



COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No. UCPJMU6189

This contract entered into this 7th day of December 2021, by Ruffalo Noel Levitz, hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From December 15, 2021 through December 14, 2022 with four (4) one-year renewal options.

The contract documents shall consist of:

- (1) This signed form;
(2) The following portions of the Request for Proposal JPG-1131 dated September 15, 2021:
(a) The Statement of Needs,
(b) The General Terms and Conditions,
(c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
(d) Addendum One (1) dated October 4, 2021.
(3) The Contractor's Proposal dated October 11, 2021 and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
(a) Negotiations Summary, dated December 6, 2021.
(b) Ruffalo Noel Levitz Master Service Agreement;
(c) The Commonwealth of Virginia Agency Contract Form Addendum to Contractor's Form, which shall govern in the event of conflict.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:
By: [Signature]
Patricia Shepherd
(Printed Name)
Title: Director of Revenue

PURCHASING AGENCY:
By: [Signature]
Jeremy Good
(Printed Name)
Title: Buyer Specialist

**RFP # JPG-1131, Admissions and Geodemographic Research and  
Marketing Services  
Negotiation Summary for Ruffalo Noel Levitz**

**12/6/21**

1. Parties agree that items within this Negotiation Summary modify RFP# JPG-1131 and the Contractor's initial response to RFP# JPG-1131 and that this Negotiation Summary takes precedence in conflict.
2. The Contractor shall negotiate with JMU and VASCUPP Members, as applicable, on specific services to offer the best price during the Scope of Work; discounting and scaling of costs will depend on the University's objectives.
3. Pricing shall be as detailed in the attached pricing schedule.
4. Travel costs are included in the prices outlined in the pricing schedule.
5. All project meetings and/or consultations are included in the prices outlined in the pricing schedule.
6. No work shall be undertaken by the Contractor until written approval from the University project manager which will be evidenced by a Statement of Work executed by both parties.
7. The Contractor acknowledges that the University is subject to the Virginia Freedom of Information Act and thus cannot accept an entire proposal marked confidential. Contractor rescinds confidentiality statement on Pg. 76 of the proposal.
8. The parties agree that the order of precedence for legal terms will be: 1) The Commonwealth of Virginia Agency Contract Form Addendum to Contractor's Form; 2) Master Services Agreement; 2) the RFP# JPG-1131 General Terms and Conditions and Special Terms and Conditions. The Contractor agrees that all exceptions taken within their initial response to RFP# JPG-1131 that are not specifically addressed within this negotiation summary are null and void.

# RFP JPG-1131 Pricing Schedule

## Marketing and Enrollment Services:

Audit of current enrollment operations and communication analysis	\$ 60,500
Developmental support of enrollment strategy and communications	\$ 87,500

## Slate Optimization:

Review of general Slate overview	\$ 30,000
Strategy and implementation of Slate improvements	\$ 125,000
List purchasing (per list of 100,00 names)	\$ 36,000 (pass through costs)

## Geodemographic Research and Communications:

Competitive analysis consultation(s)	\$ 200,000
Geospatial and market opportunity research	\$ 75,000
Targeted ad campaigns (per campaign)	\$ 53,750
Additional geodemographic services as quoted	\$ 524,400



Response to Request for Proposal

RFP # JPG-1131

James Madison University



ENROLLMENT



STUDENT SUCCESS



FUNDRAISING

# Admissions & Geodemographic Research & Marketing Services

Due Date: October 13, 2021

**ORIGINAL**

**Prepared by:**

Adam Connolly

Vice President of Enrollment Management

**REQUEST FOR PROPOSAL**  
**RFP# JPG-1131**

**Issue Date:** September 15, 2021  
**Title:** Admissions and Geodemographic Research and Marketing Services  
**Issuing Agency:** Commonwealth of Virginia  
James Madison University  
Procurement Services MSC 5720  
752 Ott Street, Wine Price Building  
First Floor, Suite 1023  
Harrisonburg, VA 22807

**Period of Contract: From Date of Award Through One Year (Renewable)**

**Sealed Proposals Will Be Received Until 2:00 PM on October 13, 2021 for Furnishing The Services Described Herein.**

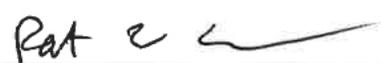
*SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.*

All Inquiries for Information and Clarification Should Be Directed To: Jeremy Good, Buyer Specialist, Procurement Services, [goodjp@jmu.edu](mailto:goodjp@jmu.edu); 540-568-3131; (Fax) 540-568-7935 not later than five business days before the proposal closing date.

**NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.**

In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:  
Ruffalo Noel Levitz, LLC  
\_\_\_\_\_  
1025 Kirkwood Parkway SW  
\_\_\_\_\_  
Cedar Rapids, IA 52404  
\_\_\_\_\_

By:   
(Signature in Ink)  
Name: Rob Ackley, PHR, SHRM-CP  
(Please Print)

Date: 10/11/2021  
Web Address: www.RuffaloNL.com  
Email: Rob.Ackley@RuffaloNL.com

Title: Exec VP, Humar Resources & Administration  
Phone: 800.876.1117  
Fax #: 319.362.7457

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 NR #2 \_\_\_\_\_ #3 \_\_\_\_\_ #4 \_\_\_\_\_ #5 \_\_\_\_\_ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:  
 YES;  NO; *IF YES* ⇒⇒  SMALL;  WOMAN;  MINORITY **IF MINORITY:**  AA;  HA;  AsA;  NW;  Micro

Note: This public body does not discriminate against faith-based organizations in accordance with the Code of Virginia, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.



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[RuffaloNL.com](http://RuffaloNL.com) | [ContactUs@RuffaloNL.com](mailto:ContactUs@RuffaloNL.com)

Jeremy Good – Buyer Specialist  
James Madison University  
Procurement Services MSC 5720  
752 Ott St, Wine Price Building  
First Floor, Suite 1023  
Harrisonburg, VA 22807

October 11, 2021

Dear Jeremy and the RFP Evaluation Committee:

The landscape of higher education is in a constant state of change and innovation. Campuses are adapting to a new generation of students. Colleges and universities need a **trusted, established, and highly credible** partner to help navigate the constant change. RNL is that trusted campus partner for hundreds of campuses helping to reach their enrollment goals. We are excited by the opportunity for RNL and JMU to collaborate to meet university enrollment objectives with a strategic approach to enrollment marketing campaigns.

Many institutions similar in size and scope to JMU have turned to RNL for our comprehensive market research and enrollment marketing capabilities and extensive consulting experience. This breadth of experience allows us to leverage best practices no matter where we find them. As you review your partnership options, here are a few highlights why institutions choose to partner with RNL for enrollment management solutions:

- ✓ **Longevity and adaptation to the current environment** - RNL's nearly five decades of history serving higher education ensures that every recommendation, project, and analysis relates directly to helping our campus partners make the right enrollment growth and stability choices. The RNL Innovation Lab is constantly testing and infusing new technology and trends into our marketing strategies so you remain at the forefront of marketing best practices.
- ✓ **Vast understanding of the higher education market** - We offer market research, enrollment marketing services, and enrollment planning solutions to institutions across the country. Our mission is to make colleges, universities, and nonprofits successful and vibrant with inspired and relevant engagement with our team of experts.
- ✓ **Data and consulting that generates actionable strategy** - Nearly all of our market research projects include analysis of various data sets and consultation designed to ensure that our partner institutions understand the data collected and can develop sound recruitment strategies based on the research findings. Our collaborative consulting approach turns those insights into action that will be JMU's plan, not ours.
- ✓ **Practical knowledge of how to use the data** - RNL has extensive experience in creating robust marketing campaigns to support student recruitment efforts across hundreds of campuses annually. Because our strategies are research-based, we know how to use these results to inform the marketing strategies we create on behalf of our campus partners.

The following proposal outlines our approach to supporting the university's admissions and geodemographic research and marketing needs. We look forward to learning more as the university evaluates responses. I remain available should you have any questions regarding our proposed approach.

Sincerely,

A handwritten signature in black ink, appearing to read "Adam Connolly", with a stylized flourish at the end.

Adam Connolly – Vice President, Enrollment Management  
[Adam.Connolly@RuffaloNL.com](mailto:Adam.Connolly@RuffaloNL.com) | 863.860.8255

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## Section IV. Statement of Needs

**1. The Office of Admissions at JMU is seeking admissions geodemographic research and marketing services to identify new and emerging markets, develop marketing strategies to attract students in existing and new markets, and increase overall student yield. Respond to each area below in detail and describe your firm's background in these general categories.**

**1.a. Geodemographic and market analysis of new and existing markets to identify new pipelines of students in and out of state.**

We know your goals are full-funnel, so your analytics should be too. Our data and insights make sure that you are growing the metric that matters—**enrollment**. From the top of the funnel to the bottom, you won't find more powerful insights.

RNL has been providing market research and predictive modeling services to our campus partners for over 25 years. We specifically recommend our search model, RNL ForecastPlus inquiry-to-enrollment model and enrollment projection modeling.

### Find the Right Students

Our formula for success sources qualified and interested students through traditional search and top-performing lead aggregators. But we know not all sources of student records are the same, and your geographic markets behave differently.

RNL's predictive search model and insights help us determine the right markets to build enrollment, the right markets to find growth opportunities, the optimal sources of search records, and markets where strategies beyond list purchasing can yield the best results. What you get is a top-of-the-funnel strategy that is diverse, flexible, and backed by data. But that's only where our analytics start.



#### Make the Most Efficient Name Purchase

We maximize your ROI with four discrete predictive models that identify multivariate impacts on your enrollment at an unsurpassed, granular level.



#### Identify New Market Opportunities

As the high school population flattens and competition increases in your markets, we bring data to identify strategic growth opportunities.



#### Efficiently Plan Counselor Travel

Our modeling also brings value to your recruitment efforts. We provide high school scoring and ZIP ranking to help you prioritize counselor time and strategically allocate your travel budget.



### 1.a. continued

We achieve this by:



Aligning your list strategy with your overall enrollment strategy



Analyzing previous list purchases so we can focus your resources on the right geographic areas



Taking different approaches with different name vendors



Building a statistical profile of the type of student who enrolls at JMU



Segmenting your lists and finding students who are the best enrollment prospects



Creating a strategy for your highest-scoring non-responder names

## Identify Which Inquiries are Most Likely to Enroll

Powered by customized multivariable analyses, *RNL ForecastPlus™* uses JMU's past enrollment data to predict future enrollment results. We'll find characteristics that influence JMU's enrollment and weigh the amount of their influence on enrollment, then apply your *ForecastPlus* model against *each student* in your inquiry pool to see how much they fit the profile of a student who did enroll. We refine and strengthen our approach by appending additional socioeconomic and demographic data to your model.

### Increase enrollment management precision and efficiency

*Proven effective on more than 100 campuses*, *ForecastPlus* allows you to optimize the enrollment impact of your communications and channel scarce resources into the recruitment strategies with the greatest potential for improving enrollment and increasing your ROI.



#### Increase Enrollment Yields

Focus your efforts on the prospective students who are more likely to enroll.



#### Shape Enrollments

Rank your best enrollment prospects by geography, gender, ethnicity, field of study, academic standing, or any other characteristic you desire.



#### Save Vital Resources

Save money on postage and printing by targeting your communications, and save time and effort by focusing the activities of your admissions staff.

### Know the score with your student leads

*ForecastPlus* scores your entire inquiry pool from 0.01 to 1.0—the higher the score, the greater the likelihood of that student enrolling. Because every student lead receives a score, it is very easy to qualify and grade your leads.



1.a. continued

A segment may look like this:

**Elias and Myron** are highly likely to enroll. Give them your attention and they will likely become students.

**Josephine, Kate, and Ryan** are also very strong. You definitely want to make communicating with them a priority.

**Tricia and Rex** are on the fence. They will need more persuasion and communication.

**Dominic and Kelly** are true long shots. You'll probably want to segment them from your main communication flow.

Elias Ballard	.99	Highly likely
Myron Kim	.88	Highly likely
Josephine Mendoza	.79	Likely
Kate Burk	.72	Likely
Ryan Marshall	.68	Likely
Tricia Andrews	.56	Somewhat likely
Rex Gutierrez	.42	Somewhat likely
Dominic Sims	.31	Less likely
Kelly Lockhart	.12	Less likely

Your ForecastPlus model is *fluid*, scoring your inquiries all year long and adapting for changes in student behavior (e.g., if a student visits campus, the model adjusts their score and enrollment probability accordingly). We also integrate *machine-learning techniques* in a competitive tournament environment, which not only introduces new types of models but also allows them to compete against each other. This tournament-style approach determines the most effective “champion” model, which could result in stronger model performance and net the university improved enrollment results.

“I’ve been in enrollment for 22 years. I’ve never seen these kinds of numbers. I’ve never seen this kind of growth—especially in a contracting market.”  
AVP Enrollment Services

When part of Student Search & Engagement (see our response to item 1.c. starting on page 21 for a detailed description of this service), our in-platform student and parent surveying can be expanded to include additional channels to reach even more of your pool. You’ll gain valuable insights such as:

- ✓ How interested and likely they are to apply
- ✓ Where they rank JMU among the colleges they are interested in
- ✓ What their academic interest is at this time
- ✓ How difficult they perceive financing their college education
- ✓ How likely they are to accept an invitation to visit campus
- ✓ The most important factor to them in their college search



### 1.a. continued

## Reveal key data elements down to the ZIP+4 level

Using Acxiom data to supplement your historical data ensures that our predictive modeling services provide the most accurate, precise, and detailed predictive models for enrollment management. Appended data categories include:

- ✓ **Personicx clusters**—Personicx is an advanced tool for demographic segmentation. Using 70 different categorization “clusters,” Personicx offers fresh data that accurately reflects the subtle, yet distinct, differences between demographic groups.
- ✓ **Average household income**—With household-level detail, JMU will get even more accurate income data.
- ✓ **Ethnicity classifications**—As with household income, the Acxiom ethnicity classifications drill down to the household level, making it easier to identify students from specific ethnic groups who wish to enroll at JMU.

We also provide some calculated variables that come from your own data, such as number of days as an inquiry and distance from campus.

## Forecast the Impact of Future Demographic Changes

Our partner institutions have reported dramatic shifts in traditional student markets as demographic changes and decreased high school graduates and fluctuations of adult students heighten competition and alter the supply of students across the country. We work with institutions to develop a more strategic understanding of their emerging enrollment trends and develop a more precise understanding of where these shifts are occurring within their region and how they will affect enrollment.

Our research team addresses the question of future enrollment for JMU by estimating the likely levels of enrollment given projections in the trends of graduating high school seniors and community college (transfer) enrollments students. Creative and strategic uses of the data include identifying specific regions to target recruitment activities by revealing pockets of student subpopulations, focusing travel in precise geographic areas, and targeting list purchases and mailings more strategically.



### *Projections for New First-Year Students*

We first prepare demographic projections of the size of the high school senior classes in counties in an institution’s region where they draw significant numbers of students. These projections are developed for each major race/ethnic group and for all students in each county. We then use historical data on the numbers of enrolled freshmen from each county to calculate the institution’s current share. We then use this information and projections of the size of the high school classes to develop projections of freshman enrollment at the institution over the next 10-year period.



1.a. continued



Projections for New Transfer Students

For new transfer enrollment, we also begin with projections of graduating high school classes by county and race/ethnic group and then project the estimated size of the potential transfer market (based on college going rates and expectations of student transfer rates). We then use historical data on the numbers of enrolled new transfer students (under the age of 24) from each county to calculate the institution’s current share of the estimated potential transfer student market. We then use this information and projections of the size of transfer market to develop projections of new transfer enrollment at the institution over the next 10-year period.

Sample deliverables

We provide an Excel workbook with summary tables that show the multi-year projections for new first-year and transfer students. This tool provides a baseline forecast to include:



No changes in market share and the most likely future trends in the size of each market



A best-case forecast that assumes increases in market share and the most likely future trends in the size of each market



A worst-case forecast with loss in market share and likely trend in market size.

