requested and addressed to:

"DISTRICT"

San Mateo County Community College District  
Richard Storti, Executive Vice Chancellor of Administrative Services  
3401 CSM Drive  
San Mateo, CA 94402

"CONTRACTOR"

VisionPoint Marketing, LLC  
Matt Walters, Vice President of Client Services  
3210 Fairhill Drive, Suite 150, Raleigh, NC 27612  
matt@visionpointmarketing.com | (919) 848-2018

Either party by written notice to the other party may change the address of the notice or the names of the persons or parties to receive written notices.

22. EXPENDITURE OF PUBLIC FUNDS. Contractor agrees to comply with Government Code Section 8546.7 which provides that any contract involving expenditure of public funds in excess of \$10,000 requires that the contracting parties shall be subject to the examination and audit of the Auditor General for a period of three (3) years after final payment under the contract.
23. PUBLIC RECORD. All contracts become the property of the District and as such become public documents available to be reviewed by the public upon request. Government Code Sections 6250 et. seq., the Public Records Act, define a public record as any writing containing information relating to the conduct of public business. "Writing" means any handwriting, typewriting, printing, photostating, photographing, photocopying, transmitting by electronic mail or facsimile, and every other means of recording upon any tangible thing any form of communication or representation, including letters, words, pictures, sounds, or symbols, or combinations thereof, and any record thereby created, regardless of the manner in which the record has been stored. Any contract may be published and made available to the public as part of the Board of Trustees approval process.
24. DATA CONFIDENTIALITY. The Parties will maintain the confidentiality of any and all personally identifiable information exchanged by each as a part of this agreement, and prevent further disclosure except as authorized by this

Agreement and in accordance with state and federal laws. The confidentiality requirements under this paragraph shall survive the termination or expiration of this agreement or any subsequent agreement intended to supersede this agreement.

With regard to students, personally identifiable student information is defined in 34 CFR 99.3 and includes: (a) the student's name; (b) the name of the student's parent or family members; (c) the address of the student or student's family; (d) a personal identifier such as a student's social security number or student number; (e) other indirect identifiers such as the student's date of birth, place of birth, and mother's maiden name; (f) other information that, alone or in combination, is linked or linkable to a specific student that would allow a reasonable person in the school community, who does not have personal knowledge of the relevant circumstances, to identify the student with reasonable certainty.

To ensure the continued confidentiality and security of data processed, stored, or transmitted under this Agreement, the parties shall establish a system of safeguards that will at minimum include the following:

- a. Procedures and systems that ensure all records, including records containing personally identifiable information, are kept in secured facilities and access to such records is limited to only those personnel who are authorized to have data access under this section of the Agreement.
- b. Procedures and systems that shall require the use of secured passwords to access computer databases used to process, store, or transmit data provided under this Agreement.
- c. Procedures and systems, such as good practices for assigning passwords, shall be developed and implemented to maintain the integrity of the systems used to secure computer databases used to process, store, or transmit data provided under this Agreement.
- d. Procedures and systems that ensure that all confidential data processed, stored, and/or transmitted under the provisions of this Agreement shall be maintained in a secure manner that prevents the interception, diversion, or other unauthorized access to said data.
- e. The procedures and systems developed and implemented to process, store, or transmit data provided under this Agreement shall ensure that any and all disclosures of confidential student data comply with all provisions of FERPA and California law relating to the privacy rights of students, such as but not limited to, the Information Practices Act and the California Public Records Act insofar as such laws are applicable to the parties to this Agreement.
- f. Data transmitted under this agreement must use a minimum standard of RSA 2048-bit encryption or a mutually agreed upon equivalent.

25.  If checked, this agreement is subject to the SMCCCD Data Sharing Agreement, attached hereto as Exhibit B and by this reference made a part hereof.

26. CAPTIONS. Any captions to or headings of the articles, sections, subsections, paragraphs, or subparagraphs of this Agreement are solely for the convenience of the parties, are not a part of this Agreement, and shall not be used for the interpretation or determination of validity of this Agreement or any provision hereof.

27. CONTRARY TAX POSITIONS. Contractor agrees that it is not entitled to, and will not take, any tax position that is inconsistent with its relationship as a service provider to District with respect to Contractor's management or use of any District-owned property. Contractor agrees that it will not claim any tax deductions or credits including but not limited to depreciation expense, amortization expense, rent expense or investment tax credits with respect to any District-owned property managed or used by Contractor.

Agreement with VisionPoint Marketing, LLC

28. COUNTERPARTS. This Agreement may be executed in any number of counterparts, each of which shall be deemed an original, but all such counterparts together shall constitute one and the same instrument.
29. EXECUTION. By their signatures below, each of the following represents that they have authority to execute this Agreement and to bind the party on whose behalf their execution is made.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement in duplicate.

**SAN MATEO COUNTY COMMUNITY  
COLLEGE DISTRICT**

**CONTRACTOR**

By: \_\_\_\_\_  
Yanely Pulido, Director of General Services

By: \_\_\_\_\_

\_\_\_\_\_  
Name/Title of Authorized Signatory

Date: \_\_\_\_\_  
Employer Identification Number: 94-3084147

Date: \_\_\_\_\_  
Federal Tax Payer Identification Number (EIN):

\_\_\_\_\_

**EXHIBIT A**

Services shall be billed to “San Mateo County Community College District” and become payable after satisfactory completion of services and upon presentation of detailed invoice(s) specifying services being provided. Invoices shall be sent to: SMCCCD, Accounts Payable Office, 3401 CSM Drive, San Mateo, CA 94402.

**Location: Districtwide**

SERVICE TO BE PERFORMED	DATE TO BE COMPLETED BY	PAYMENT AMOUNT
Contractor to serve as the District’s Agency of Record to provide digital and integrated marketing services, as further described in Section VIII Scope of Work of the RFP and Contractor’s Proposal.	Specific milestones to be developed each year of the agreement.	\$228,748 annually for agency fees
Media Buy Allowance for first year of agreement, as reviewed and approved by District’s main point of contact.		\$1,150,000

**The total amount paid under this Agreement shall not exceed \$1,378,748.00.**

**EXHIBIT B**  
**Vendor Proposal**



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# San Mateo County Community College District

RFP #86863 Districtwide Agency of Record for  
Marketing Services

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October 4, 2021

VisionPoint Marketing, LLC

Dana Cruikshank, Director of Strategic Partnerships | [dana@visionpointmarketing.com](mailto:dana@visionpointmarketing.com)  
919.848.2018 ext. 128 | 3210 Fairhill Drive, Suite 150, Raleigh, NC 27612

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## a. Cover Letter

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To the San Mateo County Community College District:

VisionPoint intends to perform the services described and enumerated in this proposal. We acknowledge receipt of Addendum 1, released September 29, 2021. Should VisionPoint's proposal be accepted, we agree to enter into a contract under the terms and conditions as set forth herein.

### **VisionPoint Contacts:**

1. [Dana Cruikshank](#)
  - Director of Strategic Partnerships
  - [dana@visionpointmarketing.com](mailto:dana@visionpointmarketing.com)
  - 919.848.2018 ext. 128
  - 3210 Fairhill Drive, Suite 150, Raleigh, NC 27612
  
2. [Matt Walters](#)
  - Vice President of Client Services
  - [matt@visionpointmarketing.com](mailto:matt@visionpointmarketing.com)
  - 919-848-2018
  - 3210 Fairhill Drive, Suite 150, Raleigh, NC 27612

Signed,



Craig Heldman | CEO

# b. Company & Signatory Page

San Mateo County Community College District

Request for Proposal

## ATTACHMENT A

### COMPANY INFORMATION AND SIGNATORY PAGE

*(Attach additional pages to e-bid submission if needed.)*

Company Name: VisionPoint Marketing, LLC

Business Address: 3210 Fairhill Drive, Suite 150, Raleigh, NC 27612

Telephone: 919-848-2018 Fax: 919-322-4439

Email: info@visionpointmarketing.com Website: www.visionpointmarketing.com

Type of Firm:  Corporation  Proprietorship  Partnership  Joint Venture  
 Other (please describe): \_\_\_\_\_

Business License Number (must be active and in good standing. If not, District will find Bidder non-responsive): \_\_\_\_\_

Number of years in business under firm name: 2

Number of years as a provider of this type services: 20

Number of years as a provider of services: 20

Names and titles of all your owners (>10% ownership), officers, principals, responsible managing officers and responsible managing employees:

Name:	Title:
<u>Diane Kuehn</u>	<u>Founder and Chairman</u>
<u>Capitala Group</u>	<u>Board of Directors</u>

Has the firm changed its name within the past 3 years?  YES  NO

If YES, provide former name(s):  
VisionPoint Media, Inc. DBA VisionPoint Marketing

Have there been any recent (within the last three years) changes in control/ownership of the firm?

YES  NO If YES, explain: In August 2019, Diane Kuehn, our Founder, partnered with Capita Group and Cascadiy, LLC to restructure.

Have officers or principals of the firm ever had their business license suspended or revoked for any reason?

YES  NO If YES, explain: \_\_\_\_\_

State your firm's gross revenues for each of the last three years:

Current Year: 14 Million  
Last Year: 6.5 Million  
Year before last: 3.2 Million



San Mateo County Community College District

Request for Proposal

Has your firm ever reorganized under the protection of bankruptcy laws?  YES  NO

If YES, please enter date of reorganization: \_\_\_\_\_

Please list any past and/or pending litigation or disputes related to the work described herein, that the firm has been involved in within the last five years. Include case names, nature of litigation, and outcomes.

N/A  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name and title of person responsible for submission of this proposal and the responses to this questionnaire:

Signature: Matt Walters Date: 9-29-21

Print Name and Title: Matt Walters Vice President of Client Services

Phone: 919-848-2018 Email: info@visionpointmarketing.com

(END OF ATTACHMENT A)

## c. Statement of Requirements

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### *Executive Summary*

Greetings!

On behalf of VisionPoint Marketing, we are thrilled to submit the following proposal to San Mateo County Community College District ("SMCCCD," "San Mateo County CCD," or "the District") to provide digital and integrated marketing services.

#### **We Can Deliver on Every One of SMCCCD's Goals**

The most common challenge our clients face is enrollment growth.

For SMCCCD, this could mean a variety of things: raising top-of-funnel awareness, improving deeper-funnel conversion rates, closing gaps within particular audience segments, tightening your brand position, improving web content strategy, better leveraging your CRM, prioritizing particular programs for promotion, complementing paid digital strategies with organic efforts, or a combination of all of the above. The District's RFP enumerates the following goals:

- Drive Requests for Information (RFIs), applications, and enrollments to the colleges and programs.
- Collect information to measure campaign success and optimize future campaigns
- Engage potential students
- Community awareness that the colleges are here to support community members to achieve their academic, vocational and personal goals.

In other words, the District seeks a comprehensive digital-forward marketing strategy with an agency that is highly familiar with the challenges many community colleges also currently face, and is highly adept at overcoming them. At VisionPoint, **70% of our services are in digital marketing for higher education institutions**. Not only that, but each and every one of your goals is something that VisionPoint has been solving for higher ed institutions across the country for more than 20 years. As you'll see throughout this proposal, we are the one-stop shop partner that SMCCCD desires in an agency; one that will work as an integrated extension of your marketing and communications team.

**VisionPoint is 100% higher ed focused and specializes in using digital-forward marketing strategies to expand awareness and drive enrollment.** In fact, each of the services outlined in the RFP make up 70% of all the services we provide to our clients (with the 30% being web

design and development for higher education). Therefore, our work over the past 20 years of being in the business of delivering success for higher ed institutions spans hundreds, if not thousands, of different projects and project completions — enough to fill a textbook.

The strategies and plans we craft to help our clients address their particular situation in pursuit of their goals tend to be quite complex. That is why the solutions we propose below are customized to SMCCCD's unique challenges.

### **The Opportunity Ahead**

The time is right for San Mateo County CCD to be expanding and improving its marketing efforts to drive enrollment in the upcoming spring cycle – and well beyond. As community colleges across the U.S. head into a recruitment cycle that is subject to COVID-19 and Delta variant disruptions, increased competition, shifting demographics, and other challenges that are even more pronounced in the West where higher education institutions abound.

SMCCCD is well-positioned to stand out as a primary choice for many students. That is where VisionPoint can help. This project is about more than just driving increases at all points of the funnel and delivering strong campaign results; it's laying the long-term strategic framework needed to thrive in an evolving higher ed landscape. We'll work alongside your team to apply our full-funnel expertise to shape a truly integrated digital marketing strategy rooted in this mindset.

### **We Know California and the Bay Area**

We are familiar with California's DMAs as **we have run campaigns in the state's major metros, including San Mateo, San Francisco, and the surrounding areas.** Our own Holly Simons, Vice President of Integrated Strategy, has deep experience working with California higher education institutions. Some of our clients, past and present, include:

- National University
- University of California Davis
- University of California Santa Barbara
- University of California Education Abroad Program
- California College of the Arts
- Norco College
- North Orange Continuing Education

### **Proven Success Specifically with Community Colleges and Community College Systems**

Community colleges and community college systems across the country have been turning to VisionPoint to deliver the types of outcomes you've envisioned for this project. In our case studies, we share a number of success stories that speak to our ability to maximize our clients' media

budgets and deliver meaningful results against even the most daunting institutional goals. Some of those stories include:

- Overturning misconceptions plaguing the nation's second largest community college through a brand campaign and strategy that has driven an **8.2% lift** in brand awareness and **10 point leap** in perceptions in just one semester's time.
- Driving a **5% increase** in full-time equivalent enrollments at a technical college in a competitive geography through leveraging cutting-edge creative messages and a unified paid, earned and organic marketing strategy.
- Delivering measurable increases in awareness and perception for an affordable tuition initiative targeting hard-to-reach underserved learner populations through an industry-beating **7.71% click through rate** and a **10 percent increase** in audiences' likelihood to attend in-state college.

Through countless digital marketing engagements, we have perfected a best-practice methodology that we can adapt to the District's situation and goals.

Competing in this environment will require the right partnership. VisionPoint is purpose-built to be the type of agency the District needs at this crucial crossroads. We understand how to read data and recognize the broader trends that will drive enrollment marketing in coming years. More than that, we have the specific capabilities SMCCCD will need to execute this new focus correctly. And we have the deep data analytics sophistication required to ensure your campaigns are fully optimized to drive leads and enrollments in the most cost-effective way possible.

We invite the District's enrollment and marketing departments to get in touch with the references we provide in this proposal for a fuller picture of how well we can provide an all-around solution for your enrollment goals.

### Looking Ahead

We revel in the challenges a partnership with the San Mateo County Community College District will bring. We believe in the transformative power of higher education as a gateway to career success for individuals and as a catalyst for socioeconomic growth for the communities you serve. We look forward to hearing from you and diving more deeply into the discussion of VisionPoint's unique approach to helping SMCCCD succeed.

Warm regards,



**Craig Heldman | CEO**

## ATTACHMENT B

### STATEMENT OF REQUIREMENTS

# A. Project Approach

*“This section will consider and evaluate the proposer’s ability to provide a work plan detailing how the firm intends to achieve the overall goal of the project. List specific tasks for each of the major elements identified in Section VIII Scope of Work. Include the name of the responsible individual who will lead the work with the District for coordination and execution of the services, and the location where management and coordination of services will be performed. Also, describe in more detail a proposed timeline for completing a marketing campaign project.”*

## Research & Discovery

We will begin by establishing a deep understanding of your audiences, competition, brand promise, and current state of your marketing efforts.

### *Project Kickoff Call*

VisionPoint will conduct a kickoff call with the San Mateo County CCD project leads and internal stakeholders to connect our project teams, establish roles and responsibilities, solidify a timeline, and open the lines of communication for a successful partnership.

### *Brand & Marketing Review*

VisionPoint will begin by reviewing San Mateo County CCD’s existing inventory of marketing and communications materials to better understand your current brand positioning while assessing strengths and opportunities for improvement.

Specifically, we will review:

- Current website content, structure, and design.
- Brand guidelines and style documentation.
- The District’s social media profiles.
- Brand execution across traditional and online media.
- Marketing collateral that reflects either the positioning of specific programs or marketing to specific target audiences.
- Any relevant past research, including market research, stakeholder research, audience surveys, etc.



- Photography, video, and any other visual assets.

### ***Enrollment Data/Student Demographics Review***

VisionPoint will also aim to identify best-fit students, recognize trends and opportunity gaps, and better understand how prospective students engage with San Mateo County CCD from awareness through enrollment by reviewing the following information:

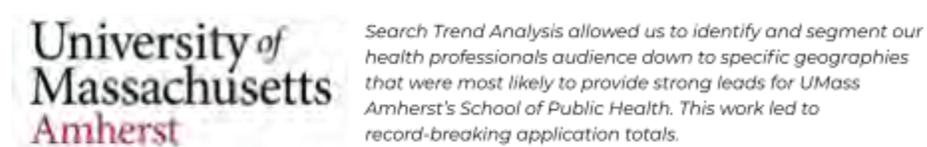
- General inquiry and enrollment data (to help identify trends by program and by audience segment).
- Current student profiles and demographics.
- Information regarding the District's retention rates.
- Existing market research results.

### ***Competitor & Peer Research***

VisionPoint will evaluate the District's place in the competitive landscape by reviewing available marketing materials of up to five competitor institutions vying for your audiences' attentions. Our goal will be to find ways to better differentiate San Mateo County CCD through messaging and media approaches that will reach and resonate with your right-fit audiences.

### ***Search Trend Data Analysis***

To help the District determine where and when your identified audiences are searching for the types of programs you offer, we'll conduct an analysis of search engine data trends surrounding your key academic programs or curricular areas of focus.



We'll uncover which topics prospective learners are searching for, which geographic areas they are searching from, and which times of the year are yielding the highest search volume for those specific topics. For example, we can determine what the top five metropolitan areas are for people searching for "undergraduate degrees" within the past 12 months. The insights gained from our analysis will help the District identify your targeting parameters for your forthcoming campaigns.

### ***Marketing Funnel Analysis***

VisionPoint will examine how prospective students become aware of the District's programs, how they engage with San Mateo County CCD, and what drives them to

convert. Once we have a thorough understanding of prospective students' behavior, we will map out your marketing funnel and identify opportunities to improve "leaks" or areas of drop-off. This process will eventually inform our channel selection, as we may discover the need to invest more heavily into awareness, engagement, or retention, depending on what we find in this analysis.

### *Keyword Research*

VisionPoint will conduct research of high-volume, low-competition keywords surrounding up to three key programs. Leveraging industry-leading data analysis platforms, we'll glean insights that will enable us to align San Mateo County CCD's existing keyword inventory with the words actual prospects are using to find the types of programs San Mateo County CCD offers. Our goal will be to maximize the online visibility of your forthcoming campaigns and ensure each ad yields the highest return on investment.



*Keyword research gave us the ability to pinpoint the most valuable keywords to target and led to landing University of Pennsylvania LPS in the number one position on Google, multiplying the reach of our campaign at **no additional cost**.*

### *Virtual Listening Tour (Stakeholder Interviews)*

The cornerstone of our discovery process will be a Listening Tour where we meet with key stakeholders identified by the District who represent major academic units and divisions within the District (e.g., Admissions, Athletics, Advancement, etc.) along with representatives of the District's target audiences. During each exploratory discussion, to inform the deliverables included in this Scope of Work, VisionPoint will invite feedback and input on a variety of topics related to:

- Goals.
- Brand messaging.
- Target audiences.



*Our listening tour with internal stakeholders and market perception study polling outsiders turned up a recurring, poignant misconception: people feared they'd be "settling" for a NOVA education. Our award-winning, stigma-defying campaign challenges people to think again.*



- Perceived strengths, weaknesses, opportunities, and threats (i.e., SWOT).

In addition to gathering feedback to inform our strategy, these interviews will provide VisionPoint with our first opportunity to speak directly with audiences including but not limited to:

- Prospective and current students.
- Parents.
- Members of faculty and staff
- Alumni.
- Donors.

The Listening Tour will consist of a total of up to five small-group virtual stakeholder interviews conducted via videoconference. Each individual interview will last from 30 minutes to one hour depending on the participants.

**Note:** Should the District wish to conduct more than the five listening tour interviews scoped in this proposal, SMCCCD and VisionPoint will agree to a change order

## Strategy & Planning

Based on the discovery work, we'll devise an integrated strategy that achieves our agreed-upon goals.

### *Marketing Strategy Development*

Building on the research described above, VisionPoint will develop a Marketing Strategy that identifies high-level goals and lays the groundwork for developing the integrated marketing plan. The Strategy will consist of the following content:

- **High-Level Goals:** In partnership with San Mateo County CCD, VisionPoint will identify specific, measurable marketing goals and indicate how progress against each goal will be measured.
- **Current State Summary:** An open-eyed assessment of the current state is an essential precursor to developing good strategy that capitalizes on strengths and opportunities while mitigating weaknesses and threats.
- **Target Audience Segments** We will help San Mateo County CCD understand, document, and prioritize your target audiences, including:
  - Demographic details to inform our channel strategies, media placements, and targeting parameters.
  - Psychographic details about the audience's motivators, behaviors, goals, attitudes, and even a narrative backstory, all of which helps

ensure our messaging appeals to our audiences by addressing the things that matter most to them.

Based on the District's goals and our research takeaways, VisionPoint will define a set of up to five prospective student segments, which may include a mix of undergraduate, graduate, and transfer students depending on the District's priorities.

**Custom Marketing Strategies:** Leveraging the goals, current state situation and target audiences as outlined above, VisionPoint will formulate a set of high-level strategies that will serve as a game-plan for all the specific decisions to come. Marketing strategies for San Mateo County CCD will not be standard, template based, or recycled recommendations, but highly customized directives that address San Mateo County CCD's specific situation. We will guide investments in pursuit of the District's goals, given our deeply informed insights into your particular situation.

VisionPoint will deliver the Marketing Strategy to San Mateo County CCD as a written document and discuss its contents over a collaborative, one-hour conference call with the District's marketing and communications personnel.

### *Channel Rebalancing Analysis*

Having the right channel mix means getting the highest return possible from your media budget. We will help San Mateo County CCD determine those channels by examining your past media mix and channel buys along with inquiries by month to inform the development of your media plan. Then, we will use our **Media Mix Modeling process** to build out the new plan, enhancing campaign performance within your media budget. Using a series of regression models around past media spend levels, we identify channels and spends that will maximize conversions with your audiences. Then, we will adjust your channel mix according to the results of our data models.

*Figures 1 and 2* below show our approach in action. Our client provided us with data on the number of inquiries received and the amount they had been spending each month by channel. Using this information, we ran their data through our models and were able to determine that by rebalancing their channel mix, we could increase their inquiries from **602 to 874 with a \$0 increase in their media budget.**



execute the agreed-upon strategies and achieve the District's goals. Your integrated marketing plan will contain the following:

- **Executive Overview:** The narrative overview ties the high-level marketing strategies to each major initiative identified in the plan and explains the coordinated approach to achieving the desired goals.
- **Media Plan & Media Calendar:** We will provide an overview of each media channel in the plan with corresponding general budget allocations by channel, all of which are driven by the District's specific goals and strategies to reach your target audiences. The plan also includes a month-by-month media calendar with specific placement, run, management, and reporting dates by channel.
- **Tactics & Initiatives:** We will lay out other marketing and creative needs beyond media planning that can contribute to success as well. This could include things like shoring up communications plans with prospects, tracking prospect data along the full funnel, improving and optimizing the District's web platforms, producing creative to supplement your internal team's capabilities, or even planning and implementing other initiatives to bring the District's brand promise to life. The plan will depend on the District's goals and situation, but VisionPoint will share all the recommendations we consider essential to executing your strategies in pursuit of your goals, whether VisionPoint executes those needs or are handled in-house.
- **Creative Asset List:** VisionPoint will identify specific marketing content needed to execute the plan. The asset list may cite content that currently exists as well as new content that will be needed to execute the plan.
- **Project Timeline:** We will include a month-by-month outline of the specific tasks, deliverables, deadlines, and resources necessary to execute the proposed Integrated Marketing Plan.

VisionPoint will deliver the Integrated Marketing Plan to San Mateo County CCD as a written document and discuss its contents over a video conference call with the District, inviting feedback that VisionPoint will leverage to provide one round of edits to the proposed plan.

### *Smart Spends Media Calculator™*

VisionPoint has developed and refined a sophisticated digital media budget calculator, our **Smart Spends Media Calculator™**, which calculates the media budget you will need to achieve specific enrollment goals (or



*We used our Smart Spends Media Calculator to reallocate College of Charleston's spending across their media mix, maximizing campaign performance on the same media budget to deliver a **225% increase** in year-over-year enrollment leads for their MBA program.*



increases) based upon standard digital marketing KPIs for channels such as Facebook, Google Ads, Instagram, programmatic display, video, etc., and taking into account San Mateo County CCD's historical funnel pacing rates at each stage of the prospect journey.

## Campaign Creative Concept

Many people think “creativity” is something that comes easily to those who “have it.” At VisionPoint, we know better. The creative process is just that: a time-tested and strategic process that leads to outstanding work. For us, “outstanding work” is not only emotionally charged, clever, eye-catching and impactful, but work that appeals to the target audience and leads them to think and act in ways that achieve our clients' goals. Our award-winning creative team is exceptionally talented, but we're not interested in selling creativity for creativity's sake. As we are pursuing audiences who are inundated with messaging in an increasingly crowded marketplace, we want to help SMCCCD rise above the noise and stand out in ways that reach and motivate your audiences to take action.

To that end, VisionPoint will develop a winning creative concept to drive the campaigns at the heart of SMCCCD's integrated marketing plan. Our deliverables at this stage will be a finished Campaign Creative Concept, as illustrated by a Sample Creative Kit that includes specific executions we believe will be necessary in executing the eventual marketing plan, along with Campaign Concept Guidelines to inform how the campaign's creative elements should be used.

### *Process and Deliverables*

As a first step in developing the Campaign Creative Concept, VisionPoint will present the District with 3 thematic approaches we call “Big Ideas” that will connect with your target audience and drive results. We work through a three-round process to arrive at the final chosen concept in partnership with the District. That process includes the following:

#### **Round 1 – The Big Ideas Presentation**

- A “Big Idea” drives the overarching approach of a campaign's message and creative direction. VisionPoint will propose 3 Big Ideas for the District's consideration, documenting each with a narrative description and asking the District to choose a winner for further exploration.
- Note that our process is one in which we intentionally avoid exploration and presentation of visuals at this stage. We find it important to focus on the core ideas in order to make sure they are viable and impactful. Visuals at too early a stage can overpower the concept, potentially leading to creative that is more flash than substance. That said, if a Big Idea is dependent upon a visual concept, we will exercise the right to share visuals in Round 1.



## Round 2 – Refinement And Visual Exploration

Having chosen a Big Idea, VisionPoint will explore several creative illustrations of the chosen Big

Idea through examples like sample headlines, ad copy, or sketches of how imagery might be used.

- We will present Round 2 explorations to the District, seeking feedback for final approved direction to the Campaign Creative Concept.

## Round 2 – Concept Testing (optional)

- It is critical that your campaign creative is poised to have a maximum impact and deliver the strongest possible return on your media investment before the full launch of your campaign. To this end, VisionPoint will conduct statistical significance tests on up to three key elements within the chosen concept (e.g. headline copy, imagery, CTAs, etc.) during Round 2.
- Through our process, we will determine which combination of elements within your chosen concept evoke the strongest response from your target audience in terms of KPIs.
- These early-stage tests will serve as a precursor to the performance-based optimizations which we apply to your digital ads throughout the life of your campaign.
- We will present our findings from the initial concept testing to the District, seeking feedback for final approved direction to the Campaign Creative Concept.

## Round 3 – Finalization of Concept and Creative Kit Deliverables

- Once the direction for execution has been chosen, VisionPoint will make final refinements to the execution examples from Round 2. The finalized set of conceptual assets will serve as the initial draft of your Sample Creative Kit (described next).

### *Sample Creative Kit*

Once a final Campaign Creative Concept is chosen, VisionPoint will bring that concept to life through a kit of polished sample creative executions to be decided upon by VisionPoint and the client. These executions not only serve as a useful framework for future campaign creative development, but they are also Round 1 creative for specific ads needed for executing the developed integrated marketing plan. For the purposes of delivering a fixed cost, VisionPoint has assumed that SMCCCD's campaign creative kit will include:

- Two - three digital display ads including copywriting and design
- One print ad including copywriting and design
- One billboard design including copywriting and designs

*Note: We can adjust the contents of the sample kit if the strategic direction of the campaign calls for a different set of representative executions that better achieve your goals.*

### *Campaign Concept Guidelines*

After the Sample Creative Kit has been delivered, VisionPoint will create a graphic style guidelines document that illustrate basic guidelines and principles on how to use the creative elements of the chosen campaign direction. For example, the document will illustrate usage of imagery, typography, color usage, headlines, tag line(s), and any additional elements that may be in play.

### *Ad Hoc Copywriting and Design for Additional Campaign Creative*

Rather than committing to specific creative executions at this early stage without having first established the brand and marketing strategy, we propose and have included in our cost estimate an allocation of **150 creative hours (50 hours for copywriting and 100 hours for design)** which would be dedicated to the creation of the assets necessary to execute the approved marketing plan.

Leveraging these hours, we'll give SMCCCD the flexibility to choose the specific creative assets we produce, including but not limited to:

<b>Advertising</b> Display ads Paid Search ads Geofencing ads Retargeting ads Radio spots TV commercial scripts Print ads Social media ads Outdoor ads	<b>Collateral</b> Brochures Event promotional material Direct mailers
<b>Organic Social Media</b> Content strategy Content development Visual asset development	<b>Websites / Landing Pages</b> <b>SEO Strategy and Content Development</b> Short- and long-form articles SEO content
	<b>CRM</b> Email nurturing content SMS / text messaging

### *Digital Campaign Creative*

Digital marketing is all about reaching the right audiences in the right moments. As audiences are constantly changing, so must your campaign creative. Unlike traditional creative executions such as print ads and billboards, digital creative is constantly changing, with messaging that is iterative and informed by trends in your data.

We will produce the following digital creative assets to execute your plan, each of which will respond to your audiences active search patterns to meet them where they are with the power of your brand story.

The following assets are included in this Scope of Work:

- Digital Display Ads — Impress an image upon your audience’s minds.
- Facebook Ad creative — Stand out on your audience’s news feeds.
- Paid Search Text Ads — Be the answer to your audience’s search queries.

### *Creative Refresh*

Regardless of the potency of your brand story, audiences quickly tire of hearing the same story over and over. The marketplace is saturated with new messages daily, which means that your brand creative has a shelf life and will eventually grow stale in the eyes of your audience if not properly maintained.

To prevent a decrease in conversion rates due to ad fatigue, VisionPoint will refresh the digital campaign creative while keeping the assets consistent with SMCCCD's image and established brand standards. We have included the following in our Scope:

- Display Ads
  - Updates to copy
  - Updates to photography (any new photos will be provided by SMCCCD)
  - Updates to design template in five standard sizes (i.e.300x250, 728x90, 300x600, 300x50, 320x100).
- Facebook and LinkedIn Ads
  - Simple updates to copy
  - Updates to photography (any new photos will be provided by SMCCCD)
- Search Ads
  - Simple updates to copy
- Landing Pages
  - Simple updates to copy for each page
- Youtube Ads
  - Simple updates to copy

In the interest of being as cost-efficient as possible, VisionPoint assumes that we will continue to leverage the campaign concept and will provide one round of revisions for each refreshed creative asset. As we strive to earn the best results, we have included both the design and copywriting necessary to refresh your digital ads no less than every 4 months following the launch of your new campaign.

*Note: If SMCCCD requires a new set of digital creative that is substantially different from the previous creative work, VisionPoint and SMCCCD will agree to a change order.*

## Digital Campaign Launch and Management

### *Digital Advertising Placements*

Every media investment VisionPoint will make on behalf of San Mateo County CCD will be anchored in the research-informed marketing strategy which we establish in partnership with your key project stakeholders at the beginning of the project.

VisionPoint's Google Ads certified digital marketing strategists will negotiate, place, and manage the digital media buys within the scope of the District's approved budget. These may include placement of your Display ads, Facebook and Instagram ads, Google Search ads, and other specific assets called for by the media plan.

## Digital Campaign Management & Optimization

Active campaign management is what ensures a great plan produces great results. During the execution of your plan, we will maximize your return on media investment by staying hands-on through the life of each campaign and making the right optimizations **every week** to improve the performance yield of each ad over time.

### University of Massachusetts Amherst

*In our work with the University of Massachusetts Amherst, our weekly optimizations **reduced the cost per qualified lead by 95%** throughout the life of the campaign for key graduate healthcare programs, delivering a tremendous return on our client's investment. This type of success story is typical; not a lightning-in-a-bottle one-off.*

VisionPoint will set-up each campaign and optimize it on a weekly basis after launch to drive the most return on investment for San Mateo County CCD. As an added value benefit, we will **implement provided ad creative adjustments** as part of our ongoing ad testing and optimization activities.

Our weekly optimization activities include but are not limited to:

- Adjusting keyword bid strategy (i.e. bidding higher on high converting keywords and excluding low converting keywords from future bids)
- Researching and adding new keywords to the mix
- Rewriting and tweaking text ads
- Adjusting display ad content to reach and resonate with target audiences
- Additional iterations informed by the campaigns' performance

Our team of Google Ads certified strategists will improve your digital campaign's performance yield as the project progresses.

As an added benefit of our partnership, we will create all-new ad accounts for you - which includes Facebook, LinkedIn, Google, and more. These new accounts will feature custom read-only access and will be transferable at the conclusion of our partnership.

### *Traditional Advertising Placements*

Every traditional media placement decision that VisionPoint will make will be rooted in the established consensus of SMCCCD's Integrated Marketing Strategy. This will ensure that every placement is not only strategically viable against your awareness and enrollment goals, but that SMCCCD understand the reason behind each investment.

