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| **REQUEST FOR PROPOSAL 71-Q2024-07**  University of North Carolina at Pembroke Purchasing Department  Auxiliary Building  One University Drive  P.O. Box 1510  Pembroke, N.C. 28372-1510 | |
| Issue Date: 04/2//2024 | Due Date: 05/9/2024 |
| Purchasing Specialist: Beatrice L Williams | Description: Enrollment Marketing Services |
| **ADDENDUM #1: This must be signed and returned with your response** | Responses to Questions- |

**RFP Responses**

1. Is there a total budget for media allocation e.g. Spend in Year 1 of the agreement?

Our current servicer has a media allocation for Social focused specifically on undergraduate recruitment is embedded with their services. The funding allocated is approximately $100,000.

1. Will vendor be required to capture video content for ad units or will raw video be provided for editing? UNCP provides video content.

1. Will vendor be required to take new photography assets or will campus and student life photography be included in scope? UNCP provides photography assets.

1. This RFP speaks specifically to outbound marketing - is organic or inbound marketing being handled separately in house or should the vendor include organic inbound optimization (SEO) as a service item within the media budget? Inbound marketing is currently being supported in house and through a Media contract managed by an additional vendor. Will consider proposals that address organic Inbound optimization focused specifically at undergraduate prospective students as part of the service.
2. Is there a current provider for enrollment marketing services, and if so, who is the incumbent? EAB
3. Will the incumbent be submitting a proposal for this RFP? They have indicated that they will be submitting a proposal.
4. Could you share the anticipated budget for this enrollment marketing project? The current budget for the project is approximately $380,000
5. What is the anticipated media spend? Our current servicer has a media allocation for social focused specifically on undergraduate recruitment is embedded with their services. The funding allocated is approximately $100,000.
6. Are there any specific challenges or goals you aim to address through this marketing initiative? To solidify UNCP in the immediate region as well as in expanded markets to reach more potential undergraduates who are the right fit for UNCP and whomight desire a UNCP education if they knew more about the school – and ultimately to enroll larger freshman & transfer classes.
7. Do you have pre-existing list sources or are you looking for us to research and recommend additional ones? We have pre-existing list sources; but are also looking for a partner to aid in analysis to determine that the current list sources and the purchasing mix is appropriate to meet our enrollment goal.
8. How many print pieces do you typically mail a year? We typically mail postcard mailers. 12,000 this past year. We expect to increase that.
9. Do you have a budget range for annual spend? The current budget for the project is approximately $380,000.
10. Is Direct Mail the only traditional media item included in this bid?  Others would be TV, radio, OOH, etc. and we assume are not included. Direct Mail and Digital/Social are the current media sources used. TV/Radio, OOH would not be part of this bid.
11. Can the University clarify what they envision as the awardee’s role in “Responding to the leads generated by direct marketing campaigns”, per **page 13** of the RFP? As the current advertising agency of record for an NC Promise UNC System institution, and a number of North Carolinian Universities, we haven’t seen this requirement outsourced to the advertising entity before. The scope of this project is beyond a traditional advertising campaign – it is focused on generating applications from the correct sources of students interested in the education at UNCP and would encompass a plan that moves prospective students through the application funnel.
12. **Page 13** of the RFP states that the awardee will be responsible for “maintaining communication with prospective students to encourage them to inquire and apply for admission”; can the University clarify their vision for the awardee’s role? Is the awardee meant to make direct contact with individual leads converted by the advertising campaigns? The Service would encompass a plan that moves prospective students through the application funnel by connecting with the students via a variety of modalities (Digital, Email, Print), connecting with the prospective students based on their stage of inquiry/application status.
13. **Page 13** of the RFP indicates “development and delivery of online resources such as electronic inquiry forms and applications for admission” as part of the project scope; is it the University’s intent to have the awardee build website forms as an extension of the University’s current website, or would these forms be separate and hosted separately? Is the awardee responsible for creating landing pages to house forms created by the University? The intent is to use a service that will engage new prospects to take action, engage with the institution, ultimately apply, and then enroll. We will evaluate the entire proposal and leave the plan to the vendor to propose; however, our current service drives students tolanding pages built and hosted by the vendor as part of the platform. Ultimately, the students are then driven to our website and engages in our content.
14. **Page 14**of the RFP indicates that “the vendor must have a proven program for data security including a secure file transfer protocol (SFTP) system”; to help us better clarify which of our many different SFTP protocols applies, can the University clarify in what contexts the transfer of files would be necessary for the project? We do not have one method for sharing files (in this case the files contain student data and PII) so the files that are shared must meet SFTP standards. The transfer of files is necessary for data exchange between UNCP and the vendor.
15. Regarding the requirements on **page 14**, will the University be able to provide the awardee with direct access to their Salesforce/Target X platform(s) for smooth integration? We do share access to pull some data and we partner on the integration. The actual integration work behind our firewall is typically controlled by our data managers.
16. What is the current CRM used by UNC Pembroke? Target X built on Salesforce
    1. What is the range for the digital advertising budget? Our current servicer has a media allocation for Social focused specifically on undergraduate recruitment is embedded with their services. The funding allocated is approximately $100,000.