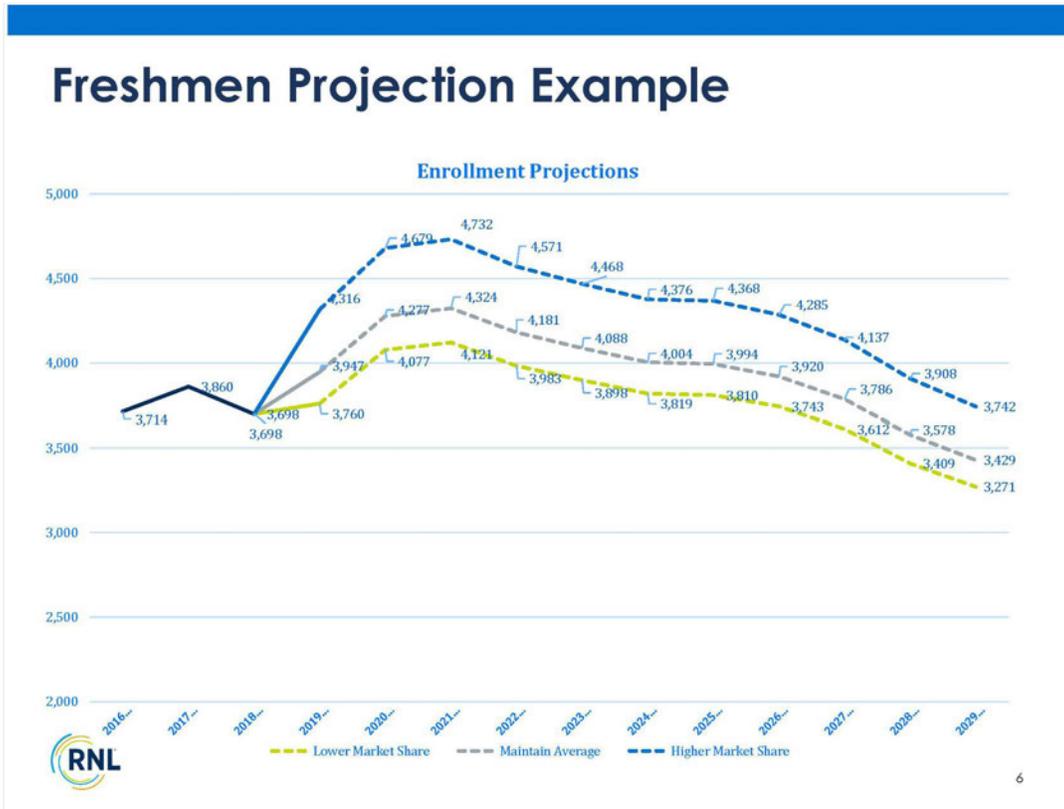
The spreadsheet tool that we provide allows the institution to alter the assumptions about the increase or decline in market share to explore alternative projections.

Table with 16 columns (Market, 2015-2016 Market, 2016-2017 Market, 2017-2018 Market, 2018-2019 Market, 2019-2020 Market, 2020-2021 Market, 2021-2022 Market, 2022-2023 Market, 2023-2024 Market, 2024-2025 Market, 2025-2026 Market, 2026-2027 Market, 2027-2028 Market, 2028-2029 Market) and 17 rows of market data including Hall, Gwinnett, Forsyth, Jackson, Fulton, Cherokee, Oconee, Barrow, Lumpkin, Clarke, Cobb, Walton, and DeKalb.

Market Size Projections: This Excel tables show total market (actual and future) of prospective freshmen projections by county using NCES data.



1.a. continued



Visual Representations show actual enrolled freshmen for 2016-2018 and projections for future years. Projections show best-case, worst-case, and no-change scenarios.

### Make decisions and act on projection data

In a webinar presentation, your RNL consultant will illustrate how enrollment projection data can be used strategically and creatively to inform infrastructure development. These projections can provide valuable information for focusing campus planning and recruitment efforts.

Specifically, RNL’s presentation of county-level projections will allow JMU to:

1. **Identify regions to target for recruitment activities.** Not only can county-level projections reveal very specific overall growth estimates of college-bound seniors, they can also reveal pockets of student subpopulations.
2. **Target travel more precisely.** This is especially valuable for campuses that have to cover larger geographic areas for recruitment.
3. **Prioritize investments in marketing by program and channel.** As with travel, knowing where you should be advertising and focusing outreach efforts can save a great deal of time and money.
4. **Estimate potential range of impacts needed for campus capacity planning.** Given results of varied recruitment scenarios, campus planning assumptions can be validated and prioritized.



**1.b. Identify and develop a 5-year comprehensive strategy to increase enrollment from underrepresented student populations and programs of study.**

- i. Increase male enrollment by 10%.**
- ii. Increase racial and ethnic diversity enrollment from 24% to 30%.**
- iii. Increase first-generation enrollment by 10%.**
- iv. Increase the percentage of Science, Technology, Engineering, and Mathematics (STEM) applicants by 10%.**
- v. Increase the number out-of-state applications in existing and emerging markets.**
- vi. Stabilize and improve out-of-state enrollment with an enrollment goal of 30% out-of-state representation.**

## Develop a Five-Year Strategic Enrollment Plan

In today's disrupted higher education environment, JMU needs a strategic, data-informed plan that will address the new realities of enrollment management, meet your enrollment goals, and achieve long-term institutional sustainability.

**RNL Strategic Enrollment Planning** (SEP) helps our higher education partners cultivate data-informed strategies for predictable long-term enrollment and fiscal health. While the events of 2020 forced many institutions to be reactive and adaptive, SEP allows us to **think and plan beyond the immediate** to identify strategic initiatives that allow our partner institutions to thrive through the new decade.



Develop a highly sophisticated and robust understanding of your current state



Employ a realistic ROI and action-item approach to planning



Focus and align your enrollment strategies with your mission, current state, and the shifting environment



Establish quantifiable, attainable, and prioritized goals designed to fuel continuing success

## Get more than a long-term recruitment or retention plan

We incorporate academic program and co-curricular planning with SEP. Why is this so fundamentally important? Because it puts the primary purpose of most colleges and universities at the center of the planning process—to **educate students**. Academic programs form the heart of JMU, so enrollment functions must support your academic and co-curricular programs to fully realize the university's educational goals.

RNL's approach to SEP is built upon an extensive foundation of research and literature review, tempered by **over 45 years** of observations from and experience with **more than 3,000 colleges and universities** across the country.



### 1.b. continued

At the outset, we invite faculty, academic leadership, and finance to the table to join enrollment management in identifying institution-wide challenges and developing potential solutions. Our methodology is predicated on the firm belief that *we must all collaborate to plan for the long-term health of JMU*, thus breaking down any organizational silos that inhibit institutional excellence.

This consultative approach runs much deeper than leading focus groups and delivering a plan to you. Because of the high levels of engagement, participation, and work from across the institution, the result will be *your plan*, owned by the campus constituents who participated in building it and championed by those who must lead implementation and execution. The RNL approach values institutional commitment, engagement, leadership, and long-term impact.

*We've worked with institutions of every size, type, and mission.* RNL has partnered with more than 100 colleges and universities to create strategic enrollment plans that help them align with changing academic demands, employment needs, and student diversity.

### Trust Our Expert-Led Process



“Institutions have finite resources. An important part of the [SEP] process is **prioritization**—identifying a small number of strategies that are really **essential** and not trying to do 100 things adequately or poorly.”

Lew Sanborne, PhD, Senior Vice President | RNL



### RNL Wrote the Book on Enrollment Strategy

Our *Strategic Enrollment Planning: A Dynamic Collaboration* provides comprehensive coverage of this critical subject

JMU's strategic enrollment plan should determine key performance indicators (KPIs), key strategies, and enrollment goals to be reached through implementation of the plan. Annual plans take the operational items identified through the planning process and move these tactics to action. Together, RNL and JMU will identify milestones so that the university can reach goals before aiming for new ones. See page 15 for our approach to annual planning for JMU's action items.



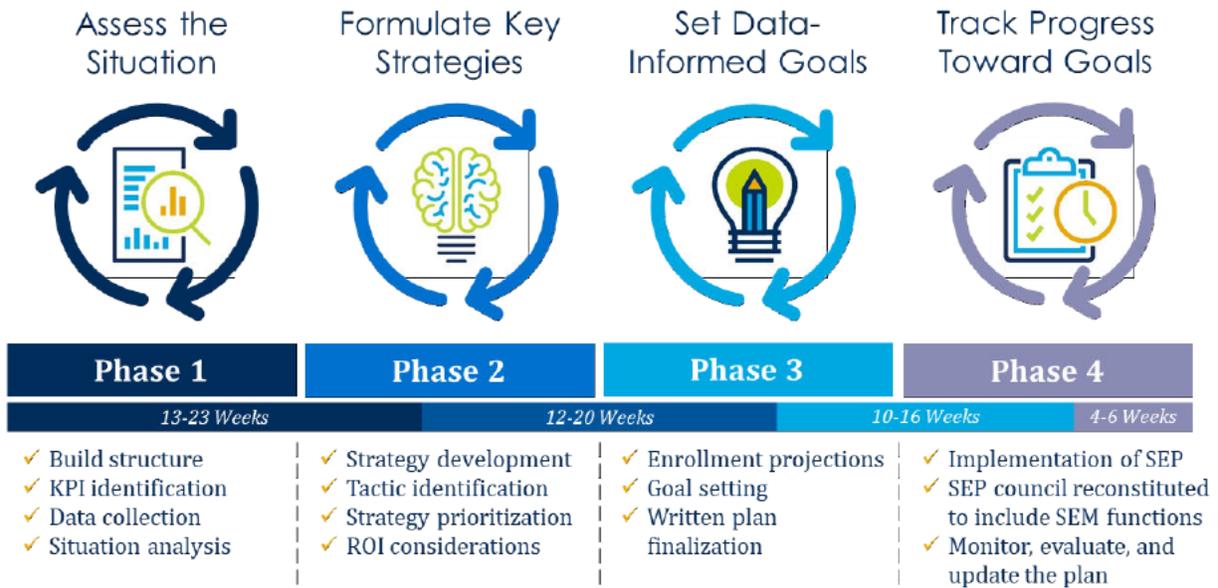
### Be engaged in the process and own your plan

The goal of SEP is not to do everything, but to use data to identify the strategies that have the greatest potential to improve institutional performance and mobilize the campus community to action. There simply won't be bandwidth to do it all, so a systematic, data-informed planning process with clear criteria for prioritization is an absolute must.

The RNL SEP process typically encompasses four phases over 9-15 months. These phases provide an overview of the tasks and relative timing of the stages, which will be shaped specifically for JMU's developing needs.



1.b. continued



SEP is not a linear planning process. Instead, it should be viewed as a **recursive process** that proceeds through the phases outlined above, looping back as necessary, and then becoming part of JMU's regular planning regimen. As a result, our partner institutions often report **positive enrollment results during the planning year**, not just after the plan is completed and implemented.



### Assess the situation

Your RNL consultant will collaborate with the JMU team to complete a thorough review of internal and external data and current practices. This includes determining Key Performance Indicators (KPIs) and developing a situation analysis that sets the stage for the rest of the planning process.

Specific components of this phase will likely include:

- Reviewing your institutional strategic plan;
- Defining the scope of your planning process;
- Organizing leaders and participants, including the steering committee (or council) and key campus working groups focused on student success, marketing and recruitment, finance, academic programs, and others;
- Defining KPIs;
- Collecting and reviewing data relative to each KPI; and
- Conducting a data-informed situation analysis.



### Make Data-Informed Decisions, Not Data-Driven

We work with you to use data to **inform** your enrollment strategy decisions. But JMU is a complex organization, so we don't just focus on the data. Your RNL consultant will pay close attention to important cultural and human elements at JMU that should be considered in the decision-making process.



## 1.b. continued



### Formulate key strategies

A high-quality situation analysis drives high-impact strategy development. We'll help categorize, combine, and prioritize potential strategies to inform the development of clear, distinct strategies and tactics.

Your RNL consultant will collaborate with your team to:

- Develop data-informed strategies addressing the findings of the situation analysis;
- Optimize the KPIs;
- Identify the major tactics and action items to support each strategy;
- Prioritize the strategies and tactics based on the expected enrollment and financial impact; and
- Identify additional data needed to refine the strategies, tactics, costs, and ROI.



### Set data-informed goals

Goal setting includes developing realistic enrollment estimates, projecting the expected impact of prioritized strategies and tactics, and calculating each resulting ROI. The resulting goals are based on data—**clear, quantifiable, and attainable**—and can include, but are not limited to the goals identified in this RFP regarding increased male enrollment, racial and ethnic diversity enrollment, first-generation enrollment, and STEM applicants, as well as out-of-state applications and enrollment. Activities during this phase will include:

- Developing baseline Enrollment Projection Models based on JMU's historical market share rates for first-time-in-college (FTIC) class sizes and/or transfer student projections (see page 8 for detailed description);
- Incorporating anticipated outcomes from prioritized enrollment strategies into the baseline Enrollment Projection Model, allowing us to calculate multiple enrollment scenarios and resulting outcomes;
- Determining multiyear KPI goals based on the most attractive scenario;
- Finalizing your written plan; and
- Coordinating the institutional approval process for the plan.



### Track progress toward goals

SEP can't be "one and done." We'll help you form a Strategic Enrollment Management Council to monitor your KPIs and provide regularly scheduled progress reports. Your team will be equipped to work through the process of responding to results that exceed, match, or miss expectations.



### 1.b. continued

During this phase and beyond, JMU will be prepared to:

- Thoroughly implement your plan at every level;
- Rely on the tools and training we have collaboratively developed to keep the plan moving forward;
- Monitor and evaluate your plan’s outcomes; and
- Develop strategies to continually update your plan to align with new data or environmental changes.



The planning process is so well-defined that it gives us the confidence to do things that involve a little risk. When the plan comes together, it’s very rewarding. But it doesn’t mean our work is over—far from it. It should never end.”

Vice President of Enrollment Services

But a successful planning process should have **organizational and cultural benefits** beyond just moving the metrics. Our goal is to inclusively and transparently engage the JMU campus community and raise awareness of how enrollment influences institutional health and success. We’ll work together to break down silos, provide a common campus vocabulary, and change the ways JMU uses data in decision making. Campus culture and climate changes may be harder to measure but are an important outcome of RNL’s SEP process.

## Create a Data-Driven Annual Recruitment Plan

While the vast majority of institutions report having annual marketing and recruitment plans in place, a significant number do not believe their plans are of excellent quality. The recruitment of new students has become fiercely competitive and requires masterful planning and execution. Planning alone does not ensure results, but it does provide disciplined appraisal, goal setting, and strategizing that can minimize failure. Developing an annual recruitment plan that includes defining the current state, setting goals, identifying strategies, and writing action plans can vastly improve the chances that new-student enrollment goals will be met at JMU.



The university’s annual recruitment plan should be in alignment with your strategic enrollment plan, taking the operational items identified through the SEP process and moving these tactics to action.

### What sets RNL apart

Our experts have worked with more campuses than any other firm to help them analyze their opportunities and develop data-informed strategies to enroll the class they want. JMU will draw on this deep pool of collective expertise and a wide array of technological resources to develop an efficient, data-driven approach toward your achieving your goals.



We were able to really brainstorm and create a plan of the future—to bring our recruitment practices to the 21st century.”

AVP, Recruitment and Admissions



1.b. continued



**Create a Clear Path for Achieving Your Goals**

Our systematic, data-informed planning process will help us develop the optimal strategies for achieving your goals.



**Increase Your Operational and Organizational Efficiency**

We prioritize your resources more strategically to develop a stronger, more focused organizational structure that better serves your enrollment objectives.



**Move Faster Than You Could on Your Own**

We're your catalyst to set goals, develop plans, and realign resources. As an objective change agent, we foster increased cooperation and agreement on any organizational changes.



**Measure the ROI for Every Strategy**

We give you concrete metrics and data to justify successful strategies and adjust those that are not as effective, increasing both accountability and transparency.