The media plan included in SMCCCD's integrated marketing plan will include a selection of specific traditional media channels and creative approaches that will produce the highest return on investment for SMCCCD. Upon approval of the plan, VisionPoint will negotiate, place and manage the media buys in keeping with the District's approved budget. Traditional media may include TV commercials, radio spots, print ads, billboards, direct mail inserts, and other specific assets called for by the media plan.

During media planning, VisionPoint conducts extensive research on various channels — and even individual outlets — to ensure our chosen media placements deliver the best possible reach across SMCCCD's service area and target demographics.

Typically beyond the initial media planning process, VisionPoint has been very successful in negotiating added value with media outlets to maximize reach, frequency, impressions and ultimately effectiveness of the campaign. In fact, VisionPoint has the proven ability to obtain **25% more in added bonus media** per traditional media dollar spent.

Our strategic approach to traditional media placement is rooted in three core competencies:

- 1. Extensive Research** — We analyze your market, audiences, existing data, and competitive landscape, helping you identify the strengths and opportunities while mitigating weaknesses and threats from a media buying perspective. Specific to digital, we will examine search traffic and keyword rankings using tools such as BrightEdge, data models of past media spends, channel-specific KPIs via SEMRush reports and other key factors to create the optimum media mix.
- 2. A Vast Media Network** — We bring long-standing relationships and preferred partner status with several major platforms, such as streaming/OTT television partner SpotX, streaming radio partner IHeartRadio, and programmatic Partner, BrkThru. This means we're able to tap into our network of traditional, digital and hybrid media vendors and national media conglomerates to negotiate for the best possible rates on behalf of SMCCCD. We also are afforded access to information on station formats, Nielsen and Arbitron ratings, circulation/viewership/listenership/UMV numbers, audience

demographics by daypart, DMA data, and other more granular insights specific to each outlet in your media plan.

- 3. Superior Negotiation** — We have experts dedicated to media negotiation. Because we purchase media in markets all over the country, we have gained the national media buying clout needed to stretch your budget further and earn **25% more in added bonus media** per traditional media dollar spent. Some of the added value components we routinely secure for our clients include:

- Additional live and recorded on-air mentions
- Extended advertising run dates
- Discounted media buy rates
- Prime placement opportunities (high-volume dayparts, Sunday print editions, morning shows, etc.)
- Experiential marketing opportunities at large-scale event remotes
- Upgraded sponsorship packages
- Amplified exposure on syndicated outlets or programs

- 4. Active Campaign Management** — Active campaign management is what separates a great strategy and plan from great results. During the execution of your plan, we will maximize your return on media investment by staying hands-on through the life of each campaign and making the right optimizations **every week** to improve the performance yield of each ad over time. For example, in our work with the University of Massachusetts Amherst, our weekly optimizations **reduced the cost per qualified lead by 95%** throughout the life of the campaign, delivering a tremendous return on our client's investment.

### *Traditional Media Management*

Following the approval of the media plan, VisionPoint will coordinate the specific buys, ensure fulfillment, traffic creative, negotiate makegoods and track and deliver intuitive invoicing aligned with needs.

As a full-service agency, VisionPoint Marketing has been developing and executing traditional media campaigns for more than two decades. A third of our full-time, permanent VisionPointers bring substantial experience in traditional media buying, including our Founder and Chairman, Diane Kuehn.

Prior to founding VisionPoint, Diane invested over 15 years of her career with traditional media giants such as Cox Communications, Valassis/ADVO, USSPI, and Jordan Industries. As a result, Diane developed a deep strategic and tactical understanding of nearly every traditional channel, including newspapers, magazines, radio, television, direct mail, direct

response, and inbound and outbound telemarketing. Diane's affinity for traditional media channels runs throughout VisionPoint's media buying approach.

## Campaign Reporting

At VisionPoint, our mantra is: what gets measured, gets done. We live this mantra by not only measuring the results of our efforts and tracking progress against your goals. We stay nimble throughout our execution and optimize tactics in real-time based on trends in the data to ensure your goals are being met. We conduct in-depth analyses such as Chi-Squared tests and A/B assumptions tests to uncover **statistical significance** behind your results and prove the effectiveness of your marketing efforts. Further, we customize measurement tools around your goals to give you real-time visibility on your return on investment, along with data-driven insights and actionable recommendations that will guide your team's decisions on all future marketing initiatives. At VisionPoint, we don't just work for winning results: we'll make winning results work for you and pay dividends over time. And we've built our portfolio of success by staying true to that conviction for the past 20 years.

To ensure our marketing strategies are accomplishing San Mateo County CCD's goals, we've included the following services in measurement and reporting, which will prove the San Mateo County CCD's return on your marketing investment on an ongoing basis and empower your team to replicate and build upon winning results year-over-year in pursuit of sustained growth:

### *Full-Funnel Measurement Strategy*

VisionPoint will build SMCCCD's campaign measurement strategy upon an analysis of your digital marketing funnel. Specifically, we'll examine how prospective students become aware of San Mateo County CCD, how they engage with San Mateo County CCD, and what drives them to convert. Once we have a thorough understanding of prospective students' behavior, we will map out your marketing funnel and identify the key performance indicators (KPIs) that we'll track to accurately measure campaign performance and growth (e.g. impressions, click-throughs, click-through-rate, cost-per-click, engagement rates, conversions, etc.).

We'll submit our proposed set of KPIs to San Mateo County CCD for approval, along with the definitions and strategic significance of each metric. This collaborative approval process allows VisionPoint and San Mateo County CCD to establish a consensus of what is being measured, how it is being measured and the optimizations we'll make to improve the performance of each metric throughout your campaign. As the word "conversion" may carry conflicting meanings to different project stakeholders, our process will ensure your measurement strategy is aligned with the goals of your campaign.

Once we've agreed upon the KPIs that your measurement strategy will track, we will implement the data tracking tools necessary so that we can begin gathering the data that we'll filter into our **Campaign Results Dashboard** (described below). We have several measurement tools available, and would recommend the following for San Mateo County CCD:

- Google Tag Manager Container
- Google Analytics code
- Facebook Pixel

### *Campaign Results Dashboard*

To give you ongoing visibility on the performance of your campaign, VisionPoint will build an **Campaign Results Dashboard** to provide San Mateo County CCD with 24/7 access to daily-updated KPIs (e.g. impressions, click-throughs, click-through-rate, cost-per-click, engagement rates, conversions, etc.) fed by the channels included in the plan. We'll collaborate with you to define the ROI metrics that align with what we consider to be "conversions" for San Mateo County CCD, and build your dashboard to highlight only those metrics so you'll know at-a-glance how your campaign performance is trending toward your goals. Within your dashboard, we'll also include the appropriate context for interpreting the data.



The Campaign Results Dashboard offers the ability to automatically feed in data from scores of marketing platforms including but not limited to:

- Display channels, Google Analytics, Google Ads, Retargeting and more
- Facebook, Instagram, Twitter, YouTube, Snapchat, TikTok, and more
- Your own spreadsheets where you update or manage your own metrics

### Campaign Reports

In addition to providing 24/7 access to the data via the Campaign Results Dashboard, VisionPoint will generate a formal evaluation and recommendations report every three months through the life of the campaign, demonstrating performance across all advertising channels included in the plan. VisionPoint will deliver and discuss each report with the client during a video conference call, addressing any questions and sharing our recommendations for data-driven adjustments and improvements.

## **OPTIONAL Services (a la carte)**

Below, we have included a list of recommended optional a la carte services that we can provide SMCCCD should it have room in its budget. Note that the costs for the following services are NOT included in the total costs we have submitted in the proposal, but rather, are offered as potential add-ons should the District choose to do so.

### SEO Services

Given that “to ask” has been effectively replaced by the verb “to Google” in our modern lexicon, search engine optimization (SEO) is a cornerstone of a successful marketing strategy. Roughly 70% of higher education traffic comes from organic search. Moreover, search engines like Google are by far the largest traffic source channeling new visitors to higher ed websites. More than a marketing buzzword, keywords are an invaluable lens into your audience's questions and interests in their own words. Purchasing audiences' attentions through paid search advertising is not enough, especially given the significant budgets online and for-profit competitors are spending in competition for key search terms. Moreover, results from paid ads end when the media buys expire, whereas organic content continues to pay dividends long after the content has been published. From an inbound marketing perspective, it is crucial that the SMCCCD site is optimized to rank organically – ideally on the first results page – for the programs, offerings and services *for which you should be known*.

To this end, VisionPoint proposes an advanced SEO program for SMCCCD that addresses each of the following three components to drive your target audience organically (through non-paid means) to your website:

1. **Strategy and Planning:** We'll identify which **keywords** are best for your institution to pursue in the next 12 months, along with what **content** should be created to better compete for those keywords. Your SEO strategy will consist of:
  - BrightEdge Account for 12 months to provide the data to select your keywords and to track your and competitors' performance on target keywords
  - Core Optimization Strategy brief which includes a 12 month content calendar and 20 optimized pages
2. **Content Development:** We'll **consistently** create strategically aligned content each week that targets the selected keywords. Each piece of content will strike a balance between being relevant to both your readers' needs and to search engine algorithms. Further, we'll ensure your content engages your target audience with thought-leading interest topics to spark comments, social shares, inquiries, and conversation as native

ambassadors of your brand story. The content development support we'll provide to SMCCCD will come in the form of:

- 1 short form article per month for 12 months
  - 1 long form article per month for 12 months
3. **Measurement & Monitoring:** Search engine ranking and traffic is ever changing. To ensure your goals are met, VisionPoint will consistently **evaluate** and **make adjustments** to your SEO efforts in order to stay on your roadmap toward your goal. This will involve giving SMCCCD ongoing visibility on how your site is performing for your target keywords, how much traffic those keywords are delivering, whether your competition for those keywords is changing, and if the search engines are changing how those chosen keywords are evaluated and ranked. Specifically, our measurement approach will include:
- Quarterly reports which include our analysis of data available through your BrightEdge dashboard, Google Analytics, and your CRM (as applicable).
  - Quarterly discussions with SMCCCD project leads that detail our recommendations for improving your site's SEO performance.

## Landing Pages

### *Landing Page(s) Creation, Hosting, Data Capture and Data Delivery -*

VisionPoint can leverage the landing page design from your campaign creative kit to develop and host a responsive landing page that will drive inquiries to your various priorities. This landing page will be used for paid advertisements and will follow best practices for lead generation. As a VisionPoint hosted page, VisionPoint will embed the API code provided by SMCCCD to capture and deliver lead data directly to SMCCCD's CRM. The following components are included in this Scope of Work:

#### **Lead Generation Landing Page**

- VisionPoint can create the copy, design and develop landing pages that capture your target audiences' contact information by inviting them to request additional information about SMCCCD's programs or to receive an offer by completing a lead form.

Due to the complexities of building out a new page or pages within an existing site (with front-end and back-end components in place), we will build your pages on **VisionPoint's landing page toolkit**. This platform will enable us to develop your landing pages more quickly and at a lower cost to you without compromising on design quality or lead-generation effectiveness. The toolkit will also allow us to apply real time optimizations on multiple landing pages to maximize conversion results.

## Video

### *Video Production Methodology*

Research has proven that humans are wired for story telling, and we're especially attracted to a story that is being told via the combination of motion and sound. At VisionPoint, we understand the profound impact and power that video has when it's done well, and we have a methodology that allows us to weave your story into the medium in a way that will not only engage your audience, but will inspire them, tug at their heart strings, make them want to take action. We'll guide your team through the creative process of ideation, concepting, scripting, talent selection and beyond. Further, we'll leverage the deep skills and experience of our stable of video partners who will not only serve as our "hands" through the shoot and post-production, but who will also act as creative consultants who are able to speak into strategy and execution. Our process will entail the following stages:

#### **Pre-production:**

- We'll start by creating a vision for the video. We'll work closely with your team to align that vision with SMCCCD's overarching brand guidelines and/or campaign creative concept and tell SMCCCD's story in an engaging way. Then, we'll craft a narrative – in the form of written-word, script, visuals, rough storyboards, or whichever format we feel best brings the vision to life. Finally, we'll share our fully articulated vision with your team over a collaborative, one-hour discussion via phone or videoconference.
- Our goal at this stage of the process will be to gain consensus on the message and the stylistic direction. We may also review sample video executions together as a way to ensure we're envisioning the same creative outcome.
- Once we've agreed upon the vision and creative direction for the video, VisionPoint will develop the creative elements necessary to driving the final piece. These elements may include scripts, storyboards, video samples, photography, design elements or other forms of documentation.
- Upon approval of the creative elements, VisionPoint will develop a timeline and production plan for completion of the final piece. Once the plan is in place, we'll immediately begin reviewing and evaluating the initial, run-of-show production schedule as detailed in the production plan.
- The production plan will include logistical decisions, talent arrangements, production personnel and location, weather forecasts, directions, contact information and due dates. SMCCCD's team will approve and/or make revisions to the plan. Within this stage of the process, we'll secure voice talent if applicable.

**Production:**

Depending on our needs, the chosen video partner can provide both in-studio and on-location services for shooting the video content, as well as all equipment, materials, personnel and craft services necessary for the shoot. Production support may include the use of a Producer, Director of Photography, Director, Audio Engineer, Lighting Gaffer, Grip, Makeup/Wardrobe and Production Assistant. The chosen video partner will be responsible for obtaining all necessary release forms for individuals appearing or heard on the video.

**Post-production:**

Once shooting is complete for the video content portion, we'll begin the audio and video post-production process. This may include color correction with DaVinci suite, video editing using Final Cut Pro, animation and motion graphics as needed, audio dialogue replacement, sound design and editing, closed captioning, and the composing of any background music or recorded sound effects. A rough version of the video will be posted for SMCCCD's review and feedback, whereupon we will make the requested changes to the draft until SMCCCD is satisfied with the finished product. After SMCCCD stakeholders have signed off on all aspects of the video, we will traffic all deliverables to the necessary media partners for installation/distribution.

**A Note on Video Costs**

The approach and scope of video production elements cannot be fully determined until the creative and visual vision has been established and agreed upon. Some shoots require things like talent, studio time, wardrobe, props, make-up and rights usage, while others are much simpler and straight-forward.

## Photography

### *Photography Services*

Successful creative development depends heavily on the use of compelling, arresting imagery that captures a strong and authentic sense of place, represents the District's people, and invites audiences to picture themselves at the heart of the SMCCCD experience. Furthermore, certain creative executions (ads, websites, print pieces, etc.) often require photography that's crafted specifically to support a particular concept. The power of an image can not be understated.

If the District does not have a readily available bank of visual elements, or if specific creative executions call for particular photography support, VisionPoint will coordinate

with a photography partner to develop a body of images to be used in serving the marketing plan's various creative purposes.

VisionPoint's creative team will also provide hands-on creative direction for the photo shoot — a value-added service that photography companies typically handle.

Specifically, we will help SMCCCD:

- Establish a stylistic approach for the photography
- Determine shot locations in partnership with the photographer and/or locations scout
- Provide on-location creative direction for the photo shoot
- Build a specific shot list
- Select the talent, even if that "talent" consists of internal, non- professional representatives (actual students, faculty, staff, etc.)

*Note: If SMCCCD prefers to use an in-house photography team or an existing photography vendor, VisionPoint will draft photography guidelines based on our chosen campaign creative concept and provide creative direction for the photoshoot to ensure the photos produced align with the brand-driven concept.*

## Radio

### *Radio Advertising Creative*

VisionPoint will leverage the direction provided in the Campaign Creative Kit to develop one 15-second and one 30-second radio commercial including scriptwriting, production and editing. Given one of the goals of SMCCCD is local, community-wide awareness among a demographically diverse range of audience segments, on-air radio spots on local FM/AM station outlets would leverage the targeted reach of specific station formats (i.e. CHR/top 40 for current and prospective students, Classic Hits for adult learners, Classic Rock for veterans, SP for Hispanic listeners, etc.) to expand awareness within key communities of your DMA.

Our award-winning creative team brings deep experience producing radio spots for higher education institutions across the country. We understand how to make radio content entertaining in order to cut through the noise and reach your audience. Beyond entertainment value, we understand that the best radio content tells stories. And fortunately, community college systems like SMCCCD are story incubators, cultivating brilliance, creativity, discovery and leadership through education. Adult learners and international students, in particular, present compelling protagonists who overcome additional challenges to achieve life-changing success. At VisionPoint, the radio spots

we'll produce for SMCCCD will tap into these advantages and tell the stories that your audiences will not only hear, but also remember and act upon.

Like video production, we've honed a proven, collaborative process for developing and producing radio creative that strikes an emotional connection between your brand and your audience. Some of the tactics we employ in our approach include:

- Abstaining from “radio announcer” voices and instead, searching for and casting talent with real, believable voices.
- Writing our radio scripts with a heightened sense of the rhythmic perfection and impeccable timing needed to hold an audience's attention.
- Methodically ironing out any clunky or canned sounds from our copy to ensure brand messages ring genuine when they hit the listener's ear.

We'll develop your radio creative using the following process:

### **Pre-production**

- With direction from SMCCCD and the VisionPoint Strategist, our copywriter will create the radio scripts (:15, :30, or :60 seconds).
- VisionPoint will present (read) the spots to SMCCCD.

### **Production**

- If approved, VisionPoint will commence casting — typically with NYC, LA and Atlanta talent.
- VisionPoint will recommend up to three talent auditions per spot for SMCCCD to listen to and choose.
- VisionPoint will book talent and studio time.
- VisionPoint will produce the radio spots with a sound engineer and live talent in the booth or via ISDN line.

### **Post Production**

- VisionPoint will edit the spots, adding music and sound effects as needed.
- VisionPoint will send the produced spots to SMCCCD for approval.
- VisionPoint or SMCCCD will disseminate the produced spots to selected stations according to the media plan.

### **Our Production Partner:**

To bring our radio spots to life, we regularly partner with Studio Center and leverage their team's capabilities in recording, editing, mixing, sound design, original music and effects. Studio Center offers sixteen fully-outfitted audio rooms in their five locations

across the country. Their talented engineers produce thousands of radio spots, voiceovers, video mixes and foreign translations every year, including over 100 award-winning jingles and music beds annually.

## *B. Qualifications*

This section should provide a description of the professional qualifications and any licensing / certification of the firm's key personnel, specifically:

1. Identify by name and title key staff members who will be assigned to manage or otherwise play a major role(s) in this project and their assigned role(s).
2. Provide resumés of all key personnel.
3. Qualifications of any sub consultants proposed to be used on this project; clearly explain their role and the percentage of involvement.
4. Any specific or special qualifications your firm possesses that would benefit this project.

## **The Work We Do**

As a 100% higher ed-focused integrated marketing agency, the work we do in partnership with our clients is nationally recognized, and our VisionPointers (our people) are frequently invited to speak at many of higher education's preeminent marketing conferences, demonstrating our team's thought leadership on topics ranging from brand research and development, content strategy, integrated marketing, and website design.



## Our Core Offerings



### INTEGRATED MARKETING

- Integrated Marketing Strategy & Planning (Traditional & Digital)
- Media Planning & Placement
- Change Management
- Inbound Marketing, Content Strategy & SEO
- Outbound Marketing: Paid Search & Online Advertising
- Social Media Strategy
- Advanced Analytics & ROI Reporting
- CRM/Nurturing Integration



### BRAND CREATIVE

- Brand Platform Development
- Brand Messaging & Storytelling
- Campaign Creative & Visual Design
- Content Strategy
- Copywriting & Content Development
- Video & Multimedia Production



### WEB STRATEGY

- Analytics & SEO Consulting
- Website Design & UX
- Information Architecture
- User Testing
- Full Stack Development (Front-End, Back-End, Server-Side)
- Content Management Systems (CMS) Consulting & Implementation
- Web Governance
- Student Information Systems & Software Integration
- Accessibility Testing & Compliance

## Our Focus on Higher Education

In a world where many marketing agencies tout their agility across multiple industries, our complete dedication to serving higher education is not only rare, it's intentional.

Ask any VisionPointer, and they will tell you a personal story about the way they've been profoundly shaped by a professor, a project, a course or an educational experience (it's actually part of our interview process). We are passionate believers in the transformative power of higher education.

Beyond just our passion for higher ed, we've discovered over the years that our core competencies align perfectly with the most daunting marketing challenges that colleges, universities, and community colleges routinely face. Those core competencies are:



**A FIRM  
COMMITMENT  
TO STRATEGY**



**A PROVEN  
PROCESS FOR  
BUILDING  
CONSENSUS**



**AN  
INTEGRATED  
APPROACH**

## Key Personnel

Your team would likely be made up of some of the following key VisionPointers. We typically assign clients their own Account Director and Project Manager upon engagement. We can submit the resumes of SMCCCD's team upon engagement. For the sake of keeping this proposal's length reasonable, we have included a short description of each individual's experience.



***Diane Kuehn, Founder & Chairman***

B.S. in Business Administration, Concentration in Marketing | University of North Carolina Chapel Hill

Having founded VisionPoint Marketing in 2001, Diane Kuehn has spent two decades pioneering new approaches in data-informed, strategic marketing in higher education. She has helped more than 500 leaders from institutions of all shapes and sizes across the country to distinguish their

brands, attract and retain right-fit students, grow enrollments, deepen alumni engagement, and even shape and market new offerings.

As her many clients over the years will tell you, Diane is both a marketing savant and a prescient consultant. Perhaps her most valuable gift, though, is her tenacity as a problem solver. Diane has a knack for seeing through challenges to new opportunities, along with the organizational and executive prowess to mobilize teams to seize them. Before founding VisionPoint, Diane worked with Cox Communications, SourceLink, High Speed Net Solutions, and ADVO (now Valassis) – the country’s largest direct marketing firm – among other respected organizations.



*Craig Heldman, CEO*  
B.A. in Finance | Michigan State University

Craig Heldman is a self-described educational lifer. He believes education is the best hope for our world and our future. The driving passion behind his work is ultimately a desire to help foster life-changing connections between institutions and right-fit students. He’s also a visionary who sees beyond siloes, and he’s spent his career helping hundreds of schools revolutionize operations at the intersection of marketing, enrollment, institutional advancement, and technology.

Raised in an education family, he practically grew up on the Michigan State University campus in East Lansing. Craig has since invested more than 25 years of his career growing businesses that serve educational institutions in both the K-12 and higher ed spaces. Before taking the helm at VisionPoint, Craig spent over two decades at Hobsons – as their U.S. President and later as CEO – joining the company when it was in relative startup mode and leading the transformation of the business from an electronic publisher to a technology provider. Craig then became CEO of iModules, reestablishing its place as the market’s leading alumni engagement platform.



*Tony Poillucci, Vice President & Creative Director*  
B.F.A. in Graphic Design | Massachusetts College of Art & Design

As our Vice President and Creative Director, Tony Poillucci does a little bit of everything. He’s heavily involved in the early stages of projects that require strong strategic direction, decision-making, and consensus building. He sometimes finds himself in the position of Information Architect, responsible for translating goals and strategies into the intuitive and user-friendly organization of

content on an institution's website. When projects move into the design phase, Tony puts on his creative hat. He enjoys collaborating with VisionPoint's designers and our clients to find the best creative solutions, and he's always quick to remind us we need a reason behind every decision.

Whether he's delivering a strategy presentation on a university campus, sharing a sitemap on a conference call, or presenting a case study at a higher ed conference, Tony is no stranger to the spotlight. He's our all-star speaker when we need to bring out the big guns. He's worked in several different fields and in a host of interesting places. Prior to joining VisionPoint, he was President of aHA! Factory, a highly successful consulting, design, and web development firm based in Miami.



***Matt Walters, Vice President of Client Services***

B.A. in English, Minor in History | Gardner-Webb University  
M.A. in English | University of Tennessee

As Vice President of Client Services, Matt Walters wears multiple hats at VisionPoint. He's ultimately responsible for ensuring VisionPoint's team delivers extraordinary work and killer customer service across all our client projects. Additionally, Matt's a gifted content strategist and our go-to guy for helping clients devise and implement integrated strategies that give their content direction and purpose. Matt also contributes to VisionPoint's conference presentations around the country, speaking on content strategy, integrated marketing, and website governance, among other timely and relevant subjects. More than anyone else we know, Matt lives with the motive of making the world around him a better place and the people who interact with him happier.

Prior to joining the VisionPoint team, Matt earned an M.A. in English from the University of Tennessee, where he won awards for teaching and for his work in the writing center. Following graduate school, Matt returned to his alma mater, Gardner-Webb, where he served several roles including major gifts officer, executive communications director, and adjunct instructor in the English department. His versatility and appreciation for stakeholders' diverse perspectives across the institutional landscape make him an excellent consultative resource.



***Holly Simons, Vice President of Integrated Strategy***

B.A. in English & Rhetorical Theory | Willamette University

As our Vice President of Integrated Strategy, Holly Simons is an expert among experts. She guides our team of marketing strategists to turn clients' high-level goals into tactical, actionable strategies.

From improving deeper-funnel conversion rates, to closing gaps within particular audience segments, tightening brand positions, building web content strategies, leveraging CRM capabilities, and complementing paid digital strategies with organic efforts, Holly brings synergy to VisionPoint's brand marketing and enrollment marketing intersection.

Holly also has the invaluable experience of having been both marketing consultant and higher ed marketer. Most recently, Holly ran her own successful independent consulting business, providing full-service capabilities across digital media, brand strategy, campaign development, market research, and more to over 40 colleges and universities. As former Director of Strategic Communications and Marketing at the University of Oregon, Holly's insights in higher ed marketing were born from well-earned experience in successive enrollment and marketing leadership roles at the university. Under her enrollment marketing leadership, the university hit enrollment goals consecutively for 20 years.



***Chriss Thompson, Director of Media & Optimization***

B.S. in Journalism & Strategic Communications | University of Kansas

Chriss Thompson is a natural-born leader with an aptitude for growth – be it campaign results, client business, or internal talent. He pilots our integrated marketing operation across multiple client projects, from market research and strategic planning to campaign execution across digital and traditional channels, full-funnel measurement, optimization, and reporting. He draws from nearly a quarter-century of experience in corporate leadership, positioning our cross-functional team for success and driving breakthrough results for our higher education clients.

Chriss brings an invaluable outside perspective to higher education marketing challenges, having worked with regional brands to Fortune 500 companies across a wide range of industries in executive-level roles that were vital to business development. He thrives under the bright lights of both client-side and internal expectations, which he regularly exceeds with an assured charisma reminiscent of his idols, Winston Churchill and Teddy Roosevelt.



***Brandi Stocker, Director of Research & Analytics***

B.A. in Communication | Lindsey Wilson College  
M.A. in Student Personnel Services in Higher Education | Eastern Kentucky University  
Ed.D. in Educational Leadership | Eastern Kentucky University

Our forte at VisionPoint is in seeing the big picture. Brandi Stocker is one of the reasons why. She uncovers patterns in data that prove marketing attribution, providing our clients with full visibility

on their return while equipping them with the insights they need to replicate success. As a marketing automation guru with hands-on experience working in CRM platforms like Hobsons and Slate and building predictive data models, Brandi also helps our clients nurture leads to enrollment en masse.

Like VisionPoint itself, Brandi brings a resume that is focused squarely in higher education. She led graduate recruitment and retention efforts at Eastern Kentucky University, published research on online learning trends, and delivered numerous keynote presentations on industry topics. With a doctorate in Education Leadership and Policies Studies, Brandi adds Ed.D.-level certainty and client-first empathy to every project she touches, helping drive the best possible results for our clients' marketing campaigns.



***Dana Cruikshank, Director of Strategic Partnerships***

B.A. in Political Science | American University  
M.A. in Organizational Communications | Bowie State University  
M.P.H. in Public Health Education | Virginia Tech

Dana Cruikshank ensures that our clients are getting the most from VisionPoint's perspectives, services, and capabilities through his trademark visionary leadership. He tirelessly and fearlessly pursues new opportunities with prospective clients while finding right-fit agency partners that allow VisionPoint to expand its capabilities even further for the benefit of its clients.

Dana brings to our clients a rich portfolio of diverse experiences in marketing and media. At Virginia Tech, he guided communications and marketing for a \$60 million grant funded by the U.S. Army to promote STEM education and helped develop branding strategies for the university's Continuing and Professional Education office. He previously worked as an associate producer creating the Discovery Channel's international websites and served as a strategic communications advisor to the U.S. Army Corps of Engineers in the aftermath of Hurricane Katrina. As a senior media officer at the National Science Foundation, he created strategies and content explaining nanotechnology, cybersecurity, and other subjects.



***Hayley Rogers, Vice President of Finance***

B.S. in Business Administration, Concentrations in Accounting & Finance  
| North Carolina State University

VisionPoint's growth has accelerated at a record-breaking pace. Hayley Rogers' role is to ensure our growth is well-planned, using financial data to help inform strategic business decisions and position our agency for long-term success. As our CEO's financial right-hand, she juggles multiple

administrative hats behind the scenes, from cost analysis and accounting to financial forecasting, budgeting, and other tasks crucial to meeting and exceeding our company-wide goals. Hayley's experience traces back to high-growth ad agencies and production houses in New York City where she served in a variety of financial leadership roles, driving pivotal growth spurts for agencies with multi-million dollar sales goals and stiff competition.



***Katy Campbell, Director of Account Leadership***

B.S. in Sport Management, Minor in Business | North Carolina State University

As Director of Account Leadership at VisionPoint, Katy Campbell leads our Account Directors and works closely with our Client Services teams to enhance our innovative insights and bring VisionPoint's capabilities to life for our clients. As a strong client advocate with proven success in creative, integrated marketing, and web services, Katy combines proven leadership, a knack for delivering measurable results, and thoughtful strategic consideration.

Along with her plate-spinning capabilities, Katy has a knack for understanding clients' brands and competitive positions, pinpointing strengths that set them apart. She's also simply a delightful person, and clients and coworkers frequently express how much they enjoy working with her. Before joining the VisionPoint team, Katy was the Director of Marketing and Partnerships for the North Carolina Football Club, where she helped lead rebranding and marketing campaigns for both the North Carolina FC and the NC Courage soccer clubs.



***Rachel Vincent, Account Director***

B.A. in Communications, Concentration in Public Relations | East Carolina University

Ask Rachel Vincent what she considers to be her top priority in her role as a VisionPoint Account Director, and she will say two things: 1) to build and cultivate strong relationships with her clients, and 2) to maintain strong bonds that turn into long-lasting partnerships. As one of the primary points of contact for VisionPoint's clients, she is a consultative liaison that ensures her clients' projects are running smoothly.

She is as results-driven for her clients as she is for herself, and she helps ensure her clients' budgets and timelines are always moving forward; always on track. Equipped with more than a decade of experience working for advertising agencies across multiple industries, she has led many successful full-service advertising campaigns throughout her career.



***Dave Perks, Account Director***

B.A. in Liberal Arts | Virginia Tech

M.S. in Mass Communications | Virginia Commonwealth University

Dave Perks brings to every project a strong commitment to achieving a client's goals both effectively and creatively. With over 20 years of experience in advertising, integrated marketing, public relations, and copywriting, Dave is particularly well-equipped to play a central role in developing and executing every aspect of a client's marketing strategy.

Before joining our strategy team, Dave spent a large portion of his career in creative departments working with writers, art directors, and digital media specialists on a wide variety of client campaigns including web and digital strategy, branding, competitive analysis, SEO, social media, and content strategy. He has a track record of award-winning work for clients at agencies large and small, as well as from running his own marketing consulting company for several years; his clients have included higher ed institutions, National Geographic, and the U.S. Marine Corps, among many others.



***Amber Essary, Account Director***

B.A. in Psychology | University of North Carolina Chapel Hill

Amber Essary is an Account Director on the VisionPoint team, acting as the primary point of contact and advocate for her clients. She works closely with account strategy, integrated marketing, website, and creative resources to keep all the key components of client campaigns running smoothly and ensures that client deliverables are on target and on time. And with her expertise in content development across campaigns, Amber adds a layer of creative strategy to every project she manages.

Amber began her VisionPoint career as a content and social media specialist on the marketing team. After playing a role in almost every integrated marketing campaign at VisionPoint, Amber developed great insight into how research, strategy, and tactics come together to move a client's goals forward. Before joining VisionPoint, she gained experience at a public relations agency and a consulting firm, managing social media outlets, writing and managing blogs, and performing social media audits.



*Alicia Todd, Account Director*

B.S. in Recreational Therapy | East Carolina University

Alicia Todd leverages her strategic communications and managerial background daily to marshal our clients' priorities. She works closely with our marketing strategists, integrated marketing team, web experts, and creative resources to keep all the key components of client campaigns running smoothly and on-target. As our clients' primary point of contact, Alicia advocates for their voices in the overall strategic vision and keeps them informed of weekly progress made to achieve their goals.

Before joining VisionPoint, Alicia worked from coast to coast, living in North Carolina, Colorado, and Hawaii. As a former Account Executive for Bennet Group Strategic Communications, Alicia sharpened her managerial, marketing, and strategic communications skills as she spearheaded six-figure fundraising campaigns and managed an extensive media and public relations network.



*Megan Hall, Account Director*

B.A. in Advertising | University of North Carolina Chapel Hill

For Megan, the key to forging a path for great work is a meaningful relationship. As an Account Director at VisionPoint, she works cross-functionally with our writers, designers, project and account managers, and researchers to lead integrated marketing projects. She does it all while building long-lasting partnerships with our clients.

Before joining VisionPoint, Megan worked in client services for various industries – from coffee and sports to financial services and healthcare. A UNC-Chapel Hill graduate, Megan worked in recruiting and waited tables to put herself through college. The experience, knowledge, skill sets, and friendships she gained during her college experience, is what she strives to give back by working in higher ed.



*Bruce Ortiz, Account Director*

B.A. in General Studies, Concentration in Marketing | Southern New Hampshire University

Bruce is an effective leader in change, both inside and outside of the office. As an Account Director, he strives to lead our clients to success. He collaborates with clients one-on-one to address needs and develop action plans that are personalized to their unique goals and challenges. Like every great leader, Bruce has a team of experts working alongside him, collaborating closely with our marketing strategists, integrated marketing team, website experts, and creative resources.