1. Is there a technology investment that is separate? What marketing tools/software are you currently using, if any? TargetX built on Salesforce is our CRM. We do not have additional technology investment that is separate. The RFP expects the vendor to provide own tools.

1. Have you worked with a third-party or used outside data resources in the past? Education data partners etc.? EAB is our current vendor for this service.
2. How many applications did the university receive in 2023 and 2024?
   * 1. Fall 2023 7075 Freshman 1515 Transfer
     2. Fall 2024 8476 Freshman 1245 Transfer as of April 15
3. What is the application goal for 2025 & 2026?
   * 1. Fall 2025 8500 Freshman (more Domestic Applications)

1750 Transfer

* + 1. Fall 2026 9000 Freshman (more Domestic Applications)

1750 Transfer

Enrollment goals for 2025 & 2026?

* + 1. Fall 2025 1100 Freshman (25% of class from OOS/INTL)

1000 Transfer

* + 1. Fall 2026 1200 Freshman (25% of class from OOS/INTL)
       - 1. Transfer

1. How many total names has the university purchased historically for student search per year? 75,000 approximately – We are evaluating the amount for future planning.
2. How many inquiries does the university have for the recruiting class of 2024, 2025 and 2026? (some duplication expected in the numbers below)

2024 Prospects: 126,654

2024 Inquiries: 13,300

2025 Prospects: 52,541

2025 Inquiries: 718

2026 Prospects: 27,198

* 1. Inquiries: 267

1. Does the university have existing publications and email communications that can be utilized for the fulfillment of inquiries?  We have developed some existing publications and some email communication flows written. Looking for partner who builds this out with us as part of their services.
2. How long has the university been on the TargetX/Salesforce CRM? 3 years
3. Does the university have robust email journeys built for fulfillment of multi class recruiting? No
4. The RFP states, “Vendor must build from established messaging and creative with a minimal discovery process.”  We would want to launch early Fall, preferably with a plan in first of August. We are looking for a vendor whose established process is focused on a 8 – 12 week process, not a 4, 5, or 6 month to get things created and launched.
5. What is considered Minimal, and will the chosen firm have access to all of the established messaging and creative that is currently being used? We would want to launch early Fall, preferably with a plan in first of August. We are looking for a vendor whose established process is focused on a 8 – 12 week process, not a 4, 5, or 6 month to get things created and launched. Yes, our partner would have access to UNCP’s current messaging and creative.
6. The RFP states, “direct marketing services including message development, publication design and creation, distribution management, digital strategy, communication planning and tracking, and responding to the leads generated by direct marketing campaigns.”  Does the university desire that the chosen firm will run all fulfillment after an inquiry, or application is produced? Or will the university run that fulfillment?

The chosen firm will run part of the fulfillment, in conjunction with the university.  The chosen firm will continue to utilize various channels to drive actions from inquiry to the applicant to enroll (e.g., social campaign, email, and print).  While the university is building a personal relationship with the student through its own email, text, phone call, and events, to move the student through the stages to ultimately enroll as a student.