**Increase Staff Knowledge and Capabilities**

We ensure your staff possesses the necessary skills, knowledge, tools, and training to meet your enrollment goals and maintain progress year after year.



**Get a Partner Who Collaborates for Success**

Your RNL consultant is a true partner, providing frequent communication through on-site or virtual meetings, conference calls, and reports.

**Plan to maximize enrollment**

First, your RNL recruitment consultant will sit down with you and listen. We'll learn more about your enrollment goals, your successes, and your challenges. Then, we'll collaborate with your team to build an annual marketing and recruitment plan inclusive of these key steps:



**Assess the Situation**

Compile data for a recruitment SWOT analysis



**Set Data-Informed Goals**

Establish realistic recruitment goals



**Formulate Key Strategies**

Develop strategies to achieve realistic goals



**Develop Action Plans**

Identify responsibilities, dates, objectives, and budget



**Track Progress Toward Goals**

Monitor progress and measure success



### 1.b. continued

The best way to ensure successful development and implementation of your annual plan is for our consultant to be with the JMU team early and often. Our process is flexible, scalable, and tailored to your unique needs.

These sessions will help build an infrastructure that will allow the JMU and RNL teams to systematically develop and implement marketing and recruitment action plans, review and revise systems that must work together seamlessly, and facilitate the changes in organizational behavior necessary to achieve the university's enrollment goals.

A well-conceived plan is an organized thought process and communication tool that describes what JMU wants to achieve and how it will accomplish it. In short, it is the roadmap to reaching your new-student recruitment goals. An overview of our planning stages, which will be shaped specifically for JMU's developing needs, is included below.



### Assess the situation

The initial step is to document the current state of enrollment with historical data, market research, and an articulation of the internal and external environments in which the enrollment effort must be carried out. This includes the following tasks:

- Review JMU's mission statement;
- Confirm the primary target markets and enrollment growth strategies your campus is pursuing;
- Assess current strengths, weaknesses, opportunities, and threats, or driving forces (combination of strengths and opportunities) and restraining forces (combination of weaknesses and threats);
- Compile and review historical enrollment, recruitment, and admissions data, both overall and by specific program or market segment;
- Review appropriate demographic trends and environmental data; and
- Evaluate existing information from recent competition or market research studies.



### Set data-informed goals

Setting clear, realistic goals is a fundamental key in the recruitment planning process—and one that must occur jointly between admissions and executive leadership. We will work with JMU to develop goals that are:

- Derived directly from the recruitment planning process and serve as an expression of the outcomes of the annual recruitment plan;
- Quantified and understandable to all who are accountable to the achievement of the goals;
- Stated as simply and concisely as possible;
- Mutually agreed upon by all whose efforts must achieve them; and
- Supported by one or more strategies.



1.b. continued



### Formulate key strategies

The next step in the planning process is to formulate key new-student enrollment strategies that are designed to achieve the annual goals. Most goals have multiple strategies. Like goals, these key strategies should be prioritized, measurable, clear, specific, and realistic. We will collaborate with you to spend the necessary time to ensure formulation of the key strategies that will produce the best results for JMU.

Effective recruitment plans include a variety of strategies that will vary from one institution to the next and by student population, but some are central to any plan. Essential areas of focus for JMU’s strategies will include:

- Recruitment marketing efforts;
- Funnel and data management;
- Key marketing messages and communication flow;
- Territory management, outreach, and travel;
- Market penetration;
- Pricing and scholarships;
- Organization and operations of recruitment and admissions;
- Campus visit programming;
- Website analysis (optional); and
- Staff training and development.



### Develop action plans

The final step of the planning process is to devise action plans for each of the key strategies, which will form the “heart” of your annual plan. Each strategy must be supported by one or more specific activities necessary to successfully accomplish the strategy. The activity plan describes the actions or tactics that will occur in order to implement the strategy and achieve the goal. The action plan will assign responsibility, as well as include clear beginning and end dates, measurable objectives when appropriate, and budget information.



#### What Are You Going to Do?

Describe specifically a quantifiable and measurable activity.



#### Who Will Be Responsible?

Designate clear assignments of responsibility for performing important tasks.



#### When Will It Be Done?

Provide timetables that clearly show key dates and deadlines.



#### How Much Will It Cost?

Provide budget information showing the cost of implementation.



### 1.b. continued



## Track progress toward goals

Essential to this process is measuring outcomes and feeding the results into your future planning efforts. We'll work with you to monitor key performance metrics and help you make adjustments, as needed. While each institution has specific enrollment-related goals with methods for evaluation, some common performance indicators we may choose to monitor at JMU include:

- Conversion, yield, and melt rates;
- New-student enrollment (headcount and/or FTE overall and by market segment);
- Entering student quality (test scores and/or GPA);
- Diversity or underrepresented student enrollment; and
- Net tuition revenue generated.

### 1.c. Developing inquiries and leading the inquiries to applicants.

## Generate Leads from Organic Search

Whether a prospective student has seen an ad for your institution, been referred by a friend, engaged with your faculty, visited your social site, or visited campus—*they will always find their way to your website*. Your site is their most influential resource to learn more about your program offerings, cost, enrollment processes, student support, convenience considerations, career outcomes, and more.

Search engine optimization (SEO) is the foundation for being found online so prospective students can get informed on your programs and brand. Your website must provide clear pathways to this information with valuable content that conveys the specific benefits and values inherent to a JMU education.



**FACT:** Implementing a strong SEO strategy is the difference between ranking highly in search engine results, where most clicks are made, or ranking poorly (or, worse, not at all).



## 1.c. continued

### Write copy that appeals to search engines and students

For a robust approach to SEO, RNL will work with the university to develop search-engine-optimized, benefits-focused content for priority academic program and enrollment-focused landing pages. For optimized search engine rankings, the content will directly address the concepts RNL knows prospective students are searching when exploring their education options:

- ✓ **Program benefits**    ✓ **Tuition**    ✓ **Modality**    ✓ **Timing**    ✓ **Career outlook**



#### RESEARCH

- Research the keywords and topics that prospective students are searching related to your program(s) and/or offerings
- Interview JMU stakeholders to identify unique program benefits



#### WRITE

- Develop keyword-rich, benefits-focused landing page content that addresses the information needs of prospective students
- Implement compelling calls to action to drive website users to engage and convert



#### MONITOR SEO PERFORMANCE

- Demonstrate results of content investments based on SERP rankings, competitive comparisons, page entrances, and conversions
- Prioritize technical and on-page performance fixes

Specifically, our search engine and content experts will:

- Conduct interviews with faculty/administrative subject matter experts for each of the identified program areas;
- Review the current state of your website—assessing overall visibility in the Google search engine based on keywords, monthly search volume, and click-through rate;
- Assess website performance issues and identify priority technical fixes to improve SEO performance;
- Conduct keyword research and create blueprints outlining on-page SEO strategy for prioritized program landing pages;
- Compare SEO keywords among peer institutions;
- Create optimized meta data for each page identified, including page titles and descriptions;
- Deliver initial page drafts and facilitate revisions with campus stakeholders; and
- Check in and review your performance following implementation.



1.c. continued

### Create and implement a robust SEO strategy

This work will result in a robust SEO strategy to increase website traffic to the specific pages targeted for this project and the university’s site overall. A deliberate SEO strategy drives more traffic to your site, creates more interest, and engages prospective students with your program(s), ultimately leading to *stronger leads and higher enrollments*.

### Level Up Your Student Search and Engagement Marketing

Your prospective students live in a world of personalized experiences, content, and interactions. The standard is being set every day around us. From Amazon to Netflix to Starbucks, other industries have changed how they customize communications for their audiences. This conditioning has set the same expectations for when students interact with JMU.

Search strategy has always had its challenges, but now you have to be ready to easily engage today’s students *anytime, anywhere*. What you do now can impact your next several classes, so you need a modern search solution built for today’s digital world that delivers *enrollment results*.

### Apply our proven student and parent engagement formula

At RNL, everything we do is driven by data and analytics. We’ve spent thousands of hours conducting polls, fielding research, and reviewing data from millions of student records to become the preeminent student behavior experts.

Student search and engagement are complex challenges, but our enrollment experts and data scientists have demystified them. We’ve mastered a proven formula that will create the right student search experience for JMU.

**The Engagement Formula** allows us to deliver compelling, personalized interactions at scale by placing each student and parent at the center of their own personalized communication flow. Aligning your search strategy to this formula is the key to *targeting the right students, increasing conversions, and boosting your enrollment*.



To execute **JMU’s unique Engagement Formula**, we align your value proposition with student expectations, make it easy for them to engage with you wherever they are, and communicate the value of each step they take on their enrollment journey. We work with you to calculate and optimize these variables and amplify your success with the power of personalization at scale.



1.c. continued

## Create a personalized, persuasive, and powerful search experience

We've seen a lot of top-of-funnel disruption in 2020-21, and we know these new complexities are keeping enrollment managers up at night. Our formula for success continues to source qualified and interested students through traditional search and top-performing lead aggregators. But a majority of students will bypass your direct marketing and search on their own, so we also help you go beyond lists to bring you *net-new leads*.

You'll engage with students and parents where they really are and where they may already be showing an interest in JMU. We're listening to, qualifying, and engaging students and parents through the power of social media, community building, and engagement between peers. The result is *two-way engagement*, amplified by the power of personalization, that adapts to their interests and status in your admissions cycle.

## Four critical components of your search and engagement strategy

This proven approach drives more of the right leads and gathers actionable intelligence you can use throughout the recruitment process. With RNL, JMU will always know where you stand and what the optimal recruitment paths are toward your goals.



### Supercharged Search Marketing

Blend traditional search with digital and social media components, so you have multiple lead generation strategies.



### Digitally Driven Community Engagement Powered by ZeeMee

Increase responders and enrollment with digitally-driven engagement that connects students to your greatest recruitment resource—your campus community.



### Parent Engagement that Boosts Enrollment & Retention

Boost enrollment and retention by turning parents into your best influencers and champions.



### Advanced Behavioral Analytics

Receive actionable, real-time data for your team to increase your conversion rates.

## Reach your full enrollment potential

The high school students you want to recruit spend nine hours a day on their digital devices, and most will bypass your direct marketing to search on their own. Our tried-and-true strategies blend with artificial intelligence, automation, social media, and digital communications to deliver hyper-personalized content at scale that gets results:



Our search efforts are the most significant enrollment driver for our clients—typically **40% of enrollment**.



Our parent engagement strategy has led to **3x inquiry to app conversion rates and a 6 percentage point lift in yield** for our clients.



Students engaged in a social community **convert to applicants at a 2x higher rate** than your typical search and lead aggregation vendors.



1.c. continued

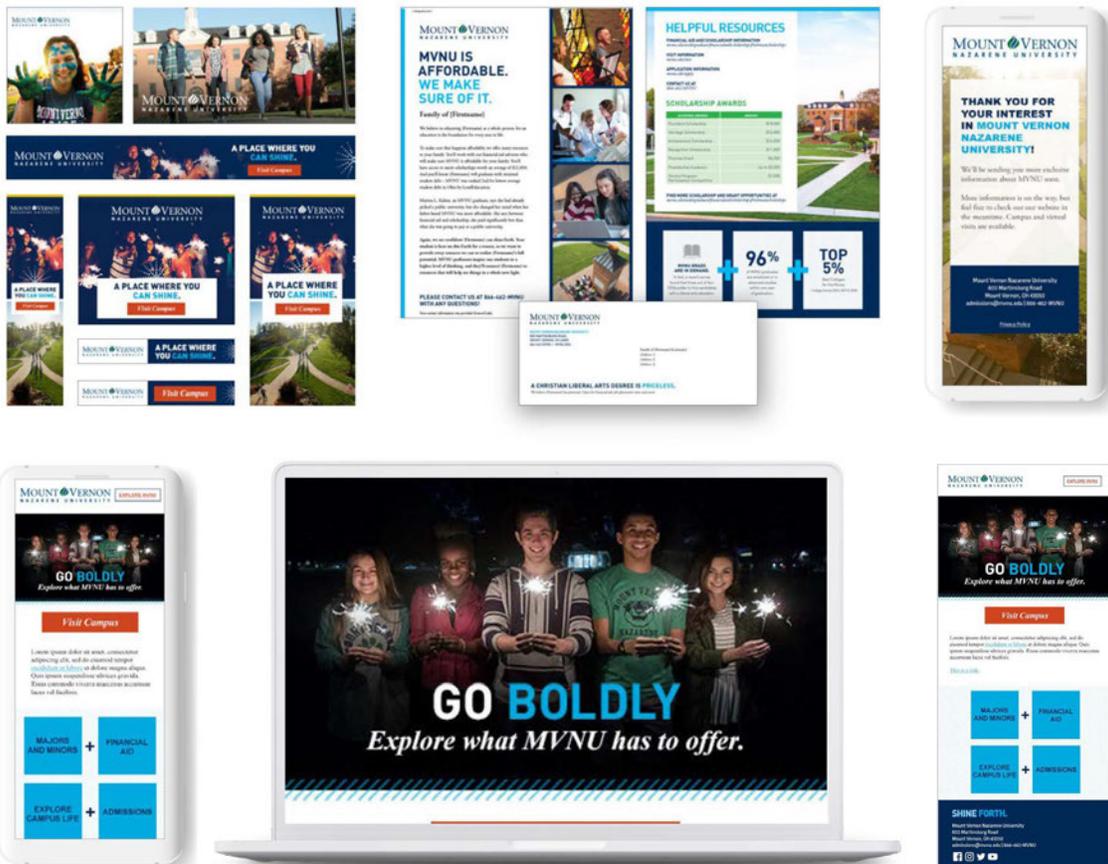
## Engage students anytime, anywhere

After identifying the right students, we need to deliver the kind of hyper-personalized experiences they encounter from Amazon, Starbucks, and Snapchat--*anytime, anywhere*, through whichever communication channels they prefer. That's what they expect from JMU.

Our strategy is driven by amplifying your brand to *nudge students to engage how they want to engage*—whether they're on their phones, on social media and webpages, in their email, or opening their mail.

## We Make Engagement Easy with Modern Search for Today's Digital World

Digital Marketing • Direct Mail • Mobile E-Card • Email • Visual Caller ID





## 1.c. continued



### Text Message Reply

We offer the option to text a reply to your email and direct mail outreach, which demonstrates your openness to hearing from them in various ways and on their own terms.



### Visual Caller ID

When we call students, we add a custom message and brand the screen of their smartphone to JMU. This creates a brand experience even when students don't answer the call—and you'll still leave a valuable call-to-action with a branded missed call alert and notification.

## Robust digital targeting tactics

Conversion is paramount with the disruption occurring at the top of the funnel. We give you a **Digital Boost** to convert pools of students and their parents to a specific action, which can be related to applying, enrolling, attending an event, meeting deadlines, and more. Our flexible, focused campaigns run ads for a specified timeframe with calls-to-action focused on immediate actions and conversion tactics.



"We are excited to have a digital marketing partner who understands all of our recruitment and marketing efforts and gives us the insight and analytics to succeed across these efforts."

Associate Dean of Enrollment

- **First-Party Matching:** We identify and match your search names with our digital ad placement to deliver ads with relevant and timely calls-to-action as they surf the web and scroll through today's most popular and widely used mobile apps.
- **Location-Based:** We draw a virtual "fence" to target prospective students, parents, guidance counselors, and other key influencers within a particular location, such as feeder high schools and community colleges, athletic/school events, and even when they're physically near your competition. Once your audience leaves specified venues, we can extend your reach to their homes to drive further action and next steps.
- **Social Media:** We know which platforms students are engaging with now to target your ads based on their social, demographic, and behavioral criteria, including age, geography, interests, and online behaviors.
- **Retargeting:** When students leave your traditional marketing path, we keep engaging them with continuous messaging toward the next step in their recruitment journey.
- **Lookalike Audiences:** We expand your reach and help you shape your class by targeting specific types of students who share interests, activity patterns, and demographics similar to your current inquiries, applicants, admitted, and/or enrolled students.