As a marketing professional, Bruce has worked on both the agency and client sides. From contributing to student enrollment at Pearson Education and Adtalem Global Education to supporting the launch of UTEP Connect and Maryville Online at the University of Texas El Paso and Maryville University, respectively, Bruce's extensive experience working within the education sector proves his client service, digital marketing strategy, and media and analytics expertise. He has also helped boost enrollments for institutions such as Cincinnati State Technical and Community College, Nova Southeastern University, Ross University's School of Medicine and School of Veterinary Medicine, and American University of the Caribbean School of Medicine through marketing leadership roles. Bruce's experience outside of higher ed includes his work in experiential and field marketing in the consumer goods and retail industries. Most notably, he worked with Red Bull North America supporting national and regional brand events.



*Alex Lucas, Account Director*

B.A. in Marketing | Nottingham University

As an Account Director at VisionPoint, Alex describes himself as the quarterback for his clients, seeing himself as an extension of their team. He guides projects to success from start to finish, ensuring no idea, big or small, is left behind. Alex utilizes the depth and breadth of VisionPoint's knowledge and capabilities, working cross-functionally alongside our creative, account, and media teams.

Alex's 13-year history in marketing began in local government, working as an account director for Nottingham City Council's Sport and Leisure department. His interest in higher ed marketing stems from his career in academic publishing as a marketing manager for Oxford University Press and Elsevier. And before joining VisionPoint, Alex took on multiple account management roles for various American agencies. He developed and implemented SEO, PPC, creative content, SEM strategies, and websites for a wide range of companies spanning various industries.



*Taylor Tice, Senior Project Manager*  
B.S. in Commerce | University of Virginia

As Senior Project Manager, Taylor Tice works to ensure that the VisionPoint resources collaborate smoothly to exceed client expectations on every project he manages. With his strong commitment to maximizing efficiency, Taylor keeps client projects on time and on budget, while supporting his fellow account managers in complex client projects. He enjoys building meaningful relationships with clients and he's always excited to play a key role in helping them achieve their goals. Taylor's attention to detail, combined with his strategic vision, allow him to excel in managing the many components of complex projects. He employs his strong communication skills to keep clients always in the know and team members clear on their responsibilities.

Taylor is skilled in a variety of marketing tactics including web, print, direct mail, and email. Before joining VisionPoint, Taylor helped grow the local brokerage at Nest Realty Group, resulting in a twelve location franchise spanning four states. At Nest, Taylor served in many capacities from launching new franchise locations to overseeing the company's market data and analytics program to creating website and marketing content.



*Caroline Daley, Senior Project Manager*  
B.A. in Communication, Minor in Leadership Studies | Auburn University

Caroline Daley is a Senior Project Manager on the VisionPoint team, acting as the primary project manager, point of contact, and advocate for her clients. She has managed large, complex projects across all of VisionPoint's offerings, with clients that range from four-year universities to community colleges, state systems, and everything in between. She has helped spearhead process improvements that have helped the company become more efficient.

Caroline works closely with strategists and resources across our integrated marketing, web, and creative teams to keep client projects running smoothly, ensuring our work is on-target and on-time while keeping clients and teammates alike in-the-know. A seasoned professional, she now also mentors other Project Managers and Project Coordinators on the team.



*Emma Huelskamp, Senior Project Manager*

B.A. in History | Wake Forest University

Emma Huelskamp is a Senior Project Manager at VisionPoint. She supports the project management team, helping to develop the tools they need to go above and beyond for our clients. As one of the main resources for our internal team, Emma ensures that projects progress on time and within budget.

Before joining VisionPoint, Emma worked as a project manager for a small integrated agency where she managed their two largest accounts, both of which had a national presence. She scoped and created estimates, assisted with client discovery and research, and managed integrated campaigns while juggling timelines and budgets.



*Christian Jessup, Project Manager*

B.A. in Music Composition & Communication Studies | Gardner-Webb University

Christian Jessup is a Project Manager on the VisionPoint team, acting as the primary project manager, point of contact, and advocate for his clients. Christian works closely with strategists and resources across our integrated marketing, web, and creative teams to keep client projects running smoothly, ensuring our work is on target and on time while keeping clients and teammates alike in the know.

Those who watch Christian work might say it's like watching someone compose a symphony, the way he guides and manages the contributions of various teammates and clients toward beautiful outcomes. That's not surprising, as Christian actually is a composer.



*Katy Mennicken, Project Manager*

B.S. in Marketing & International Business | University of Delaware

Pairing her mind for marketing with her penchant for adaptability, Katy Mennicken brings creativity and structure to our clients' projects as an account manager. One of her biggest goals is ensuring that our clients feel that we are all members of one team, working towards common

goals together. As a former media planner and marketing project coordinator, Katy leverages her experience in planning digital and traditional marketing campaigns when building and executing timelines for her clients' projects.

Before coming to VisionPoint, Katy worked in a variety of fast-paced industries in the New York City metro area, from finance to fashion to trade shows. Her breadth and depth of media planning experience helps her brainstorm innovative and creative ways to introduce new media tactics into our marketing plans.



***Sammy Bowen, Project Manager***

B.A. in Public Relations, Minors in Hispanic Studies & Social and Economic Justice | University of North Carolina Chapel Hill

As a Project Manager, Sammy Bowen works closely with our Account Services team to organize the myriad of details within any one of our numerous projects. From inception to completion, Sammy helps plan and develop elements that keep our projects on schedule and on budget. She is responsible for initial timeline builds of our client projects, as well as owning and leading the organization of all of VisionPoint's documentation of client files, deliverables, and objectives.

Bringing to VisionPoint a well-trained eye for project management, administrative organization, and documentation, Sammy has honed her skills through a variety of roles in digital marketing, public relations, tourism, and nonprofits. Her hands-on experience comes from her work managing a wide array of details at the organizational level for communication audits, outbrains, and website content in the wake of a major site redesign.



***Naomi Hill, Project Coordinator***

B.A. in Interpersonal Communication & Political Science | Meredith College

As Project Coordinator, Naomi is the project management team's go-to gal for project support. Whether she's taking notes or listening in on client calls, Naomi makes sure everyone is on the same page when it comes to producing projects that are on time and within budget. She works jointly with our account services, strategy, and creative teams to create our best work, leaving no client's needs behind.

Naomi began her career at VisionPoint as an intern with hopes of one day becoming a full-time VisionPointer. She quickly integrated herself into the project management team, proving herself

a valuable asset to the group. Her ability to work cross-functionally comes from her passion for learning. Naomi has four minor degrees in various areas of study: Marketing, Pre-law, Political Science, and Professional Writing.



***Erica Kim, Marketing Strategist***

B.A. in Public Policy | Duke University  
B.A. in English | Duke University  
Ed.M. in Higher Education | Harvard University

Erica Kim earned her Master's in Education (Ed.M.) at Harvard University and now applies her specialized skills and knowledge on behalf of our client partners to help them achieve their enrollment and admissions goals. Having researched and studied the world of higher education, she develops effective strategies and marketing plans to get clients where they want to be and need to be. Her familiarity with the trends and shifts in higher education allow her to contribute subject matter expertise and strategic insight across the board.

Erica's career has led her to work with clients across industries – from health care and education to consumer product and transportation. At Harvard, her research focused on undergraduate curricular innovation, the future of work, and adult learning in technology-enabled environments. Most recently, Erica served in a brand marketing role at an education technology company that partners with colleges and universities to offer online degree programs.



***Lydia Kuekes, Senior Graphic Designer***

B.A. in Graphic Design | North Carolina State University  
M.A. in Graphic Design | North Carolina State University

A Senior Graphic Designer, Lydia Kuekes creates experiences that surprise, delight, and engage our clients' target audiences. From website designs and logo concepts to 20-foot hand-painted murals, Lydia's love for creating amazing work stems from a deep-rooted passion: to make the world a beautiful place. But the best designers recognize that great design isn't about beauty; but the most important aspect of great design is *communication* – and Lydia is a master of both. To quote Lydia, "I love language and I love design. And finding a way to effectively communicate by combining them is so satisfying."

A veteran designer with not one, but two degrees from NC State's prestigious College of Design, Lydia balances her work at VisionPoint with her involvement in our local design community. She currently serves as Director of Design Ability of AIGA Raleigh – the Triangle's preeminent

association for design advocates, practitioners, enthusiasts, and patrons.



*Luis Popoca, Interactive Graphic Designer*

B.F.A. in Graphic Design | The Art Institute of Raleigh-Durham

A gifted creative thinker with a pixel-level eye for detail, Luis Popoca ensures the work we do at VisionPoint is not only thoughtful and strategic, but delightful. While he's an artist in every sense of the word, Luis' approach to design is rooted in a lifelong fascination with psychology – with how people think, how they communicate, and why they choose to do what they do. He even considered a career in psychology before pursuing a more creative path.

Luis channels his unquenchable thirst for knowledge and his enduring interest in psychology into his design work, using a multitude of visual mediums to engage, captivate, inspire, and motivate our clients' target audiences. As Luis always says, design is as much about effective, persuasive communication, and problem-solving as it is about aesthetic beauty – and Luis channels both.



*Alli Hutchinson, Graphic Production Designer*

B.A. in Visual Arts Studies | University of Florida

As a Graphic Production Designer at VisionPoint, Alli combines her appreciation for typography and command for color with other design fundamentals in her approach to creative projects. Alongside our senior designers, Alli builds out production-ready files for internal and external ad campaigns and landing pages. She uses her keen eye for detail to select photography and visual assets for design material.

Before becoming a VisionPointer, Alli was a Gator at the University of Florida, where she earned her degree in Visual Arts Studies. After college, she worked as a graphic designer for a mid-sized real estate development company in Florida, and showcased her design skills in an Adobe x Airbnb International design competition, winning 5th place overall.



***Sean Krause, Senior Copywriter***

B.A. in English Literature | College of the Holy Cross  
M.A. in English | University of Mississippi  
M.A. in Publications Design | University of Baltimore

As an award-winning copywriter, Sean Krause came to VisionPoint with deep experience in the advertising world and a reputation for strong conceptual ideas, engaging copy, and a knack for storytelling. He has an instinct for getting to the heart of every client's story and for finding creative ways to turn it into messaging that makes an impact.

Over the years, he's written for a mix of corporate, non-profit, and higher ed clients, including United Airlines, Penn State University, Smuckers, and Johns Hopkins University. Sean's expertise puts him in the thick of every big content project at VisionPoint. He's a multi-faceted marketing strategist and adept at all media – web, print, broadcast, radio, and social media. Sean sees education as an incubator of stories. He especially enjoys writing about non-traditional students – transfers, study abroaders, G.I. Billers, and students who start out wanting to be poets and end up as chemists – and teasing out great insights and unique angles that captivate a reader's attention.



***Maria Muniz, Senior Content Strategist & Writer***

B.A. in English & Journalism | New York University

Maria Muniz is the Senior Content Strategist & Writer for VisionPoint's Media & Optimization team. She has over 30 years of experience in content creation, marketing, public relations, social media management, and email marketing – and an arsenal of skills to go with it. Maria loves content development and management. From concept through delivery, she specializes in blogs, monthly newsletters, case studies, e-books, infographics, webinars, and social media content.

Maria's focus is on creating engaging content that adheres to inbound and SEO best practices. She develops inbound marketing strategies to achieve clients' marketing goals and brings those strategies to life, using content marketing as a vehicle for brand building, awareness, and lead generation.



***Jamie Boggs, Senior Analyst***

B.A. in Mathematics | Berea College  
M.A. in Human Services: Student Personnel | Eastern Kentucky University

Jamie Boggs approaches everything analytically – including his beloved sport of baseball – and personifies our truth as a data-first marketing agency. With a mathematics degree and nearly 15 years of experience in higher education, he helps clients use data to drive decisions. He pieces together data points from campaigns, Google Analytics, CRM, SIS, and other sources to provide a 360-degree view on the impact our marketing strategies are having on our clients' big-picture goals.

One of Jamie's strengths is building data models to forecast student success outcomes – an ability he honed while working at Eastern Kentucky University and Berea College. With VisionPoint, he has been taking his skills to the next level by helping engineer VisionPoint's DecisionEngine, a state-of-the-art platform that uses predictive analytics to give our clients full visibility on the student journey.



***Brittany Casali, Senior Digital Marketing Specialist***

B.A. in Advertising, Minor in Entrepreneurship | University of North Carolina Chapel Hill

Brittany Casali, one of our talented Senior Digital Marketing Specialists, keeps all of our digital marketing campaigns performing at peak capacity. Her weekly hands-on optimization, research, and testing guarantees we're earning the highest ROI for our clients. And with certifications in Google Analytics, Google Adwords, and BrightEdge, Brittany has no shortage of skills in her toolkit to seek solutions, optimize ads, and meet client goals.

And while Brittany brings her experience in digital marketing to VisionPoint, she also brings a wide range of marketing savvy. Starting out with companies like Disney, Cartier, and Gucci, Brittany earned her chops through brand building, traditional marketing, and experiential marketing. She uses her high-level perspective of campaign building and market research to ask the right questions and, ultimately, find answers that bring in top-notch results for every one of our clients' campaigns.



***Carly Wisse, Senior Digital Marketing Specialist***

B.S. in Communication, Concentration in Public Relations | Appalachian State University

Carly Wisse takes our clients' campaigns from conception to completion. With our relentless pursuit to optimize our digital ads to yield the highest possible results for our clients, Carly and our entire Media & Optimization team are integral parts to making that goal a reality. She collaborates

across teams and leverages her own digital marketing savvy earned from her extensive background in the marketing and media buying world.

Carly has seen all sides of the marketing agency process, from pitching to media buying to campaign management. She has managed campaigns for programmatic media, SEM, and social media, as well as maintained expert-level knowledge in SEO and a wealth of digital media channels. Her experience equips her with a sense of flexibility for the fast-paced world of marketing, but her passion for digital marketing drives her to bridge the gap between client needs and solutions.



***Casey Nelson, Digital Marketing Specialist***

B.S. in Communication, Concentration in Public Relationships, Minor in Spanish | Western Carolina University

Casey Nelson is the force behind VisionPoint's weekly campaign optimizations. She sees our client's campaigns from creation to implementation to optimization by leveraging her in-depth expertise across a variety of digital marketing channels – Facebook, Google, YouTube, and LinkedIn – to name a few. By conducting granular ad and landing page optimizations, auditing website analytics, and reporting on marketing metrics, Casey drills down to help our clients realize results based on real-time insights.

Casey brings to our clients her experience working in digital marketing and social media for a variety of organizations, including higher education institutions like Western Carolina University and Southwestern Community College. From awareness building to lead generation to conversion, Casey ensures that prospective audiences move effectively through the enrollment funnel to achieve our true ROI.



***Katie-Beth Vornberger, Digital Marketing Specialist***

B.A. in Public Relations, Advertising, & Applied Communication | George Mason University

Katie-Beth's problem-solving dedication is what makes her a sought-after Digital Marketing Specialist. As a resident digital platform expert, Katie-Beth supports strategy development and implementation through cross-team collaboration. She not only ensures all campaigns are launched successfully, but also that throughout their life, they never grow stagnant in achieving true ROI. Her development, execution, and constant optimizations of our digital marketing campaigns exceed our clients' expectations.

The knowledge and expertise Katie-Beth offers all of VisionPoint's clients was earned through years of social and digital media advertising. With experience in everything from Facebook to YouTube, programmatic geofencing, and more, Katie-Beth comes armed with both the tactical experience and the high-level understanding of the digital marketing world to meet our clients' various needs.



*Cassie Fleming, Digital Marketing Specialist*

B.A. in Communication, Minor in English | Denison University

As a Digital Marketing Specialist, Cassie uses her keen eye for detail and organization skills to develop media strategy and plans, upload and optimize campaigns for various platforms, analyze performances, and write and deliver reports. With expert knowledge in paid media, Cassie serves as an educator for our internal team and clients.

Cassie began her career at VisionPoint leveraging her Communication degree and English minor to maintain clients' reputations by ensuring all add materials were error-free – both grammatically and technically. She collaborated with our integrated marketing teams to dive deeply into keyword and target audience research to secure peak optimizations and the highest return on investment from every campaign our team touches. Before joining VisionPoint, Cassie honed her skills through marketing roles at digital marketing agencies, real estate firms, and news sources like the Pittsburgh Post-Gazette.



*Victoria Navarro, Digital Marketing Strategist*

B.S. in Business Administration & Spanish | University of Richmond

As a Digital Marketing Specialist, Victoria taps into her attention to detail, organizational skills, and knowledge in data management to lead digital campaigns throughout their entire life cycle. From planning to building to implementing, Victoria works cross-functionally to showcase our clients on platforms that optimize performance and achieve true ROI.

Before assuming her role as a Digital Marketing Specialist, Victoria managed media budgets, invoices, and marketing campaign data as a Media Buyer with VisionPoint and ensured no detail was lost in our media plans. As a Mexico native, Victoria formerly served as a data manager and Latinx Liason in the North Carolina school system, working as a translator and coordinator to foster collaboration between faculty, staff, and Spanish-speaking students.



*Daniela Langille, Media Buyer*

B.A. in Advertising | Autonomous University of the West

Daniela Langille knows that a clients' goal is nothing without a well-structured plan. As a Media Buyer for VisionPoint, she bridges the gap between our clients and our vendors, negotiating on their behalf to secure the best possible value based upon needs and media budgets. Daniela works closely with our digital marketing strategists, designing effective campaigns, utilizing traditional and mixed media, and working directly with vendors to make sure everything is going to plan. She is also responsible for managing day-to-day invoices.

Daniela is no stranger to media planning. Before joining VisionPoint, she honed her skills at Universal McCann Colombia for almost three years as a media buyer, performing tasks similar to her role at VisionPoint – developing media buying strategies and negotiating with various media outlets. As an Autonomous University of the West graduate with a major in Advertising, she traveled to the U.S. to learn English and grow in her career.



*Melissa Hendricks, Marketing Specialist*

B.S. in Business Administration, Concentration in Marketing | North Carolina State University  
B.A. in International Studies, Concentration in Global Cultural Studies | North Carolina State University

With her eye for detail and mind for marketing, Melissa Hendricks dives deeply into the inner workings of our campaigns at launch to ensure that every keyword is well-researched, every ad is uploaded across platforms correctly, and each word has been thoroughly checked for quality assurance. By accounting for every detail on the back-end of our ads, Melissa guarantees that our clients' campaigns maintain high quality and a strong reputation.

Before joining VisionPoint, Melissa worked at Media Partners, Inc., where she gained a deep understanding of the various components of integrated marketing. By managing everything from campaign finances to reporting and sharing KPIs with clients, Melissa developed insights into a successful campaign lifecycle from start to finish.



*Tate Cohen, Marketing Specialist*

B.A. in Communication Media | North Carolina State University

For Tate, even the smallest of details don't go unnoticed. As a Marketing Specialist for VisionPoint, she makes sure all ads are clear, concise, and error-free. She verifies that leads are accurate and up-to-date, and she ensures our clients are able to connect with interested students in a timely manner. Tate makes sure that everything goes off without a hitch.

Before joining VisionPoint, Tate worked on political campaigns doing field work – voter outreach, phone banking, and canvassing. This work allowed her to strengthen her attention to detail, and she learned the importance of collaboration and straightforward communication. As a volunteer, Tate found herself performing tasks similar to her role at VisionPoint, checking for quality assurance, eventually working her way up the ladder towards the role of Field Director for a state senate campaign. Now, she's adapting her skills to the world of higher education.

## C. Experience

1. Overall Years' Experience
2. Description of Firm's overall Background and Experience
3. Total number of years of experience providing similar services for higher education projects
4. Description of Firm's overall Background and Experience with Higher Education
5. Proposer shall provide a minimum of two (2), but not to exceed four (4) case studies of work performed for clients in the past three years, in the higher education area that demonstrates your capabilities and experience related to the performance of relevant responsibilities listed in the scope of work. The case studies should also include:
  - i. Examples of Research - including needs assessment, market research, and platforms
  - ii. Examples of Planning – including campaign strategy, creative development, and targeting

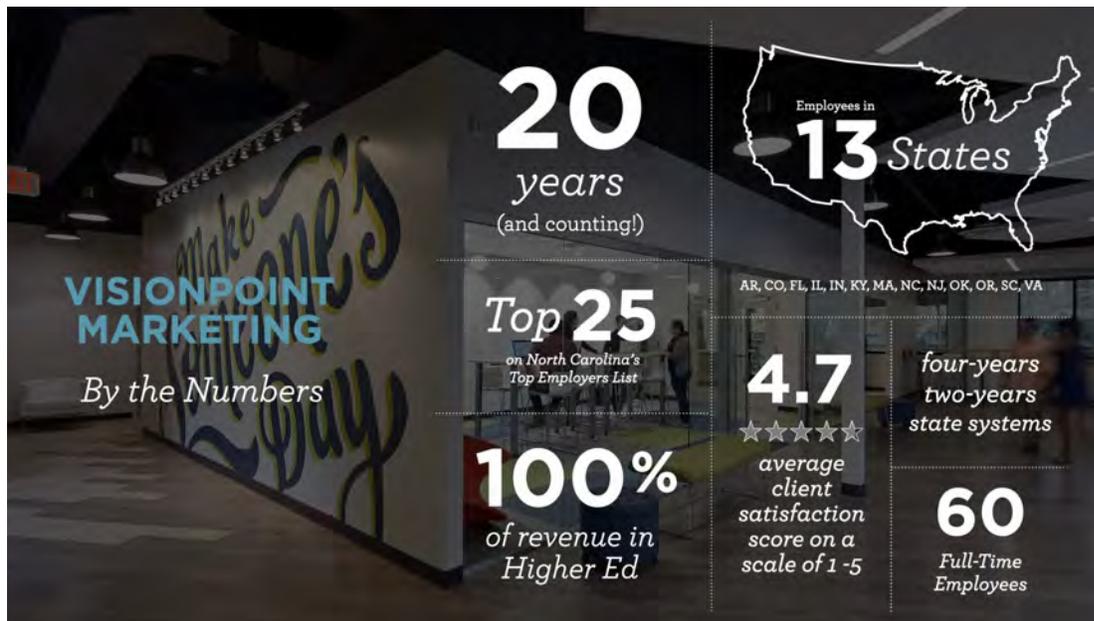
iii. Examples of Implementation - address methods and tactics (ex: SEO, paid social, display, etc.)

iv. Examples of Management of Campaigns – including evaluation and optimization

v. Examples of Tracking, Reporting and Recommendations

6. References. Complete Attachment C References. Provide the name and contact information of three (3) existing clients that can be contacted for reference checks, preferably similar to the scope of this RFP and/or industry.

## VisionPoint by the Numbers



VisionPoint Marketing is an award-winning marketing and advertising agency focused solely on serving higher education institutions throughout the U.S. Founded in 2001 and headquartered in Raleigh, North Carolina, with a handful of satellite offices throughout the country, VisionPoint combines next-level data analytics sophistication with the essential suite of services in brand, web, advertising, and enrollment marketing to drive sustainable enrollment growth in partnership with our clients. We bring together a team of 57 full-time higher education marketing experts whose commitment to actionable strategy, deep understanding of all marketing disciplines, and consensus across scores of stakeholders enable us to form long-standing, consultative client relationships.

We're also proud to be a perennial top-25 employer in our state, a value to our clients because our employees are highly satisfied and deeply motivated to do great work.

## Just a Few of Our Clients

### Two-Year Institutions

- Anne Arundel Community College
- Carroll Community College
- College of the Albemarle
- College of Southern Maryland
- Community College of Baltimore County
- De Anza College
- Foothill College
- Milwaukee Area Technical College
- Mission College
- Norco College
- Northern Virginia Community College
- North Orange Continuing Education
- Northern Essex Community College
- Tidewater Community College
- Trident Technical College
- Wake Tech Community College
- West Valley Community College

### Four-Year Institutions

- American University
- Ball State University
- Boston College
- Cornell University
- College of Charleston
- Dalton State College
- Gardner-Webb University

- Georgia Southern University
- Georgia Tech
- Meredith College
- National University
- Northern Vermont University
- Texas A&M University-Corpus Christi
- University of California Santa Barbara
- University of North Carolina Charlotte
- University of North Carolina Greensboro
- University of North Carolina Wilmington
- University of Arizona Online
- University of Arkansas at Fayetteville
- University of Colorado Boulder
- University of the Cumberlands
- University of North Dakota
- University of North Georgia
- University of Oregon
- University of Pennsylvania
- University of South Carolina
- University of Texas at Arlington
- University of Texas at Dallas
- University of Virginia
- University of Wisconsin - Milwaukee
- Virginia Tech
- Western Carolina University
- Worcester State University

### Schools, Departments, & Centers

- California Western School of Law
- Johns Hopkins University Engineering for Professionals
- Texas Tech University Health Sciences Center
- University of North Carolina Charlotte Belk College of Business
- University of California Education Abroad Program
- The University of Illinois Chicago Business
- University of Maryland Robert H. Smith School of Business
- University of Massachusetts School of Public Health & Health Sciences
- University of Virginia Curry School of Education

### Education Systems

- Alabama Community College System
- Colorado Community College System
- University of Missouri System
- University of North Carolina System

## Why VisionPoint

After years of working alongside higher ed institutions across the country, we've realized that what differentiates us from our competitors is not just the work that we do, but the way that we do it. Below are some of the basic tenets for how the VisionPoint team approaches each and every project.



### OUR PLACE IS IN THE TRENCHES

One of our clients recently told us, "You know, it doesn't feel like you're a vendor. You're part of our team, in the trenches with us." The quality she recognized is no accident, and the phrase she used has become our mantra. From project managers to senior leaders, our team will become your team, solving problems and celebrating success alongside you.



### GET EVERYONE ONBOARD

It can be tempting in a large-scale project to block out the noise and charge ahead in the fastest way possible. But we know that getting your campus and your leadership to support the project is critical to long-term success. We get stakeholders involved, educate them, include them in critical decisions, and gain consensus at each step.



### DO THE RIGHT THING

Not necessarily the most popular or trendy thing, the easy thing, or even the most profitable thing for our company. We promise to do the right thing for you and your goals, even when that means insisting on the difficult conversation. Our ethical standards are absolute, and your success will be our measuring stick – period.



### SEE THE BIG PICTURE

What we mean by that is we're a marketing agency first. We do a lot of website redesign and brand work, but we're not exclusively a web or brand shop. We work to understand your marketing goals and your business goals as an institution, and we architect our solutions with those goals in mind. That is our focus.

## A Great Place to Work



We are perennially recognized as a Top-25 Best Employer in North Carolina. Although the average turnover for our industry is around 30-35%, our turnover rate is almost half of the industry average. Our employees are not only excelling at VisionPoint, but they are passionate about achieving great results for our higher ed clients.

## Financial Stability



VisionPoint Marketing is a 6-time recipient of the Greater Raleigh Chamber of Commerce's Pinnacle Award for Steady Growth and Profitability (2006, 2009, 2011, 2012, 2013, 2015) which demonstrates our financial success and stability. Since 2015, VisionPoint has continued to grow and improve our financial success and stability. We have simply discontinued submitting our application for this particular award.

## Account Management & Communication

For all VisionPoint engagements, the process is as follows after project initiation:



### INTERNAL HANDOFF MEETING

VisionPoint team holds an internal launch meeting to review the Scope of Work, existing research or assets provided by the client, preliminary competitive research, and the draft Project Plan.



### PROJECT PLAN

The Project Manager develops a detailed Project Plan with each task, dependency of tasks, milestones, deadlines, and responsible parties for each task.



### PROJECT KICKOFF CALL

VisionPoint and client hold a Kickoff Call and reach a mutual agreement on Project Plan details and assignments, project goals, Scope of Work, and next steps.



### PROGRESS REPORTS

VisionPoint's Project Manager holds bi-weekly conference calls with the client contact to review the written bi-weekly progress reports.

The bi-weekly progress report will be emailed to the primary client contact and client "sign off" authorities each week prior to conference call. These conference calls can take as little as five minutes and are pre-set for a standing day of the week and time.

Bi-weekly progress reports review everything that was accomplished in the past two weeks and all of the tasks by date that will be worked on over the next two-week horizon. Any tasks that the client must do are specifically noted as a client assignment.



### SCOPE MANAGEMENT

There are four principles that guide our approach to change orders. 1) Sometimes change happens. 2) Not all changes are bad. 3) A change in direction doesn't necessarily involve a change in cost. 4) The key to managing change is to recognize it, talk about it, agree on it, and document it before the change happens.

## C. References

### Colorado Community College System

**Fiona Lytle, Director of Communications & Marketing**

[Fiona.Lytle@cccs.edu](mailto:Fiona.Lytle@cccs.edu) | (303) 595-1641

9101 E Lowry Blvd., Denver, CO 80230

**Length of Business Relationship:** February 2018 - Present

**Project Description:** Please see case study provided in previous section

### Alabama Community College System

**Rachel Bunning | Communications and Marketing Administrator**

[rachel.bunning@accs.edu](mailto:rachel.bunning@accs.edu) | (334) 293-4651

135 South Union Street, Montgomery, AL 36104

**Project Description:**

#### **Situation — Proving their Value**

The Alabama Community College System (ACCS) serves over 172,000 students and is made up of 24 institutions. ACCS was challenged by a lack of awareness of the system and of unified messaging that connected them to the schools within it. In response, they embarked on a statewide brand awareness initiative to drive enrollment at the system's colleges and prove their value to the economic prosperity of their state. However, convincing first-time students, non-traditional adult learners, and other audiences in Alabama to pursue a two-year education wouldn't be easy. The system needed to first redefine perceptions of the state's community colleges and the value they offered students.

#### **Approach — A Messaging Strategy that Hit Home**

After conducting extensive research on the system's statewide audiences, we devised a brand messaging strategy that spoke to their needs, values, and beliefs. Our goal was to earn audiences' attention, while challenging the community college stigma and inspiring a newfound appreciation for the role of the colleges in the communities they served.

Our research themes and campaign messaging objectives were as follows:

**Dispel the negative perceptions of the community college experience:**

Position schools within the ACCS as a high quality and competitive option on the route to achieving educational and career success.

**Local success is a product of the ACCS:**

Highlight the benefit and importance of local support, influencing development within the student's own community. Community college is a pathway to community advancement.

**Every student is the right fit for an Alabama Community College:**

Challenge the belief that there is an ideal or uniform look for a student who attends a community college. Opportunities are developed for anyone, through all stages of their lives.

**An affordable, accessible, and quality education:**

Highlight key influencing factors for students considering a community college education.

With this strategic framework in place, we shaped a campaign creative concept that explored the idea that the system's colleges were not merely *located* in the communities they served. They were a part of the fabric of those communities.

Our concept put a spotlight on how well the colleges understand and respond to the needs of their communities, how they know the local vernacular, and how they serve the real people and businesses in their communities. The campaign also dispelled the commonly held belief that you have to "go places" to be successful in life, while the reality is that you can get a quality education without even leaving your own community. Our concept played on the visual appearance of the words "Go Far In Life", where the copy revealed those words as a hidden message if you looked at any given ad from far away. The campaign creative assets we created included digital display, radio, and billboards. A centerpiece in our inventory of creative was an animated [video](#) we produced in partnership with our trusted animation partner, *Dash*, that brought the *go far* concept to life.

**Results — Inspiring a Paradigm Shift**

We defined success by increased traffic to the system's website, as well as amplified visibility and engagement across social media. Mid-way through its first year, the campaign has delivered on these priorities and surpassed industry benchmarks. We have shown impressive results in raising awareness, with an overall click through rate (CTR) for display of 0.18%, more than **double the higher education sector average**. For adult learners, veterans, and low-income women, the rate was 0.20%. Google search is a good indicator of awareness impact, and the paid search component of this campaign returned a cost per acquisition (CPA) of \$41.57, almost **half the**

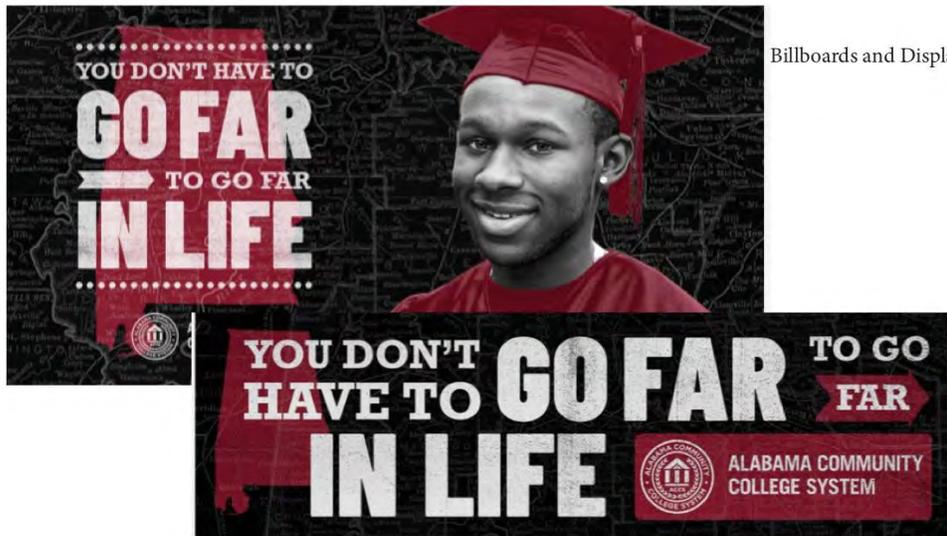
**sector benchmark** of \$72.70. The general awareness campaign, along with two smaller Grant-specific campaigns, generated nearly 1.7 Million impressions and over 1,800 confirmed lead form submissions across the state of Alabama.

The ACCS campaign even caught national attention and recognition. **Inside Higher Education**, a leading industry publication, recently featured an [article](#) on ACCS, lauding the campaign's emphasis on staying close to home — a message that couldn't be more relevant in the COVID-19 era given travel is limited, consumer budgets are tight, and the need to upskill in response to a volatile job market is at an all-time high.