1. For publication development, is this limited to the search campaign deliverables, or should we be proposing fulfillment publications too? Publications would be related to the search campaign, typically mailers and or postcards as well as digital publications. The institution creates its own recruitment brochures, viewbooks, road pieces, etc. that the recruitment team takes with them to college fairs**.**
2. Does the university want the chosen firm to host an application for the campaign, or is directing senior prospects to the university-hosted application acceptable? Directing to UNCP’s Existing Application & The Common App, both used by UNCP.
3. The RFP states “Develop, design, and deploy personalized landing pages with dynamic content.” Does the university have personalization capabilities within their existing CRM? Yes
4. The vendor must have a proven ability to communicate effectively with the university’s CRM and SIS. Please explain the firm’s protocol.” The firm must be able to capture data related to the interactions it is having with prospects, applicants, and admits and be able to feed that information back to our CRM. Typically, data exchange is done through a secure file transfer.
5. What is meant by communicate effectively with the university’s CRM and SIS? Is the firm able to use data from UNCP related to the prospect & applicant data pool, capture data related to the interactions the firm is having with prospects, applicants, and admits and be able to feed that information back to our CRM. Typically, data exchange is done through a secure file transfer.
6. Vendor will manage process, data collection and campaigns in concert with the University. All assets, communication platforms developed must integrate with a Salesforce/Target X platform.”    What level of integration is required by the university? Information exchange - We do share access with vendors to pull some data and we partner on the integration. The actual integration work behind our firewall is typically controlled by our data managers.
7. In e) Vendor’s Proposal, the note states to indicate which section the vendor should reference as a guide to addressing all RFP specifications. Is that referring to 5.3, SPECIFICATIONS, or are there any other portions of the RFP that we need to address? No, it is not referring to just section 5.3 SPECIFICATIONS but pertains to all sections that require a response throughout the proposal.
8. Is there a format you would prefer to organize the budget in Attachment A? There is no link to the form since typically there is a provided format so that all proposals can be organized similarly.   No, there is not a preferred format.
9. Is there an estimated annual budget range for this project?  The current budget for the project is approximately $380,000.
10. Should the vendor include estimated/suggested ad spend in the total budget?   Yes
11. #6 in Additional Requirements mentions the CRM and SIS. What systems do you currently use for these? Please include a list of all marketing technology tools and if the vendor or the university team will be "pushing the buttons." Are you open to new tools if they will increase efficiency?  TargetX/Salesforce, Ellucian Banner. We are open to new tools that supplement and enhance what we are doing but do not replace functions already provided by the services we currently are paying for through or enterprise systems.
12. Will the vendor be implementing all campaign deliverables, or will the UNCP internal team work alongside the agency as needed?  The UNCP internal team will work alongside the agency; however, the agency will ultimately implement the campaign deliverables that will be outlined in the MOU and SOW.
13. #7 in Additional Requirements mentions "All assets, communication platforms developed must integrate with a Salesforce/Target X platform." Will the vendor have to DO the integrations, or just ensure that we collaborate effectively with internal teams?  The vendor will be a partner in the process and will be responsible for their part of the project. The firm must be able to capture data related to the interactions it is having with prospects, applicants, and admits and be able to feed that information back to our CRM. Typically, data exchange is done through a secure file transfer.
14. Can you provide goals across the enrollment funnel for the Fall ’24, Fall ’25 and Fall ’26? (Prospect, Inquiry, Applicant, Deposit, Enrollment) We look similar in 2024 for apps & admits but we are up 130% in international students and down 15% in in-state students. We need to attract and enroll more instate & more domestic out of state. We enrolled 90 OOS freshman last year. We are looking for 1000 Freshman this year.

Freshman 25 & 26  
Prospect 100k  
Inquiry 35K  
Applicant 12K   
Orientation 1300  
Enrollment 1200

1. Has a budget range been established for this project and if so, how much is it? The current budget for the project is approximately $380,000.
2. What digital marketing initiatives are you currently doing, or have you done in the past?  How do you measure the ROI of those digital initiatives?

SEM, YouTube, Meta, Snapchat – measure by engagement scores, click rates, and scoring tied to CTA and linked to specific applications and enrollments.

We also do some retargeting and geofencing.

1. Culturally speaking, what are you looking for in a recruitment partner?

A firm that will be an extension of our Admissions & Marketing team, bringing additional expertise to the discussion as well as someone to do more work than our staff are able to do. Must be respectful and have a team mentality – this is not a set it and forget it initiative with no interaction from the school.

1. Please describe your current recruitment/enrollment process and outcomes.  What would you like to retain versus what you’d like to do differently? We are looking for strong messaging on brand, additional opportunity to drive interactions and information about applicants/admits that the admissions team can use to prioritize the applicants with the most likelihood of enrolling. We want to modernize our communications and the approach we use to engage with students and move them along the funnel.
2. How will you define success in a new recruitment partnership beyond reaching your numerical enrollment goals? Enhance the reputation of the institution among college going population & major stakeholders to help UNCP become a first-choice destination school for most of our students instead of a Plan B school.
3. Historically from what sources and what volumes of Seniors, Juniors, and Sophomores have you purchased in the past?