1.c. continued

### Targeted non-responder strategies

We know most students won't respond to your call-to-action and will research you on their own. So, if you aren't actively engaging non-responders, you're leaving enrollment on the table.

We strategically identify and engage select non-responders who wouldn't otherwise be in your inquiry pool. We deploy many tools throughout the funnel to ensure we don't miss anyone as we build the right inquiry and applicant pools for JMU.

- ✓ **Identify and engage top non-responders with your inquiry pool**—Your search models statistically identify the top non-responders you should continue to engage with your inquiry pool. We engage your highest-scoring non-responders with a series of emails to influence their decision to apply.
- ✓ **Serve up digital ads**—We keep JMU front and center with targeted and relevant display ads. Your search model helps us focus on specific high schools and geographic regions to expand our reach to influence both students and parents.
- ✓ **Engage and track their behavior on your website**—We expect students to bypass calls-to-action and explore your website. We identify students from our campaigns who go to your site and track their digital behavior.



### Students and Parents Need to be engaged!

Our **engagement platforms** (see pages 27-28) give you all the tools you need to reach the right students in the digital channels they use every day—and turn their parents into enrollment champions.

#### Top Channels

- ✓ Video
- ✓ Website
- ✓ Social Media
- ✓ Text

#### Top Desired Content

- ✓ Academic Programs
- ✓ What the Community is Like
- ✓ Costs/Aid



**79**—the average number of times a student unlocks their phone each day.

**70%** of students bypass direct marketing and search on their own.

**99%** of parents say they are involved in the search process.



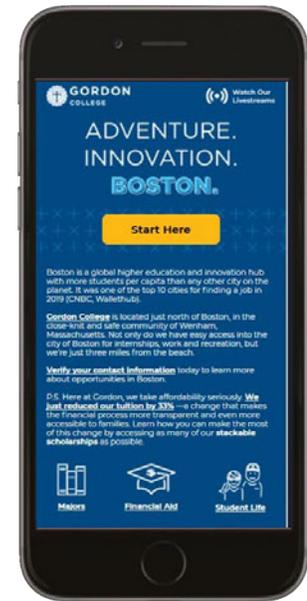
1.c. continued

## Effectively convey your value

We need to provide specific examples that prove why JMU’s educational offerings, faculty, and facilities are strong and differentiate those offerings from other institutions. We’re facing a consumer-minded market that requires concrete proof rather than lofty, self-affirming soundbites.

Providing those specifics requires collecting specific examples and data, which is difficult, if not impossible, for institutions to do on their own.

- ✓ **Justify the ROI of a JMU Education**—We’re the only firm able to mine your alumni outcomes to develop content that highlights your program outcomes and best illustrates JMU’s unique value.
- ✓ **Address Concerns About Cost**—We give you accurate insights into the need levels for all of your students well before FAFSA data is submitted so that you can work more proactively with those students and families. Using our industry-exclusive Affordability Predictor, we send highly personalized emails with relevant financial aid and affordability messaging based on each student’s predicted EFC range.
- ✓ **Demonstrate Graduate Success**—Rather than relying solely on alumni stories and other anecdotes, we help you articulate concrete proof of graduate success with reliable, program-level career outcomes data—like starting salary and career placement for specific academic programs.
- ✓ **Enhance Your Marketing Campaigns**—We integrate the data into your student and parent outreach and fulfillment across all channels—email, web, social, digital, video, print, and everything in between.



By consistently communicating value, investment, academic quality, outcomes, and competitive advantage throughout the year, we place JMU in a more advantageous position—especially during financial aid season. Most colleges and universities will attempt to promote the “strong investment” card with families when discussing aid. Still, only those that have already established a strong understanding of value/ROI throughout the cycle will be able to capitalize on this discussion fully.





1.c. continued

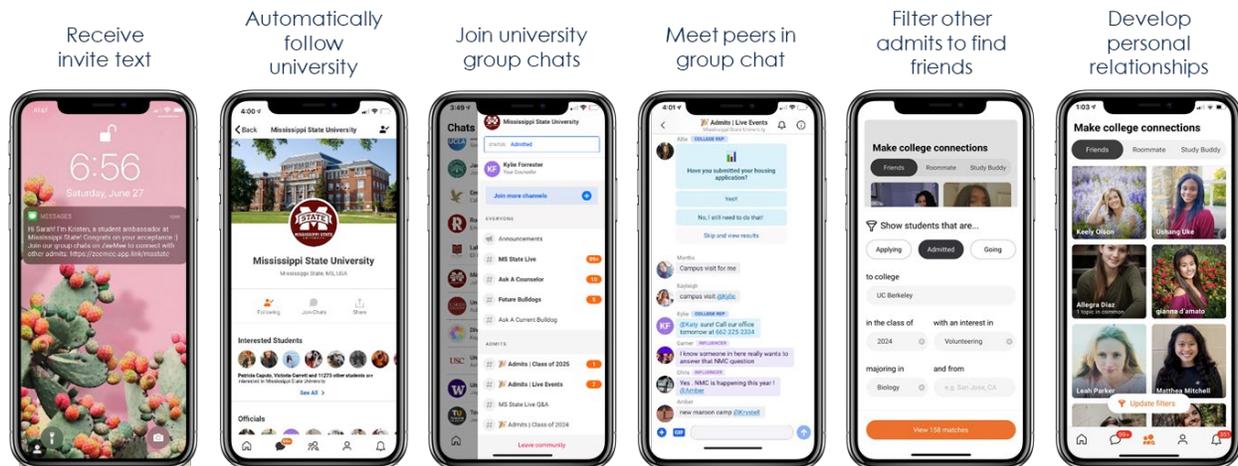
## Digitally Driven Community Engagement • Powered by ZeeMee

Many students will bypass your direct marketing to look for a community and find their own informational pathways. That’s why we give them multiple paths to explore their interests further and engage with their peers, so they continue toward enrolling at JMU.

Centered around chat and video, the **RNL Digital Student Engagement** platform empowers your prospective students to not only engage with one another, current students, and the JMU team. We’ll showcase the JMU campus community and culture, drive interaction, and increase affinity with organic and natural in-platform content, including authentic video from your student ambassadors. Students get authentic, community insights that reinforce their enrollment decision—we see **2x higher app rates, 4x higher deposit rates, and 3x higher yield rates** among engaged students.



We grow the top of your funnel by inviting your inquiries, applicants, and admits to follow JMU and join your digital community. You’ll also see and gain organic and **net-new** followers who aren’t on your inquiry list.



The RNL Digital Student Engagement community is a student-driven platform where students are empowered to connect based on where they are in the admissions cycle. Continuous engagement opportunities keep students coming back for more (over 30 times a month!) with features such as virtual events, friend finder, roommate matching, and more.

### **Listen to students and expand your strategies to engage.**

Every in-platform student interaction is measured and tracked with a Student Engagement Score. A proprietary algorithm indicates the likelihood of deposit, and you’ll see the top schools your prospective students are also following on the platform.



1.c. continued

## Parent Engagement that Boosts Enrollment

Since the start of the pandemic, parents are more involved than ever, and their expectations are even higher. Simply put, no one has a more significant impact on a student’s college experience than their parents. Impersonal mailers addressed to “the parents of” won’t cut it anymore.

The **RNL Parent Engagement for prospective family communication** helps colleges and universities focus on parent involvement with an all-in-one platform for helping strategically engage parents through the student lifecycle. The platform combines hyper-personalization, data and analytics, and omnichannel communications to connect with parents on their phones and PCs.

- ✓ Personalized web and email experiences help you send the right information to the right families at the right time. And it works—parents of prospective students have a **40% higher email open rate** on our platform.
- ✓ We’ll “nudge the nudgers” to increase parent interest and have them become champions for JMU. Students with a parent using the platform are nearly **3x more likely to apply**.
- ✓ Synchronized CRM data integration keeps the platform aligned with your pipeline and communication plan. Reach your most interested families, encourage them to take the next step, and measure the impact. Students with a parent using the platform have **yield rates up to 6% higher** than average.
- ✓ Our **Parent Promoter Score™** qualifies interest levels so that you can focus your recruiting efforts on the most active and influential parents. Students with high-scoring parents are **3x more likely to enroll**.



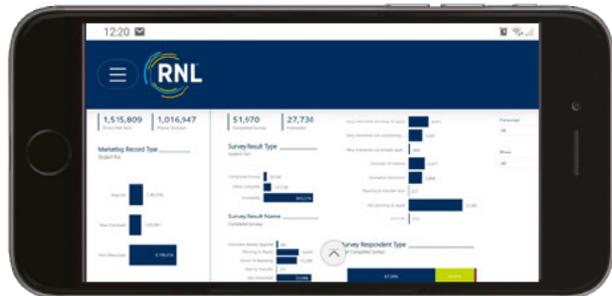


1.c. continued

## Measure the ROI of Your Engagement Formula

We give you **24/7 access** to all of this data via intuitive dashboards. You can track and analyze campaign progress and results by utilizing filters and drill-down reporting capabilities that allow for target group segmentation and analysis. RNL dashboards are intuitive and user-friendly, facilitating data-informed decision making in a presentation-ready format.

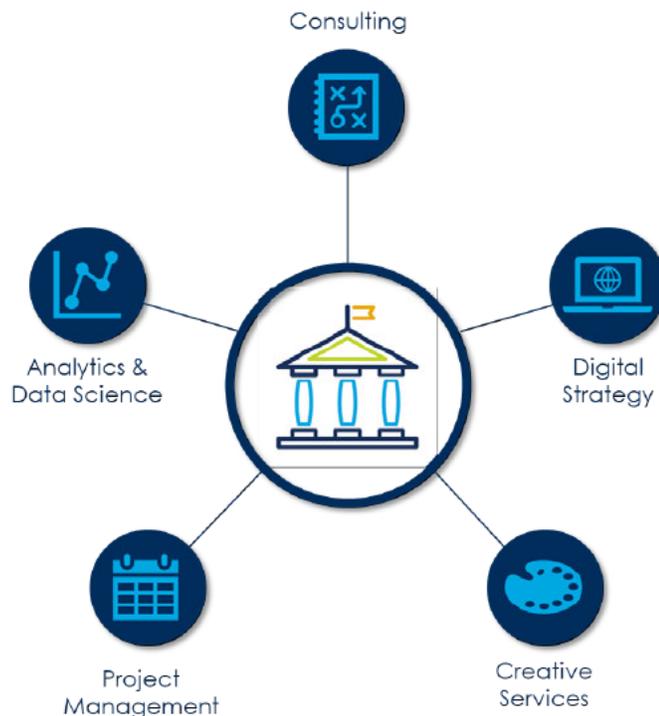
Your RNL strategy team also monitors and uses these insights to know which levers to pull to make sure you reach your enrollment goals. And those many levers are not just adding volume to the top of the funnel or creatively counting what is or is not an application. Our insights are true indicators of intent and engagement.



**Expert insights empower your team to use student data and feedback to market, inform, educate, and get results.**

We surround you with a team of marketing and enrollment specialists to bring you expertise in:

- Higher-ed research and analytics
- Campaign strategy
- Growth market identification
- Creative design
- Predictive and behavioral modeling
- CRMs
- Data security
- Project management
- Digital strategy
- AI and marketing automation
- Machine learning
- Web and SEO
- Organic lead generation
- Parent engagement





### 1.d. Increasing the percent of admitted students who matriculate.

Included in *Student Search & Engagement* are strategies that can also support your recruitment efforts as students progress through the funnel, even as they are admitted and matriculate. The same *RNL Digital Student Engagement* that is designed to help build a community where students can find JMU will then foster that community that encourages a student to enroll once admitted (see page 27). Similarly, *RNL Parent Engagement* helps JMU reach your most interested families, encourage them to take the next step, and measure the impact (see page 28). Students with a parent using the platform have **yield rates up to 6% higher than average**.

To build on these strategies established at the search stage, we recommend the university incorporate *RNL Personalized Video Services* and *RNL Personalized FinAid Video* to carry the power of personalization through each student’s journey to enrolling at JMU.

## Boost Conversion and Yield with Personalized Videos

Your prospective students want visual forms of communication with content that matches their interests. The power of visual storytelling and video is undeniable—seniors, juniors, and sophomores all rate the medium highly and are more likely to retain your message when they can watch it. But it takes advanced technology and tools to achieve the level of personalization and customization Gen Z expects as they evaluate numerous college options in today’s saturated market.

# 68%

of students are likely to point to videos as an influence for their final decision.

Educatations.com

## Keep students engaged and moving through your funnel

*RNL Personalized Video Services* provide you with a revolutionary way to produce personalized videos with **customized content for all students at scale**. There’s a lot of noise out there, but we give you the tools to grab their attention with compelling, relevant, and memorable enrollment messages that literally speak directly to each student.



### Personalized

Tailor and deliver the right video to the right audience at the right time with limitless dynamic content.



### Scalable

Send thousands of personalized videos in a way that’s completely manageable for your team.



### Strategic

Deliver videos on demand or set schedules throughout the entire student recruitment cycle and beyond.



### Integrated

Send videos as part of your RNL student search marketing campaigns.



1.d. continued



Sample Custom Content

- Major
- Interests
- Alumni Outcomes
- In-State/Out-of-State
- First-year/Transfer
- Residency Status
- Domestic/International
- Athlete/Non-Athlete
- Honors/Non-Honors

Combine the proven power of video with variable student-level data you already have in your CRM to generate thousands of personalized videos, at scale, that are highly relevant to each prospective student. Within minutes of completing your RFI form, a prospective student can receive a video personalized based on the information they provided. In this example, the video has been tailored to the student's academic ability (high ability), academic interest (engineering), and relevant internships and outcomes.

Create personalized and relevant videos for each student

We aren't simply inserting the student's name in the video or overlaying text on a still image. We're tailoring the video's content to each viewer, including their interests in academics, campus life, and more.



There's nothing cookie cutter about it.

For each student, we synthesize multitudes of dynamic content into one seamless, targeted video.

95%

Viewers retain 95% of a message when they watch it in a video—compared to 10% when reading it in text.

Insivia

How it Works

Go live with your first video in just 8 weeks.



Personalized Video



Based on your audience and type of video, we will customize the number of dynamic video segments (e.g., academic major) a student will experience based on their specific data. Each dynamic video segment can have multiple sequences (e.g., biology, art, business, etc.) to further tailor the content to each individual student.



1.d. continued

The search video examples below include dynamic video segments for academic interest, internships, and alumni success, featuring sequences for **Technology** and **Health** programs



“ I heard from many parents and students that they found the Personalized Video to be the differentiating factor for their student in coming to Villanova vs. another school.

Dr. Joyce Russell, Dean | Villanova School of Business

### Customize to fit your needs and audience

To truly connect with your prospective students on an emotional level, it takes more than a single video. You need a powerful, *year-long* video engagement strategy to keep students engaged and moving through your enrollment funnel.

Our video experts and enrollment management consultants will work with you to customize your video subscription for the amount and types of videos you need in your recruitment cycle.

# 300%

Adding a video to your email can increase click rates by 300%.

Hubspot

#### Video Types:

- ✓ Search
- ✓ Inquiry
- ✓ Applicant
- ✓ Admitted Student
- ✓ Financial Aid Explainer
- ✓ Parent
- ✓ Net Price Calculator
- ✓ Campus Visit
- ✓ International Student
- ✓ First-Year Orientation
- ✓ Anti-Melt
- ✓ Holiday
- ✓ Re-Enrollment



### Drive conversions with action buttons

We can also incorporate multiple Action Buttons into your videos to encourage students to take their next step to apply for admission, schedule a visit, chat with an admission counselor, make a deposit, accept a financial aid award, and more.