Campaign Collateral

Display Ads



Billboards and Display Ads



## College of DuPage

### Laurie Jorgensen, Director, Marketing and Creative Services

425 Fawell Blvd, Glen Ellyn IL 60137

(630) 942-2755 | [jorgensenl@cod.edu](mailto:jorgensenl@cod.edu)

Dates of Services: From: March 2018- Present

**Project Description: Please see case study in previous section.**

## Northern Virginia Community College

### Toni Angelo, Director of Marketing College Marketing, Web and Creative Services

[tangelo@nvcc.edu](mailto:tangelo@nvcc.edu) | (703) 764-6029

3924 Pender Dr., Fairfax, VA 22030

**Length of Business Relationship:** May 2017 - Present

#### Project Description:

#### Situation

It says a lot that Northern Virginia Community College is recognized not by its initials, but by 'NOVA.' It's a nickname as big as the region NOVA serves. As the nation's second largest community college, NOVA is as well-positioned as perhaps any school in the nation to confront misconceptions about two-year education in a bold, new way.

#### Approach

Rather than trying – and failing, as so many two-year institutions do – to imitate four-year schools, VisionPoint recognized an opportunity for NOVA to embrace a completely different brand promise, promoting a message that only an institution like NOVA can offer its students.

In summary, that message emphasizes NOVA as:

- A **springboard to opportunity**, accelerating students' paths to success.
- **Relevant and in-demand**, producing graduates qualified for the region's fastest-growing industries in one of the nation's most competitive markets.
- Employing faculty who are **experts in the classroom and in the field**, bringing years of insight and experience to their students.
- Offering a **real-world diversity**, as students teach one another to navigate the diverse communities they will inhabit after graduation.

An **outstanding value**, offering *all of this* for a small token.

The following materials show how we promoted that message not only through content but also a style that departs from traditional approaches to higher-ed brand strategy in a bold, even defiant tone that's as confident as it is good-humored; a tone that only NOVA could own.

With six campuses and more than 90,000 students, Northern Virginia Community College is the second largest community college in the country, making it significantly larger and more complex than most of the majority of 4-year schools.

VisionPoint helped the College reposition itself via a brand-messaging platform engagement that included the development of a long-term, comprehensive brand campaign. The campaign is designed to extend across all campuses and offerings within the college, so it required the development of clear guidelines that ensure consistency and quality across a vast array of output. These guidelines covered TV spots, digital display ads, printed materials, internal communications pieces, traditional metro ads, and more.

## Results

By redefining the institution's brand promise, devising rich campaign creative, and launching a multi-channel, integrated marketing plan capable of changing audiences' minds and motivating action, we've achieved tremendous results. After being in-market for only two months, our intervention analysis shows that our brand campaign caused (not just correlated with) an 8.2% lift in brand awareness along with a 10 point (not percent) jump in positive perceptions in NOVA's service area. Beyond the initial campaign, we conducted a second quantitative study that proved 72% of the same respondents from our foundational research now consider NOVA as a top choice. And NOVA didn't just earn the attention of students. Higher Education Today lauded the campaign we launched in a [feature article](#) that spoke to exactly what NOVA was trying to accomplish: erasing the community college stigma.

To see an online portfolio of the award-winning creative work we developed for Northern Virginia Community College, visit [info.visionpointmarketing.com](http://info.visionpointmarketing.com).

## Milwaukee Area Technical College

**Tony Tagliavia, Director, Marketing and Communications**

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700 W State St, Milwaukee, WI 53233

**Project Description: Please see case study in previous section.**

# University of North Carolina System

**Camille Barkley, Associate Vice President for Strategic Communications**

ncbarkley@northcarolina.edu | 919.843.5037

910 Raleigh Road | Chapel Hill, NC 27514

**Length of Engagement:** April 2019 - Present

## **Project Description:**

### **The Situation – A Widespread Lack of Awareness**

Recognizing a need to better bolster and promote the affordability of public higher education in North Carolina, the state's legislature sponsored two new initiatives to help control college costs: a *Fixed Tuition Program* and the *NC Promise Tuition Plan*. Both statewide initiatives focused on closing achievement gaps in underserved learner populations and fueling the socioeconomic growth of communities across North Carolina, and it fell to the UNC System to leverage one-time state grant funding to promote these exciting new initiatives. The challenge, however, was that the target audiences –underserved, socioeconomically distressed communities for whom a college education is far from a foregone conclusion – were largely unaware of the System's role in the state's higher education landscape, let alone the life-changing opportunities available to them through these new initiatives. The System needed a state-wide marketing effort that would penetrate the hard-to-reach segments of first-generation students and non-traditional adult learners – a task that would prove especially challenging in population-dense media markets.

### **VisionPoint's Approach – Clever Creative and Concise Targeting**

The UNC System turned to VisionPoint to develop an integrated marketing campaign strategy that reached their wide range of audiences with precise targeting. First, we performed extensive research that entailed a series of quantitative marketplace studies across the state's underprivileged communities. In this work, we held online focus groups with current N.C. high school students, as well as conducted surveys of high school parents and guidance counselors to gauge perceptions and attitudes on higher education accessibility in North Carolina. Based on our findings, we developed personas to identify and prioritize the System's best-fit audiences for the initiatives, and shaped an integrated marketing strategy for reaching and engaging those audiences. To bring the strategy to life, we produced a creative concept that spoke first not about the initiatives (the solution) but about the problem itself, the prohibitive pain point of perceived exorbitant costs. The concept was disarmingly humorous and refreshingly honest, quite a different tone than most legislatively-motivated public service campaigns. Finally, we took the campaign to market across a multitude of traditional and digital channels, measuring our results along the way and making the right optimizations to improve results based on trends in performance data.

### The Results – Impacting Awareness, Perception, Understanding and Interest

Our goals revolved around building awareness for the System-wide opportunities and shaping perceptions on higher education affordability in the state. Within the first few months of our campaign, we delivered on each of those goals through meaningful results. For example, our ads alone earned an efficient **7.71% click through rate** on Google Search, proving a tremendous return for the system in that the costs were nearly eight times lower than industry standards of less than 1% CTR. Our campaign went on to produce a total of **46,979,414 impressions and 113,260 clicks**, giving the system unprecedented visibility. We even conducted a follow-up market study that proved our campaign delivered measurable increases in positive awareness among prospective parents, including an **11 point increase** in the percentage of parents who understand the value of the system’s offerings and a **10% increase** in parents’ likelihood to encourage kids to pursue in-state institutions.

Moreover, the TV commercials we produced for the campaign won two silver award ADDYs from our regional American Advertising Awards, earning the System recognition across the higher education landscape. Beyond results and awards, this project was met with glowing feedback from stakeholders across UNC System because of how we worked – they valued our listening skills, approach to the partnership, and how we shaped a truly customized strategy that responded to their situation and aligned with their vision. To view the award-winning work we produced for the NC Promise campaign, visit

<https://www.visionpointmarketing.com/portfolio/unc-system-nc-affordable-education/>

**We have served higher ed institutions all over the country for 20+ years.** In that time, we have helped institutions define their brands, stake claim to stronger marketplace positions, shape perceptions, and drive increases in all parts of the enrollment funnel.

Below is a high-level summary of projects of note:



- After being in-market for only two months, our intervention analysis shows that our brand campaign for the Northern Virginia Community College caused (not just correlated with) **an 8.2% lift in brand awareness along with a 10 point (not percent) jump in positive perceptions** in NOVA’s service area. Beyond the initial campaign, we

conducted a second quantitative study that proved **72% of the same respondents** from our foundational research now consider NOVA as a top choice.

- In just three months, **College of DuPage** notched over 22 million impressions, converting inquiries at a cost-efficient \$20 cost per acquisition (**which is nearly 50% lower than the average \$35 CPA**) and a **6.5% clickthrough rate** on Google Search during a time of widespread decline.
- We devised a campaign concept for the **University of North Dakota** targeting adult learners to drive **more than 3,000 direct inquiries** in the early months of our campaign.
- We dispelled the community college stigma for schools across the **Alabama Community College System** with a brand messaging strategy that earned the attention of audiences, as well as **Inside Higher Education**, a leading industry publication, in a recently featured [article](#) on educational equity



- We're currently engaged with the **University of North Carolina Wilmington** to help shed their reputation as an oceanside party school. We've guided them to own their location, crafting foundational brand messaging and creative assets that speak to their environmental- and marine-science focus as an altruistic value woven into the fabric of their identity.



Display Ad Creative

- We empowered **Worcester State University** with a campaign messaging strategy that embraced their identity as a self-made institution on the rise and drove **420 enrollment-related conversions** at costs below industry averages as a result of the campaign.

- We developed the brand platform, marketing strategy, and inventory of assets for a new, specialized graduate program at the **University of California Santa Barbara**, where we launched a campaign that drove more than

**800 qualified prospective student leads** for an inaugural cohort of just 20 students.



Program Brochure

**RESULTS:**  
Drove 800 qualified leads for inaugural cohort of 23 students in excess of University's goals

- We transformed the reputation of an unknown and overshadowed MBA program at **North Carolina State University** into one of the nation's **top 20 programs**, a top-choice for students interested in technology.



Viewbook



The common thread of our creative work is **strategic substance**. We don't just produce flashy designs and cunning copy for higher ed institutions. We devised sophisticated, custom strategies that responded to each clients' situation — utilizing data-informed insights on our clients' audiences, competitive set, and surrounding market. Then, we brought those strategies to life through our creative design and messaging work.

As you'll see from working with us, we don't create work to win awards (though we've won dozens). We create to win the attention of your audiences. We create to drive engagement in the right moments. We create to bring campus communities together with a brand story worth rallying behind.

**We create whatever it takes to achieve your goals.**

We have included a wide selection of **case studies** that demonstrate overwhelming evidence of our capabilities and experience across each of the service areas outlined in the RFP.

***Afterward, you'll find an inventory of creative samples for each service area. Note that each case study included here is anchored by creative samples in that subsequent section.***

## Case Studies

### ***Case Study for Publication and Marketing – North Carolina State University***

**Relevance to the San Mateo County Community College District: Scaling a university brand to a new program and bringing the brand to life through a variety of analog executions.**

#### **The Situation — In the Shadows of Giants**

In the shadows of national powerhouses Duke University and the University of North Carolina at Chapel Hill, North Carolina State's MBA program was almost entirely unknown when our partnership with NC State's Poole College of Management began. The few people who actually

knew of the Jenkins MBA program were unclear as to what the program stood for. Was it a 'real' MBA? Was it the "cheap option"? Was it a "technology MBA"? These were real questions we heard in stakeholder interviews, and ironically, the program was all three and then some. But without a brand marketing strategy, the College had been totally ineffective in distinguishing the program's unique strengths, attributes and value proposition.

Struggling to move the needle, the College turned to VisionPoint to redesign the Jenkins MBA program's website. But in actively listening to staff, faculty, current students, alumni, prospective students and other interested stakeholders, we quickly realized the program needed more than a new website – it needed a brand.

### **VisionPoint's Approach — Owning the Tech Niche**

We first distilled the program's signature strengths and value claims into five key brand pillars that distinguish the Jenkins MBA from its competitors, not just in the Triangle but around the country:

- Technology Focus
- Real Projects with Real Companies
- Academic Rigor
- Cross-Disciplinary Partnerships
- Value

While the program could lay exclusive claim to none of those pillars, no other program could promise to deliver on the combination of those qualities like the Jenkins MBA. We then developed a brand marketing campaign centered especially on the program's Technology Focus, its key differentiator, and executed that campaign through a multi-channel digital and traditional marketing plan that included a new program website, content strategy, print materials, social media strategy, online outreach campaigns (paid search, banner ads and social media ads), billboards, radio spots and the interior design of Jenkins' satellite campus facility in Research Triangle Park.

### **The Results — A Position of Prestige**

Over our six years of partnership, the NC State Jenkins MBA program moved from relative obscurity to recognition as one of the nation's top-20 ranked MBA programs, particularly known for its innovative use of technology and commitment to applied learning. Today, name recognition is at an all-time high, and due to consistent messaging, positioning and marketing, prospective students now have a clear understanding of the strengths and differentiators of what has become one of the country's most competitive programs.

## *Case Study for Website Design and Creation – University of North Carolina Charlotte*

**Relevance to the San Mateo County Community College District: Elevating the digital presence of a growing research university to reflect the stature of their identity and brand.**

### **The Situation — Misrepresented**

Due largely to its award-winning research, its unique relationship to the city of Charlotte, and its ongoing investment into a vibrant, state-of-the-art campus, UNC Charlotte is not only the fastest growing university in North Carolina, it is also one of the best. However, their website was anything but reflective of their vibrance, growth, and commitment to the highest standards of excellence. To remedy this, VisionPoint Marketing was brought in to redesign uncc.edu.

### **The Approach — Tell a Better Story**

From a tactical perspective, the project included information architecture, content strategy and development (written content, videography, and photography), visual design, front-end development, and training for the website's top-tier pages. Strategically, this redesign was an opportunity for the university to make a statement: to authentically position UNC Charlotte as a robust, diverse, and booming center of culture and learning; one that no longer lives in the shadows of its peer powerhouse institutions like the University of North Carolina and NC State. UNC Charlotte is not your ordinary university and so its new website had to be more than an ordinary higher education website.

### **The Results — A Worthy Engagement Platform**

In order to achieve this, the website's design and functionality reflect the university's energy by incorporating elegant – yet dynamic – use of animations, transitions, and other functional elements. The use of HTML5 video captures a true sense of place, while the written headlines and intro copy carry through the UNC Charlotte brand voice in ways that draw the user in and encourage them to take action. The end result is a website that finally does justice to a truly outstanding university. Visit [uncc.edu](http://uncc.edu) to see our work.

## *Case Study for Graphic Exhibits – University of North Dakota*

**Relevance to the San Mateo County Community College District: Articulating the spirit of a university culture with bold visuals and arresting images.**

### **The Situation – Articulating a Brand Promise in Flux**

University of North Dakota is an institution whose identity is rooted in leadership and community involvement. Having just launched their One UND Strategic Plan and cementing a strong brand platform, *Leadership in Action*, the university was challenged with taking their brand promise out of the vacuum and translating it to their wide range of key audience segments—namely, military, transfer and graduate/adult learners. Meanwhile, leadership turnover, a change in

mascot and lingering confusion on how to speak to these priority audiences began to trickle down to UND's marketing efforts.

These discrepancies led to a lack of cohesiveness in their advertising. Still, with the right strategy, UND was poised to grow enrollment as the state's largest flagship public university. They even offered unique opportunities for special audiences like military students and their families. VisionPoint joined as UND's marketing partner to craft a creative campaign and digital marketing strategy that would rally the university community together to reach very specific segments (military students, adult transfers, traditional transfers and graduate students) with the unifying message of the value of a UND education.

### **VisionPoint's Approach – A Message Worthy of a Proud Identity**

In order to provide the kind of campaign that UND needed to achieve results, VisionPoint began diving deeply into the university's brand positioning. We spent our time at the beginning of the project conducting extensive research, particularly on some of UND's competitors and their messages. Equipped with an understanding of their marketplace, we could bridge the gap in marketplace messages with UND's unique brand promise.

Equipped with these insights, as well as the university's comprehensive brand book, our team of marketing and creative strategists identified a seemingly small message in the folds of the brand book that encapsulated the true spirit of UND: **“Work hard at work worth doing.”**

This quote by Teddy Roosevelt was not only well-respected in the North Dakota community, but it also helped UND define the type of leaders their culture was positioned towards. This quote inspired our Big Idea, **“Work Worth Doing”** and gave legs to the messaging that spoke to the hard work each of UND's target audiences – adult graduate students, military students and transfer students – people who lead by doing through their accomplishments.

The message appealed to UND's core audiences of learners who had already invested into their careers and education, and were building on their own momentum with a laser focus on getting things done. It also made it clear that UND would be the right place for them to continue working towards worthwhile work. In collaboration with UND's skilled in-house creative team, we made the message scalable to marketing tactics at any point in the enrollment funnel – from building brand awareness to email copy in lead nurturing workflows.

### **The Results – Unity that Produced Results**

The message of Work Worth Doing was so well-received by the UND community and stakeholders, that it spurred unity across campus and between our teams. Our Creative Director worked closely with UND's creative team, serving as an extension for the UND team to begin building out their own ideas and executing creative across a variety of media.

The extensive campaign concept guidelines we provided the university also empowered them to use this creative in a variety of ongoing messaging and marketing needs. But the results from this campaign didn't just end with the anecdotal success of our creative partnership with UND. Within less than a year in market, our campaigns generated **more than 3,000 direct inquiries** and an estimated **ROI for the university of \$10 to \$1**. The success of this creative campaign also led to an additional campaign creative concept project for UND, in which VisionPoint conceptualized an undergraduate campaign, "Lead Your Own Way."

### *Case Study for Graphic Exhibits – Worcester State University*

**Relevance to the San Mateo County Community College District: Illustrating the rise of an overlooked university with campaign visuals that brimmed with optimism and invoked local pride.**

#### **The Situation — Humble Beginnings**

WSU is a school whose identity is centered in its location: a hard-nosed city on the outskirts of Boston, built on a blue-collar ethos and a proud tradition of hard work, tenacity, and hometown pride.

For decades before, as one Worcester stakeholder put it, "Worcester was known as a bit of a rough place. No other way to put it." Despite the area's lack of appeal to businesses and transplants, Worcester State established its reputation as a quality, affordable institution built for the people of Worcester—many of them first generation students, many from immigrant families, all looking to transform their futures. It was a place where ambitions were rivaled only by the challenger mindset of the city.

Recently, though, community revitalization efforts and new business developments were moving the city forward with palpable momentum. The city of Worcester found itself in the midst of a renaissance. In this climate of optimism, WSU was charting a course for growth. They knew they already had a relatively strong position with somewhat underserved student communities and a brand ethos of hard work and resilience. The excitement and promise of a city on the rise presented them with an opportunity to share in that progress while staying true to who they've always been. Their focus was two-fold: 1) build the WSU brand and 2) launch a new campaign that would drive undergraduate enrollment.

#### **The Approach — Finding the Right Story**

The challenge, however, was that WSU sat in a region flanked by powerhouse competitors—including more than a dozen higher ed institutions within the immediate vicinity of the city. They needed a campaign that would give them a fighting chance and set the institution apart in an overcrowded marketplace.

Our research pointed to a key differentiator that WSU was poised to own: **grit**. This was the word most-used by survey and interview respondents when describing the values, attitudes and beliefs they associated with their journey through college. We worked closely with the WSU marketing team to craft a brand-driven campaign concept that revolved around the rallying cry, **From Grit to Great**.

As we were finalizing the new campaign for launch, a few members of the WSU faculty came to us voicing some concern that would alter the course of our entire campaign messaging strategy. According to recent debate in scholarly literature, celebrating someone's "grit" can be read as a subtle reinforcement of racist, classist power structures that force some displaced and marginalized groups to need grit in order to succeed. The last thing we'd want to do is antagonize the very audience we sought to reach, let alone inadvertently perpetuate systemic injustice.

We were determined to find the right words to tell the WSU story from a better angle – one that captured WSU's stance on achievement equity while staying true to the work ethic and determination so characteristic of the WSU culture.

We knew that the people of Worcester have always been proud of being self-made. We gave this "maker" mentality a home: WSU was a place where students take control of their narratives and make something of themselves, regardless of who they are or where they come from. Our strategy positioned WSU as a homegrown product of Worcester itself, the university for and by the same people that made the city into the testament of success it is today. And to promote inclusivity, we channeled the same sense of self-made pride that brought the people of Worcester together and gave them a new accomplishment to celebrate. Our solution was a concept that rang with simplicity and truth: **Made in Worcester**.

### **The Results — An Emotional Response**

This class-neutral approach struck a chord with WSU faculty and leadership alike. Once we got the green light to take the new campaign to market, we ran with the concept, producing a fresh inventory of brand-driven assets that included display ads, print ads, radio and TV spots and various pieces of campaign ephemera like bumper and laptop stickers. As a nod of endearment to the heart in their hometown logo, we designed a heart-shaped emblem as the thematic visual element of the campaign.

Early performance data proves that our brand creative is resonating with our audiences. Combined with sophisticated targeting and tireless optimization, our campaign helped WSU drive significant increases in visibility, awareness and engagement. In the first month after launch, we produced **420 enrollment-related conversions** on Google Search at costs well-below industry averages for institutions in WSU's category. In that same month, our Facebook ads have delivered **over 190 enrollment leads** with a vast majority of those leads being the parents of first-time learners — a key influencer in the enrollment decisions of first-time students. Beyond

promising early-stage results, the new brand strategy has given WSU a defined voice in the marketplace, fueling growth from the momentum that is radiating outward from Worcester into the world beyond.

### *Case Study for Motion Design – College of DuPage*

**Relevance to the San Mateo County Community College District: Imploring audiences to rethink their perception of an institution through imaginative campaign messaging and quirky animation.**

#### **Situation — In a Class of Its Own**

The College of DuPage is a community college that defies its genre.

With over 20,000 students, COD is a stronghold of opportunities for learners all over the greater Chicagoland area — from the lower income neighborhoods of the inner city to the affluent suburbs, and everywhere in between. Their state-of-the-art campus rivals that of research universities, shattering the stereotypical image of a community college being a nondescript cement building with old desks and second-rate facilities. DuPage is a place where lofty ambitions are within reach — an accessible institution of higher learning whose programs offered real-world career outcomes at an affordable price tag.

As the effects of the pandemic crippled community college enrollment across the board, COD saw a 2% dip in enrollment of its own. But rather than passively waiting for conditions to improve, they took action.

#### **Approach — A Place of Ideation**

We helped COD shape and launch a new enrollment-focused campaign that would strengthen their position in the marketplace and stabilize enrollment. Our campaign needed to reach a broad range of audiences, which included traditional undergraduates, non-traditional learners, and the general community, with a special focus on underserved and underrepresented populations in Chicago affected by the COVID pandemic.

Through our discovery work, we learned that COD had all the bells and whistles of a big-name university without the hefty price tag — world-class faculty, a vast library of in-demand programs, a picturesque campus, and notable alumni. They boasted transfer agreements with all public and private institutions in the state, making it a hub of upward mobility. Our Listening Tour revealed that COD inspired a sense of fanaticism for all they had to offer. It was a place that you wanted to write home about, but were too excited to find the words that would do your experience justice.

At COD, the idea of a community college education was reinvented. Therefore, our campaign concept needed to be a bold departure from the status quo. With the encouragement of COD's marketing team to push boundaries, we devised a messaging strategy that celebrated ideation.

Our campaign refrain, “It’s Like COD”, is a literal brainstorm of ways to describe COD’s differentiators. COD’s wealth of opportunities is like a genie that offered 5 wishes instead of 3. Their surprisingly affordable tuition is like finding a new smartphone to be the prize inside of a cereal box. The flexibility they offered adult learners is like a choose-your-own-adventure game.

The far-fetched nature of these comparisons was intentional. Our strategy was to capture the effusive spirit of a raving word-of-mouth review, while poking fun at the moment when words fall short. We invited input from stakeholders across the COD community and narrowed our copy down to a few core analogies that aligned with the needs of specific audience segments. And while the messaging went in every direction, it all pointed back to COD as the starting point: a place where boundaries are broken. We brought our campaign to life with whimsical collages and motion graphics that leaped off the page and hijacked the attention of our audiences.

### **Adapting to Crises**

We launched the campaign in April 2020 across digital and traditional channels — right when COVID was erupting into one of the most transformative crises of our time. The ensuing economic downturn prompted key adjustments in our targeting and positioning. While the creative approach remained the same, we shifted the focus of the campaign to adult learners who were now looking to retool and high schoolers caught unsure of how (or where) to begin their college journey in the aftermath. Then, we positioned COD’s accelerated learning courses and job-ready skill certificates as a practical part of the solution — the affordable tuition made sense in the wake of financial hardship and job market instability, and the proximity to home, coupled with online course flexibility, jived with stay-at-home restrictions and post-graduation uncertainty.

As the Black Lives Matter movement commanded the global spotlight in May 2020 following the murder of George Floyd, COD’s long-standing focus on diversity, [social justice](#), and educational equity became more relevant than ever. We tweaked our media mix to reinforce their stance and reach underrepresented and underserved audiences in black neighborhoods, highlighting the financial accessibility of these learning opportunities that were in growing demand.

### **Results — Defying the Downturn**

In just three months, COD notched over 22 million impressions. The campaign itself has been a lead generation machine, converting inquiries at an industry-beating \$20 cost per acquisition and a 6.5% clickthrough rate on Google Search during a time when community college enrollments were in decline. These results prove our quirky messaging is not only striking a chord with our audiences, but also earning their engagement.

Equipped with a repertoire of newfound ways to tell their story, COD is poised to grow in a post-2020 climate that’s been — for the sake of a campaign-inspired analogy — like a low-budget

disaster movie with a bad ending. On the contrary, the future for COD looks like all the best things.

## *Case Study for Digital Marketing and Media Campaigns – University of Pennsylvania*

**Relevance to the San Mateo County Community College District: Using a digital-forward campaign to position a new program, reach new audiences, and drive inaugural enrollment leads at industry-beating costs for an Ivy League university in a prestigious competitive set.**

### **The Situation — Uncharted Water**

Along with a reputation for quality and excellence, most Ivy League programs come with an air of elitism and exclusivity. In 2018, the University of Pennsylvania leveled the playing field by launching the nation's first-ever fully online Ivy League degree program, built to be *inclusive* rather than exclusive. A game-changer in the higher education space, Penn LPS Online opened the gates of an Ivy League degree to all regardless of their previous education or background. Prospective students can “prove their way in” by successfully completing four designated Penn LPS Online gateway courses with a minimum GPA requirement. While the program itself was revolutionary, the university faced the challenge of launching this first-of-its-kind program in an oversaturated online education marketplace with no built-in audience. What's more, the university had to overcome the long-standing perception that unless you're wealthy or among the top 1% academically, an Ivy League education might as well be a pipe dream.

### **VisionPoint's Approach — Erasing the Asterisks**

Penn partnered with VisionPoint to turn these challenges into opportunities for success. Our first objective was to define the program's audience and competitive position. To this end, we met with scores of stakeholders and target audience representatives across the university who spoke into the institution's brand promise and what made the new online program unique. We held an interactive, half-day brand workshop, establishing consensus on how to best position the program with a suite of compelling messaging points for use in marketing and communications. We reviewed and assessed the greater competitive landscape, the various new certificate and degree options the university had in their pipeline, enrollment data trends and other key strategic factors.

Through this work, we helped the university pinpoint the focal differentiator that would go on to become the foundation of our entire brand messaging strategy. Aside from offering a “real” Ivy League degree from the University of Pennsylvania – with courses designed by Penn's renowned faculty – what made Penn LPS Online unique is its accessibility. If you could achieve the required grades, you could earn the degree. Audiences were understandably skeptical of this idea as being too good to be true, so we developed a creative concept that turned their skepticism into a selling point. Our ads invoked paradoxical asterisks accompanied by no-frills messaging that

debunked misperceptions and spoke to the life-changing opportunities that were now within arm's reach.

With our concept in place, we built and launched an integrated marketing plan to drive growth in several specific online degree offerings — work that included the creation of a brand-driven asset inventory, traditional and digital media planning and buying, campaign execution and management, analytics, real-time ROI reporting and the full-scale development of the program's new website, <https://lpsonline.sas.upenn.edu>. To compliment paid marketing efforts, we also developed a public relations strategy that helped garner positive publicity for the Program.

### **The Results — Commanding the Spotlight**

Due in large part to the creative and positioning work we developed for Penn LPS Online, the Fall 2018 launch campaign helped Penn attract the right type of national attention, sparking coverage in publications like the [Chronicle of Higher Education](#), [E-Learning Inside](#) and [Inquisitr](#) through articles that echoed our brand creative and broke down the perceived barriers to an Ivy League degree. To complement paid marketing efforts, our SEO strategy helped Penn LPS Online rise through the search engine rankings and command the **number one position** on Google search results for coveted keywords like “bachelor of applied arts and sciences” and “organizational anthropology”, amplifying visibility among audiences who were actively searching for the types of opportunities the program offers. Beyond awareness, our campaigns have delivered qualified enrollment leads at costs **80% lower than industry averages** across all channels — proving a **tremendous return on investment** for Penn in a competitive set that features some of the most prestigious institutions in the country.

### *Case Study for Branding and Logo Development – Gardner Webb University*

**Relevance to the San Mateo County Community College District: Reimagining a university's brand to reverse enrollment decline, which included everything from research and messaging to visual identity work and launch campaign strategy.**

### **The Situation — Hemorrhaging Enrollment**

At the outset of VisionPoint's partnership with Gardner-Webb University – a private Christian liberal arts institution in Boiling Springs, North Carolina – the university was grappling with a three-year enrollment decline fueled by two daunting challenges: (1) increased competition for fewer qualified high school graduates; and (2) a growing misperception about the value of a liberal arts degree in a jobs-focused economy.

In response to these challenges, Gardner-Webb was striving to position itself as a great option for just about anyone, a one-size-fits-all approach that was actually softening rather than sharpening its brand identity. Meanwhile, the university was struggling to convince its most qualified applicants to actually enroll, converting only 17% of traditional undergraduate admitted students, a low conversion rate relative to peer institutions. Plus, retention numbers were

declining across the board, especially in the traditional undergraduate program. To reverse this trend, something desperately needed to change.

### **Our Approach — Less is More**

Gardner-Webb engaged VisionPoint to rebrand the university and reinvigorate its enrollment marketing strategy. The crux of that strategy was a hypothesis that most tuition-driven institutions consider too risky to try: that targeting fewer students could actually lead to higher enrollment. The key would be to distill the essence of what sets Gardner-Webb apart into a clear brand identity, and then communicate that brand promise in compelling ways to those students who are the best fit. Gardner-Webb would stop trying to be all things to all people, instead resolving to simply, and confidently, be itself.

First, VisionPoint rebranded Gardner-Webb, distilling a more specific brand promise focused on the ways GWU partners with students in a supportive, Christian community. We then developed a multi-channel integrated marketing campaign that included both traditional and digital media investments targeting more than 20 personas across GWU's undergraduate, graduate, and degree completion programs.

Specifically, our strategies focused on targeting new geographies, getting prospects to campus, and increasing investment in the “second funnel,” moving students from acceptance to enrollment. Most important, though, we focused all our messaging on brand pillars Gardner-Webb could truly own, and we narrowed our audience targeting to those who are truly “best fit” students.

### **The Results — An Epic Revival**

For Gardner-Webb, the investment into a narrowly targeted, brand-driven enrollment marketing strategy brought a huge and immediate return. The university enrolled 10.3% more students on 11% fewer applications and 10% fewer visits, proving we were reaching the best fit students who were more likely to engage and convert. Year-over-year conversion of undergraduate admits to enrolled students also grew 24%, along with a three-year low in paid cancels. Ultimately, Gardner-Webb beat its net revenue goal by 3.3% in the plan's first year, far exceeding the university's expectations.

### ***Case Study for Art and Illustration — Milwaukee Area Technical College***

**Relevance to the San Mateo County Community College District: Owning an institution's location through distinctive artwork and hand-drawn campaign visuals that spoke to the values of hyperlocal audiences and had a positive impact on enrollment.**

### **The Situation – Confronting Harmful Connotations**

Milwaukee Area Technical College (MATC), located in the highly-competitive media market of Milwaukee, has long since been a victim of the negative stereotypes surrounding community

and technical colleges. MATC's reputation was the victim of a negative acronym: Milwaukee's Alternative to College. This slur was embedded into the local vernacular and spoke directly to deep rooted misperceptions on the quality of a two-year education. But we believed that the "alternative" MATC presented might be more valuable than any of their audiences realized.

### **VisionPoint's Approach – Smarter Messaging, Smarter Strategy**

Following a deep research and strategy phase, we devised a creative campaign concept that would turn this sentiment on its head.

Our discovery work revealed that many of the people in MATC's community were not yet fulfilled. They were in search of something better for themselves and their families: something different. They were looking for alternatives to their current situation. Yet many of them also carried unfortunate misperceptions about MATC (and community colleges in general).

In the past, "alternative" may have been used as a negative, but today, people are looking for – even celebrating – alternatives. Alternative sources of energy. Alternatives to politics-as-usual. Alternatives to traditional education.

By focusing in on the "alternative", our campaign repositioned MATC and its offerings in a more positive, future-forward light. We created an emotional connection with MATC's audiences by owning the nickname they knew and highlighting the bragging points of the institution: low tuition, acclaimed faculty that are accessible, courses rooted in lucrative career outcomes, personalized instruction via small class sizes, and more.

To take the creative to market, we created a smarter strategy that maximized MATC's limited media budget in the overpriced, expensive Milwaukee market. We leveraged a multi-channel, non-siloed approach to unifying MATC's paid media, earned media, and organic social efforts.

### **The Results – Exceeding Enrollment Goals**

Our messaging strategy, along with our multi-channel approach, **drove a 5% increase** in spring full-time equivalent enrollments at MATC. These results proved our creative spoke our audiences' language and making a meaningful impact on the institution's goals.

## *Case Study for Photography and Videography – Colorado Community College System*

**Relevance to the San Mateo County Community College District: Curating a cinematic inventory of video and photography to tell the story of multiple institutions across the state and speak to the hopes and aspirations of non-traditional learner audiences.**

### **The Situation — Unknown in Their Backyard**

With 13 colleges, 39 campuses, and more than 1,000 programs, the Colorado Community College System faces unique marketing challenges. Chief among them is the fact that CCCS itself is

relatively unknown in its home state – instead, Coloradans are more likely to know the individual colleges in their own cities and towns.