About 100K names – mostly seniors, and a few juniors in the spring (rising seniors). No sophomore buys in our recent history.

1. Can you provide the top 5 inquiry sources for the University’s first-year Inquiries, Applications, and Enrollment for Fall ’21, Fall ’22 and Fall ’23?  Approximately as we have been working on standardizing our data, but historically this information was not captured consistently as we only had the tool to begin capturing data in Fall of ‘22: EAB, College Board, High School Visit, Cappex, College Fair.
2. How would you describe the quality of your historical data?  Below Average
3. How many underclassman names and senior names are you purchasing? Currently, about 75,000
4. Do you have a budget in mind? The current budget for the project is approximately $380,000.
5. Are you able to share 3-year enrollment trend data including inquiry to application conversion, admission rate, yield rate, and anything else you think would be helpful?

Our funnel data is for freshman and transfers.  We added the common app in Fall of 2023 so that helped improve our application rates and ultimately our enrollment since the volume increased.  This year we are overall up in applications, but down in-state and out-of-state.  Our increase in internationals is leading to the increased volume.   We are hoping for Fall 2022's yield rate which was in the 35% range, which will allow us to match/exceed Fall 2023's class.

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| Year | Inquiry | Apply | Admit | Enroll |
| Fall 2023 | 39067 | 12332 | 10513 | 1492 |
| Fall 2022 | 55501 | 5717 | 4393 | 1035 |
| Fall 2021 | 26221 | 6868 | 5085 | 1026 |

1. What are your strategic enrollment goals for the next cycle?
   * 1. Fall 2025 1100 Freshman (25% of class from OOS/INTL)

1000 Transfer

* + 1. Fall 2026 1200 Freshman (25% of class from OOS/INTL)

1000 Transfer

1. Are you looking for any support with your website as it pertains to Search efforts?   
   No
2. In the scope of work you mention, "Development and delivery of online resources such as electronic inquiry forms and applications for admission." Are you looking to have a partner create and host an application, or drive students to the institutional application?  
   Drive students to our institutional application or our Common App. Keeping the RFP open if someone has a developed plan that includes an easy app, like an inquiry form that would allow students to start the application by having basic information fed to us.

1) Can UNCP please provide the decision timeline for this RFP?

There is not a definitive timeline for this RFP. Proposal submission/opening is May 9, 2024, with a minimum of 30 days to review.

2) Do vendors need to complete the point of contact information with its response?

Yes, the point of contact information should be completed with the response.

1. Is UNC Pembroke open to working with providers outside of the state of North Carolina?  
   Yes
2. What internal staff resources does UNC Pembroke have in the marketing and recruitment departments? Chief Marketing Officer, Chief Enrollment Officer, Director of Admissions, CRM Manager/Business Analyst
3. What are the skills and specialties of that staff?  Marketing and Recruitment experience – over 90 years. We will discuss creative, tell you the recruitment strategies, pull data, evaluate metrics, and set goals – and overall set the institutional strategy and then share the feedback for the work being done by this firm.
4. Does the university work with an outside vendor at present on this type of campaign work? We set the goals, establish the campaign brief, answer questions, guide the development through feedback, approve the work. We are very collaborative but expect the firm to work with us following our brand and build ideas together. This is an iterative project with lots of information exchanged as well as built together.
5. How does the university today develop predictive and behavioral data models to inform outreach and recruitment efforts to intended audiences? We have only been doing this for a couple of years and need additional assistance. Currently measure interactions with campus (ie: tour, application, attend an event), use engagement information from web data, and some engagement measuring from the current vendor providing this service.
6. How do you acquire list data? Purchase from multiple sources. Currently, College Board, ACT/NACCRUA, Cappex, and CBSS
7. What tools or systems do you use to provide real-time market analysis throughout each campaign? We use vendor tools currently. This RFP will replace those tools.
8. What technology stack and set of tools do you utilize beyond Salesforce and TargetX? For example, website platforms like WordPress, email marketing solutions, analytics tools, CRM technologies (ie Salesforce, TargetX); We are moving to WordPress for our website. Will be ready next December. Our current vendor provides analytics, only use TargetX for our email campaigns.
9. Could you provide an example of an outcome defined for previous campaign?  
   The goal is to keep the funnel strong and increase enrollment each Fall while strengthening the sophomore and junior pipeline of traditional high school students.

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_