1.d. continued

### Qualify student interest and prioritize your outreach

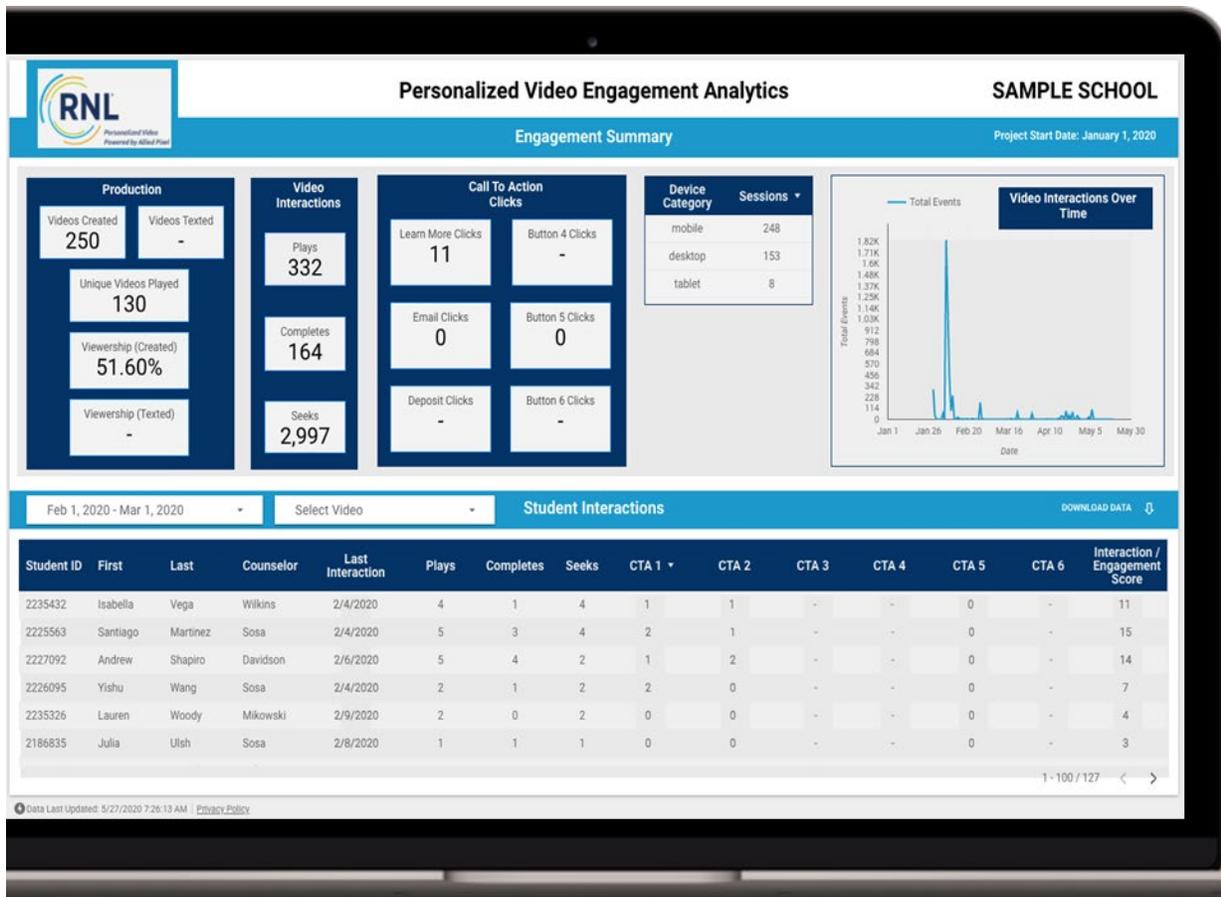
Video production companies don't understand student recruitment and enrollment management. An RNL expert works with you to develop a video engagement strategy that will move and convert students through your funnel. We help identify and prioritize the video initiatives, content, and calls-to-action that are needed most at JMU to achieve your enrollment objectives.

We also help your team develop a post-video engagement strategy using analytics from our real-time dashboard. We track video engagement metrics for each student in your outreach campaign and empower your admissions staff to use this information to trigger electronic and personal follow-up actions with the right students.

- ✓ Track video engagement every step of the way
- ✓ Qualify student interest in JMU
- ✓ Prioritize your outreach



RNL Personalized Video services are powered by over **25 years** of award-winning video and film production.





1.d. continued

## Increase Clarity and Value in Financial Aid Offers

The financial aid offer is arguably the most critical piece of communication JMU will send during the recruitment and reenrollment process. Prior to the pandemic, there was already a gap for colleges and universities to fill by improving how they communicate aid, net cost, fit, and value to students and their families. Now, there's even more financial and educational uncertainty compounding the need to eliminate any confusion students and families experience regarding the financial aid process and understanding of their award package.

2/3

of students don't completely understand the cost of their college education prior to making an enrollment decision



92%

of students believe financing their college education is going to be difficult  
RNL, PLEXUSS & RaiseMe. (2020).

### Evolve your financial aid offers through video

Leveraging video technology will improve how students and their families perceive and digest financial aid information. *RNL Personalized FinAid Video*, powered by Allied Pixel, converts each student's financial aid data into fully branded, unique, and personalized award videos that we deliver via text links. JMU can also send the video links via email or post them on your student portal.

We've combined nearly *three decades* of financial aid optimization experience with *25 years* of award-winning video production to:

- ✓ Provide student-level aid awards in a compelling, efficient, and easy-to-understand manner;
- ✓ Demystify college costs by helping students understand their specific cost of attendance;
- ✓ Present payment options to help students finance their education;
- ✓ Demonstrate value with outcomes and the benefits of attending your institution;
- ✓ Guide students to their specific next steps with embedded web links;
- ✓ Revise and update the video offer in response to any changes in packaging;
- ✓ Provide a consistent and personalized experience for your students across their life cycle; and
- ✓ Gain staff efficiencies by answering students most common financial aid offer questions.

### The Personalized Presentation Makes a Compelling Case for Enrolling.

*Videos are accessible on any device and available in Spanish language and/or subtitles.*



Personalized Greeting



Total Award Package



Breakdown by Types of Aid



Net Cost



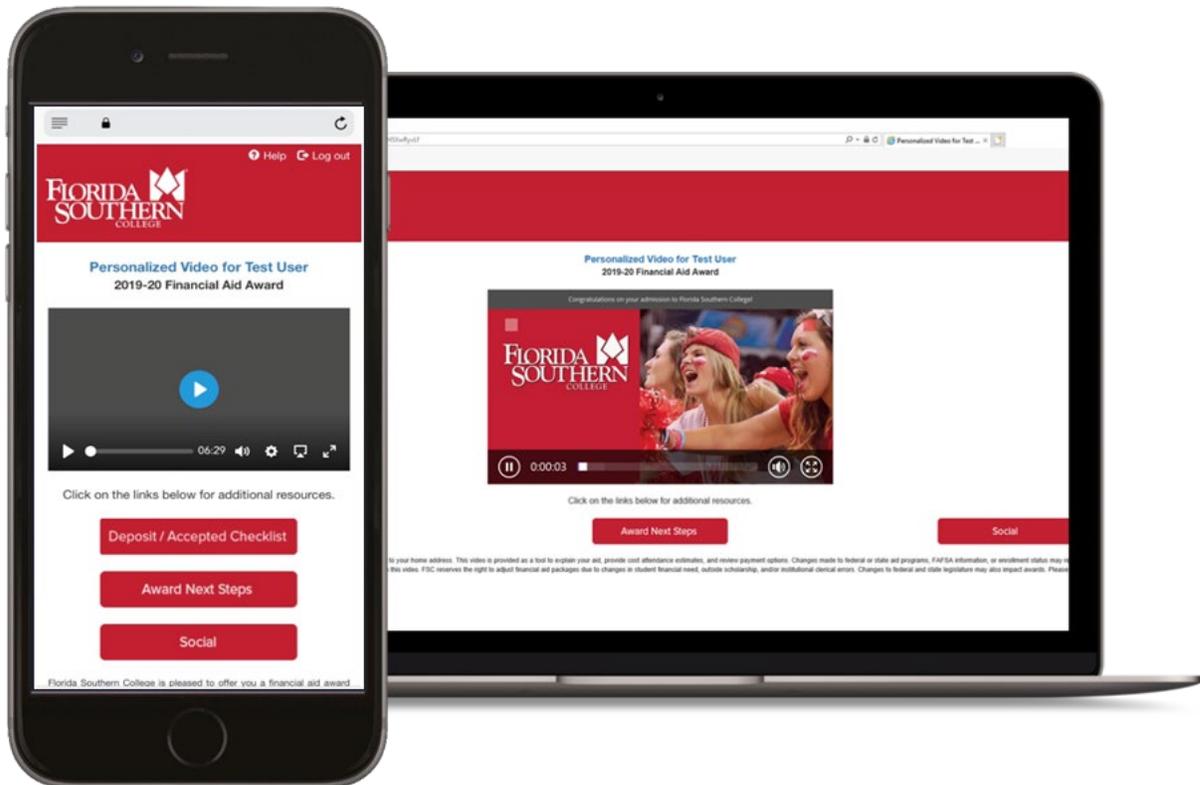
Unique Value Proposition



## 1.d. continued

### Make your award communication competitive

With students applying to multiple institutions, your award communication will be compared to other institutions. RNL makes sure yours are designed to engage students and guide them to their next steps in the enrollment process. We'll differentiate JMU from your competition as you explain the aid package in a modern, compelling, clear, and relevant way.



### *Include all financial aid components of your offer and more*

- ✓ Congratulate each student on acceptance to JMU or milestones achieved in their college experience
- ✓ Walk students through financial aid offer details, including eligibility and renewability criteria
- ✓ Highlight merit-based awards
- ✓ Explain federal and state free aid
- ✓ Feature institutional grants, as well as other scholarships and awards
- ✓ Review federal student loan eligibility
- ✓ Breakdown a direct cost calculation
- ✓ Show payment options—per semester payment, payment plan, direct plus loan, and alternative loans
- ✓ Feature academic programs
- ✓ Demonstrate an outcomes-based value proposition
- ✓ Encourage interaction with an admissions counselor or academic advisor
- ✓ Provide specific next steps

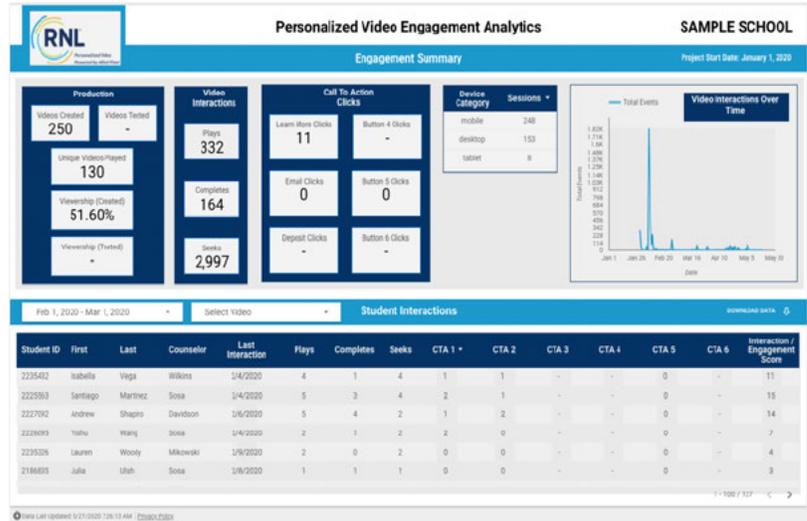


1.d. continued

### Access live video engagement metrics

A live dashboard of video analytics gives you visibility into:

- Total videos created
- Number of videos played
- Number of videos completed
- Number of clicks on video's call-to-action buttons
- Video views by device type
- Student-level analytics



### Work with an expert to optimize yield

Your RNL consultant works with you remotely to:

- ✓ Provide strategic advice on video segmentation based on your enrollment goals;
- ✓ Help you streamline your financial aid awarding data;
- ✓ Provide best practices to encourage video viewership; and

Guide you with post-video follow-up communication strategies.



Download the 2020 High School Student Perceptions of College Financing Report



1.e. Maintaining and strengthening university presence in existing markets.

### Align Your Content with Student Expectations

Early in the recruitment process, JMU must build a foundational understanding of the university based on how you provide a strong return on investment to your students. We base your search messaging on strong value propositions aligned with the major enrollment influencers for your students.



*1.e. continued*

To best align your content with student expectations, we start by gathering valuable information about JMU—what’s unique about your team, your students, and your campus. Together, we build a shared understanding of:

- Goals for your program and how we’ll measure success
- Expectations of service and performance
- History of brand development and messaging strategy
- Future state of brand development and messaging strategy
- Current marketing efforts
- Any market, audience, or competitor research
- Steps in your communication plan following RNL communications

“When we first started, we were really trying to figure out how to increase the number of out-of-state students. But what that conversation also dove into was, ‘What are our value propositions for our in-state students as well? What are we doing, not only to get them in the door, but to keep them here at the institution?’”

Director of Admissions  
Weber State University (UT)

RNL lives by the mantra of **“Authentic Messaging Leads to Genuine Interest.”** When our discovery process captures the essence of JMU, we know your prospective students are connecting with something real as they convert through our programs. In the end, that leads to **more enrolled, better-fit students.**



***Achieve Marketing Excellence with Award-Winning Creative***

The campaign examples throughout our proposal demonstrate the care we will put into being stewards of JMU’s brand. RNL’s agency has received numerous industry accolades and awards, including [Educational Advertising Awards](#) and [AVA Digital Awards](#).

The power of this messaging must reach the right students, which is why we utilize our predictive search model and insights to help us determine the right markets to build enrollment, the right markets to find growth opportunities, the optimal sources of search records, and markets where strategies beyond list purchasing can yield the best results. We’ll use this insight to ensure messaging to your existing markets can strengthen your presence there while messaging to new markets is targeted to bringing awareness of the JMU brand. For more details on the RNL search model, see our response to item 1.a. on page 5.



### 1.f. Expanding brand awareness to a national scale.

JMU’s new strategic plan positions the university to bring your mission to a community beyond your traditional markets and with the recent reclassification as an R2 high research university, you are now effectively a national university. The strategy that guides your engagement with prospective students must also be adaptable to connect with a national market, thus continuing to build JMU’s brand across the U.S.

Your RNL team is constantly scanning the horizon to ensure JMU is keeping up and staying ahead of student expectations. We’ve made an investment in talent and new technologies in the digital marketing space called the **RNL Innovation Lab**, designed to bring you the latest in prospective student engagement. Our Innovation Lab is constantly testing and infusing new technology and trends into our marketing strategies.

Our partnerships are guided by original market research projects unique to the developers, practitioners, and professional staff employed by RNL, including national benchmark polls of higher education professionals, field research among active and prospective students, and insightful data from millions of student records. No other firm can provide this scale of **industry-leading** insight, benchmarks, segmentation, and comparisons, which we utilize to inform our approach and customize strategies to the unique needs of every campus partner.

Utilizing our nation-wide perspective and industry research on best practices combined with New & Next marketing strategies, RNL brings the tools JMU needs to expand the university brand awareness to a national scale. We’ll utilize strategies that include digital advertising and SEO to broaden your markets. Your site is their most influential resource to learn more about your program offerings, cost, enrollment processes, student support, convenience considerations, career outcomes, and more.

#### Top 5 Free-Form Search Terms for Students

We gathered the search terms students told us they use and organized them into five buckets ranked by importance:



“ On a college website, I want to understand why the majority of people go there to study, the financial aid they offer, and what kind of success students have after graduating.

Survey Respondent | **RNL E-Expectations® Trend Report**

RNL’s predictive search model and insights help us determine the right markets to build enrollment, the right markets to find growth opportunities, the optimal sources of search records, and markets where strategies beyond list purchasing can yield the best results. What you get is a top-of-the-funnel strategy that is diverse, flexible, and backed by data, so we can create a strong brand awareness in the right markets consistently.



### *1.g. Identifying advertising opportunities with a high return - including digital, print and out-of-home formats.*

Through the consulting support provided with **RNL Student Search & Engagement**, JMU receives expert insights that empower your team to use student data and feedback to market, inform, educate, and get results. For all of our partner institutions, we regularly use our consolidated client data to review the strategy behind and execution of our campaigns and services to identify opportunities to enhance our shared success. Most notably, our analysis over the last few years informed the development of our latest industry-leading solutions. RNL's approach has evolved from our past products with new and enhanced features that are more prescriptive around what our research tells us works best in order to **maximize results for our clients**.