### **The Approach — Surprise Them With Quality**

With this in mind, we partnered with CCCS to shape a compelling message about who they are and what they offer that will resonate with their target audience, while helping educate their audience about the role CCCS plays and the immense value it brings to its colleges and the entire state. Specifically, the project includes shaping and launching a statewide promotional campaign that drives awareness for the state's commitment (through its community colleges) to making affordable higher education available to all Coloradans. While CCCS initially was unclear as to how to position its message relative to the individual institutions that make up the system, we developed a campaign concept rooted in a pledge, a bold promise to eliminate the real and perceived barriers holding Coloradans back from enjoying free and full pursuit of the opportunities available statewide. The campaign's tone is both inclusive and inspiring, an appeal designed to rally statewide excitement for the promise of quality higher education across the state.

The creative concept we've developed focuses on changing perceptions in fairly subtle ways. Our creative executions imply quality through the cinematic approach to the video spots and the sophistication of the visual brand work. While CCCS was making a bold promise (The Pledge to Colorado) and addressing misconceptions and audience pain points head-on, one of the goals of the look of the campaign was to surprise audiences and linger over how a community college system could produce something so elegant and of such high quality. This effect aligned directly with how we wanted CCCS' audiences to think of their offerings: with a bit of surprise in their quality. The centerpiece of our system-wide messaging strategy was an [award-winning TV commercial](#) that we developed, produced, and rolled out for CCCS in the summer of 2018. The CCCS commercial was so well-received that our media partner, Comcast, donated six months of 30-second video spots to support CCCS's continued dissemination of their brand message.

### **The Results — Newfound Acclaim**

Not only is CCCS thrilled with the newfound positioning and state-wide attention, but they leveraged our creative concept to tell their story to state legislation, resulting in an ROI report that showcased CCCS' enormous contribution to their state's economy. Due to the overwhelming success of our partnership and state-wide support, CCCS engaged us to work with each of their colleges, now on an individual basis to identify and execute their top marketing needs. We are currently focused on ensuring that the work is done in collaboration with the schools, extending and elevating their efforts rather than overlapping and competing with them.

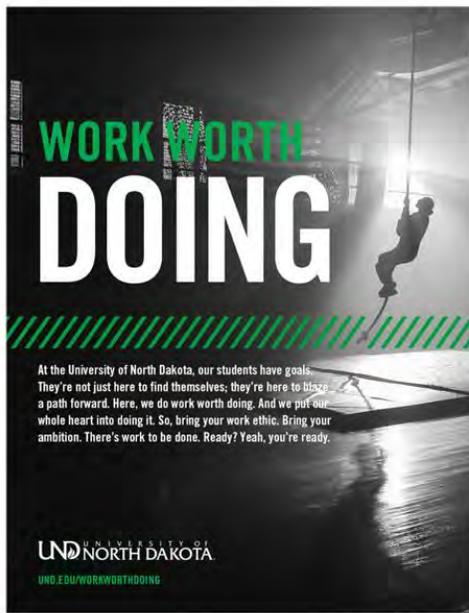
See our award-winning TV spot at

[:https://www.visionpointmarketing.com/portfolio/colorado-community-college-system/.](https://www.visionpointmarketing.com/portfolio/colorado-community-college-system/)

## Design Samples

Below is a selection of design samples showcasing our ability to bring our creative campaign concepts to life and tell our clients' brand stories through a variety of campaign mediums.

### *University of North Dakota*



— Magazine ad



— Display Ad Creative



Billboard —

North Carolina State University

# The 5 Pillars of NC State MBA

Key messaging points for the NC State Jenkins MBA program.

## Technology

- All students take core courses related to **technology**, including strategy, operations, and managing people in a high-tech environment.
- Even courses in traditional management subjects, such as economics and marketing, have a **technology slant through the choice of cases and projects used in the course**
- Many students have a **strong technology background and seek careers with high-tech companies**
- **RTP is in our back yard** faculty work there, we have **relationships with tech companies**, and we learn from this.

## Partnerships

- Highly **collaborative approach** to studying business management.
- We **collaborate with other disciplines across campus** on projects and research.
- Students work in **collaborative teams** preparing for **the way business is actually done**.

## Academic Rigor

- **Work hard, learn a lot, reap the rewards**
- Students will be **challenged and inspired**
- We provide in-depth knowledge and practical skills needed to **succeed** in a highly technological, **highly competitive marketplace**.

## Real Projects

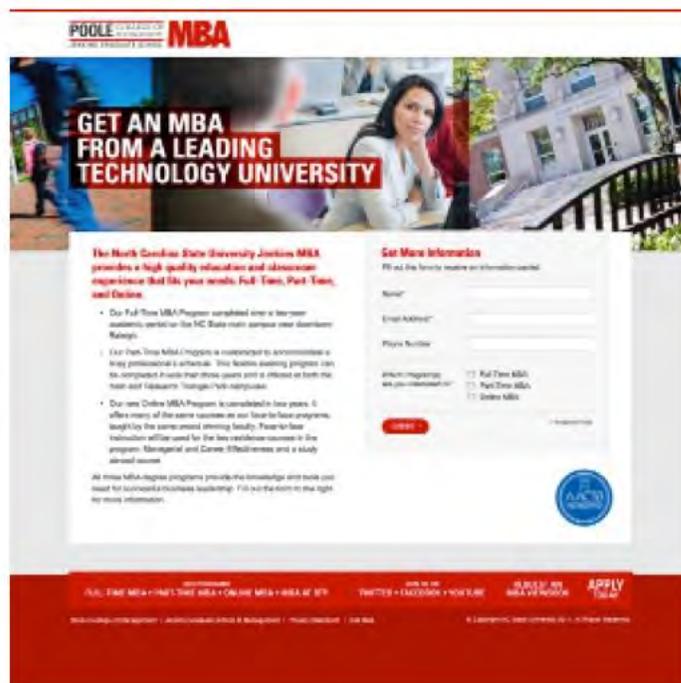
- Work with **real companies** on **real projects**
- Students **gain real world experience while studying**
- This **knowledge can be applied immediately in the workplace**
- A **practical approach** to business management education, stressing **real, applied learning**

## Value

- A lot of **bang for your buck**
- We are able to make a one-of-a-kind MBA education **affordable, with reasonable tuition rates** and a **wide range of financial-aid options**.
- A little more than **1/3 of the cost of similar programs**



Digital Display Ad Creative



Landing Page

Viewbook





Satellite Campus Branding



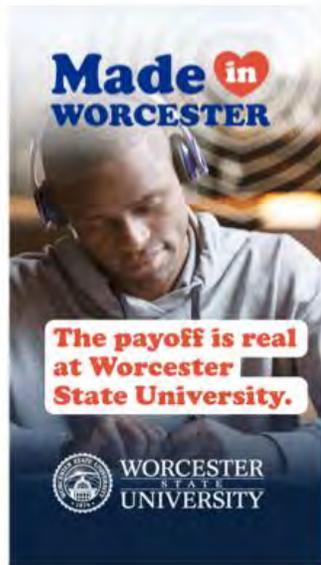
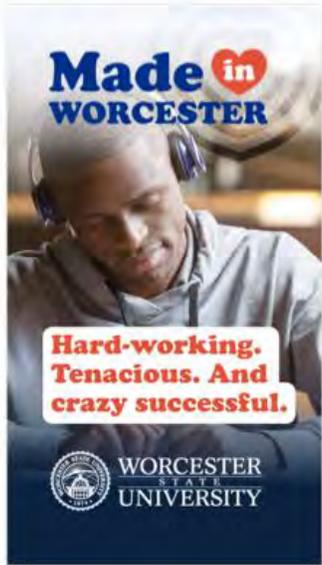
Billboard Design



"Day in the Life"  
Video Series



*Worcester State University*

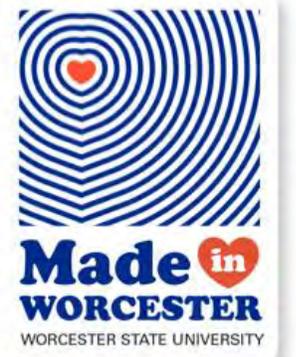


Animated  
Snapchat  
Story Ad

Campaign  
Ephemera

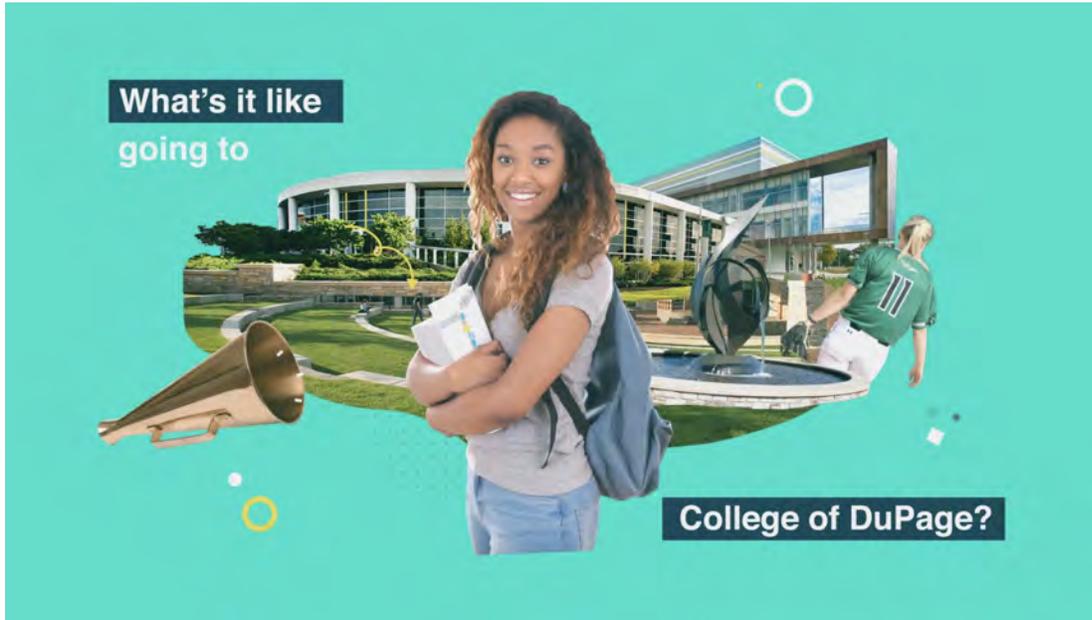


Display Ad Creative



## Motion Graphics Samples

Below is a selection of motion graphics work from our creative studio partner, Dash, including a digital ad animation sequence we collaborated with them on for **College of DuPage**:



College of DuPage: <https://vimeo.com/450180435/4648029f8b>



Wolfspeed: <https://vimeo.com/432516488/b93edd9539>



Lenovo Product Demo: <https://www.dashstudio.net/lenovo10e>



Money Magic Game: <https://www.dashstudio.net/money-magic>



RSM: <https://www.dashstudio.net/rsm-hobbies>



Clubhouse: <https://vimeo.com/342027972>



Celltra: <https://vimeo.com/310882400>



Socati: <https://www.dashstudio.net/socati>

## Video Samples

### *Northern Virginia Community College*

We produced a series of television commercials for NOVA as part of their brand-driven campaign that anchored the hand-drawn aesthetic of their campaign creative concept, “Settle For...”. We included three speaking characters who embodied different key brand messages to bring the concept to life and speak to the different target audiences of the campaign. Further, we wrote scripts for a Spanish-language version which involved not only linguistic translation, but cultural translation to ensure the subtle humor of the campaign carried to Spanish-speaking audiences.

Link to Video:

<https://www.visionpointmarketing.com/portfolio/northern-virginia-community-college/>

### *Colorado Community College System*

The television commercial we produced for CCCS as a part of their system-wide branding campaign focused on making emotional connections and changing perceptions in fairly subtle ways. Like NOVA, the goal was to combat and overturn deep-rooted, prevailing misperceptions about the quality of a community college education. Our video creative for CCCS implied quality through a cinematic approach to the video spots and through the sophistication of the visual brand work. We wanted to surprise viewers with understated quality and emotional sincerity, which aligned directly with our brand-driven strategy of how we wanted target audiences to think and feel about the educational programs offered by the colleges within CCCS.

Link to Video:

<https://www.visionpointmarketing.com/portfolio/colorado-community-college-system/>

### *University of North Carolina System*

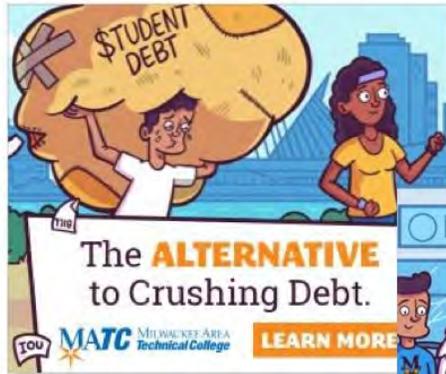
VisionPoint first began working with UNC System to develop their website, and in 2019 we began collaborating on their critical statewide initiatives: the Fixed Tuition Program and the NC Promise Tuition Plan. As part of the project, we produced a series of videos focused on overcoming low awareness and audience misperceptions to target traditionally underserved and underrepresented student populations from traditional high school students. The videos were anchored by a creative concept that spoke first not about the initiatives (the solution) but about the problem itself, the prohibitive pain point of perceived exorbitant costs of college.

Link to video:

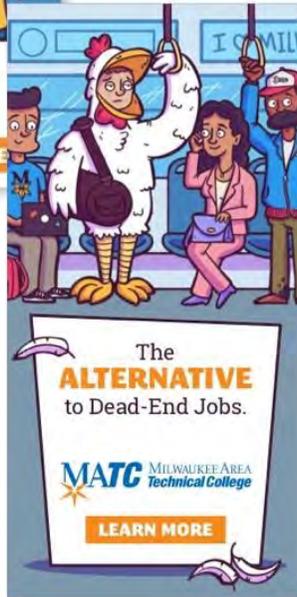
<https://www.visionpointmarketing.com/portfolio/unc-system-nc-affordable-education/>

# Art and Illustration Samples

## Milwaukee Area Technical College



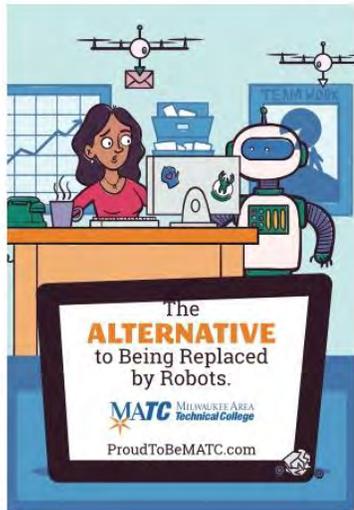
Digital Display Ads



Bus Shelter Signage



Billboard



*College of DuPage*



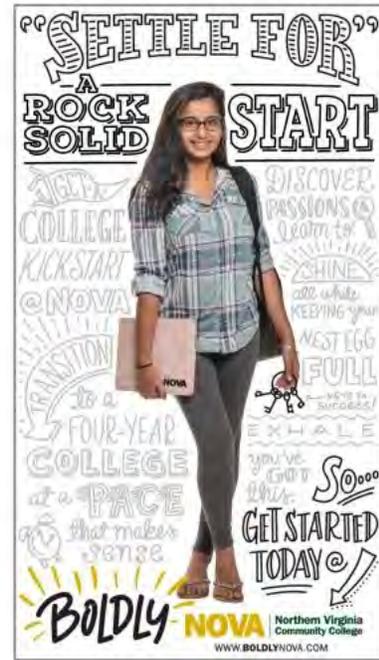
**It's like being  
granted 5 wishes  
instead of 3.**



**Yeah, it's like that at**  
 **College of DuPage**

### Northern Virginia Community College

Digital Metro Ads





Digital Display Ads



RESULTS:

8.9%

Lift in brand awareness in under 3 months per intervention analysis

Newspaper Ads



## Writing Samples

### *Colorado Community College System: A Story of Redemption Rooted in a Pledge*

Below is the excerpt from our award-winning commercial for CCCS, which articulates the CCCS Pledge and speaks to the wide array of audiences our campaign was built to reach. This script was iconic of our campaign and instrumental in earning recognition across the state for the types of transformative opportunities offered by the system.

***For too many Coloradans, the dream of a college education has proven unattainable. We pledge to change that. Because going to college shouldn't break the bank. Because working adults need to retool and retrain. Because there is more than one path to success. Because learners span many generations. Because college is not just for the elite or the wealthy. Let all who hear these words take notice: In Colorado, the cost of a college education is affordable, and the doors open to all. This is more than mere words. It is a call to a better life. To more successful careers. To the pursuit of happiness for all Coloradans, no matter the size of your bank account. Your age, or your previous achievements. Colorado community colleges have a class with your name on it. We promise. We are the Colorado Community College System. And this is our pledge to you.***



### *Worcester State University Radio/Video Script*

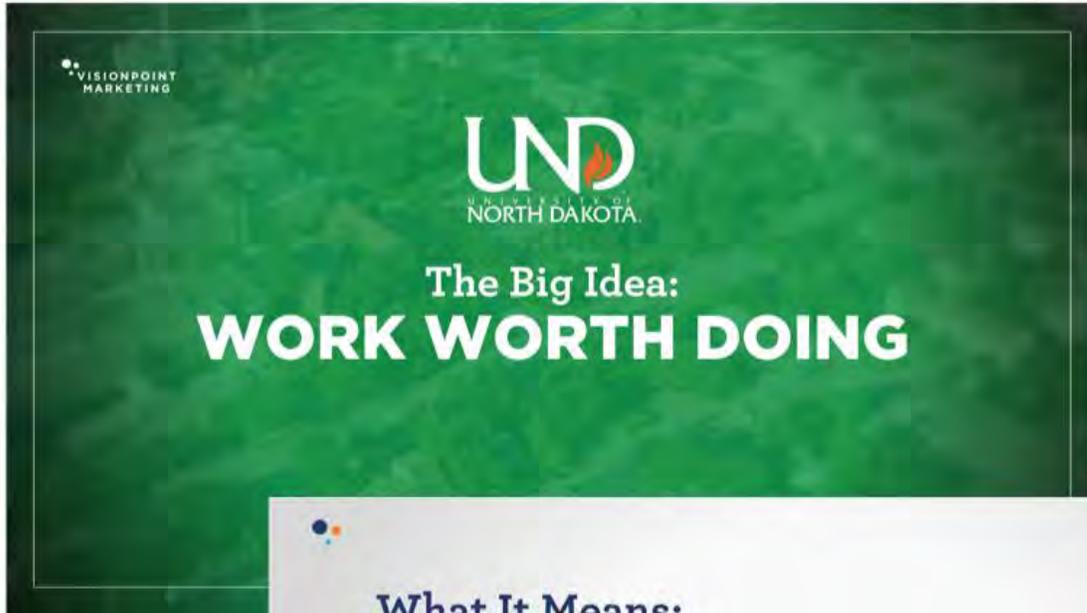
We knew that the people of Worcester have always been proud of being self-made. We gave this “maker” mentality a home: WSU was a place where students take control of their narratives and make something of themselves, regardless of who they are or where they come from. Below is an excerpt from the final radio/video script we delivered to Worcester State University:

***College will shape you. Change you. It'll be part of what makes you into the best version of yourself – a smarter, wiser, bolder you. At Worcester State University, you will take pride in what you've made of yourself. Because here, all that hard work, the late nights, the 110% ... it pays off. The City of Worcester is thriving, and so will you. So whether you were born in Boston, Burlington or Bogota, you'll be made in Worcester.***

### *University of North Dakota: Work Worth Doing*

The University of North Dakota was facing fragmentation within their campus identity. Leadership turnover, a change in mascot and confusion on how to speak to multiple priority audiences began to trickle down to UND's marketing efforts.

We identified a seemingly small message in the folds of the brand book that encapsulated the true spirit of the University of North Dakota's culture: "Work hard at work worth doing." This quote by Teddy Roosevelt was not only well-respected in the North Dakota community, but it also gave tangibility to the more abstract concepts in UND's brand positioning like strength, a high work ethic and leadership.



Initial Big Idea  
campaign  
presentation

### **What It Means:**

Teddy Roosevelt left his mark on North Dakota, and in the pages of the new UND brand book.

"Far and away the best prize that life has to offer is the chance to work hard at work worth doing."

Roosevelt's quote may not resonate with those for whom the prize of attending college mostly lies in attending football games and tailgate parties. It will, however, strike a chord with our core target audiences, many of whom have experienced life — both the successes and the setbacks. They have put in the hard work. They have an endgame in their sights. They seek a more purposeful life, and they want nothing more than a chance to work hard at work worth doing.

The final three words of the quote - work worth doing - are incredibly powerful all by themselves. By honing in on these words, the University will be making a statement to right-fit prospective students of all ages and backgrounds:

"We see you and we recognize you. Now let us be your ally in moving forward."

### *The University of Arizona Online – Positioning Statement*

In 2018, VisionPoint partnered with the University of Arizona Online to develop a brand positioning platform that will help the university extend the reach of their mission to new markets across the country.

We were able to assess which positioning traits were authentic and capable of differentiating Arizona Online from the competition as the university looked to roll out their program across the country beyond their existing regional markets throughout the southwest and California. We developed a comprehensive positioning platform for Arizona Online that included audience personae, a positioning statement and messaging points that clearly defined who Arizona Online is, what they stand for, who their audience is, how they're different, and why they're important.

Below is an excerpt from the final positioning statement we delivered to the University of Arizona:

***For ambitious, adult students who want to open their lives to more options and greater opportunity, the University of Arizona Online offers bachelors and graduate degrees that connect students directly to Arizona's flagship university. In an environment where many online degrees over-promise and under-deliver, Arizona Online defies the norm by providing the same prestigious education you'd expect from one of the nation's top-tier research institutions.***

## Photography Samples

Below is a selection of photography samples showcasing our ability to capture a sense of place and invite students to picture themselves at the heart of the rich educational experiences our clients offer.

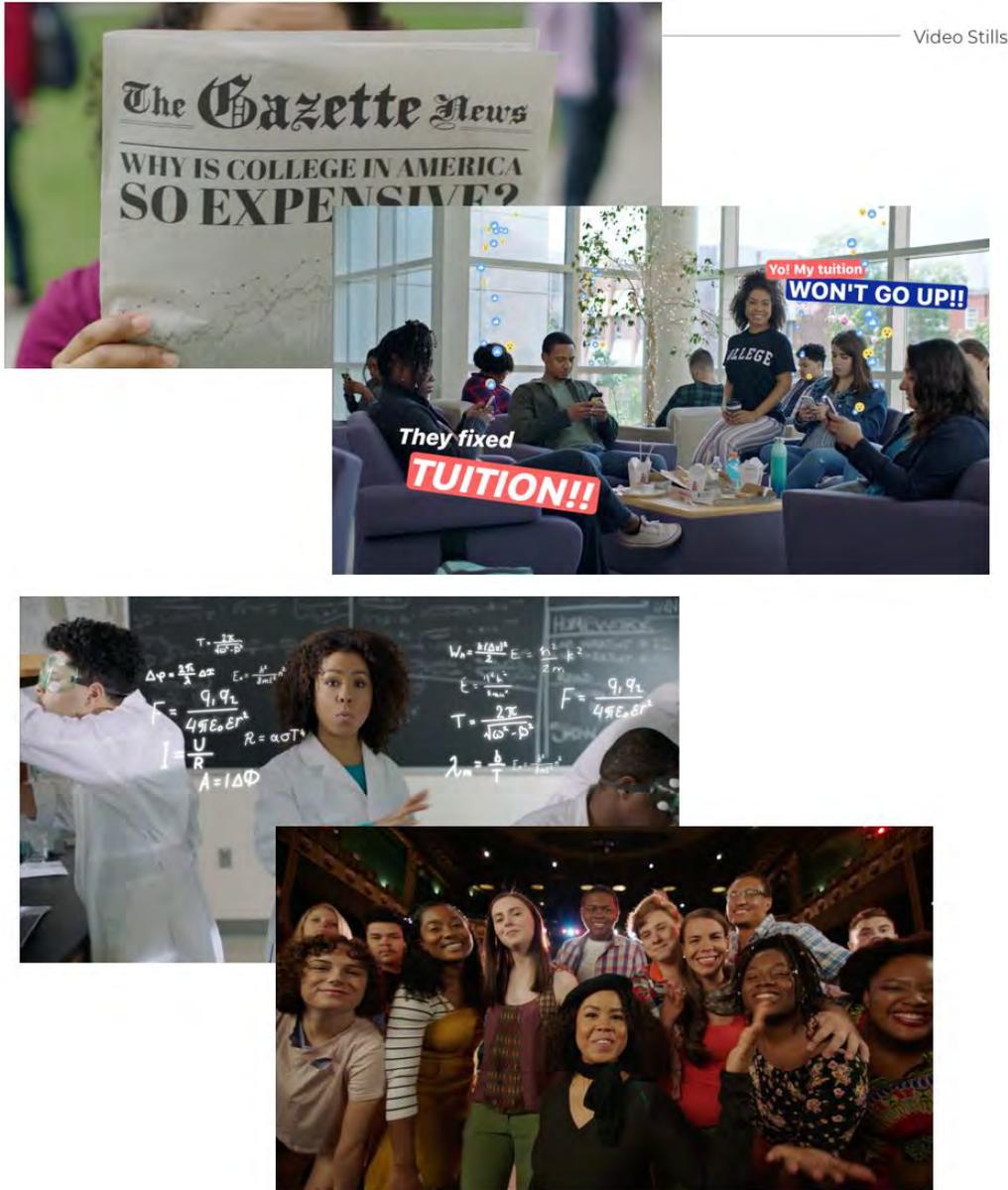
### *University of Pennsylvania – Photography for Campaign Creative*



— Photography



*University of North Carolina System – Stills From TV Commercial*



Video Stills

*Colorado Community College System – Stills From TV Commercial*



Pledge to Colorado 2:00  
Campaign Video/  
Television Commercial,  
:30 brand videos



2018 NCMPR District 4  
Gold Medallion for  
College Promotional  
Brand Video

## d. Itemized Fee Schedule

We have provided itemized pricing of each component in our proposed Scope of Work for SMCCCD in a separate pricing document, *as instructed by the RFP*. Below, we have included our hourly rates. Please see our pricing sheet for price proposal. Thank you!

### Hourly Rates

The following are VisionPoint's hourly rates for each internal resource:

CEO	\$200
VP, Creative Director	\$175
VP of Client Services	\$175
VP of Marketing & Innovation	\$175
VP of Integrated Strategy	\$175
Director of Web Production	\$175
Director of Account Leadership	\$175
Director of Media & Optimization	\$175
Account Director	\$175
Marketing Strategist	\$175
Web Strategist	\$175
Account Manager	\$150
Project Manager	\$125
Information Architect	\$150
Content Strategist / Content Developer	\$150
Senior UX Visual Designer	\$150
Interactive Graphic Designer	\$150
Digital Marketing Strategist	\$150
Media Planner	\$150
Web Developer	\$175
Travel	\$85

### Payment Terms

- All invoices due Net30.

### Project Initiation

This project will be initiated by the signatures below:

#### Accepted and agreed to by an authorized executive:

.....  
Signature Date

.....  
Printed Name & Title

#### Accepted and agreed to by:

.....  
Craig Heldman, CEO Date

VisionPoint Marketing, LLC  
3210 Fairhill Drive, Suite 150  
Raleigh, NC 27612  
Phone: 919.848.2018; Fax: 919.322.4439

# e. Non-Collusion Declaration

San Mateo County Community College District

Request for Proposal

## ATTACHMENT D

### NON-COLLUSION DECLARATION TO BE EXECUTED BY BIDDER AND SUBMITTED WITH PROPOSAL

Matt Walters, \_\_\_\_\_, being first duly sworn, deposes and says that he or she is VP of Client Services of the party making the foregoing bid that the bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the bid is genuine and not collusive or sham; that the Bidder has not directly or indirectly induced or solicited any other Bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any Bidder or anyone else to put in a sham bid, or that anyone shall refrain from bidding; that the Bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the Bidder or any other Bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other Bidder, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the bid are true; and, further, that the Bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.

I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

**BIDDER:** Matthew Walters

**BY:** *Matthew Walters* (Type or print complete legal name of Bidder)

(Signature)

**Name:** Matt Walters

(Type or print)

**Title:** Vice President of Client Services

(END OF ATTACHMENT D)

# f. Agreement to Terms and Conditions

San Mateo County Community College District

Request for Proposal

## ATTACHMENT E

### AGREEMENT TO TERMS AND CONDITIONS

Each Bidder must state below whether it accepts the attached Agreement and its attachments (if any) ("Agreement"). Any exceptions must be included, if at all, with Bidder's Proposal submission.

**NOTE:** Exceptions taken to terms and conditions may be a negative factor in evaluation of Bidder's Proposal or disqualification.

Initial the Appropriate Choice, below:

MW Bidder **accepts** the form of Agreement **without exception**.

**OR**

\_\_\_\_\_ Bidder proposes **exceptions/modifications** to the form of Agreement. If this choice is selected, Bidder shall include all of the following:

1. Summarize any and all exceptions to the Agreement.
2. Provide written explanation to substantiate each proposed exception/modification.

**BIDDER:** VisionPoint Marketing, LLC

**BY:** Matt Walters (Type or print complete legal name of Bidder)

(Signature)

**Name:** Matt Walters

(Type or print)

**Title:** Vice President of Client Services

(END OF ATTACHMENT E)

## g. Additional Information

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# San Mateo County Community College District

RFP #86863 Districtwide Agency of Record for Marketing Services

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October 4, 2021

VisionPoint Marketing, LLC

Dana Cruikshank, Director of Strategic Partnerships | [dana@visionpointmarketing.com](mailto:dana@visionpointmarketing.com)  
919.848.2018 ext. 128 | 3210 Fairhill Drive, Suite 150, Raleigh, NC 27612

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# Price Proposal

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We have provided itemized pricing of each component in our proposed Scope of Work for SMCCCD below.

We have also included an a la carte menu of optional services that SMCCCD can add to the Scope if budget allows.

We welcome the chance to discuss with your team on ways to right-size any part of our Scope to align with your budgetary requirements and priorities.

## Research & Discovery

- Discovery and Project Kickoff Call
- Enrollment Data / Student Demographics Review
- Brand & Marketing Audit
- Competitor/Peer Research
- Priority-Specific Keyword Research
- Marketing Funnel Analysis
- Search Trend Data Analysis
- Prep for Virtual Listening Tour
- Virtual Listening Tour

**Phase Cost**

**\$22,775.00**

---

## Marketing Strategy

- Determine High-Level Goals
- Current State Summary
- Identify and Define Target Audience Segments
- Custom Marketing Strategies
- Create Marketing Strategy Brief
- Deliver Marketing Strategy Brief
- Finalize Marketing Strategy Brief and High-level Marketing Strategies

**Phase Cost**

**\$25,470.00**

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## Integrated Marketing Plan

- Develop Written Narrative/Executive Overview
- Develop Marketing Plan Calendar
- Develop Creative Asset List
- Develop Media Plan
- Channel rebalancing models

Create Media Plan Written Deliverable  
Present Integrated Marketing Plan

**Phase Cost** **\$33,155.63**

---

### Campaign Concept & Creative Kit

Round 1 (concepts)  
Round 2 (select and refine a concept)  
Round 3 - Develop Creative Brief and Sample Executions  
Campaign Concept Guidelines

**Phase Cost** **\$32,375.00**

---

### Digital Campaign Creative

Digital Display Ad Creative Design  
Digital Display Ad Copy (Headlines and CTAs) for display ads & facebook ads  
Refresh Ad Creative Design  
Refresh Ad Creative Copy  
Ad Hoc Copywriting  
Ad Hoc Design

**Phase Cost** **\$31,450.00**

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### Digital Campaign Launch and Management

Campaign Setup  
Campaign Setup: Digital only  
Campaign Setup QA Digital only  
Zapier license  
Digital Campaign Management and Optimization  
Campaign Management  
Vendor Management  
Monthly Management / Internal Check In

**Phase Cost** **\$75,312.50**

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### Campaign Reporting

Custom Reports Dashboard Set Up: Digital and Traditional  
Campaign Reporting Prep  
Campaign Reporting Calls

**Phase Cost** **\$8,209.82**

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<b>Total Agency Costs</b>	<b>\$228,747.95</b>
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Media Budget	TBD by SMCCCD
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### Notes & Assumptions

A number of assumptions underlie our fixed cost quotes for the scope above. Some dive fairly deep, but we find that sharing our assumptions overtly with clients helps ensure we're all on the same page. If any of our assumptions seem inaccurate, we welcome your feedback and will happily adjust in order to best meet your needs:

1. SMCCCD will identify, provide access to and coordinate scheduling of individuals to participate in the Listening Tour.
2. Each Listening Tour stakeholder interview session typically lasts from 50 minutes up to 90 minutes (depending on the audience) and will be conducted virtually.
3. The specifics of the plan including timing and channel-by-channel budget allocation will be a recommendation based on projected scenarios in media budget, availability and demand. The actual execution of the plan may deviate from the media plan based on available advertising inventory, pricing and resources.
4. Any additional rounds of revisions to the deliverables (beyond those described in the Scope of Work) will increase costs and extend the project's timeline. This increase will be documented in a Change Order.
5. Campaign Concept Style Guidelines will provide instructions for campaign components use. If additional creative applications of the campaign concept are desired (i.e. stationary, business cards, t-shirts, etc.), we will provide a change order.
6. If SMCCCD requires the incorporation or use of paid fonts (vs. free fonts), VisionPoint will purchase the required paid fonts and charge SMCCCD for the cost incurred. SMCCCD will assume ownership of the paid fonts.
7. VisionPoint assumes SMCCCD will provide all photography and visual assets needed in any creative executions that may be required in this Scope of Work.
8. The cost of this proposal includes all of the services listed above to develop SMCCCD's Integrated Marketing Strategy and Media Plan but does not include the services required to execute the Integrated Marketing Plan. Services to execute include but are not limited to media placement and management, digital campaign management and

reporting, campaign creative beyond the kit sample executions, SEO content development, web development, etc.

- 9. Digital Campaigns:** VisionPoint assumes the client will provide VisionPoint with appropriate access to SMCCCD's social media, digital channels and web analytics as necessary in order to implement, track and manage the campaign. As an added benefit of our partnership, we will create all-new ad accounts for you - which includes Facebook, LinkedIn, Google, and more. These new accounts will feature custom read-only access and will be transferable at the conclusion of our partnership.
- 10. Digital Ads - Display:** VisionPoint will create 3 sets of display ads; each set is produced in all five standard sizes (i.e.300x250, 728x90, 300x600, 300x50, 320x100). In creating the display ads, VisionPoint will share a sample mix of ads and provide one round of revisions the design and copy before developing all of the sizes for each set. Periodic iterations for the purposes of testing to that creative are included in our management and optimization services.
- 11. Digital Ads - Facebook:** VisionPoint will create Facebook creative based on the Campaign Concept Kit components or client-provided visual and copy assets assuming Facebook campaigns are part of the approved media plan.
- 12. Digital Ads - Text / Search:** As part of VisionPoint's digital campaign execution, we will create the text ads to be leveraged in the search engine marketing (paid search ad) campaigns including components for responsive search ads. Periodic iterations and improvements to that creative are included in our management and optimization services.
- 13. Media Buying:** SMCCCD may choose to pay media costs directly to media vendors or to imburse VisionPoint in advance to make payments to media vendors on the College's behalf. VisionPoint and SMCCCD will collaborate after project launch to determine the approach that best suits the College's needs.
- 14. Digital Media Budget:** The cost page itemizes the suggested media budget for digital net media cost. VisionPoint does not charge a media management fee i.e. commission on digital media buys.
- 15. Media Commission**

  - a. *Digital Media:* Rather than charging a commission on digital media cost, VisionPoint charges an inclusive campaign management agency services fee for digital media buys based on your stated total budget, digital campaign

management and weekly campaign optimization and passes only the net digital media cost to our clients.

- b. *Traditional Media:* VisionPoint collects a standard **15%** commission on all gross traditional media buys as compensation for media negotiation, purchasing, placement, monitoring, trafficking, vendor engagement and vendor reconciliation activities of traditional media.
  - c. For purposes of media placement and management, VisionPoint considers terrestrial and streaming television and radio as traditional media channels with the corresponding commission fee due to the significant time commitment required for these formats.
- 16. Digital Campaign Optimization:** Rather than examining and tweaking every single ad on a weekly basis, we will touch your campaign every week where we will cycle through which portions of the campaign are in need of optimization and testing based on trends in your data. Then, we will provide you with an overview of the optimizations we've made, improvements we've driven and noteworthy campaign highlights during our bi-weekly progress calls and reports as part of our standard project management process.

**EXHIBIT C**



**REQUEST FOR PROPOSALS (RFP)**

**RFP 86863**

**Districtwide Agency of Record for Marketing Services**

**Department of General Services  
3401 CSM Drive  
San Mateo, California 94402  
Telephone (650) 574-6879  
Email [districtbids@smccd.edu](mailto:districtbids@smccd.edu)**

**Filing Deadline: October 4, 2021 2:00PM (PT)**

**Issued September 21, 2021**

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**I. NOTICE REQUESTING PROPOSALS**

**NOTICE IS HEREBY GIVEN**, that pursuant to Statutory Code 20651.7, the San Mateo County Community College District (the “District”), acting by and through its Governing Board, is soliciting proposals for the award of a contract for the following named project. **Electronic Proposals** will be received up to, but not later than, the proposal deadline listed below.

**RFP 86863****Districtwide Agency of Record for Marketing Services****Bid Deadline: October 4, 2021 at 2:00 p.m. (PT).**

The bid package will be available **September 21, 2021** and all questions and bid proposals must be submitted electronically via the District's Online Vendor Portal (PlanetBids) at <https://pbsystem.planetbids.com/portal/20507/bo/bo-detail/86878>. Proposers must be registered to view and download the documents. There is no charge to sign up. Incomplete, inaccurate, or untrue responses or information provided therein by a Proposer shall be grounds for the District to reject such submissions for non-responsiveness.

There will not be a formal public bid opening for this RFP. After the recommendation for contract award is submitted to the Board of Trustees for approval, all proposals will be available for public review. More information regarding this project may be found at the website listed above.

*Board of Trustees*

*San Mateo County Community College District*

*Thomas A. Nuris, President*

Publication Dates:     September 21, 2021  
                                  September 28, 2021

**II. DISTRICT BACKGROUND INFORMATION**

Approximately 45,000 people throughout San Mateo County attend one of the three Colleges of the District: Cañada College in Redwood City, College of San Mateo, and Skyline College in San Bruno. Although the boundaries of the San Mateo County Community College District are the same as those of the County, the District Board of Trustees is independent of County government. The District’s Board of Trustees consists of five members who are elected by District Trustee Areas for staggered, four-year terms.

**III. PURPOSE / INTRODUCTION**

The purpose of this Request for Proposal (RFP) is to solicit proposals from qualified advertising agencies. San Mateo County Community College District (SMCCCD or District) is seeking an advertising agency of record to provide the District and its three colleges ongoing support in strategizing, planning, coordinating, producing, and distributing integrated advertising through a variety of digital and physical distribution channels.

Advertising campaigns will primarily originate from and promote several entities within the District including but not limited to: the District as a whole, each of the three individual colleges, Community & Corporate Education, International Education, and Strong Workforce. These will be tailored to each entity’s specific goals and objectives while maintaining brand and copy consistency across all campaigns.

**IV. DATES AND TIMEFRAMES**

The District reserves the right to change or alter these times and activities at its sole discretion.

ACTIVITY	DATE & TIME (PT)
Advertisement/Issuance of RFP	1 <sup>st</sup> : September 21, 2021 2 <sup>nd</sup> : September 28, 2021
Last Day to submit questions about RFP (RFIs)	Wednesday, September 29, 2021
Final RFP Addendum issued (if required)	Friday, October 1, 2021
<b>Deadline for Submission of Proposals</b>	<b>Monday, October 4, 2021 at 2:00 PM</b> <b>MUST SUBMIT ELECTRONICALLY</b>
Proposal Review	October 5-7, 2021
Interviews (Optional)	Tuesday, October 12, 2021
Anticipated Board Approval	Wednesday, October 27, 2021
Contract Start Date	Friday, November 5, 2021

**V. PREPARATION OF PROPOSAL**

Electronic proposals must be received by, but no later than the date and time referenced under Section IV - Dates and Timeframes. The Bid and Contract Documents are available online on the District’s Online Vendor Portal (PlanetBids) at <https://pbsystem.planetbids.com/portal/20507/bo/bo-detail/86878>. Any and all Bid Addenda will be posted on this webpage. It shall be Proposer’s sole responsibility to conduct periodic checks of this webpage to identify and download any Addenda. Incomplete, inaccurate, or untrue responses or information provided therein by a Proposer shall be grounds for the District to reject such submissions for non-responsiveness. In the event this RFP is obtained through any means other than the District’s distribution, the District will not be responsible for the completeness, accuracy, or timeliness of the final RFP document. Should there be any questions as to changes to the content of this document, the District’s copy shall prevail.

Each submittal must conform and be responsive to this invitation. The District reserves the right to reject any and all Proposals, or parts of any Proposal, and to waive any irregularities or informalities

in any Proposal or in the proposal process. All questions shall be submitted electronically to the “Q&A” section of the District’s Online Vendor Portal (PlanetBids) where the RFP was downloaded by the deadline referenced under Section IV- Dates and Timeframes. Questions submitted after the date and time stated above will not be accepted. Responses from the District will be communicated via the Online Vendor Portal (PlanetBids) system to all recipients of this RFP.

**VI. EVALUATION OF PROPOSAL AND AWARD**

**1. Evaluation Method**

All proposals shall be reviewed to verify the Proposer has met the RFP submission requirements. Proposals that have not followed the rules, do not meet minimum content or requirements and quality standards, conflict with or take unacceptable exceptions to the terms and conditions or are non-responsive to the required responses in this RFP will be eliminated from consideration.

Proposals determined to have met the RFP requirements will be reviewed and evaluated by an Evaluation Committee. As a part of this review, the District may require proposing firms to clarify the information submitted. This clarification process may be conducted through written or electronic correspondence or through an interview with the Evaluation Committee.

Responsive Proposers may be required to give oral presentations as part of the evaluation process. The purpose of presentation is to give finalists an opportunity to demonstrate their ability to perform the scope of work defined in this RFP and clarify outstanding issues. It is in the proposing firm’s best interests to submit a thorough and complete proposal and not depend on the presentation process to provide additional information.

**2. Evaluation Criteria**

The Evaluation Committee will review, evaluate and score proposals in accordance with the criteria and point schedule noted below.

	<b>Evaluation Criteria</b>	<b>Points</b>
1.	Cover Letter/Description of Services	10
2.	Project Approach	25
3.	Qualifications	20
4.	Experience	20
5.	Cost	20
6.	Quality and completeness of proposal	5
	<b>Points:</b>	<b>100</b>

**3. Interviews**

It may also be necessary, at the discretion of the District, to conduct individual interviews with one or more of the Proposers who submitted Proposals. See Section IV - Dates and Timeframes for the dates prospective Proposers should reserve to make themselves available for Interviews. The Proposers will be notified of the exact time and location in advance of any interview. The purpose of this interview is to confirm information provided in Proposal submitted by the Proposers. This will also be another opportunity for the Evaluation Committee to request additional clarifications. In these interviews, the Proposer may expand on the information provided in its key personnel present as the primary representatives during this process.

#### 4. **Best and Final Offer (BAFO)**

The District reserves the right to negotiate with and/or request best and final offers from selected vendor(s), as the District may deem appropriate in its sole and absolute discretion.

#### 5. **Contract Award**

The District will award the contract to the responsive and responsible vendor whose proposal is most advantageous to the District. The District will be the sole judge of the suitability of the proposal and the vendor shall abide by its decision. Responsive refers to meeting the terms, conditions, requirements and specifications of this RFP. Responsible refers to those who can provide, for example, evidence and references that support a history of compliant contract performance and sound business operation. The District has the right to inspect the facilities, services areas, and business practices of all Proposers submitting offers prior to the award of this contract. The purpose of an inspection is to determine the Proposer's potential ability to perform under the terms of this Proposal. The District also has the right to inspect the facilities and operations of the selected Proposer at any time during the contract period.

Award of contract will only be by action of the District's Board of Trustees or in accordance with authority delegated by action of the District's Board of Trustees. The District reserves the right to and may from time to time contract with a vendor other than the firm awarded activities under this Agreement.

#### 6. **Post Award**

Awardee is required to submit the following documents to District by 4:00 p.m. of the fifth (5) day following Notice of Award. Execution of Contract by District depends upon approval of these documents.

- a. Certificate of Insurance with Endorsements (insurance requirements outlined under Attachment G)
- b. Completed and signed Form W-9

Failure to provide the documents within the time frame may result in withdrawal of the award, and award will be made to the next highest ranked proposer.

### VII. **GENERAL TERMS AND CONDITIONS**

#### 1. **Agreement**

The form of Agreement, which the successful Proposer will be required to execute, is included in the RFP (**Attachment F**) and should be carefully examined by Proposers. The Agreement will be executed in the following counterparts: the Agreement as shown in the sample herein; the RFP; the subsequent successful Proposal as accepted by the District, including all modifications thereof and duly incorporated therein; and the Purchase Order. All of the above documents are intended to be consistent and be complementary. Should Proposer request edits to the Agreement for consideration, such requests must be clearly identified and noted on the Agreement to Terms and Conditions document (Attachment F) and submitted at the time of Proposal. The District reserves the right to modify the District Terms in the best interests of the District. No additional terms and conditions will be accepted following receipt of Proposal, and the District will consider such additional contractual terms and conditions as part of its evaluation process. The winning Proposer's Proposal and all documents submitted will be incorporated into the District's Agreement.

#### 2. **Term of Contract**

The initial term of this contract shall commence upon a fully executed agreement and shall terminate three (3) years after the effective date, with an option to renew for up to two (2) additional one-year periods based on availability of funds, review of price schedules and satisfactory

performance by the Contractor. The District reserves the right to cancel the agreement at any time for convenience with 30 days' notice and no further payments will be due. Increases for any additional periods beyond the initial 3-year term may not exceed 3%.

### **3. Conflict of Interest/Restriction on Lobbying and Contacts**

No officer, member or employee of the District and no member of its governing bodies shall have any pecuniary interest, direct or indirect, in this contract or the proceeds thereof. No Vendor or member of Proposer's family shall serve on a District board, committee, or hold any such position which either by rule, practice or action nominates, recommends, supervises Proposer's operation or authorizes funding to Proposer.

For the period beginning on the date of the issuance of this RFP and ending on the date of the award of the contracts, no person or entity submitting a response to this RFP, nor any officer, employee, representative, agent, or consultant representing such a person or entity, shall contact through any means or engage in any discussion regarding this RFP, the evaluation or selection process/or the award of the contracts with any member of the District's Governing Board, evaluation committee members, or with any employee of the District except for clarifications and questions as described herein. Any such contact shall be grounds for disqualification of the Proposer.

### **4. District Modifications to RFP / Addenda**

The District may modify this RFP, any of its key action dates, or any of its attachments, prior to the date fixed for submission by issuance of a written addendum posted to the District's Online Vendor Portal (PlanetBids). Addenda will be numbered consecutively as a suffix to the RFP Reference Number. Vendors must view, read and acknowledge all posted addenda according to the Bid Portal Instructions. Modifications may require vendors to update and re-submit their proposals. All proposals must show a status of "Submitted". Failure to acknowledge posted addenda and re-submit proposals according to the Bid Portal Instructions may result in disqualification of the proposal.

### **5. Cancellation of Solicitation**

The District may cancel this solicitation at any time.

### **6. Limitations**

The District reserves the right to contract with any Proposer responding to this RFP. The District makes no representation that participation in the RFP process will lead to an award of contract or any consideration whatsoever. The District reserves the right to amend this RFP and the RFP process and to discontinue or re-open the RFP process at any time.

### **7. Proposal Preparation Expenses**

The District will not be responsible for any expenses in the preparation, submission/delivery and/or presentation of the Proposal or for the disclosure of any information or material received in connection with this solicitation, whether by negligence or otherwise.

### **8. Confidential and Proprietary Information / Public Record**

All materials submitted relative to this RFP will be kept confidential until such time a notice of intent to award a contract or the RFP is cancelled. At such time, all materials submitted are subject to the California Public Records Act (*California Government Code* Section 6250 et seq.). Any information deemed confidential or proprietary should be clearly identified by the Proposer as such at the time of Proposer's submission. Such information may then be protected and treated with confidentiality to the extent permitted by state law.

The Public Records Act provides that public records shall be disclosed upon written request, and that any citizen has a right to inspect any public record, unless the document is exempted from the disclosure requirements. The District cannot represent or guarantee that any information submitted in response to the proposal or bid will be confidential and will not assert any privileges that may exist on behalf of the person or business submitting the proposal or bid. If the District receives a request for any document submitted in response to this Proposal or bid, it will not assert any privileges that may exist on behalf of the person or business submitting the proposal or bid. Rather, the District will notify the party whose proposal is being sought. In the event that a party who has submitted a proposal or bid wishes to prevent disclosure, it is the sole responsibility of that party to assert any applicable privileges or reasons why the document should not be produced, and to obtain a court order prohibiting disclosure.

**9. Intentionally Omitted.**

**10. Promotion**

In no instance will the District/College name be used by the Proposer in connection with any advertising or promotion *without the specific written permission* of the District.

**11. Intentionally Omitted.**

**12. Proposal Protest Procedure**

a. Submittal of Proposal Protest.

Any Proposal Protest must be submitted in writing to the District's main office (Attention Bernata Slater, Chief Financial Officer, 3401 CSM Drive, San Mateo, California 94402) before 5:00 p.m., no later than the fifth (5) calendar day following issuance of the Notice of Intent to Award. Any Proposal Protest received after the deadline as described herein shall be deemed null and void.

- i. The initial Protest document must contain a complete statement of the basis for the Protest.
- ii. The Protest must refer to the specific portion of the document that forms the basis for the Protest, and must describe in detail the specific errors allegedly committed by the District in evaluating the protesting Respondents Proposal.
- iii. The Protest must contain the name, address and telephone number of the person or entity representing the protesting party.
- iv. Only Respondents whom District otherwise determines are responsive and responsible are eligible to protest a decision; protests from any other Proposer will not be considered. In order to determine whether a protesting Proposer is responsive and responsible, District may evaluate all information contained in any protesting Respondent's Proposal and conduct the same investigation and evaluation as District is entitled to take regarding a Proposal that is most advantageous to the District.
- v. The procedure and time limits set forth in this paragraph are mandatory and are the Respondent's sole and exclusive remedy in the event of Proposal Protest. The Respondents failure to promptly comply with these procedures shall constitute a waiver of any and all rights to further pursue the Proposal Protest, including without limitation filing a Government Code Claim or instituting legal proceedings.

b. District Review and Disposition of Proposal Protest

Provided that a proposal protest is filed in strict conformity with the foregoing, the Chief Financial Officer or such individual(s) as may be designated by them ("Designee") will review and evaluate the basis of the proposal protest. The Chief Financial Officer or Designee shall provide the Proposer submitting the proposal protest with a written statement concurring with or denying the proposal protest ("Proposal Protest Response"). The Proposal Protest Response

is deemed the final action of the District and not subject to appeal or reconsideration by any other employee or officer of the District or the Board of Trustees of the District. The issuance of the Proposal Protest Response by the Chief Financial Officer or his/her Designee is an express condition precedent to the institution of any legal or equitable proceedings relative to the proposal process, the District's intent to award the Contract, the District's disposition of any proposal protest or the District's decision to reject all Proposals. If any such legal or equitable proceedings are instituted and the District is named as a party thereto, the prevailing party(ies) shall recover from the other party(ies), as costs, all attorneys' fees and costs incurred in connection with any such proceeding, including any appeal arising therefrom.

### **VIII. SCOPE OF WORK**

As referenced under Section III – Purpose/Introduction, the District is seeking an advertising agency of record to provide the District and its three colleges ongoing support in strategizing, planning, coordinating, producing, and distributing integrated advertising through a variety of digital and physical distribution channels.

Advertising campaigns will primarily originate from and promote several entities within the District including but not limited to: the District as a whole, each of the three individual colleges, Community & Corporate Education, International Education, and Strong Workforce. These will be tailored to each entity's specific goals and objectives while maintaining brand and copy consistency across all campaigns.

#### **GENERAL GOALS:**

- A. Drive Requests for Information (RFIs), applications, and enrollments to the colleges and programs.
- B. Collect information to measure campaign success and optimize future campaigns
- C. Engage potential students
- D. Community awareness that the colleges are here to support community members to achieve their academic, vocational and personal goals.

#### **TARGETING:**

- A. Prospective college students
- B. Currently enrolled students
- C. Previously enrolled students
- D. High school students
- E. Under-represented students: undocumented, foster youth, BIPOC, ESL, Veterans
- F. Job seekers in Strong Workforce areas: accounting, auto tech, cosmetology, electronics, entrepreneurship, etc.
- G. Lifelong learners
- H. International students

Services shall include but are not limited to:

- Design an integrated marketing plan for the entity(ies)'s program offerings including, but not limited to: display ads, social, paid search, retargeting, and streaming media.
- Build, target and manage campaign content, including graphic design, copy writing, video production and voice over for digital advertising efforts.
- Research and recommend appropriate online and digital platforms, placements and channels for advertisements based on target audiences.
- Place, schedule, monitor and manage advertisements and campaigns on behalf of the entity(ies), including purchase coordination.
- Track and report monthly and end-of-campaign results.

- Consult with District/College staff in-person, by web meeting (zoom), phone or email
- Contractor may develop and place content on other websites and/or blogs in a strategic effort to direct quality inbound links to District/Colleges' website and improve overall search engine optimization (SEO). Such content can include "advertorials," articles, videos, interviews, etc.

## A. Roles and Responsibilities

### Contractor Responsibilities:

1. Research/Strategy
  - Industry and Platform Guidelines, User Trends and Best Practices
  - Audience Demand
  - Keyword Research
  - Competitive Research
  - Budget and ROI Estimations
  - Impression Share Research
  - New Potential Platforms
2. Planning
  - Short- and Long-term Strategic Marketing Plan(s) for District and Colleges
  - Marketing Goals and Objectives Review per Campaign
  - Target Audience Identification per Campaign
  - Platform and Product Planning per Campaign
  - Budget Planning per Campaign
  - Detail Options and Recommendations per Campaign per Product
3. Implementation
  - Developing Ad Groups / Keyword Segmentation
  - Creating Ad Sets
  - Performing Ad Set Up in Appropriate Channels and Platforms including configuring Google UTM/ad-tracking features
  - Developing Keyword Lists
  - Allocating Budgets
  - Placing/buying ads via major networks (whether directly or through 3rd party)
  - Launching Campaigns
4. Management of Campaigns
  - Continuous monitoring and optimization of campaigns to reach established goals
  - Reviewing monthly data with District/College team
  - Performing online checks, reviews and optimizations
  - Adjusting campaigns as necessary (including budget)
5. Tracking and Reporting
  - Report monthly results on each campaign
  - Report benchmarks of District/College campaigns to industry average (Bay Area community colleges)
  - Provide year-over-year and month-over-month reporting as well as transparency into the decision process for the agency
6. Other

- Contractor shall provide a detailed price proposal and rate schedule for each specific campaign based on the itemized fee schedule submitted for this RFP, for District/College review and approval prior to the commencement of each campaign. This includes but is not limited to account administration, strategy, design, creative development, research, hosting and click costs.
- Contractor shall provide final copies of all creatives to the District/College.
- Contractor shall give the District/College at least 10 business days minimum, to review and approve all campaign plans, creatives and schedules prior to implementation. Contractor shall not place or implement any creatives without written approval from the District and/or College.

**District/College Responsibilities:**

1. Gathering background materials and information that will assist the Contractor in their preparation.
2. Identifying District/College staff members related to the project.
3. Providing input and suggesting allocations of resources to maximize the efficiency of campaigns.
4. Reviewing and approving all campaign plans, creatives and schedules prior to implementation.
5. Storing contact information collected from inbound marketing leads.
6. Maintaining and updating campaign-related landing pages hosted on entity(ies)’s website.

**B. Deliverables**

1. The contractor shall work closely with the District/College Marketing Communications staff to understand the unique traits of the college programs and design an integrated marketing advertisement strategy.
2. The contractor shall provide demographic research, ad design and creation for specific program campaigns.
3. The contractor shall work closely with the District/College Marketing Communications staff to recommend and assist in developing quality content.
4. The contractor shall conduct research and recommend the most appropriate media and platform vehicles for respective campaign goals. The contractor will also assess advertisement opportunities and recommend ones with the best return on investment (ROI).
5. Contractor shall recommend lifecycles of advertising campaigns based on the stage of program development, growth opportunities and enrollment deadlines.
6. Contractor shall offer campaign reports as requested, including post-campaign reports, showcasing campaign metrics and data across all devices.
7. Contractor shall negotiate on behalf of the District/College to gain equal or greater value on paid media buys.

**IX. PROPOSAL INSTRUCTIONS**

**1. Questions and District Representative for RFP Process**

All questions and issues regarding this RFP process, requirements, criteria, and/or information, must be submitted electronically by posting same to the District’s Online Vendor Portal (PlanetBids) referenced under Section V – Preparation of Proposal. All questions must be submitted no later than the due date indicated under Section IV – Dates and Times. Questions received after the due date will not be considered. No email or telephone call questions will be responded to. It is the sole responsibility of each Proposer to check the District’s Online Vendor Portal to be completely familiar with the contents thereof.

The District Representative for the Selection Process is:

Name	Yanelly Pulido Director, Department of General Services
------	--

Address (mailing):	3401 CSM Drive San Mateo, CA 94402
Telephone:	(650) 358-6863
E-Mail:	<a href="mailto:pulidoy@smccd.edu">pulidoy@smccd.edu</a>

## 2. Modifications to Submitted Proposal

Proposer may modify its proposal it has already submitted any time PRIOR to the time/date deadline for submission of proposals. Modifications to a proposal must be made thru the District's Online Vendor Portal (PlanetBids) referenced under Section V – Preparation of Proposal. Proposer must re-submit its proposal as directed on the Online Vendor Portal (PlanetBids). All proposals must show the status of "Submitted".

## 3. Submission of Proposals

Proposers must file their digital proposal through the District's Online Vendor Portal (PlanetBids) at <https://pbsystem.planetbids.com/portal/20507/bo/bo-detail/86878>. The Proposer must attach a pdf file(s) to the electronic bid submission containing all the completed and signed Bid Documents. All submitted proposals must show a status of "Submitted" on the District's bid portal. Proposers experiencing any technical difficulties with the bid submission process may contact the PlanetBids System Support at 818-992-1771. If you continue to have difficulty, contact the District's Purchasing Department at (650) 574-6879 or by email at [districtbids@smccd.edu](mailto:districtbids@smccd.edu). Neither the District nor the District's bid management system, make any guarantee as to the timely availability of assistance, or assurance that any given problem will be resolved by the bid submission date and/or time.

Faxed proposals, printed hard copy proposals, emailed proposals or proposals submitted in any way or form other than through the District's Online Vendor Portal (PlanetBids) will not be accepted. Failure to meet the deadline will result in disqualification of the proposal.

## 4. Proposal Contents

In order to expedite the evaluation process, each Proposal shall be organized in accordance with this section. Proposal Forms must be made on forms obtained from the District. All items on the forms must be filled out. Numbers should be stated in figures, and signatures of all individuals must be in long hand. Proposals that do not follow the specified format outlined below, or fail to provide the required documentation, may receive lower scores, or if found to be non-responsive, be disqualified. In the event of any conflict between any of the Proposal documents, resolution thereof shall be in the District's sole discretion.

Proposals shall include the following information in the format indicated:

### a. Cover Letter /Description of Services

The cover letter shall include:

- i. A brief statement of intent to perform the services proposed.
- ii. Full contact information (overnight mailing address, phone, fax, e-mail, etc.) for the individual designated as Proposer's contact on this RFP and a secondary contact.
- iii. Acknowledgement receipt of all addenda issued.
- iv. Expressly state that, should the Proposer's proposal be accepted, the Proposer agrees to enter into a contract under the terms and conditions as set forth herein.
- v. Signature of an authorized officer of the organization who has legal authority in such transactions.

### b. Company & Signatory Page (**Attachment A**)

A responsible officer or employee of the Proposer responsible for submission of this proposal and the responses to this questionnaire must sign this page. An unsigned, but executed proposal will be rejected for non-responsiveness.

- c. **Statement of Requirements (Attachment B)**  
 Include a direct and thorough response to each of the requirements detailed in the Statement of Requirements document. Where appropriate and available, provide supporting documentation such as screenshots, sample reports, and user documents to demonstrate how a specification is addressed.
  - i. **References (Attachment C).** Complete this form in response to question C.6 of part C Experience.
- d. **Itemized Fee Schedule**  
 Proposers shall provide an itemized fee and rate schedule. The proposed pricing provided in the Proposer’s electronically submitted bid form is binding on the Proposer.

**NOTES:**

- i. **Pricing Adjustments:** In the event the District elects to exercise options to extend the Agreement, price adjustments may be considered by the District. The Proposer must demonstrate to the satisfaction of the District that a price increase is justified. Increases shall not exceed 3% or the annual average increase from the previous year in the United States Department of Labor Bureau of Labor Statistics Producer Price Index (PPI).
- e. **Non-Collusion Declaration (Attachment D)**  
 Proposers shall submit the Non-Collusion Declaration with its Proposal. Proposals submitted without the Non-Collusion Declaration shall be deemed non-responsive and will not be considered.
- f. **Agreement to Terms and Conditions (Attachment E)**  
 Proposers shall complete and submit the Agreement to Terms and Conditions with its Proposal. Should Proposer request edits to the District Terms and Conditions (Attachment G) for consideration, such requests must be clearly identified and submitted with its Proposal. No additional terms and conditions will be accepted following receipt of Proposals. The District will consider such additional contractual terms and conditions as part of its evaluation process.
- g. **Optional Additional Materials:** Proposers may include other materials that they feel may improve the quality of their Proposal submissions and/or are pertinent to this RFP.

**X. ATTACHMENTS**

- 1. Attachment A      Company Information and Signatory Page
- 2. Attachment B      Statement of Requirements
- 3. Attachment C      References
- 4. Attachment D      Non-Collusion Declaration
- 5. Attachment E      Agreement to Terms and Conditions
- 6. Attachment F      Required District Terms and Conditions (Sample)

**ATTACHMENT A**

**COMPANY INFORMATION AND SIGNATORY PAGE**

*(Attach additional pages to e-bid submission if needed.)*

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

Business Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_ Website: \_\_\_\_\_

Type of Firm:     Corporation     Proprietorship     Partnership     Joint Venture  
                   Other (please describe): \_\_\_\_\_

Business License Number (must be active and in good standing. If not, District will find Bidder non-responsive): \_\_\_\_\_

Number of years in business under firm name: \_\_\_\_\_

Number of years as a provider of this type services: \_\_\_\_\_

Number of years as a provider of services: \_\_\_\_\_

Names and titles of all your owners (>10% ownership), officers, principals, responsible managing officers and responsible managing employees:

Name:	Title:
_____	_____
_____	_____
_____	_____

Has the firm changed its name within the past 3 years?     YES     NO

If YES, provide former name(s):  
\_\_\_\_\_

Have there been any recent (within the last three years) changes in control/ownership of the firm?

YES     NO    If YES, explain: \_\_\_\_\_

Have officers or principals of the firm ever had their business license suspended or revoked for any reason?

YES     NO    If YES, explain: \_\_\_\_\_

State your firm's gross revenues for each of the last three years:

Current Year: \_\_\_\_\_

Last Year: \_\_\_\_\_

Year before last: \_\_\_\_\_

Has your firm ever reorganized under the protection of bankruptcy laws?  YES  NO

If YES, please enter date of reorganization: \_\_\_\_\_

Please list any past and/or pending litigation or disputes related to the work described herein, that the firm has been involved in within the last five years. Include case names, nature of litigation, and outcomes.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name and title of person responsible for submission of this proposal and the responses to this questionnaire:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name and Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

(END OF ATTACHMENT A)

## ATTACHMENT B

### STATEMENT OF REQUIREMENTS

#### INSTRUCTIONS FOR RESPONDING TO THIS SECTION:

1. Respond to each requirement, and clearly indicate if the requirement is currently available, available through configuration performed by Proposer, available through configuration performed by District, or the requirement is not available.
2. Comment on each specification as required to assist District in understanding how the requirement is met. Please be as concise in your response as possible.
3. Where appropriate, provide supporting documentation such as screen shots, sample reports and user documentation in order to demonstrate how the specification is addressed.
4. Responses such as “will comply” are not acceptable. The District is interested in understanding the current capabilities of your proposed solution in meeting the District’s specifications.

#### NOTES:

1. Where the word “shall” or “required” appears, Proposers may not take an exception.
2. The terms “Contractor” and “Vendor” are used interchangeably. Where the term “Contractor” or “Vendor” are used, the description denotes the responsibilities of the selected Proposer, once an agreement is completed. Where the term “Proposer” is used, the description denotes expectations of the respondents to this RFP as part of their proposal.

*This Statement of Requirements is to be used as a general guide and is not intended to be a complete list of all work necessary to complete the project.*

#### A. Project Approach

This section will consider and evaluate proposer’s ability to provide a work plan detailing how the firm intends to achieve the overall goal of the project. List specific tasks for each of the major elements identified in Section VIII Scope of Work. Include the name of the responsible individual who will lead the work with District for coordination and execution of the services, and the location where management and coordination of services will be performed. Also, describe in more detail a proposed timeline for completing a marketing campaign project.

#### B. Qualifications

This section should provide a description of the professional qualifications and any licensing / certification of the firm's key personnel, specifically:

1. Identify by name and title key staff members who will be assigned to manage or otherwise play a major role(s) in this project and their assigned role(s).
2. Provide resumés of all key personnel.
3. Qualifications of any sub consultants proposed to be used on this project; clearly explain their role and the percentage of involvement.
4. Any specific or special qualifications your firm possesses that would benefit this project.

#### C. Experience

1. Overall Years’ Experience
2. Description of Firm’s overall Background and Experience
3. Total number of years of experience providing similar services for higher education projects
4. Description of Firm’s overall Background and Experience with Higher Education
5. Proposer shall provide a minimum of two (2), but not to exceed four (4) case studies of work performed for clients in the past three years, in the higher education area that demonstrates your capabilities and experience related to the performance of relevant responsibilities listed in the scope of work. The case studies should also include:
  - i. Examples of Research - including needs assessment, market research, and platforms

- ii. Examples of Planning – including campaign strategy, creative development, and targeting
  - iii. Examples of Implementation - address methods and tactics (ex: SEO, paid social, display, etc.)
  - iv. Examples of Management of Campaigns – including evaluation and optimization
  - v. Examples of Tracking, Reporting and Recommendations
6. References. Complete Attachment C References. Provide the name and contact information of three (3) existing clients that can be contacted for reference checks, preferably similar to the scope of this RFP and/or industry.

(END OF ATTACHMENT B)

**ATTACHMENT C**

**REFERENCES**

<b>Bidder shall provide a minimum of three (3) College/University Customer References with three (3) or more years' experience with the Bidder.</b>	
<b>REFERENCE #1</b>	
NAME	
ADDRESS	
CITY, STATE ZIP CODE	
TELEPHONE #	
PRIMARY POINT OF CONTACT	
DATES OF SERVICE	
APPROX. FTES	
<b>REFERENCE #2</b>	
NAME	
ADDRESS	
CITY, STATE, ZIP CODE	
TELEPHONE #	
PRIMARY POINT OF CONTACT	
DATES OF SERVICE	
APPROX. FTES	
<b>REFERENCE #3</b>	
NAME	
ADDRESS	
CITY, STATE, ZIP CODE	
TELEPHONE #	
PRIMARY POINT OF CONTACT	
DATES OF SERVICE	
APPROX. FTES	

*(ATTACH ADDITIONAL SHEETS IF REQUIRED OR DESIRED)*

**(END OF ATTACHMENT C)**

**ATTACHMENT D**

**NON-COLLUSION DECLARATION  
TO BE EXECUTED BY BIDDER AND SUBMITTED WITH PROPOSAL**

\_\_\_\_\_, being first duly sworn, deposes and says that he or she is \_\_\_\_\_ of the party making the foregoing bid that the bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the bid is genuine and not collusive or sham; that the Bidder has not directly or indirectly induced or solicited any other Bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any Bidder or anyone else to put in a sham bid, or that anyone shall refrain from bidding; that the Bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the Bidder or any other Bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other Bidder, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the bid are true; and, further, that the Bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.