We see great opportunities in deploying our digital and engagement strategies to best align with connecting students and parents to JMU, and we see tremendous potential to leverage our personalization at scale technologies to drive a high return. Our campus partners experience the best results implementing an omnichannel approach with **robust engagement opportunities** aligned with student behaviors—like social media peer-to-peer connections and personalized video to reach far more students on a truly personalized level.



Our public campus partners realized a nearly **2% higher inquiry to deposit rate** in 2020 with students included in **RNL Student Search & Engagement** campaigns vs. other sources

# 68%



of students are likely to point to videos as an influence for their final decision.

Educations.com

### *1.h. Working with colleges that are moving to a higher Carnegie reclassification.*

While we work with JMU in developing your annual recruitment plan, we can also provide custom recruitment consultation to support the university in identifying:

- ✓ Ways to leverage your new R2 classification in your messaging;
- ✓ How the change in your ranked accolades may impact enrollment efforts;
- ✓ Create brand awareness and marketing opportunities to focus on segmented student populations; and
- ✓ Ways to best market and advertise JMU's most distinctive academic offerings.

### *1.i. Building successful strategies for CRM implementation (preferably in Slate). Describe other CRM technologies for which you support integration.*

Slate is perhaps one of the most customizable CRM platforms in higher ed enrollment today. Because of that flexibility, no two Slate instances end up looking alike. But that also means it is very easy to implement an instance of Slate in a way that seems to make sense at the time, but later turns out to be less than ideal to meet the needs of your institution. RNL's solution to this challenge is a deep-dive investigation in the partner Slate instance to evaluate system efficiency and maximize JMU's return on CRM investment.



1.i. continued

As a platinum member of the *Slate Preferred Partner Program*, RNL has a *deeper understanding* of the Slate product function and process and we've gained access to a variety of resources and insights into best practices. RNL's approach is *powered by data*, which makes our partnership with Slate a logical fit as well as a great boon to our campus partners.

**Platinum Member** | Slate Preferred Partner Program



“RNL and Slate are both committed to the success of colleges and universities, and they both have very dedicated communities of higher education professionals. Combining their comprehensive and end-to-end platform with our data-informed solutions allows us to power scalable, automated 1:1 personalization that campuses need to engage students and alumni today.”

RNL President and CEO, Sumit Nijhawan

Harvard Business Review writes about the importance of creating effective systems to maximize productivity in an article from January 2021, entitled *“Productivity Is About Your Systems, Not Your People.”* Because your team works in an interrelated environment – where the interactions and communications of one person affect the work that everybody else is doing – it is essential to optimize the systems your team works with to make their jobs as easy as possible.

Depending on where you are in implementing the Slate platform, RNL can provide assistance to meet your needs to:



**Build Your CRM to Optimize Your ROI**

In the beginning stages of implementing your CRM? RNL can provide consulting support specific to initial implementation of your CRM.



**Develop & Prioritize Your CRM Enhancement Plan**

This approach guides campuses already utilizing Slate that need an assessment of current practices and recommendations for improvements and updates.



**Optimize Your CRM with Expert Support**

As Slate continues to roll out new and updated features, it may be a challenge to understand and use everything your CRM offers. These consultations will provide custom support to ease future maintenance, preserve data integrity, and allow the instance to adapt gracefully to future needs.



**Automate & Streamline Your RNL Data Integrations**

We will work with new or current RNL partners to implement the RNL Slate data integration template to ensure an accurate and automated two-way data transfer between the partner CRM and RNL.



**Engage Students with Timely & Relevant Messaging**

Generate genuine interest with our CRM solutions for enrollment marketing with the power of your own CRM system paired with the custom expertly crafted messaging content.



1.i. continued

## Build Your CRM to Optimize the Return on Your Investment

### Successful CRM implementation is critical

Your CRM connects all the core functions of your admissions office and makes it easier for your admissions officers to do their job – student interactions, communications, event management, applications, and more. But your CRM can only help JMU find, admit, and enroll the right students if the system has been set up in a way that matches your enrollment process and is easy for your team to use.



The most popular CRMs offer the most connected functionality and tend to be the most customizable. The upside is that these systems tend to be very flexible and can allow you to accomplish many of your goals. The drawback is that you have to know exactly what functionality exists, how that functionality is intended to work, and know how to adapt your enrollment process to fit that functionality. In the end, a system is only as effective as the decisions you make setting it up.

RNL combines JMU’s specific needs, the Slate Technolutions implementation roadmap, and our experience-based best practices to quickly build the core CRM functionality that will allow your admissions office to meet your enrollment goals more effectively.



1.i. continued

### Assess your enrollment processes and needs

Implementing a new CRM system from initial purchase to system launch requires building or re-building many existing or reimagined enrollment processes in the new CRM system. To streamline the CRM build-out and minimize the amount of time before the system is fully functional, one of the most important goals for an institution to accomplish is to review, update, and document those processes that will be transferred into the new CRM.

One of the best times to review existing enrollment processes is when changing to a new CRM system. Naturally, some changes will be necessary based on the system functionality, so RNL recommends reviewing general enrollment practices to not only determine what they currently are but how they would function in an ideal environment as well.

RNL CRM consultants have developed a framework to help your institution investigate, document, and relay essential information for the implementation project. Prior to the beginning of the implementation project work, JMU will be provided with several documents and preparation guides to assist the university in reviewing and producing this requested documentation.

## 3 Steps to Transform Your CRM



### Assess

*Is your CRM making your job easier or harder? What areas make it easier? What areas make it harder?*



### Enhance

*Keep using the areas that work for you; create a plan to fix those areas that don't.*



### Invest

*Spend the time and resources to optimize, educate, and train.*

### Design a system with end-users in mind

While one of the initial temptations will be to build your new CRM system exactly like your old system or to meet the specific needs of your SIS, the best way to optimize your new CRM is to build it with your end-users in mind—the prospective students and institution staff that will be using the system every day. By keeping your end-users in mind, the resulting system will make their jobs easier and make it easier for prospective students to apply and enroll, which is ultimately the end-goal for the system!

### The RNL CRM consultant and your team

At the beginning of the project, your RNL CRM consultant will do much of the initial configuration and building functionality in your new CRM system as the JMU team learns the basic user interfaces and functionality of the new system. Because of the hands-on nature of the partnership, the RNL CRM consultant will require an administrator-level CRM account typically with the highest-level permissions.



### 1.i. continued

The CRM consultant will ensure that your team is aware of how the system has been configured and will be able to maintain the system in the future. When appropriate, the CRM consultant can also provide more hands-on trainings for certain system functionality, such as Communications Delivery, Events Management, and Data Importing and Exporting.

RNL recognizes that the implementation project will eventually end. As a result, our goal is to provide your team with the information and resources necessary to use and maintain the system even after the project is complete. Our goal is your long-term success!

## Schedule and work plan

RNL will work with you to implement the new CRM quickly and accurately from system acquisition to “go-live” so you can leverage the core capabilities of the system to enhance JMU’s enrollment practices. Implementing a new CRM system from initial purchase to system launch requires building many existing or streamlined enrollment processes in the new CRM system.

## Step-by-step project approach

1. A discovery call to introduce team members from both JMU and RNL, establish preliminary implementation timelines, “go-live” dates, frequency of project communications, and set dates for a “virtual” campus visit.
2. The RNL consultant will provide implementation preparation documents to JMU prior to project kick-off that includes, but is not limited to:
  - CRM Pre-Implementation Preparation Questions Guide
  - Institutional Documentation Requests
  - Application Requirements Partner Discovery Questionnaire
  - Sample List of Fields/Prompts
  - Slate Sample Upload Templates
3. The RNL consultant will create a written implementation plan to highlight main functionality and project goals.
4. Recurring remote implementation “calls” that will accomplish a number of goals:
  - Review project timeline and ensure project meets pre-determined goals
  - Demonstrate built/implemented functionality for questions and review by JMU
  - Provide learning opportunities for the client to make system maintenance easier
  - Create the opportunity to ask questions and provide additional documentation (as needed)
5. A “virtual” campus visit to provide concentrated building time to accelerate the implementation and move towards system functionality “go-live” dates.
6. Project adjustment and realignment (as needed).
7. Post “go-live” support at key phases of the project.
8. Four weeks of post-project support to ensure the system functions as expected.



## 1.i. continued

### Expectations of JMU staff

To complete the work of implementing the CRM, the partner institution will be expected to provide time, resources, and information including:

- ✓ Constituting a core implementation team to work with RNL consultant
- ✓ Providing requested process documentation in a timely manner
- ✓ Scheduling recurring check-in calls to keep the project on track
- ✓ Completing project assignments by determined deadlines set during remote implementation calls

### An opportunity for feedback

One of the primary benefits of working with RNL is that our consultants have the knowledge and experience that comes from working with over 1,900 institutions every year. RNL combines a data-informed approach with best practices learned from hands-on experience. During your implementation project, let our CRM consultant provide potentially new ways of thinking about old enrollment practices. Some recommendations may require adjustment time by your team, but our CRM consultants make all recommendations based on best practices and expertise.

In the end, we realize that all institutions have external pressures and requirements that may prohibit certain recommendations from being implemented. Our recommendation is to approach the implementation project with an open mind and a mindset that is receptive to feedback.

## Develop & Prioritize Your CRM Enhancement Plan

### Optimization philosophy and approach

After an initial CRM implementation is complete, there is always more that can be done, especially with Slate. Because Slate encompasses so much functionality with new and updated features rolled out every year, it is virtually impossible to understand and use everything that Slate offers.

The assessment can address questions such as:

- ✓ Was your system implemented in a way that meets your needs?
- ✓ Are you using Slate effectively?
- ✓ How can you make life easier for students? For your counselors?
- ✓ How is your bin system designed?
- ✓ How are you utilizing rules? How can you enhance automation?
- ✓ How is your status page servicing your students?
- ✓ Are there opportunities to use portals in a new way?
- ✓ What new features are coming that you can prepare for?
- ✓ Are you maximizing the most up-to-date features that Slate offers?



### 1.i. continued

RNL experts will spend time investigating and understanding the partner's needs from their Slate instance and thoroughly assess the Slate instance to provide a detailed report suggesting improvements and updates. The goal of this assessment is to ensure that partners are maximizing returns on their CRM investment. The assessment report will provide an estimate to add a CRM consulting project for an RNL CRM consultant to implement the remediation plan.

System functional areas that can be assessed include but are not limited to:

- ✓ Data architecture, collection, and storage
- ✓ Delivery and communications
- ✓ Events and scheduler management
- ✓ Applications and decision review processes
- ✓ Rules and automation
- ✓ Reports and data visualization
- ✓ Application and materials processing
- ✓ Security, roles, and permissioning

### Timeline

While the length of time it takes to assess a functional area in Slate can vary on several factors, in general it takes 7-9 hours to fully evaluate each of the more involved functional areas in Slate. As a result, a basic three-area assessment will typically take **four weeks** to complete, while a full-system audit can take **6-8 weeks** to complete. A detailed report will be provided that will detail findings, potential remediation strategies, along with a suggested prioritization of needs based on the findings of the assessment.

### Step-by-step project approach

1. A discovery call to introduce team members from both JMU and RNL, establish preliminary goals, partner needs, and timelines for project deliverables, and set dates for recurring remote consultations and/or trainings.
2. A Slate account set up by the partner institution for the RNL CRM consultant to begin working in the partner CRM instance.
3. RNL CRM consultant will evaluate the pre-determined functional areas within the CRM and develop recommendations for enhancing and optimizing the CRM.
4. An additional call may be necessary to address any questions that arise during the evaluation.
5. RNL CRM consultant will create a full optimization report that will provide feedback, priorities, areas of strength, and areas for improvement along with a detailed plan for implementing the recommendations.
6. A remote call will be scheduled to review the results and determine next steps.

### Expectations of JMU staff

To complete a system assessment, JMU will be asked to create a Slate account with full admin access for the RNL CRM consultant. JMU will need to be available for an initial learning call, as well answer any questions in a timely manner the RNL consultant may have to complete the assessment. Additional requests may be made of the partner during the assessment depending on findings.

## 1.i. continued

# Optimize Your CRM with RNL Expert Support

Enhancing a current CRM system properly can represent a great opportunity for any institution. Through our tenure working with institutions like JMU, we feel a personalized approach with RNL as a strategic partner for both the university and your Slate CRM can maximize the effectiveness of your recruitment practices, streamline the work for your staff, and help set you apart from your competitors.

After the initial CRM implementation is complete, there is always more that can be done, especially with Slate. Because Slate encompasses so much functionality with new and updated features rolled out every year, it is virtually impossible to understand and use everything that Slate offers.

RNL CRM consultants will help partners optimize their use of the CRM platform by streamlining existing processes, implementing new modules, or providing general support. Consulting partnerships can typically be either project-based (with specific implementation goals and/or issues to resolve) or support-based (client brings timely needs to RNL consultant on an ongoing basis).

Based on our initial discussions regarding this opportunity for JMU, we propose that RNL support the university to optimize your instance of Slate CRM. This support will be a mix of remote consulting sessions, remote trainings, and hands-on building in the Slate instance. The mix of these hours will be determined after the initial remote discovery call. This support will *ease future maintenance, preserve data integrity*, and allow the instance to *adapt gracefully* to future needs.

## Project approach

Once we have completed our discovery call and determined priorities and scope of the project, we will provide a detailed project plan to show the tasks below on a timeline, as well as key deliverables. We will work with JMU to assess which areas are highest priority. Examples of possible project topics may include but are not limited to:

- ✓ Discussing university pain points to create and implement solutions
- ✓ Reviewing and updating system data architecture and structure
- ✓ Creating enhanced population segmentation
- ✓ Exploring financial aid segmentation
- ✓ Supporting annual cycle prep and evaluation
- ✓ Building additional workflows or review processes
- ✓ Creating advanced analytics and reporting
- ✓ Setting up and/or managing virtual events
- ✓ Integrating additional third-party data sources
- ✓ Updating deprecated functionality/implementing current features
- ✓ Optimizing origin groups and sources
- ✓ Enabling ping and ping reporting
- ✓ Customizing organization/school records and dashboards
- ✓ Implementing territory management strategies and dashboards
- ✓ Slate reader/application review practices and processes
- ✓ Auditing rules and system automations
- ✓ Designing and implementing data retention policies
- ✓ Providing general support to partner Slate captain



## 1.i. continued

### Schedule and work plan

In order to maximize the value of the consultation, JMU should have in mind several projects or areas for improvement within the CRM system. At the beginning of the partnership, a list of potential projects and partner's existing needs will be discussed. The list of projects and needs will be prioritized at the beginning of the partnership but can be adjusted throughout the consultation.

The length of the active engagement between the partner and RNL will depend on the number of hours and the length of time projects are completed. All hours must be used within *six months* from the beginning of the consultation.

Our approach includes the following:

1. A discovery call to introduce team members from both JMU and RNL, establish preliminary goals, partner needs, and timelines for project deliverables, and set dates for recurring remote consultations and/or trainings.
2. A Slate account set up by the partner institution for the RNL CRM consultant to begin working in the partner CRM instance.
3. Recurring remote consultations and/or trainings as determined in the initial discovery call.
4. Periodic written updates on project work by the CRM consultant as determined by the scope of work or initial discovery call.
5. Work will be completed by the RNL CRM consultant in a timely manner within the partner CRM as agreed by partner and RNL consultant.

### Expectations of JMU staff

The frequency of any remote consultation and training sessions will be determined by the university and RNL consultant at the beginning of the partnership. JMU will be expected to provide project goals at the beginning of each consultation. The university should be available for occasional or recurring remote calls to discuss project progress and answer questions.

The RNL CRM consultant will need a Slate account in your instance with the Admin (all access) role in order to properly provide support and implement new functionality to achieve CRM optimization—with the understanding that the RNL consultant will make no changes to the system without prior consent from JMU. Additional Slate permissions may be necessary later in the project depending on the full scope of the project.

The full scope of the partnership will be limited by time rather than by specific and tangible deliverables. Full scope of project deliverables will be determined at the beginning of each consultation project by JMU and the RNL CRM consultant. This approach provides maximum flexibility to address the most immediate, and often changing, needs of the partner in a timely manner that makes the consulting partnership more valuable for JMU.



1.i. continued

## Automate & Streamline Your RNL Data Integrations

Like many institutions, JMU relies on a CRM to coordinate outreach, communication, and interactions with prospective students and applicants to increase the likelihood they will enroll. Data drives these engagements, defining who to contact, when to contact them, and what the appropriate message should be. RNL has been a trusted partner for guiding that engagement strategy because of our experience with data-driven strategies. *But those engagements are only as effective as the data that support them.*

You need a partner to ensure the right data gets transferred to the right place at the right time. RNL CRM consultants can implement the RNL data transfer template to create an accurate and automated data integrations process so the data is both sent and received when it needs to be to continue providing key insights to inform your engagement strategy.

### Our data integration philosophy

Our partners rely on RNL to provide timely and insightful data that helps them to communicate with and recruit the right students at the right time. For JMU to maximize the usefulness of RNL products in meeting your enrollment goals, timely and accurate two-way data transfer is required between the university and RNL. We want to make that data transfer as seamless as possible for you.

### Project approach

RNL will work with new or current RNL partners to implement the RNL Slate data integration template to ensure an accurate and automated two-way data transfer between the partner CRM and RNL. This will allow for “real time” insights into the effectiveness of enrollment strategies and continuous engagement optimization.

To fully evaluate our partner’s data integration needs the RNL consultant will perform a CRM data architecture review, provide a remediation plan (if necessary), and implement the data integration in the partner CRM.

### Expectations of JMU staff

Your RNL CRM consultant will need a Slate account in your instance with the Admin (all access) role, in addition to the SFTP Access and Security Administrator exclusive permissions. These permissions are essential for the RNL CRM consultant to properly implement the RNL data integrations template. The RNL consultant will make no changes to the system without prior consent from JMU.

We place a high value on the integrity and *security of your data*, as such, your RNL consultant will abide by all data privacy and security rules and regulations. Additional Slate permissions may be necessary later in the project depending on the full scope of the project.

Check-in calls will be scheduled frequently between university data managers and the RNL CRM consultant.



## 1.i. continued

### Schedule and work plan

RNL will work with the JMU team to set an attainable timeline to implement the RNL data integrations template. We are able to begin work on this project immediately and anticipate a partnership with active engagement for **5-7 weeks** with ongoing support for up to 5 hours (to be used within one month) after the initial project.

### Step-by-step project approach

1. A discovery call to introduce team members from both JMU and RNL, establish preliminary goals, partner needs, and timelines for project deliverables, and set dates for follow-up conversations.
2. JMU creates a Slate account with the requested permissions for the RNL CRM consultant to begin working in the partner CRM instance.
3. RNL CRM consultant performs an initial data architecture review, inspects existing data integrations, and develops a concrete implementation plan for the RNL data template.
4. Partner reviews the implementation plan and signs off on the work to be done.
5. Work will be completed by the RNL CRM consultant in a timely manner within the partner CRM as agreed by partner and RNL consultant.
6. CRM consultant will test all new integrations for accuracy.
7. After the initial integrations work is completed, RNL consultant will provide additional support as needed within one month of completed implementation plan.

### Engage Students with Timely & Relevant Messaging

How do you stand out in today's fiercely competitive college market, especially with students who have been flooded with search campaigns from your competition?

RNL CRM Solutions helps you build demand by being more strategic, data-informed, creative, and digital in your marketing communications. Take your communications flows to the next level by tapping into both RNL's marketing and CRM experience.

By partnering with RNL, you will have access to:

- ✓ RNL's proven expertise in predictive analytics to target the right students.
- ✓ Our marketing agency's innovative creative assets that make your campaign stand out.
- ✓ Integrated multichannel engagement that reaches students no matter where they are.
- ✓ A solution built entirely in your CRM to give you the ownership and access.
- ✓ CRM expertise to not only build comms flows in your CRM but to provide the data integrations, reporting, and analysis to keep your engagement relevant every year.

Don't settle for mass interest. Generate genuine interest with our CRM solutions for enrollment marketing with the power of your own CRM system paired with the custom expertly crafted messaging content.



## 1.i. continued

### 7 Components to Engage the Best Applicants and Increase Conversions



#### Real-time Targeting and Engagement Campaigns

Inquiry pool surveys via phone and online collect real-time attitudinal information, leading to extended and custom email fulfillment campaigns



#### Student Search Predictive Analytics

Powerful predictive analytics target multiple markets to scan for the best senior search purchase to be included in the applicant campaign



#### Application Marketing Campaigns to Students and Parents

Application information package goes to students and personalized letter with relevant parent information goes to parents



#### ForecastPlus Predictive Inquiry Modeling

Multi-variable analyses will identify the strength of your inquiry pool and pinpoint which activities should be focused on each student



#### Digital Advertising with RNL Digital Dialogue

First party data matching, geo-fencing, and retargeting will reach students where they are- on their mobile



#### Campus Visit Planning and Recruitment Consulting

Campus visits from our enrollment experts for training and advising on recruitment practices empower you and your team to maximize the information we provide.



#### Personalized, Targeted Email and Direct Mail

Award-winning creative engages students and ensures your brand resonates

### Assess your institutional voice and needs

The project begins with our RNL marketing experts working with the JMU team to learn more about your institution, your place in the higher education landscape, and the way that you want prospective students and applicants to view your university.

These conversations are critical to adapting the communications content to fit the voice and character of your institution so they stand out from all the rest of the noise in the higher education marketing landscape.

Our marketing team will engage the JMU team in conversation on many of the following topics:

- ✓ Identifying your distinct campus differentiators
- ✓ Discussing your campus editorial tone and visual identity
- ✓ Determining what draws students to and deters them from attending your campus
- ✓ Reviewing previous successes and failures in your marketing messages



1.i. continued

### Design your communication plan framework

After completing the learning and requirements gathering, our marketing team will develop a segmented communications framework for the selected population for the university’s use moving forward to engage the priority population of students. This plan framework will include the audience, purpose of the communication, calls to action, timing, and mode of delivery along with message content and assets created by RNL marketing experts.

RNL marketing experts can help you target prospective student/applicant populations at many points in the enrollment funnel:

Suggested Student Populations	Grad/ Online	UG
Sophomore Engagement		6
Junior Engagement		7
Qualified Lead/ Inquiry	1	8
App Generation / Submission	2	9
Admitted Student / Yield Campaign	3	10
Enrolled Student / Anti-Melt	4	11
New Student / Start	5	12

#### Additional Available Campaigns:

- Parent/Guardian campaign
- School counselor campaign
- FAFSA completion campaign
- Program-specific population
- Event registration campaign
- Summer/Pre-college program

Below is an example of what an overview of this framework may look like, dependent upon the number of audiences and key messages already in place at JMU.

### Build the comm plan framework in your CRM

After our marketing experts have designed the communications plan architecture and content, an RNL CRM consultant will work with your team to build and execute the campaign in your CRM system. This piece of the process will require administrator-level permissions in the system to build all necessary parts of the campaign structure in the CRM system.

The build-out will include all of the following aspects:

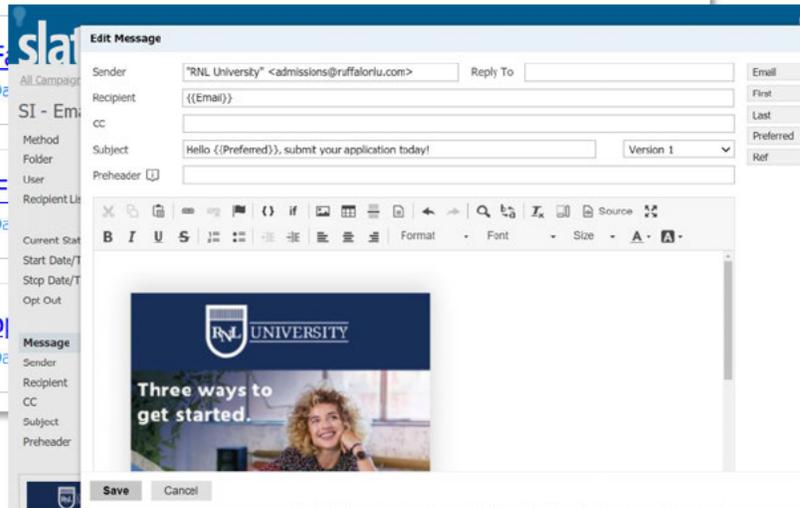
- Audience segmentation, creating populations, and building population rules
- Incorporating the campaign structure, cadence, and message mix into the CRM
- Adding specific message content to the campaign messages
- Working with the university to determine when to activate the communication flows
- Implementing the RNL data integration template to facilitate two-way data transfer
- Creating campaign reports to display campaign metrics and key KPIs



1.i. continued

Sample Campaign Cadence Built in CRM

+1	<a href="#">SI - Email #1 - Intro/Welcome email</a> Hello {{Preferred}}, submit your application today! Population Timestamp Days Population IN Sample EM Senior Inqui...	In Progress <a href="#">Preview</a>
+3	<a href="#">SI - Letter #1 - App Push</a> Population Timestamp Days Population IN Sample EM Senior Inqui...	In Progress <a href="#">Preview</a>
+7	<a href="#">SI - Email #2 - Academics/Apply</a> Population Timestamp Days Population IN Sample EM Senior Inqui...	In Progress <a href="#">Preview</a>
+7	<a href="#">SI - Letter #2 - F</a> Population Timestamp De	
+14	<a href="#">SI - Email #3 - F</a> Population Timestamp De	
+21	<a href="#">SI - Text #1 - Ap</a> Population Timestamp De	



Project phases and deliverables

There are three main phases to the Comms Flow project. First, your RNL marketing team will work with your team to learn and develop your institutional voice and needs. Next, one of our CRM consultants will work with your team to build and implement the communications plan in your CRM system. Finally, RNL will work to monitor and report on the effectiveness of the campaign.

The Comms Flow project package can include the following deliverables:

- Customized campaign strategy and architecture
- Targeted content creation and assets based on institutional priorities, including:
  - ✓ Design of email templates to be used in the campaign
  - ✓ Copy and design for postcards using Slate Print (printing/ mailing costs not included)
  - ✓ Copy for drip campaign email messages
  - ✓ Copy and design for mailer using Slate Print (printing/ mailing costs not included)
  - ✓ Content for SMS/Text messages



### *1.i. continued*

- Slate population and population rules setup for campaign population
- Building the full campaign in your CRM (includes all campaign message creation)
- Possible further message segmentation (incorporating conditional logic/content blocks):
  - ✓ RNL engagement scoring
  - ✓ Academic interest
  - ✓ Open vs. non-opened; click vs. non-click
  - ✓ In-state, out-of-state, international
- Reporting to determine effectiveness of the communication strategy
- Creating both an import and export between Slate and RNL for relevant campaign data, including:
  - ✓ Scheduled export queries with an automated SFTP transfer process to RNL
  - ✓ Any necessary source formats to import data from an automated SFTP from RNL

### **Step-by-step project approach**

1. An initial remote discovery call to introduce team members from both JMU and RNL, establish preliminary goals and timeline, as well as set dates for additional discovery conversations with the marketing team.
2. The marketing team will then conduct remote discovery conversations to interview enrollment and academic leaders to identify the appropriate voice, tone, and message for each of the messages outlined in the communications flow.
3. After all necessary marketing discovery conversations have been completed, the marketing and creative teams will develop campaign content including subject lines, pre-headers, body content, and calls to action.
4. Facilitation of review and approval by the JMU team, including up to two rounds of editing and revisions.
5. Your CRM consultant will implement the developed communications flow in the university's CRM including population segmentation, all necessary rules, loading necessary images, developing campaign templates, message creation, and review.
6. Reports will be developed to monitor the effectiveness of the campaign strategy.
7. Your CRM consultant will implement the RNL Data Integration template to create an automated two-way data transfer between the partner and RNL to enable ongoing strategy evaluation.

### *1.j. Scanning existing marketing practices, communication methods and team organization to offer feedback on how to improve.*

Through annual recruitment planning consultation, RNL will assess your current marketing practices, communication methods, and team organization and can provide action items to specifically address improvements as needed (see details about our approach to annual recruitment planning in our response to item 1.b. starting on page 15).



1.j. continued

Focusing more narrowly on communication flows, our recruitment experts can assess your current practices and provide recommendations for improvement. Details about our approach to communications flow audit and framework development in Slate are provided in response to item 1.i. starting on page 49. We can also provide a broader audit of the university’s communication flow and framework development beyond Slate, as described below.

## Assess Your Recruitment Communications

Using a mix of communication channels is necessary. Still, each channel of communication must serve a specific function in advancing your message to encourage students to move forward with their consideration of JMU.

To ensure the messaging of your segmented communication flows reinforces proven best practices, we will provide a thorough assessment of your current undergraduate recruitment communications. We will:

- Review all existing undergraduate recruitment communications, including content, timing, and methodology.
- Share recommended messages that need to be conveyed to all identified audiences if not already included in your current communication flows.
- Recommend edits to existing messages.
- Recommend the appropriate mix and timing of email, digital, direct mail, text, and phone communications.
- Share best practices on tracking the effectiveness of your communications to each of your key audiences.



### Click to Download the 2021 E-Expectations Trend Report

[www.ruffalonl.com](http://www.ruffalonl.com)

Learn about the behaviors of high school students when they search for colleges online.

## How it works



### Onboarding

RNL schedules a phone conference to review project goals and set dates for the assessment.



### Pre-Visit Review

JMU submits all existing communication flows to RNL before the on-campus visit.



### Campus Visit

RNL visits campus to review and assess JMU’s current communications plans.



### Exit Briefing

RNL outlines key observations and recommendations with identified strategies designed to boost the effectiveness of your comm flows.



### Written Report

RNL provides a written summary of the findings and recommendations.

*1.j. continued*

## Build Your Communication Plan Framework

Once an assessment of your communications plan has been conducted, RNL can work with JMU to develop a segmented communications framework for you to use moving forward. This plan framework will include the audience, purpose of the communication, calls to action, timing, and mode of delivery for you to ultimately flesh out with your key messages and content.

Below is an example of what a portion of this framework may look like, dependent upon the number of audiences and key messages already in place at JMU.

Sample Recruitment Communication Flow							
Inquiry Communication Plan Framework							
Message	Stage	Target	Interval	Comm Type	Enclosure or Link	From	Call to Action
Acknowledge inquiry, key messages - Thank you for your inquiry	Inquiry	Prospective student RFI initiated inquiry	Immediate upon submission of RFI	Immediate automated CRM email	Link to visit the website	DOA	Review programs, schedule a visit, or apply now
Following up on your inquiry	Inquiry	Prospective student	10 min to 24 hours max	Phone/Text	N/A	Recruiter	Review programs, schedule a visit, or apply now
Acknowledge inquiry, key messages (features, benefits) Explore programs at <a href="http://www.academics.edu">www.academics.edu</a>	Inquiry	Prospective Student travel-initiated inquiry	Within 48 hours of inquiry	Personalized email	Link to program viewbook	DOA	Review programs, schedule a visit, or apply now



**2. Describe your firm’s ability/experience with each of the following items. JMU is looking for a partner that:**

**2.a. Has a strong reputation of being collaborative.**

Collaboration is at the heart of all RNL partnerships. One of the key tenants of our Vision and Values is to **work together**. We believe talented people are drawn to meaningful work in a **collaborative environment**.



If you are considering a consulting firm, you should give favorable preference to RNL because of their vast experience, rich heritage, and unbelievable depth of expertise. They really have an army of professionals. RNL is a company you can really trust to help you become a better college.”