I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

**BIDDER:** \_\_\_\_\_  
(Type or print complete legal name of Bidder)

**BY:** \_\_\_\_\_  
(Signature)

**Name:** \_\_\_\_\_  
(Type or print)

**Title:** \_\_\_\_\_

(END OF ATTACHMENT D)

**ATTACHMENT E**

**AGREEMENT TO TERMS AND CONDITIONS**

Each Bidder must state below whether it accepts the attached Agreement and its attachments (if any) (“Agreement”). Any exceptions must be included, if at all, with Bidder’s Proposal submission.

**NOTE:** Exceptions taken to terms and conditions may be a negative factor in evaluation of Bidder’s Proposal or disqualification.

Initial the Appropriate Choice, below:

\_\_\_\_\_ Bidder **accepts** the form of Agreement **without exception**.

**OR**

\_\_\_\_\_ Bidder proposes **exceptions/modifications** to the form of Agreement. If this choice is selected, Bidder shall include all of the following:

1. Summarize any and all exceptions to the Agreement.
2. Provide written explanation to substantiate each proposed exception/modification.

**BIDDER:** \_\_\_\_\_  
(Type or print complete legal name of Bidder)

**BY:** \_\_\_\_\_  
(Signature)

**Name:** \_\_\_\_\_  
(Type or print)

**Title:** \_\_\_\_\_

(END OF ATTACHMENT E)

**ATTACHMENT F**  
Required District Terms and Conditions

**NOTE:** The following is a *SAMPLE* form of Agreement which the successful Proposer will be required to execute. Completion of this agreement is NOT REQUIRED as part of the proposal preparation.

*(Standard Services Agreement - Low Risk, dated January 2020)*

**SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT  
AGREEMENT  
WITH**

---

This Agreement is entered into this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ by and between the San Mateo County Community College District, a community college district formed and existing under the law of the State of California, having its principal address at 3401 CSM Drive, San Mateo, CA 94402 (hereinafter called "District") and \_\_\_\_\_, having its principal business address at \_\_\_\_\_ (hereinafter called "Contractor").

WHEREAS, it is necessary and desirable that Contractor be engaged by District for the purpose of performing services hereinafter described;

NOW, THEREFORE, in consideration of the payments hereinafter set forth, Contractor shall perform services for District in accordance with the terms and conditions set forth herein and in Exhibit A attached hereto and by this reference made a part hereof, and, in consideration of the services rendered in accordance with all terms and conditions set forth herein and in Exhibit A, District shall make payment to Contractor in the manner specified in Exhibit A.

1. **TERM OF CONTRACT.** This Agreement shall commence on \_\_\_\_\_, \_\_\_\_\_ and terminate on \_\_\_\_\_, \_\_\_\_\_. Notwithstanding the foregoing, if any applicable law limits the permissible length of the term of this Agreement, then the term of this Agreement shall not extend beyond the length permitted by law.
2. **TERMINATION OF CONTRACT.** The District may, at any time from execution of Agreement, terminate this Agreement, in whole or in part, for the convenience of the District, by giving written notice specifying the effective date and scope of such termination. Termination shall be effective on a date not less than thirty days from notice. In the event of termination, all finished or unfinished documents, data, studies, maps, photographs, reports, and materials (hereafter referred to as materials) prepared by Contractor under this Agreement shall become the property of the District and shall be promptly delivered to the District. In the event of termination, Contractor shall be paid for all work satisfactorily performed until termination, except where the contracting department determines the quality or quantity of the work performed is unacceptable. Such payment shall be that portion of the full payment, which is determined by comparing the work/services completed to the work/services required by the Agreement.
3. **INDEPENDENT CONTRACTORS.** It is understood that this is an Agreement by and between independent contractors and is not intended to, and shall not be construed to, create the relationship of agent, servant, employee, partnership, joint venture of association, or any other relationship whatsoever other than that of independent contractor. Except as District may specify in writing, Contractor shall have no authority, expressed or implied, to act on behalf of District in any capacity whatsoever.

Contractor shall have no authority, expressed or implied, pursuant to this Agreement to bind District to any obligation whatsoever.

4. TIME OF PERFORMANCE. Time is of the essence and Contractor shall perform the services required by this Agreement in an expeditious and timely manner so as not to unreasonably delay the purpose of this Agreement.
5. FAIR EMPLOYMENT PRACTICES/EQUAL OPPORTUNITY ACTS. District is an equal opportunity employer. By entering into this Agreement, Contractor certifies that he/she is in compliance with the Equal Employment Opportunity Requirement of Executive Order 11246, Title VII of the Civil Rights Act of 1973, the California Fair Employment Practices Act and any other Federal or State laws and regulations related to Equal Employment Opportunity. Contractor's personnel policies shall be made available to District upon request.
6. OWNERSHIP OF PROPERTY. All tangible and intangible property developed, produced and/or provided by Contractor under this Agreement shall become the sole property of District. District's ownership of property developed, produced and/or provided under this Agreement includes, but is not limited to, any specifications, drawings, sketches, models, samples, tools, computer programs, technical information, confidential business information, scripts, customer or personnel information or data, written, oral or otherwise (all hereinafter referred to as "Information"), obtained by Contractor from District or developed by Contractor hereunder or in contemplation hereof shall remain or become the sole property of District. Any copyrightable works or other intellectual property developed in connection with this Agreement shall remain or shall become the sole property of District and, in accordance with Education Code section 72207, Contractor understands that the District's governing board may secure copyrights, in the name of the District, to all such works. If Contractor desires to make use of any such District work for any purpose not related to this agreement, Contractor must first secure prior written consent of District for such use. All copies of such Information in written, graphic or other tangible form shall be returned to District upon termination of this Agreement. Information shall be kept confidential by Contractor, shall be used only in performing hereunder, and may be used for other purposes only upon prior written approval of District Executive Vice Chancellor or Designee.
7. LICENSES, PATENTS, PERMITS. Prior to commencement of work/services to be performed under this Agreement, Contractor shall apply for, obtain and maintain in current status, at his/her own expense, any license, permit or approval required from any agency for the performance of said work/services, or forfeit any right to compensation under this Agreement.
8. LIABILITY AND INSURANCE. Contractor shall be responsible for all damages to persons or properties that occur as a result of Contractor's or Contractor's employees fault or negligence in connection with the performance of this Agreement.

The Contractor shall take out and maintain during the life of this Agreement such liability insurance as shall protect him/her while performing work covered by this Agreement from any and all claims for damages and all operations under this Agreement, whether such operations be by himself/herself or by any Subcontractor or by anyone directly or indirectly employed by either of them.

**8.1 Required Coverage.** Contractor shall procure and maintain liability coverage which shall not be less than the following amounts (unless agreed in writing by the Executive Vice Chancellor or Designee's Office):

- a. Commercial General Liability and Property Damage insurance including:  
Bodily Injury Liability insurance which provides for injuries including accidental death, per any one occurrence in an amount not less than \$1,000,000 per occurrence and \$2,000,000 annual aggregate; and Property Damage insurance in an amount not less than \$1,000,000 per occurrence.

- b. Business Automobile Liability insurance in an amount not less than \$1,000,000 including coverage for owned, non-owned and hired vehicles; and
- c. Not Used.
- d. Professional liability in the amount not less than \$2,000,000 per occurrence and annual aggregate.

If the Contractor maintains higher limits than the minimums shown above, the District requires and shall be entitled to coverage for the higher limits maintained. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the District.

**8.2 Required Rating.** Insurance carriers must have a Best rating of A(-)X or better.

**8.3 Endorsements and Certificates of Insurance.** San Mateo County Community College District, its Officers, Agents and Employees must be named by endorsement on Contractor’s Commercial General Liability and Property Damage Policies as co-insured or additional insured.

Certificates of Insurance and endorsements for coverages required herein shall be filed with District's Executive Vice Chancellor or Designee *prior to the commencement of work*. The certificates shall provide that if the policy or policies be canceled by the insurance company or Contractor during the term of this Agreement, thirty (30) days written notice prior to the effective date of such cancellation will be given to District's Executive Vice Chancellor or Designee. The certificates shall also show the information that the San Mateo County Community College District is named on Contractor's Commercial General Liability and Property Damage policies as co-insured or additional insured. Certificates shall clearly state that “The San Mateo County Community College District, its Officers, Agents and Employees are named as additional insured per attached endorsement” and that such insurance policy shall be primary to any insurance or self-insurance maintained by the District.

- 9. **WORKERS’ COMPENSATION INSURANCE.** The Contractor shall have in effect, during the life of this Agreement that the Contractor has employees, Workers’ Compensation and Employer Liability Insurance providing full statutory coverage. In signing this Agreement, Contractor certifies awareness of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for Worker's Compensation or to undertake self-insurance in accordance with the provisions of the Code, and certifies compliance with such provisions before commencing the performance of this work of the Agreement as set forth in California Labor Code section 1861.

**Initial this box if you have employees**

I am aware of the provisions of Section 3700 of the California Labor Code, which require every employer to be insured against liability for Workers’ Compensation or to undertake self-insurance in accordance with the provisions of the Code, and I will comply with such provisions before commencing the performance of any work required under this Agreement with employees.

**Initial this box only if you have no employees and will not submit a Certificate of Workers’ Compensation**

I have no employees and, therefore, will not submit a Certificate of Workers’ Compensation.

- 10. **INDEMNIFICATION.** Contractor shall indemnify and hold harmless District, its officers, agents, and employees from all claims, suits or actions of every name, kind, description, brought for, or on account of, injuries to or death of any person or damage to property resulting from performance of any work required under this Agreement by Contractor, its officers, agents, employees and/or servants.

The duty of Contractor to indemnify and hold harmless, as set forth herein, shall include the duty to defend as set forth in Section 2778 of the California Civil Code; provided, however, that nothing herein shall be construed to require Contractor to indemnify District, its officers, agents, and employees against any responsibility or liability in contravention of Section 2782 of the Civil Code.

The indemnification and hold harmless agreement set forth above includes, but is not limited to, Contractor's agreement at its sole expense to indemnify District, its officers, agents and employees from and defend or settle any claim or action brought against District to the extent that it is based on a claim that any services furnished hereunder infringed a patent, copyright, trademark, service mark, trade secret, or other legally protected intellectual property rights. Contractor shall pay all costs, fees (including attorneys' fees) and damages which may be incurred by District, its officers, agents and employees for any such claim or action or settlement thereof.

11. ACCESSIBILITY. Contractor hereby warrants that the products and services to be provided under this Agreement comply with the accessibility requirements of Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794d) and its implementing regulations set forth in Title 36, Code of Federal Regulations, part 1194. Contractor agrees to promptly respond to and resolve any complaint regarding accessibility of its products and services which is brought to Contractor's attention. Contractor further agrees to indemnify and hold harmless the San Mateo County Community College District, its governing board, officers, employees and agents, the California Community Colleges Chancellor's Office, and any California community college using Contractor's products and services from any claim arising out of Contractor's failure to comply with the aforesaid requirements. Failure to comply with the aforesaid requirements shall constitute a breach and shall be cause for termination of this Agreement.
12. ASSIGNABILITY. Contractor shall not assign this Agreement or any portion thereof to a third party without the prior written consent of District, and any attempted assignment without such prior written consent in violation of this paragraph 12 is null and void and automatically shall terminate this Agreement. In the event of any assignment, Contractor shall remain liable to District as principal for the performance of all obligations under this Agreement.
13. FAILURE TO PERFORM. If, at any time, in the opinion of District, Contractor fails to render services of proper quality or has failed to perform, keep, and observe any of the terms or conditions herein contained on the part of Contractor to be performed, kept, and observed, District may give Contractor written notice to correct such conditions or cure such default; and if any such condition or default shall continue for ten (10) days after said written notice, then, and in that event, this Agreement shall cease and expire. Thereupon District or its duly authorized representative may employ other parties or carry this Agreement to completion as District may deem proper.
14. FORCE MAJEURE. Neither party shall be responsible for delays or failure in performance resulting from acts beyond the control of such parties. Such acts shall include, but not be limited to, Acts of God, labor disputes, civil disruptions, acts of war, epidemics, fire, electrical power outages, earthquakes or other natural disasters.
15. DISPUTE RESOLUTION. Should any dispute arise out of this Agreement, the parties agree to meet in mediation and attempt to reach a resolution with the assistance of a mutually agreed upon mediator. The mediation process shall provide for the selection, within fifteen (15) days of either party notifying the other of the existence of a dispute, by both parties of a disinterested third person as mediator and shall be concluded within forty-five (45) days from the commencement of the mediation unless a time requirement is extended by stipulation of both parties.

If a mediated settlement is reached, neither party shall be the prevailing party for the purposes of the mediated settlement. Each party agrees to bear an equal quota of the expenses of the mediator.

A party that refuses to participate in mediation or refuses to participate in the selection of a mediator cannot file a legal action. The non-refusing party shall be permitted to file a legal action immediately upon the other party’s refusal to participate in mediation or the selection of a mediator.

- 16. SEVERABILITY. Should any part of this Agreement be declared through a final decision by a court or tribunal of competent jurisdiction to be unconstitutional, invalid, or beyond the authority of either party to enter into or to carry out, such decision shall not affect the validity of the remainder of this Agreement, which shall continue in full force and effect, provided that the remainder of this Agreement, absent the unexercised portion, can be interpreted reasonably to give effect to the intentions of the parties.
- 17. AMENDMENTS. This Agreement may be amended only by written instrument signed by both District and Contractor which writing shall state expressly that it is intended by the parties to amend the terms and conditions of this Agreement.
- 18. GOVERNING LAW AND VENUE. This Agreement, including all exhibits attached hereto and incorporated herein by reference, shall be construed in and governed by the laws of the State of California. The parties consent to the exclusive jurisdiction and venue of the Superior Court of San Mateo County, California.
- 19. ENTIRE AGREEMENT. This Agreement, including all exhibits attached hereto and incorporated herein by reference, constitutes the sole agreement of the parties hereto and correctly states the rights, duties and obligations of each party. Any prior agreement, promises, negotiations, or representations between the parties not expressly stated in this document are of no force or effect. In the event of a conflict between the terms and conditions set forth herein and those in the exhibits attached hereto, the terms and conditions set forth herein shall prevail.
- 20. WAIVERS. No waiver of default by District of any terms or conditions hereof to be performed, kept, or observed by Contractor shall be construed to be or act as a waiver of any subsequent default of any of the terms and conditions herein contained.
- 21. NOTICES. All notices to be given between the parties hereto shall be in writing and may be served by commercial express/overnight courier service or by depositing the same in the United States mail, postage prepaid and certified receipt requested and addressed to:

"DISTRICT"  
 San Mateo County Community College District  
 Richard Storti, Executive Vice Chancellor of Administrative Services  
 3401 CSM Drive  
 San Mateo, CA 94402

"CONTRACTOR"

Contractor Name: \_\_\_\_\_

Contact: \_\_\_\_\_

Address: \_\_\_\_\_

E-Mail: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Either party by written notice to the other party may change the address of the notice or the names of the persons or parties to receive written notices.

22. EXPENDITURE OF PUBLIC FUNDS. Contractor agrees to comply with Government Code Section 8546.7 which provides that any contract involving expenditure of public funds in excess of \$10,000 requires that the contracting parties shall be subject to the examination and audit of the Auditor General for a period of three (3) years after final payment under the contract.
23. PUBLIC RECORD. All contracts become the property of the District and as such become public documents available to be reviewed by the public upon request. Government Code Sections 6250 et. seq., the Public Records Act, define a public record as any writing containing information relating to the conduct of public business. "Writing" means any handwriting, typewriting, printing, photostating, photographing, photocopying, transmitting by electronic mail or facsimile, and every other means of recording upon any tangible thing any form of communication or representation, including letters, words, pictures, sounds, or symbols, or combinations thereof, and any record thereby created, regardless of the manner in which the record has been stored. Any contract may be published and made available to the public as part of the Board of Trustees approval process.
24. DATA CONFIDENTIALITY. The Parties will maintain the confidentiality of any and all personally identifiable information exchanged by each as a part of this agreement, and prevent further disclosure except as authorized by this Agreement and in accordance with state and federal laws. The confidentiality requirements under this paragraph shall survive the termination or expiration of this agreement or any subsequent agreement intended to supersede this agreement.

With regard to students, personally identifiable student information is defined in 34 CFR 99.3 and includes: (a) the student's name; (b) the name of the student's parent or family members; (c) the address of the student or student's family; (d) a personal identifier such as a student's social security number or student number; (e) other indirect identifiers such as the student's date of birth, place of birth, and mother's maiden name; (f) other information that, alone or in combination, is linked or linkable to a specific student that would allow a reasonable person in the school community, who does not have personal knowledge of the relevant circumstances, to identify the student with reasonable certainty.

To ensure the continued confidentiality and security of data processed, stored, or transmitted under this Agreement, the parties shall establish a system of safeguards that will at minimum include the following:

- a. Procedures and systems that ensure all records, including records containing personally identifiable information, are kept in secured facilities and access to such records is limited to only those personnel who are authorized to have data access under this section of the Agreement.
- b. Procedures and systems that shall require the use of secured passwords to access computer databases used to process, store, or transmit data provided under this Agreement.
- c. Procedures and systems, such as good practices for assigning passwords, shall be developed and implemented to maintain the integrity of the systems used to secure computer databases used to process, store, or transmit data provided under this Agreement.
- d. Procedures and systems that ensure that all confidential data processed, stored, and/or transmitted under the provisions of this Agreement shall be maintained in a secure manner that prevents the interception, diversion, or other unauthorized access to said data.
- e. The procedures and systems developed and implemented to process, store, or transmit data provided under this Agreement shall ensure that any and all disclosures of confidential student data comply with all provisions of FERPA and California law relating to the privacy rights of students, such as but not limited to, the Information Practices Act and the California Public Records Act insofar as such laws are applicable to the parties to this Agreement.
- f. Data transmitted under this agreement must use a minimum standard of RSA 2048-bit encryption or a

mutually agreed upon equivalent.

- 25.  If checked, this agreement is subject to the SMCCCD Data Sharing Agreement, attached hereto as Exhibit B and by this reference made a part hereof.
- 26. CAPTIONS. Any captions to or headings of the articles, sections, subsections, paragraphs, or subparagraphs of this Agreement are solely for the convenience of the parties, are not a part of this Agreement, and shall not be used for the interpretation or determination of validity of this Agreement or any provision hereof.
- 27. CONTRARY TAX POSITIONS. Contractor agrees that it is not entitled to, and will not take, any tax position that is inconsistent with its relationship as a service provider to District with respect to Contractor's management or use of any District-owned property. Contractor agrees that it will not claim any tax deductions or credits including but not limited to depreciation expense, amortization expense, rent expense or investment tax credits with respect to any District-owned property managed or used by Contractor.
- 28. COUNTERPARTS. This Agreement may be executed in any number of counterparts, each of which shall be deemed an original, but all such counterparts together shall constitute one and the same instrument.
- 29. EXECUTION. By their signatures below, each of the following represents that they have authority to execute this Agreement and to bind the party on whose behalf their execution is made.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement in duplicate.

**SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT**

**CONTRACTOR**

By: \_\_\_\_\_  
Yanely Pulido, Director of General Services

By: \_\_\_\_\_

Date: \_\_\_\_\_  
Employer Identification Number: 94-3084147

\_\_\_\_\_  
Name/Title of Authorized Signatory  
Date: \_\_\_\_\_  
Federal Tax Payer Identification Number  
(EIN): \_\_\_\_\_

**EXHIBIT A**

Services shall be billed to “San Mateo County Community College District” and become payable after satisfactory completion of services and upon presentation of detailed invoice(s) specifying services being provided. Invoices shall be sent to: SMCCCD, Accounts Payable Office, 3401 CSM Drive, San Mateo, CA 94402.

<b>Location:</b>
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SERVICE TO BE PERFORMED	DATE TO BE COMPLETED BY	PAYMENT AMOUNT

**The total amount paid under this Agreement shall not exceed \$ \_\_\_\_\_.**

(END OF ATTACHMENT F)

**BOARD REPORT NO. 21-11-04CA**

TO: Members of the Board of Trustees  
FROM: Michael Claire, Chancellor  
PREPARED BY: Mitchell Bailey, Vice Chancellor/Chief of Staff

**ADOPTION OF RESOLUTION NO. 21-09 TO MAKE FINDINGS ALLOWING CONTINUED REMOTE MEETINGS UNDER BROWN ACT**

On June 11, 2021, Governor Newsom issued Executive Order N-08-21, which rescinded his prior Executive Order N-29-20 and set a date of October 1, 2021 for public agencies to transition back to public meetings held in full compliance with the Brown Act. The original Executive Order provided that all provisions of the Brown Act that required the physical presence of members or other personnel as a condition of participation or as a quorum for a public meeting were waived for public health reasons. If these waivers fully sunsetted on October 1, 2021, legislative bodies subject to the Brown Act would have to contend with a sudden return to full compliance with in-person meeting requirements as they existed prior to March 2020, including the requirement for full physical public access to all teleconference locations from which board members were participating.

On September 16, 2021, the Governor signed AB 361, a bill that formalizes and modifies the teleconference procedures implemented by California public agencies in response to the Governor's Executive Orders addressing Brown Act compliance during shelter-in-place periods. AB 361 allows a local agency to continue to use teleconferencing under the same basic rules as provided in the Executive Orders when certain circumstances occur or when certain findings have been made and adopted by the local agency.

AB 361 also requires that, if the state of emergency remains active for more than 30 days, the agency must make findings by majority vote every 30 days to continue using the bill's exemption to the Brown Act teleconferencing rules. The findings are to the effect that the need for teleconferencing persists due to the nature of the ongoing public health emergency and the social distancing recommendations of local public health officials. Effectively, this means that local agencies must agendize a Brown Act meeting once every thirty days to make findings regarding the circumstances of the emergency and to vote to continue relying upon the law's provision for teleconference procedures in lieu of in-person meetings.

AB 361 provides that Brown Act legislative bodies must return to in-person meetings on October 1, 2021, unless they choose to continue with fully teleconferenced meetings because a specific declaration of a state or local health emergency is appropriately made. AB 361 allows local governments to continue to conduct virtual meetings as long as there is a gubernatorially-proclaimed public emergency in combination with (1) local health official recommendations for social distancing or (2) adopted findings that meeting in person would present risks to health. AB 361 is effective immediately as urgency legislation and will sunset on January 1, 2024.

Because local rates of transmission of COVID-19 are still in the "substantial" tier as measured by the Centers for Disease Control, it is recommended that the Board avail itself of the provisions of AB 361 allowing continuation of online meetings by adopting findings to the effect that conducting in-person

meetings would present an imminent risk to the health and safety of attendees. A resolution to that effect, and directing staff to return each 30 days with the opportunity to renew such findings, is attached hereto.

The Board of Trustees adopted a similar resolution with similar findings on October 13, 2021.

### **RECOMMENDATION**

It is recommended that the Board of Trustees adopt Resolution No. 21-09 finding that, as a result of the continuing COVID-19 pandemic state of emergency declared by Governor Newsom, meeting in person would present imminent risks to the health or safety of attendees.

**RESOLUTION NO. 21-09****BY THE GOVERNING BOARD OF THE  
SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT  
STATE OF CALIFORNIA**

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**RESOLUTION FINDING THAT, AS A RESULT OF THE CONTINUING COVID-19  
PANDEMIC STATE OF EMERGENCY DECLARED BY GOVERNOR NEWSOM, MEETING  
IN PERSON FOR MEETINGS OF THE SAN MATEO COUNTY COMMUNITY COLLEGE  
DISTRICT BOARD OF TRUSTEES WOULD PRESENT IMMINENT RISKS TO THE HEALTH  
OR SAFETY OF ATTENDEES**

**WHEREAS**, on March 4, 2020, the Governor proclaimed pursuant to his authority under the California Emergency Services Act, California Government Code section 8625, that a state of emergency exists with regard to a novel coronavirus (a disease now known as COVID-19); and

**WHEREAS**, on June 4, 2021, the Governor clarified that the “reopening” of California on June 15, 2021 did not include any change to the proclaimed state of emergency or the powers exercised thereunder, and as of the date of this Resolution, neither the Governor nor the Legislature have exercised their respective powers pursuant to California Government Code section 8629 to lift the state of emergency either by proclamation or by concurrent resolution in the state Legislature; and

**WHEREAS**, on March 17, 2020, Governor Newsom issued Executive Order N-29-20 that suspended the teleconferencing rules set forth in the California Open Meeting law, Government Code section 54950 et seq. (the “Brown Act”), provided certain requirements were met and followed; and

**WHEREAS**, on September 16, 2021, Governor Newsom signed AB 361 that provides that a legislative body subject to the Brown Act may continue to meet without fully complying with the teleconferencing rules in the Brown Act provided the legislative body determines that meeting in person would present imminent risks to the health or safety of attendees, and further requires that certain findings be made by the legislative body every thirty (30) days; and

**WHEREAS**, California Department of Public Health (“CDPH”) and the federal Centers for Disease Control and Prevention (“CDC”) caution that the Delta variant of COVID-19, currently the dominant strain of COVID-19 in the country, is more transmissible than prior variants of the virus, may cause more severe illness, and that even fully vaccinated individuals can spread the virus to others resulting in rapid and alarming rates of COVID-19 cases and hospitalizations (<https://www.cdc.gov/coronavirus/2019-ncov/variants/delta-variant.html>); and

**WHEREAS**, the CDC has established a “Community Transmission” metric with 4 tiers designed to reflect a community’s COVID-19 case rate and percent positivity; and

**WHEREAS**, the County of San Mateo currently has a Community Transmission metric of “substantial” which is the second most serious of the tiers; and

**WHEREAS**, the Board of Trustees has an important governmental interest in protecting the health, safety and welfare of those who participate in its meetings; and

**WHEREAS**, in the interest of public health and safety, as affected by the emergency caused by the spread of COVID-19, the Board of Trustees deems it necessary to find that meeting in person would present

imminent risks to the health or safety of attendees, and thus intends to invoke the provisions of AB 361 related to teleconferencing;

**NOW, THEREFORE, BE IT RESOLVED THAT:**

1. The recitals set forth above are true and correct.
2. The Board of Trustees finds that meeting in person would present imminent risks to the health or safety of attendees.
3. Staff is directed to return no later than thirty (30) days after the adoption of this resolution with an item for the Board to consider making the findings required by AB 361 in order to continue meeting under its provisions.
4. Staff is directed to take such other necessary or appropriate actions to implement the intent and purposes of this resolution.

REGULARLY PASSED AND ADOPTED this 10<sup>th</sup> day of November 2021.

Ayes:

Noes:

Abstentions:

Attest:

\_\_\_\_\_  
Richard Holober, Vice President-Clerk  
Board of Trustees

**BOARD REPORT NO. 21-11-05CA**

TO: Members of the Board of Trustees  
FROM: Michael Claire, Chancellor  
PREPARED BY: Mitchell Bailey, Vice Chancellor/Chief of Staff

**SETTING DECEMBER 15, 2021 AS DATE FOR  
ANNUAL ORGANIZATIONAL MEETING OF THE BOARD OF TRUSTEES**

The Board of Trustees is required to hold an organizational meeting within 15 days of the first Friday in December and must set the date for that organizational meeting at the Board's regular meeting held immediately prior to December 1.

As such, the staff recommends the Board of Trustees hold its organizational meeting at the Board's scheduled meeting on December 15, 2021.

**RECOMMENDATION**

It is recommended that the Board of Trustees set December 15, 2021 as the date of its annual organizational meeting.

**BOARD REPORT NO. 21-11-06CA**

TO: Members of the Board of Trustees  
FROM: Michael Claire, Chancellor  
PREPARED BY: Bernata Slater, Chief Financial Officer

**RATIFICATION OF STUDENT ACCIDENTAL INJURY INSURANCE PROGRAM, 2021-2022**

The District has maintained a student accidental injury insurance program since 1961, providing coverage for all enrolled students of the District. In an attempt to minimize premium increases, the District conducts an annual search for an insurance plan that would provide features equitable with previous years' plans at a reasonable cost.

Student Insurance Agency submitted a proposal which provides comparable coverage for the major features of the expiring policy. The plan offers combined student/athlete accidental injury coverage and catastrophic coverage. The basic student/athlete accidental injury plan covers 100% PPO charges in-network and 50% out-of-network, a heart/circulatory benefit for intercollegiate athletes, with applicable deductibles. Additionally, the plan provides medical expenses for an accidental injury up to a limit of \$50,000 for students and \$25,000 for athletes incurred expenses during the 52 weeks following an injury. An injured student's medical expenses are covered when in excess of benefits from any personal medical insurance carried by that student or their parents. The benefits of the plan are secondary, however, for students with no other medical insurance, it will become primary.

The combined plan offered by Student Insurance Agency includes catastrophic coverage that the District has carried since 1989-1990. The plan covers catastrophic injuries extending the benefit limits and period of coverage for athletic injuries for a premium of \$23,625. The plan provides catastrophic coverage to students other than athletes for a premium of \$9,450. The maximum benefit is \$1,000,000 with a 10-year benefit period.

The total cost for combined programs is \$195,990 which is a 0.127% decrease from 2021-2022 premiums. The annual cost for the basic and catastrophic coverage is covered by student health fees and student athlete coverage is paid from the College General Fund budgets.

**RECOMMENDATION**

It is recommended that the Board of Trustees approve student accidental injury insurance and catastrophic injury programs through Student Insurance, as described above, for a total premium amount of \$195,990.

**BOARD REPORT NO. 21-11-101B**

TO: Members of the Board of Trustees  
FROM: Michael Claire, Chancellor  
PREPARED BY: Dr. Richard Storti, Executive Vice Chancellor for Administrative Services

**APPROVAL OF SUPPLEMENTAL FUNDING FOR COLLEGE RIDGE AT SKYLINE  
COLLEGE EMPLOYEE HOUSING CONSTRUCTION CONTRACT**

On March 13, 2018, the San Bruno City Council gave final approval for the District's Faculty and Staff Housing development project (College Ridge) at Skyline College. This development, the third for the District, will include 30 apartments for faculty and staff housing. The development is being constructed in two phases; Phase I which consisted of the horizontal improvements now completed by another contractor, and Phase II, which consists of the construction of the 30-unit complex. On March 28, 2018, the Board authorized (Board Report 18-3-104B) the utilization of the Lease-Leaseback project delivery method for Phase II.

The Facilities Planning Department bid this project twice on August 22, 2019 and April 13, 2020. The first bid was canceled due to delay in the completion of Phase I improvements. The bid results of the second bid were rejected due to budget constraints (Board Report 20-5-100B). Additionally, staff requested authorization to rebid the project at a later date to allow for stabilization of the construction market to COVID-19 impacts and conduct outreach to garner a larger pool of available bidders to foster more competition.

The District completed the next bid process in November 2020, and brought the continued concerns of the cost being more than the resources provided by the sale of Parcel B. Staff identified other resources, and on 1/13/2021, the Board directed staff to complete the RFP process and bring a recommendation for funding. On 1/27/2021, the Board approved a contract with Guzman Construction Group for \$19,948,060. A discussion on funding was to come later and is now presented to the Board for its consideration.

The target date for completion of College Ridge is May 2022. The analysis of the need is as follows:

Proceeds from Sale of Parcel B: \$18,800,000  
Expenses to date: \$7,003,161  
Projected expenses to finish project: \$21,718,028  
Total cost: \$28,721,188  
Deficit (rounded): \$10,000,000

Staff have identified the following possible sources for funding College Ridge:

- **Source 1 – OPEB Trust Fund:** reimburse the District for prior costs for retiree medical premiums, which returns funding to Fund 1, which then becomes available for this purpose. As noted in earlier

board meetings, this is allowable under the OPEB Trust rules, and the Trust is currently overfunded with respect to the OPEB liability. It makes sense to use funds set aside for employee retiree benefits for employee housing. Because the Trust is overfunded, these funds would not need to be paid back.

- **Source 2 – Use Capital Projects Reserves:** the District set aside funds for matching a state bond-funded project. Due to insufficient match, the District declined the state funding and postponed the project until there are sufficient funds. In addition, the colleges have set aside funds within the Capital Projects Fund that could be made available for this purpose. Using these funds will necessitate reviewing other capital needs. Fortunately, the District has received \$7.6M this year for scheduled maintenance projects that will take some of the pressure off of these capital funds.
- **Source 3 – Borrow Funds:** the District could issue a COP to fund this project. The payments would be obligations of the Housing Fund. Currently, the Housing Fund provides \$400,000 per year for the Promise Scholars Program (PSP). The remaining funds generated by the Housing Fund are used to maintain the facilities, and replenish the reserves since all of Canada's Housing Reserve was used up in cost of repairs to the building. In addition, the revenues from College Ridge will be needed for several years to fund their reserves for maintenance. Estimated annual cost of debt service over 30 years: \$440,000. This would eliminate the transfer for the PSP.

Staff recommends the option to use current capital funds (Source 2) for this project. This provides immediate funding and allows the District to proceed. In the future, with the development of the Facilities Master Plan, staff will bring information on the future capital needs of the District.

## **RECOMMENDATION**

It is recommended that the Board of Trustees authorize the use of current capital funds in an amount not to exceed \$10,000,000 for supplemental funding for the College Ridge employee housing development at Skyline College.

**BOARD REPORT NO. 21-11-102B**

TO: Members of the Board of Trustees  
FROM: Michael Claire, Chancellor  
PREPARED BY: Mitchell Bailey, Vice Chancellor/Chief of Staff

**CONSIDERATION OF APPOINTMENT OF MEMBERS TO THE  
BOND OVERSIGHT COMMITTEE**

The Board of Trustees makes appointments of members to the District's Bond Oversight Committee. The Committee is charged with the responsibility to assure voters that bond proceeds are expended only for construction, reconstruction, rehabilitation or replacement of College facilities in compliance with the ballot language approved by voters, and that no funds are used for teacher or administrator salaries or other operating expenses. Appointed members serve two-year terms and may serve no more than three terms.

In 2019, the Board directed staff to implement an application process for recruiting and recommending candidates for appointment to positions on the District's Citizens' Bond Oversight Committee. Additionally, at that time, the Board also expressed an interest in interviewing candidates for these positions who had applied to serve on the Bond Oversight Committee.

As directed, staff developed an application process, similar in style and approach to those used by other Districts (K-12 and community college). The application is available on the District's Bond Oversight Committee website.

One application has been received for consideration for appointment to the Bond Oversight Committee to fill the seat designated for a member of a bona fide taxpayer organization. The current representative in this position did not seek re-appointment in this role. The applicant for this designated position is listed below and their application is attached:

- Mark Waissar

As a reminder to the Board, the Bond Oversight Committee currently has seven members and can have as many as 15 members. Five of the members fill statutorily mandated positions and the remainder of the members serve as at-large members.

**RECOMMENDATION**

It is recommended that the Board of Trustees consider the application of interested applicant and determine if the applicant will be approved for appointment to the District's Bond Oversight Committee.

## Mark Waissar Application, pg. 1

(Information presented as collected through District Bond Oversight Committee website application)

### First Name

Mark

---

### Last Name

Waissar

---

### Email

[REDACTED]

---

### Select the public interest category(ies) in which you are active and that you wish to represent:

Taxpayers' association

---

### Why do you want to serve on the Citizens' Bond Oversight Committee?

To ensure the District is expending bond proceeds only for the purposes set forth in Measure H, as approved by the voters.

---

### Brief statement of qualifications:

I have been a resident and taxpayer in San Mateo County for over 20 years.

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### Please list three professional references, including name, position, and contact information:

Mark Greenbaum - friend, father, businessman, San Mateo County resident, taxpayer -

[REDACTED]

Curtis Smith - friend, father, businessman, San Mateo County resident, taxpayer -

[REDACTED]

Clemens Buss - friend, father, businessman, San Mateo County resident, taxpayer -

[REDACTED]

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### Are you an employee, vendor, contractor, or consultant to the District?

No

**Mark Waissar Application, pg. 2**

*(Information presented as collected through District Bond Oversight Committee website application)*

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**Do you have conflicts that would preclude your attending quarterly meetings?**

No

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**Do you know of any reason, such as a potential conflict of interest, which would adversely affect your ability to serve on the Citizens' Bond Oversight Committee?**

No

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**Are you willing to comply with the ethics code included in the bylaws?**

Yes

**Mark Waissar Application, pg. 3**

*(Information presented as collected through District Bond Oversight Committee website application)*

**Attachment: Letter of Support/Recommendation as received through the District Bond Oversight Committee Website**

**First Name**

Mark

---

**Last Name**

Hinkle

---

**Email**

[REDACTED]

---

**Comment or Question**

I am President of the Silicon Valley Taxpayers Association and would ask that Mark Waissar of Portola Valley be appointed to the Bond Oversight Committee as a member of a bonified taxpayer group.

FYI.....Mark Hinkle, [REDACTED] or [REDACTED] web:

<http://www.SVTaxpayers.org>

**BOARD REPORT NO. 21-11-103B**

TO: Members of the Board of Trustees  
FROM: Michael Claire, Chancellor  
PREPARED BY: Mitchell Bailey, Vice Chancellor/Chief of Staff

**CONSIDERATION OF REVISIONS TO BOARD POLICY 2.90 REGARDING VACCINATION REQUIREMENTS FOR STUDENTS AND EMPLOYEES**

At its July 28, 2021 meeting, the Board of Trustees approved Board Policy No. 2.90 requiring vaccination against COVID-19 for employees and students. The policy went into effect when the U.S. Food and Drug Administration provided full approval of one of the available vaccines.

The District has phased implementation and enforcement of the policy, with employee requirements effective during the fall 2021 semester and student requirements effective beginning late fall 2020 and into spring 2022 semesters. Over the course of the last several months, the District has better developed its understanding of the implementation requirements, and has consulted with District stakeholders, and finds that revisions to the policy may be warranted.

Staff is outlining proposed amendments to the policy for the Board's consideration. The amendments can be considered individually, in groups or as a whole, depending on the preference of the Board.

**RECOMMENDATION**

It is recommended that the Board of Trustees consider the proposed amendments to Board Policy No. 2.90 and determine if any or all of the amendments should be made to the policy.

**DRAFT REVISIONS – FOR DISCUSSION PURPOSES ONLY**

**BOARD POLICY**  
**San Mateo County Community College District**

**Subject:** COVID-19 Vaccination Requirement

**Revision Date:** New - 07/2021

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The San Mateo County Community College District (District) is committed to protecting the health and well-being of students, faculty, staff, administrators, and the communities we serve, as well as maintaining higher education access and attainment for our students. As we work toward the safe resumption of increased on-campus learning, working and other activities, we embrace a comprehensive strategy designed to reduce the likelihood of transmission of the COVID-19 virus.

In light of the evidence established to date regarding the safety and effectiveness of available COVID-19 vaccines, the District hereby requires that:

- (1) all full-time District employees ~~who access campuses, the District office, District facilities, and/or participate in off-site work in-person for the District,~~ must be fully vaccinated against COVID-19, unless approved as exempt due to verified medical or religious reasons (as defined in federal or state policy);
- (2) any less than full-time employees who access campuses, the District office, District facilities, and/or participate in off-site work in-person for the District, must be fully vaccinated against COVID- 19, unless approved as exempt due to verified medical or religious reasons (as defined in federal or state policy);
- ~~(2)~~(3) all students attending classes, programs, utilizing services or participating in any activity on any campus be must be fully vaccinated against COVID-19, unless approved as exempt due to verified medical ~~or religious~~ reasons ~~(as defined in federal or state policy).~~

Employees and students who qualify as exempt, ~~or who decline to state their vaccination status~~ may be subject to other safety measures as prescribed by the District ~~in accordance with Cal/OSHA regulations.~~

This vaccine requirement is effective the later of (1) the first day of the fall semester (August 18, 2021); or (2) when a COVID-19 vaccine receives full U.S. Food & Drug Administration (FDA) approval and is readily available.

Visitors to campuses, the District office or other District facilities (e.g. those individuals not considered students or employees of the District) must comply with Cal/OSHA safety guidelines and other policies in place by the District and outlined in an administrative procedure associated with this policy.

The Chancellor shall establish administrative procedures to implement this policy.

**BOARD REPORT NO. 21-11-02C**

TO: Members of the Board of Trustees

FROM: Michael Claire, Chancellor

PREPARED BY: José D. Nuñez, Vice Chancellor, Facilities Planning & Operations  
Marie Mejia, Interim Director of Capital Projects

**2022 FACILITIES MASTER PLAN INFORMATIONAL REPORT**

The current SMCCCD Facilities Master Plan was approved by the Board in 2011 (Board Report 11-7-107B) and amended in 2015 (Board Report 15-1-104B). Existing law requires the governing board of each community college district to annually prepare for the Board of Governors a five-year plan for capital construction. These plans must be based on local educational master plans and facilities master plan for each college. The preparation of a facilities master plan is, in turn, necessary in preparing the Five-Year Capital Outlay Plans that districts submit annually to the Facilities Planning Unit at the State Chancellor's Office.

In May 2021, the District commissioned Steinberg Hart to develop the 2022 Facilities Master Plan (FMP) which will serve to inform the on-going educational and community physical plant needs for planning, design, and construction across the District's three colleges.

The facilities master planning effort has proceeded as planned. Steinberg Hart has undertaken a great deal of data and information collection and analysis, meetings with each college's stakeholders, programmatic departments, students, and the community, and is well-along in the assessment of physical facilities condition and space utilization. They have identified and incorporated educational programmatic needs, identified issues that require creative solutions. The 2022 Districtwide Facilities Master Plan will be the basis and justification of new construction and or modernization capital projects for the next 10-15 years.

**BOARD REPORT NO. 21-11-03C**

TO: Members of the Board of Trustees  
FROM: Michael Claire, Chancellor  
PREPARED BY: Kurt Scholler, Interim Director of Community Fitness

**UPDATE ON REBRANDING OF THE SAN MATEO ATHLETIC CLUB**

As part of the transition of the San Mateo Athletic Club (SMAC) to a District-operated model, various rebranding options have been considered with the intent of creating a “new” identity for the enterprise while reinforcing our shared commitment to a student-centered focus. The rebranding efforts have been inclusive with participation and input from the CSM and Cañada College Presidents, Deans of Kinesiology Athletics & Dance, Directors of Community Relations and Marketing, Director of Community Fitness, and faculty at both locations.

Discussion and working meetings matured concepts in name identification to include “college name”, “athletic” and “center.” Subjective word agreement identified “college” with our students, “athletic” with the Kinesiology, Athletic and Dance Departments where Community Fitness resides and “center” a point from which an activity or process is directed or focused. Creative design developed by CSM & Cañada Directors of Community Relations and Marketing include dual tie-in between the Community Fitness Centers at both colleges. This includes the mascot identification with the corresponding college athletic center; uniform font styles, underlining and the bold face type for “Athletic Center,” recognition and branding continuity. Below are concept renderings.



**BOARD REPORT NO. 21-11-04C**

TO: Members of the Board of Trustees

FROM: Michael Claire, Chancellor

**DISCUSSION ON PROCESS FOR DEVELOPMENT AND IMPLEMENTATION OF ADMINISTRATIVE PROCEDURES**

Background:

- The Board of Trustees requested information and further discussion on the development and implementation of administrative procedures at its October 13, 2021 Board meeting. It is important to distinguish between board policies and administrative procedures. The following is an excerpt from the *Chabot-Las Positas Board Policy* document, which summarizes the delineation between board policy and administrative procedures:

*“Board policy is the voice of the Board of Trustees and defines the general goals and acceptable practices for the operation of the District. It implements federal and state laws and regulations, as well as effective business practices. The BPs do include statements required to be implemented through policy. However, the BPs do not contain all legal requirements, regulations, accreditation standards, and other professional obligations that must be followed by the District.*

*Administrative procedures implement Board policy, laws, and regulations. They address how the general goals of the District are achieved and define operations of the District. They include details of policy implementation, responsibility, accountability, and standards of practice. Although APs may be developed by the Chancellor, managers, faculty, and staff members, it is the administrators/managers who are held responsible for upholding the specific information delineated in the procedures. Procedures do not require Board action.”*

Process:

- Staff reviewed Board Policies from a representative sample of Bay Area community colleges, as well as a selected sample of community colleges from outside of the region. The chancellor has also queried three other chancellors on this matter. Staff has included excerpts of the relevant board policy for the institutions reviewed, as well as our current district policy. The excerpts are included as an attachment to this report.

Findings:

- All of the districts reviewed delegate the development of administrative procedures to the chancellor. Also, administrative procedures are not approved by the Board. At the same time, many district policies afford the opportunity for the Board to review administrative procedures and suggest modifications to ensure consistency with the intent of the related board policy.

The results are in summarized in the table below:

**Administrative Procedures Development**

<b>District</b>	<b>AP Delegated to Chancellor?</b>	<b>Board Approval?</b>	<b>Board Review and Revise?</b>
<b>SMCCCD</b>	Yes	Not stated	Not stated
<b>Chabot-Los Positas</b>	Yes	No	Not Stated
<b>West Valley- Mission</b>	Yes	No	Yes
<b>San Jose-Evergreen</b>	Yes	No	Yes
<b>City College of SF</b>	Yes	No	Yes
<b>Foothill-De Anza</b>	Yes	No	Yes
<b>Peralta</b>	Yes	No	Yes
<b>North Orange</b>	Yes	No	Not Stated
<b>Los Rios CCD</b>	Yes	No	Not Stated
<b>San Diego-Mesa</b>	Yes	No	Yes

**Staff Request:**

- The District is in the process of developing new administrative procedures related to recently approved board polices concerning the pandemic, as well as other areas. The administration requests direction and input from the Board regarding the development of new a Board Policy that addresses the creation of Board Policies and related administrative procedures.

## **Representative Board Policy Excerpts**

### **SMCCCD Board Policy 2.06**

- *Administrative procedures implementing Board-adopted policies shall be developed by designated administrators subject to approval of the Chancellor. Procedures shall be consistent with and not in conflict with policies adopted by the Board.*

### **Chabot-Los Positas District Board Policy 2410**

- *The Board of Trustees may adopt policies as are authorized by law and comply with accreditation standards or determined by the Board to be necessary for the efficient operation of the District. Board Policies (BPs) are intended to be statements of intent by the Board on a specific issue within its jurisdiction.*
- *Administrative Procedures (APs) are to be issued by the Chancellor as statements of method to be used in implementing BPs. Such APs shall be consistent with and operationalize the intent of the BPs. APs may be revised as deemed necessary by the Chancellor.*
- *The BPs and APs have been written to be consistent with provisions of law, but do not encompass all laws relating to District activities. All District employees are expected to know of and observe all provisions of law pertinent to their job responsibilities.*

### **Foothill-De Anza District Board Policy 2410**

- *Administrative procedures are to be issued by the Chancellor as statements of method to be used in implementing Board Policy. Such administrative procedures shall be consistent with the intent of Board Policy. Administrative procedures may be revised as deemed necessary by the Chancellor. The Board reserves the right to direct revisions of the administrative procedures should they, in the Board's judgment, be inconsistent with the Board's own policies.*

### **West Valley-Mission Board Policy 2410**

- *Administrative procedures are to be issued by the Chancellor as statements of method to be used in implementing Board Policy. Such administrative procedures shall be consistent with the intent of Board Policy. Administrative procedures may be revised as deemed necessary by the Chancellor.*
- *The Chancellor shall biennially provide each member of the Board with any administrative procedure revisions since the last time they were provided. The Board reserves the right to direct revisions of the administrative procedures should they, in the Board's judgment, be inconsistent with the Board's own policies.*

### **San Jose-Evergreen District Board Policy 2410**

- *Administrative procedures are to be issued by the District Chancellor as statements of method to be used in implementing Board Policy. Such administrative procedures shall be consistent with the intent of Board Policy. Administrative procedures may be revised as deemed necessary by the District Chancellor.*
- *The District Chancellor shall annually provide each member of the Board with any revisions since the last time they were provided. The Board reserves the right to direct revisions of the administrative procedures should they, in the Board's judgment, be inconsistent with the Board's own policies.*

### **Los Rios Community College District Board Policy 3112**

- *The Los Rios Community College District Board of Trustees has the responsibility for formulating broad public policy in community college education. It shall function as the legislative and policy making body charged with the oversight and control of the Los Rios Community College District. The formulation and adoption of policies shall constitute the basic method by which the Board of Trustees shall exercise its leadership in the operation of the District. The Board of Trustees shall delegate to the Chancellor the function of specifying required actions and designing the detailed arrangements under which the District shall operate.*

- *Board Policies and Administrative Procedures undergo regular review and updating. Board Policy (BP) revisions and new BPs are placed on the agenda of a board of trustees meeting for first reading and then at a subsequent meeting for adoption. Adopted policy revisions and new policies are posted on the District's website. New Administrative Procedures (APs) are placed on the agenda of a board of trustees meeting for informational purposes. New APs and revisions to existing APs are posted on the District's website*

#### **City College of San Francisco - Board Policy 1.15**

- *Administrative procedures are to be issued by the Chancellor as statements of method to be used in implementing Board Policy. Such administrative procedures shall be consistent with the intent of Board Policy. Administrative procedures may be revised as deemed necessary by the Chancellor.*
- *The Chancellor shall, provide each member of the Board with copies of new or revised administrative procedure when they are issued. The Board reserves the right to direct revisions of the administrative procedures should they, in the Board's judgment, be inconsistent with the Board's own policies.*

#### **Peralta Community College District - Board Policy 2410**

- *Administrative Procedures are to be issued by the Chancellor as statements of regulations, rules and practices to be used in implementing Board Policy. Such Administrative Procedures shall be consistent with the intent of Board Policy. Administrative Procedures may be revised as deemed necessary by the Chancellor.*
- *As they become available, Administrative Procedures shall be officially distributed to the Governing Board, after which time they shall be considered incorporated into the Board Policy manual. The Board reserves the right to propose to the Chancellor revisions to Administrative Procedures should they, in the Board's judgment, be inconsistent with the Board's own policies.*
- *The Chancellor shall issue an administrative procedure to detail the implementation of this policy.*

#### **San Diego-Mesa Community College District - Board Policy 2410**

- *Administrative procedures are to be issued by the Chancellor as statements of method to be used in implementing Board Policy. Such administrative procedures shall be consistent with the intent of Board Policy. Administrative procedures may be revised as deemed necessary by the Chancellor.*
- *The Chancellor shall annually provide each member of the Board of Trustees with any procedure revisions since the last time they were provided. The Board of Trustees reserves the right to direct revisions of the administrative procedures should they, in the Board's judgment, be inconsistent with the Board's own policies.*

#### **North Orange Community College District Board Policy 2410**

- *Board Policy (BP) is the voice of the Board of Trustees and defines the general goals and acceptable practices for the operation of the District. It implements federal and state laws and regulations. The Board, through policy, delegates authority to and through the Chancellor to administer the District. The Chancellor and District employees are responsible to reasonably interpret Board Policy as well as other relevant laws and regulations that govern the District.*
- *Administrative Procedures (AP) implement Board Policy, laws, and regulations. They address how the general goals of the District are achieved and define operations of the District. They include details of policy implementation, responsibility, accountability, and standards of practice. Although procedures may be developed by the Chancellor, managers, faculty, and staff, it is the administrators/managers who are held responsible for upholding the specific information delineated in the procedures. Administrative Procedures do not require Board action. Not all Board Policies have a related Administrative Procedure.*

**BOARD REPORT NO. 21-11-05C**

TO: Members of the Board of Trustees

FROM: Michael Claire, Chancellor

**UPDATE FROM BOARD OPERATIONS SUBCOMMITTEE**

The Board discussed the scope and authority of the Board Ad-Hoc Committee on Board Operations at its September 9, 2021 Board meeting. In addition, President Nuris appointed Trustee Petrides and Trustee Pimentel to serve on the Board Ad-Hoc Committee on Board Operations. Trustee Petrides, Trustee Pimentel, and Chancellor Claire have met and have reviewed existing Board Policies and the results of the Board Self-Evaluation, which was conducted in July 2021.

The attached document summarizes several recommendations which are designed to improve Board functions. The full Board will discuss the draft document and provide feedback and further direction to the Board Ad-Hoc Committee.

## MEMORANDUM

TO: Tom, Richard, Maurice, Mike  
FROM: John, Lisa  
RE: Board Operations Subcommittee  
DATE: November 4, 2021

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Colleagues, the Subcommittee on Board Operations has outlined a first draft of opportunities to improve our Board Operations. Please review and help us:

- Ensure we have captured the complete scope of possible changes to board operations that any Board member wishes to be considered.
- Provide feedback to the Subcommittee with any concerns or improvements to the ideas listed below (including any arguments you may have for or against each possible modification of Board operations).

### **ITEMS FOR CONSIDERATION -- POSSIBLE CHANGES TO BOARD OPERATIONS**

#### **1. Board meeting frequency, duration and content**

1. Challenges: 2-week meeting frequency distracts management from primary tasks. Most business can be completed on a 1x/month meeting cycle.
2. Opportunities: Set one monthly meeting for formal Board action and establish 4-6 study sessions for deep dives into specific policy areas.
  1. Public forward calendar of meetings and study sessions.
  2. Make topics (once selected) available for public review.

#### **2. Agenda Setting**

1. Challenges: Agenda creation is the responsibility of Chancellor, President, VP under Board Policy [\_\_\_\_] with no established process for other board members or public to propose agenda items.
2. Opportunities: Create a shared file, open to the public, of topics to be considered for future board meetings.
  1. File can be edited by the Chancellor and any Board member.
  2. Include target dates for when we hope to agendaize each item.
  3. Prioritization can be established by each Board member ranking from 0-5 their priority for any particular item. The highest average priorities will rise to the top of the list.
3. Opportunities: President/VP invites calls or emails from all Board members and the public, on a specific schedule that allows all contributions to the agenda setting process. For instance:
  1. Agenda items can be suggested by fellow Trustees, or the public, until [4:00pm] 10 calendar days prior to scheduled Board meetings. [For Discussion]
  2. President, VP, Chancellor meet at [4:00pm] 10 calendar days prior to scheduled Board meetings.
  3. Draft agenda topics are published to the Board after the Agenda Setting Meeting.
  4. Agenda finalized and published [12:00noon] 9 calendar days before the scheduled Board meeting.

### 3. **12-Month Look Ahead**

1. Challenges: The Board, Public and Staff lack a clear understanding of the annualized agenda for regular business and discussion of policy priorities
2. Opportunities: Create a rolling 12-month look ahead calendar maintained by the Chancellor.
  1. Entries can be suggested by Board members, staff, and the public.
  2. The Chancellor can maintain the normal regulatory and customary items, and the Chancellor and Board collaborate on what policy items to put on the agenda.
  3. Calendar should be maintained in a publicly accessible digital file.
  4. File can include a Parking Lot of issues that may not have a determined date for discussion, but which are held in the parking lot for future discussion or action at a time TBD by the Board.
  5. Include a calendar of key ceremonies, conferences, and other events which Trustees may be expected to attend. Board member can collaborate on how best to cover conferences and policy areas to maximize knowledge gain and minimize duplication.

### 4. **Staff preparation for board meetings**

1. Challenges: Staff presentations should contain clearly stated goals for their presentations. They can also be unnecessarily long for the public meeting.
2. Opportunities: Chancellor can convey the Board's expectations and establish procedures to ensure staff reports are sufficiently concise and rehearsed. Trustees can establish a habit of thoroughly reviewing prepared materials and background prior to the meeting.
  1. Board reports can include background reading and other more detailed materials referenced in the formal Board presentation.
  2. All reading materials and information presented at the Board meeting MUST be included on-line in the Board package made available to the public.
  3. If new materials are introduced at the live Board meeting, then those MUST also be included in the Board Package Addendum and/or minutes.
  4. Standard presentations should be limited to 15 minutes or less of staff providing an overview of the reading materials (avoid long regurgitation of materials already presented in writing).
  5. Emphasis should be on questions to staff and Board discussion.
  6. Board reports can follow the standard format shown below.

### 5. **Board reports**

1. Challenges: Board reports are inconsistent in their form of analysis and action requested.
2. Opportunities: Create a standardized approach to preparing a Board report with elements of content, specific analysis, and where appropriate staff recommendation and draft resolution.
  1. Standard Board reports can be structured to have the following elements:
    1. Identify lead staff person and contributors.
    2. Issue Summary.
    3. Background (current condition and useful context on how the current condition came to be).
    4. Financial Impact (what is the current or long term cost or savings of the proposed action).
    5. Equity Impact (how might this action affect various stakeholders in the District including historically marginalized groups).

6. Academic Senate analysis (where appropriate).
7. Options (what are the options the Board may consider to address the matter).
8. Staff Recommendation (when action is required).
9. Draft Board Resolution (when action is required).

## 6. Board inquiries to staff

1. Challenges: Chancellor is challenged to prioritize staff time and effort responding to 5 Trustees who ask multiple questions and have differing areas of interest.
2. Opportunities: Create a shared document, editable by any Trustee and the Chancellor [*and maybe open to the public? Need to consider Brown Act*], to list and prioritize inquiries and requests from Trustees. The document could include:
  1. Name of requesting Trustee and date requested.
  2. Summary of the request (including reference to a more detailed communication such as an email or phone call).
  3. Status of the Administration's response.
  4. A method for all Trustees to score their view of importance for each request from 0 (low/no priority) to 5 (highest priority).
  5. An average of the Board's scores can be calculated in real time to provide the Chancellor insight on which Board requests are of highest priority to the greatest number of Board members.
  6. Trustees may change their relative weightings at any time.
  7. If Staff has concerns about time, expense, management distraction to answer an inquiry then Staff will seek additional guidance.

## 7. Regular Board report regarding information requests from the public

1. Challenges: The Board has insufficient visibility into the handling of formal Public Record Act Requests and routine requests for information from the public.
2. Opportunities: Establish a Board policy directing staff to enable prompt and thorough responses to public inquiries including the following:
  1. Create a formal report to the Board for review at our public meetings showing each material public inquiry, the date received, the staff person assigned to respond, and the status of the response.
  2. This can be included as a normal Consent Agenda item which will take no board meeting time unless pulled out for discussion at the request of a Board member.
  3. Analyze Board Policy 2.40 in relation to this item.
  4. Create the ability for staff to request prioritization from the Board on how to manage these inquiries.

## 8. Physical location of Board Meetings

1. Challenges: Public access to District Office for some remote communities is a barrier to participation. The District's presence in certain communities (Southeastern San Mateo County and Coastsides areas for instance) could be enhanced by staging Board meetings in the community rather than at the District Office.
2. Opportunities: Create a small budget for equipment and staff necessary to execute Board meetings on the road.
  1. All meetings will still be broadcast on the internet and video recorded.
  2. Staff to confirm technology is available and affordable to facilitate this practice.

3. Establish an advanced calendar showing when and where off-site meetings will be scheduled.
4. Invite local groups and local leaders to participate in these remote meetings.

## 9. **Board Member attendance policy**

1. Challenges: COVID-19 and the part-time, volunteer nature of service on the Board of Trustees results in some Trustees needing to participate remotely in formal Board meetings.
2. Opportunities: Create a board policy that acknowledges remote participation via Zoom link or similar technology counts for attendance by a Trustee.
  1. Staff to confirm current Board Policy is consistent with allowing for remote participation by board members and the public.

## 10. **Managing public and stakeholder participation in Board meetings**

1. Challenges: There are three problems here.
  1. On controversial topics such as SMAC or X-Country Running Trail members of the public repeat similar points of view adding little new information to the discussion.
  2. Staff has no mechanism beyond the Board Minutes, to record and acknowledge public input, nor to quantify or categorize the input to help Trustees make an informed decision.
  3. Internal stakeholders to the SMCCCD community have taken to public comment to raise matters more appropriately raised through the established channels of Academic Senate and represented groups who have reserved time on every Board agenda.
2. Opportunities: Ask the Board President and Staff to take the following actions:
  1. On topics of high public interest when significant public commentary is expected, the Board President can encourage people who wish to speak and who intend to repeat arguments or information already presented, to simply state their name and affiliation along with their position for or against the motion on the table.
  2. Prior to the Board meeting the Board Secretary can compile all communications related to the matter (emails, phone calls, letters) and publish them to the Board and the public.
  3. Whenever possible the Board Secretary can categorize and quantify the public's input as part of the Board's discussion.
    1. For instance, in the process of opening a matter to receive public comments, the Board President could ask the Board Secretary if any correspondence had been received and if it can be characterized in a manner useful to the Board and the public.
    2. Using the recent issue of SMCCCD holding the permit from SFPUC for the Crystal Springs cross country course, the Board Secretary could report something like:
      1. "We received [50] letters, calls and emails, mostly from users of the course who expressed support for the motion. Generally, supporters considered the course a great public amenity critical to the operation of their sport."
      2. And, "Also, we received [50] letters, calls and emails, mostly from neighbors who live in the community surrounding the course who expressed opposition for the motion. Opponents described

intense traffic and parking congestion on race days. Generally, opponents to the motion requested the permit be amended to allow fewer total events in the running season, specifically fewer large events that disrupted their community, and measures that would reduce high traffic and congested parking in their residential community.”

3. This could also be a written report from the Board Secretary which summarizes the main arguments, the communication volumes, and lists the individuals and their affiliation who have taken the time to communicate with the Board.
4. With this information in hand, the Board President could better establish expectations that all communications delivered previously have been received and considered by the Board.
5. Staff will ensure public comments that are included in the public record do not conflict with norms for civility and confidentiality especially on personnel matters.

#### 11. Subcommittee creation, work and reporting

1. **Challenges:** The Board would be well served by establishing certain subcommittees and establishing norms for how committees work and report back to the full Board and the public.
  2. **Opportunities:** Consider establishing possible subcommittees for 1 or 2 Trustees to take the lead in certain subject areas including (but not limited to) the following.
    1. Legal Matters
    2. Collective Bargaining
    3. Budget and Financial Planning
    4. Marketing, Outreach and Enrollment
    5. Fundraising (SMCCCD Foundation)
    6. Housing Corporation
    7. Legislative
    8. Non-Academic Program Effectiveness Review (Internal Auditor)
    9. Executive Performance and Organization
    10. Future of SMCCCD in a Post-pandemic, technology enabled world
    11. Government Affairs
12. Chanceller Performance Review
1. **Challenges:** The Board needs to complete a performance review each year which includes establishing clear and definable annual goals for the Chancellor, Board and District.
  2. **Opportunities:** Establish a subcommittee (or a “Committee of the Whole”) to complete such a performance, share with the Board, take Board vote, include in personnel file.
13. Annual Budget Process
1. **Challenges:** Need Board engagement in the process earlier in the schedule to help provide priorities for staff.
  2. **Opportunity** Consider establishing a Board subcommittee on Budget and Finance
14. Board leadership norms
1. **Challenge:** Unclear, informal, possibly inconsistent norms.
  2. **Opportunities:** Determine what if any existing norms are already in place

1. Create an algorithm for annual rotation of leadership roles and adopt Board Policy.
- 
15. Establishing Board Policies and Procedures
    1. Challenge: the process for establishing new Board Policies and/or updating policies is unclear. In addition, current Board Policy is silent on the development of administrative procedures
    2. Opportunity: Develop Board Policy
  
  16. Appointments to external organizations
    1. Challenge:
    2. Opportunity:
  
  17. Internal Auditor Reporting Procedures
    1. Challenge: There are no current policies or procedures defining the internal audit function for the District.
    2. Opportunities: Review policies and administrative procedures of other Districts with an internal audit function and implement best practices.

San Mateo County Community College District

November 10, 2021

**BOARD REPORT NO. 21-11-06C**

TO: Members of the Board of Trustees

FROM: Michael Claire, Chancellor

**REVIEW AND FEEDBACK ON PROPOSED OP ED PROPOSED BY  
TRUSTEE PIMENTEL**

Trustee Pimentel has requested that the Board submit the attached editorial for publication. The Board will discuss the proposed editorial and provide further direction to staff.

## **DRAFT - For Discussion**

### **Free Community College is Common Sense for San Mateo County**

By John Pimentel, Lisa Petrides, Tom Nuris, Maurice Goodman, and Richard Holoher, (November 10, 2021)

Earlier this year, President Biden proposed a wide-reaching domestic agenda featuring nationwide free community college as a way to enable more equitable access to upward economic mobility. It was an ambitious vision to encourage fairness and equality of opportunity. Unfortunately, free community college has been jettisoned to increase political support for the package. Given Washington's narrow political balance, this outcome was not unexpected.

However, in San Mateo County, hope remains for this truly progressive concept to flourish. The San Mateo Community College District Board of Trustees recently approved its \$220 million 2021-22 Budget which reallocated \$6.75 million from existing funds to expand free access to our three community colleges Cañada College, College of San Mateo, and Skyline College.

Specifically, SMCCCD doubled the Promise Scholars Program from 2,000 to 4,000 students, expanded Dual Enrollment offerings for high-school students, and increased the use of Zero Cost Textbooks. These commitments to equity follow over \$1 million in direct food assistance for our students and their families. The San Mateo County Supervisors also supported free community college with a \$2 million contribution to this effort.

The Promise Scholars Program supports full-time, often first-generation, college students who lack the financial resources and social support to complete college. It continues to be a proven success. Currently, fewer than 1 in 5 community college students graduate and transfer to 4-year universities in less than 3 years. Promise Scholars students succeed at a rate 2.5x greater. Over half of Promise Scholars students complete their degree or successfully transfer to university.

With Promise Scholars, enrollment fees (about \$1,400 annually) are waived and financial assistance for books, computers, transportation, and food is offered. Extensive wraparound services, including dedicated individual counseling, mentoring, and academic support help students complete their degree completion or transfer process. Dual Enrollment allows high school students to take college-level courses and receive college and high school credits simultaneously. This shortens the time and cost to complete college

Completing college matters. The federal government reports salaries for those with a bachelor's degree are 65% higher than high school graduates. Lifetime earnings are \$1 million greater for college grads. SMCCCD trade and technical certifications increase worker salaries by over 50%. Higher education is the path to a better life.

So, why aren't more individuals stepping forward to take advantage of this opportunity for a better future? In San Mateo County, powerful forces such as gentrification, high living costs, competition from for-profit training organizations, and the pandemic contribute to community college enrollment declining 30% over the past decade. We hope to reverse this trend with extensive outreach to high

schools, improved technical training and job placement services, and engaged robust marketing to explain and highlight the enormous benefits of using community college.

We know that educational attainment is the greatest driver of individual economic outcomes in America. Community college can reduce unbalanced income distribution between rich and under-resourced communities by offering students a path to complete degrees and certifications which increase earning potential sustainably.

Students can expect to spend about \$28,000 per year to attend the California State University and \$38,000 per year to attend the University of California. Rather than increase our nation's \$1.7 trillion student debt burden, SMCCCD students can reduce their college cost by HALF simply by attending community college. In fact, prior to 1985 community colleges in California were tuition-free.

As stewards of the San Mateo County Community College District, we thank you, San Mateo County, for your investment in our community colleges. There is a certain magic that happens on our campuses where people with modest resources can access the single most reliable return on investment known today – completing a college degree or obtaining career and technical certification.

Please come see us at <https://smccd.edu/collegeconnection/getting-started.php> to get started on your path to a better life and a more engaged and equitable community for us all.