VP of Student & Academic Services

- ✓ See the power of open dialog and ideas from all.
- ✓ Enact cohesive approaches that make us better together.
- ✓ Invest generously in each other.

Beyond our Vision and Values, we’ve even written about the power of collaboration in helping partner institutions reach their enrollment goals in our book *Strategic Enrollment Planning: A Dynamic Collaboration*. At the outset of our SEP approach, we invite faculty, academic leadership, and finance to the table to join enrollment management in identifying institution-wide challenges and developing potential solutions. Our methodology is predicated on the firm belief that **we must all collaborate to plan for the long-term health of JMU**, thus breaking down any organizational silos that inhibit institutional excellence.

All of the services we have proposed in response to this RFP include consultation support that includes an RNL enrollment expert working as an extension of the JMU team to best help the university team in identifying challenges and opportunities then utilizing best practices, data, and innovative tools to help you work smarter, not harder.

**2.b. Has an established track record of helping clients achieve enrollment goals.**

Each year, we work with more institutions to touch the lives of more students and donors than any other firm. We are proud to support the mission and success of so many campuses and organizations making an impact in the world today.

 <b>1,900 campuses</b> and nonprofits work with us each year	 <b>3,000 institutions</b> have partnered with us in our history	 <b>300 new clients</b> started working with us last year
 <b>240 million emails</b> sent to prospective students and donors annually	 <b>20 million</b> communications mailed for our clients	 <b>6 million</b> phone conversations with students and alumni
 <b>\$2 billion</b> in institutional aid optimized for our campus partners	 <b>\$1 billion+</b> generated in philanthropic commitments for our clients	 <b>\$200 million</b> raised each year using our multichannel fundraising solutions



### *2.c. Has a reputation of being innovators.*

To solve today's evolving challenges and seek new opportunities for our campus partners, we continue to innovate and evolve our approach as the market shifts and changes. RNL was the first company to:

- Build the case for **retention and student success**;
- Apply **predictive analytics** to the recruitment process;
- **Effectively use the phone** in student surveys;
- Be a leader in development of **financial aid strategies**; and
- Build a **student search strategy** that was targeted and creatively focused on engaging students.

With the strategic acquisition of Converge (leading higher education digital marketing agency) in 2019, RNL now has an in-house Agency with more comprehensive digital solutions, insightful analytics, and data-driven strategies than any other firm in higher education. The combination of RNL's institutional knowledge and expertise in digital lead generation for prospective students and alumni engagement in higher education provides you with a trusted and respected partner that is driven by your enrollment goals and success.

We understand that the landscape of higher education marketing and recruitment of new students is constantly evolving as our technology does. While we believe it's important not to chase technology, we think that it is critical to be innovative and to evolve in meaningful ways that directly support our partner goals.

We continue to invest in talent, technology, and innovation when others are unable to. Through the **RNL Innovation Lab**, we're constantly scanning the horizon to explore, test, and infuse new and evolving digital trends even before they hit the higher education market. This ongoing commitment to innovation will help RNL clients leapfrog the competition because we are higher ed exclusive, innovative, and intelligent with the right people who understand how to apply this to our world.

By working exclusively in higher education, we are able to bring our "New and Next" motto to life. Our digital strategists are in constant communication with our platform partners to discover beta testing opportunities released to a select few agency partners. We **stay ahead of the ever-changing digital curve** by constantly researching our clients' target audiences and planning ahead for the next wave of iteration. We attend countless conferences sponsored by the leading digital platforms, both in and out of higher education. Our goal is to represent JMU with a cutting-edge digital strategy in the marketplace.

### *2.d. Can audit existing practices and work with JMU staff to improve the organization of our recruitment teams.*

Through annual recruitment planning consultation, RNL will assess your current recruitment practices and team organization and can provide action items to specifically address improvements as needed (see details about our approach to annual recruitment planning in our response to item 1.b. starting on page 15).



*2.e. Has experience with CRM Slate and marketing integration with Slate.*

As a platinum member of the *Slate Preferred Partner Program*, RNL has a *deeper understanding* of the Slate product function and process and we've gained access to a variety of resources and insights into best practices. RNL's approach is *powered by data*, which makes our partnership with Slate a logical fit as well as a great boon to our campus partners.

See our detailed list of CRM solutions provided in response to item 1.i. starting on page 39.

*2.f. Can incorporate and improve upon the parts of JMU's recruitment efforts that have been successful, including:*

- i. Use of geodemographic data*
- ii. Purchasing of names*
- iii. The JMYOU platform*
- iv. Taking in-state/out-of-state inquiries to the applicant stage*
- v. Regional advertising strategies*
- vi. Budget allocation for recruitment, advertising and marketing*
- vii. Translation of the university's brand for prospective students*
- viii. Digital advertising strategies*
- ix. Student and parent communication methods/strategies*

RNL Student Search & Engagement utilizes a data-driven, multichannel approach to build upon JMU's recruitment efforts. Your RNL consultant will collaborate with the JMU team to identify how best to incorporate the university's existing strategies with the tools and resources provided by our partnership.

Additionally, annual recruitment plan consulting will develop specific action tactics for a clear path to achieving your goals.

***3. Describe in detail your firm's approach to meeting the recruitment goals of JMU that the requested marketing company is expected to support.***

We have described our approach in detail in response to earlier items in this RFP, so for ease of reviewing how RNL meets the following requirements, we have provided a compliance matrix with page references.

We have described our approach in detail in response to earlier items in this RFP, so for ease of reviewing how RNL meets the following requirements, we have provided a compliance matrix that includes a brief response along with page references to detailed information.

Bid Requirement	Item & Page Reference
<b>3.a. Allow JMU to dominate its primary markets relating to inquiries generated, applications received, and students enrolled.</b>	<b>Item 1. Pages 5-55</b>
The solutions we've proposed in response to this RFP are all designed to support and drive the university's approach to achieving your enrollment goals.	



<p><b>3.b. With the impending high school graduate decline, JMU is looking for a partner with an innovative approach to enrollment marketing that will:</b></p>	
<p><b>i. Incorporate the existing geodemographic data that JMU uses to identify regions that possess students who might be interested in JMU.</b></p>	<p><b>Item 1.a. Pages 5-10</b></p>
<p>Utilizing the power of RNL’s search model, Forecast<i>Plus</i> inquiry-to-enrollment model, and enrollment projection models, JMU will be able to identify regions that possess students who might be interested in the university, score their likelihood of enrolling, and determine enrollment projections in key regions. Armed with this data, we will then help you understand how to utilize this knowledge to inform your enrollment goals, strategies, and messaging.</p>	
<p><b>ii. Provide messaging and instant replies tailored to the student’s specific interests.</b></p>	<p><b>Items 1.c. and 1.d Pages 21-36</b></p>
<p>Our multichannel approach incorporates various strategies enhanced with the power of personalization.</p>	
<p><b>iii. Incorporate internally generated names from university outreach in admissions recruitment efforts.</b></p>	<p><b>Item 1.a. Pages 6-8</b></p>
<p>Forecast<i>Plus</i> inquiry-to-enrollment model scores against <i>each student</i> in your inquiry pool to see how much they fit the profile of a student who did enroll. We refine and strengthen our approach by appending additional socioeconomic and demographic data to your model. This allows JMU to focus your efforts on the prospective students who are more likely to enroll.</p>	
<p><b>iv. Develop organized marketing initiatives that work collectively to attract and maintain the interest of potential students from 7-12th grade.</b></p>	<p><b>Items 1.b. and 1.c. Pages 15-36</b></p>
<p>Annual recruitment plan consulting will develop action items to direct marketing initiatives, then SEO, Student Search &amp; Engagement, RNL Personalized Video Services, and RNL Personalized FinAid Video will work collectively to attract and maintain interest of potential students.</p>	
<p><b>v. Help JMU increase its market share in key in-state and out-of-state regions.</b></p>	<p><b>Item 1.a. Pages 5-6</b></p>
<p>Key to Student Search &amp; Engagement is the predictive search model, which helps us determine the right markets to find growth opportunities and markets where strategies beyond list purchasing can yield the best results.</p>	



<p><b>vi. Help raise JMU's name recognition and the value of the JMU educational experience.</b></p>	<p><b>Items 1.c. and 1.d.</b> <b>Pages 19-21, 26-28, and 30-36</b></p>
<p>SEO will help students find their way to your website where they can get informed on your programs and brand. As part of your Student Search &amp; Engagement campaign, we incorporate alumni outcomes data and info from our Affordability Predictor to send highly personalized emails with relevant ROI and affordability messaging. By consistently communicating value, investment, academic quality, outcomes, and competitive advantage throughout the year, we place JMU in a more advantageous position. RNL Digital Student Engagement and RNL Parent Engagement provide additional pathways to engage with parents and their families, thus boosting JMU's brand awareness. RNL Personalized Video Services provides custom content that students seek regarding academic programs of interest and alumni outcomes. RNL Personalized FinAid Videos allow you to couple a unique explanation of a student's financial aid award with an outcomes-based value proposition.</p>	
<p><b>vii. Develop and implement a comprehensive plan to market the value of a JMU degree in new and existing market areas.</b></p>	<p><b>Items 1.c. and 1.d.</b> <b>Pages 19-36</b></p>
<p>RNL Student Search &amp; Engagement coupled with RNL Personalized Video Services and RNL Personalized FinAid Videos presents a comprehensive plan to market the value of a JMU degree from the top of the enrollment funnel through the financial aid award.</p>	
<p><b>viii. Increase the yield of admits to enrolled, to enable JMU to meet annual enrollment targets.</b></p>	<p><b>Item 1.d.</b> <b>Pages 30-36</b></p>
<p>RNL Personalized Video Services tailors the video's content to each viewer, including their interests in academics, campus life, and more and can incorporate Action Buttons encouraging students to take their next step to apply for admission, schedule a visit, chat with an admission counselor, make a deposit, accept a financial aid award, and more. RNL Personalized FinAid Video converts each student's financial aid data into fully branded, unique, and personalized award videos that include next steps information to enroll.</p>	
<p><b>ix. Develop organized marketing initiatives that work collectively to close the deal and move admits to enrollees.</b></p>	<p><b>Items 1.b. and 1.d.</b> <b>Pages 15-19 and 30-36</b></p>
<p>Through the initiatives identified in annual recruitment planning, we will help JMU develop marketing initiatives that guide your strategies through enrollment. RNL Personalized Video Services provide value information and Action Buttons for next steps, and RNL Personalized FinAid Videos are a helpful tool in showing each admitted student their individual award so they can make an informed decision to enroll.</p>	
<p><b>x. Help JMU increase yield in key in-state and out-of-state regions.</b></p>	<p><b>Item 1.a.</b> <b>Pages 6-8</b></p>
<p>Through the use of Forecast<i>Plus</i> inquiry-to-enroll model JMU will be able to assess likelihood to enroll and develop strategies for students in key in-state and out-of-state regions, then adjust your messaging accordingly to prioritize student outreach.</p>	



**xi. Raise the recognition of the value of JMU’s educational experiences to increase matriculates.**

**Items 1.c. and 1.d.**  
**Pages 26 and 30-36**

As part of your Student Search & Engagement campaign, we incorporate alumni outcomes data and info from our Affordability Predictor to send highly personalized emails with relevant ROI and affordability messaging. By consistently communicating value, investment, academic quality, outcomes, and competitive advantage throughout the year, we place JMU in a more advantageous position. RNL Personalized Video Services provide value information and Action Buttons for next steps and RNL Personalized FinAid Videos allow you to couple a unique explanation of a student’s financial aid award with an outcomes-based value proposition.

**xii. Identify where JMU should increase and decrease recruitment efforts in order to maximize impact on enrollment.**

**Items 1.a., 1.b., and 1.c.**  
**Pages 5-10, 15-19, 21-22, and 29**

Utilizing the power of RNL’s search model, Forecast*Plus* inquiry-to-enrollment model, and enrollment projection models, JMU will be able to identify regions that possess students who might be interested in the university, score their likelihood of enrolling, and determine enrollment projections in key regions. Armed with this data, we will then help you understand how to utilize this knowledge to inform your enrollment goals, strategies, and messaging as part of your annual recruitment planning and Student Search & Engagement.

**xiii. Incorporate the various academic and co-curricular parts of JMU into the yield effort.**

**Item 1.b.**  
**Pages 11-15**

We incorporate academic program and co-curricular planning with SEP. Why is this so fundamentally important? Because it puts the primary purpose of most colleges and universities at the center of the planning process—*to educate students*. Academic programs form the heart of JMU, so enrollment functions must support your academic and co-curricular programs to fully realize the university’s educational goals.

**xiv. Increase the JMU name recognition in current markets.**

**Items 1.c. and 1.d.**  
**Pages 19-21, 26-28, and 30-36**

SEO will help students find their way to your website where they can get informed on your programs and brand. As part of your Student Search & Engagement campaign, we incorporate alumni outcomes data and info from our Affordability Predictor to send highly personalized emails with relevant ROI and affordability messaging. By consistently communicating value, investment, academic quality, outcomes, and competitive advantage throughout the year, we place JMU in a more advantageous position. RNL Digital Student Engagement and RNL Parent Engagement provide additional pathways to engage with parents and their families, thus boosting JMU’s brand awareness. RNL Personalized Video Services tailor the video’s content to each viewer, including their interests in academics, campus life, and more. RNL Personalized FinAid Videos allow you to couple a unique explanation of a student’s financial aid award with an outcomes-based value proposition.



***4. In addition, to off-set the impact of the high school graduation cliff that has already hit parts of the United States and by 2026 will impact 48 states directly and 50 directly and indirectly, JMU seeks to contract with a marketing firm that can assist in developing a long-term, comprehensive marketing and communications plan in order to continue to meet enrollment goals, specifically:***

***4.a. JMU's primary out-of-state regions will be impacted heavily. JMU needs a marketing plan to identify innovative, economically feasible, and sustainable recruitment methods in new regions. Describe in detail how your firm would work to meet this goal.***

***4.b. JMU's primary in-state and out-of-state regions will see an influx of new competitors as they try to increase the yield from these same regions. JMU must be ready to defend these regions and increase the portion of students who seriously consider our University. Describe in detail how your firm would work to meet this goal.***

Utilizing the power of RNL's search model, Forecast*Plus* inquiry-to-enrollment model, and enrollment projection models, JMU will be able to identify regions that possess students who might be interested in the university, score their likelihood of enrolling, and determine enrollment projections in key regions. Armed with this data, we will then help you understand how to utilize this knowledge to inform your enrollment goals, strategies, and messaging as part of your annual recruitment planning and Student Search & Engagement.

Detailed information regarding the following solutions can be found in our response to item 1:

- **RNL's modeling tools:** item 1.a. on pages 5-10
- **Annual recruitment plan consulting:** item 1.b., pages 15-19
- **Student Search & Engagement:** item 1.c., pages 21-29



## Narrative Statement

***A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work.***

RNL is the leading provider of higher education enrollment, student success, and fundraising solutions. **More than 1,900** colleges, universities, and nonprofit organizations rely on us for advanced analytics, personalized engagement, and industry-leading insights to achieve their missions.

We are distinguished by a powerful portfolio of solutions focused on the entire lifecycle of enrollment and fundraising, ensuring students find the right college or university, graduate on time, secure their first job in their chosen field, and give back to support the next generation.



**Enrollment Management** – Market research, website design and strategy, predictive analytics, marketing, student recruitment throughout all phases of the funnel, and financial aid services that engage the right students for each of our campus partners.



**Student Success** – Retention assessments, analytics, and strategy consulting, as well as re-enrollment support and career services to help students achieve their educational goals and secure their first job in their desired field.



**Fundraising Management** – Annual, digital, major, and planned giving services that identify and excite donors who are ready to give.

With the strategic acquisition of Converge (leading higher education digital marketing agency) in 2019, RNL now has an in-house agency with more comprehensive digital solutions, insightful analytics, and data-driven strategies than **any other firm in higher education**. RNL has nearly **50 years** of experience serving more than 3,000 institutions, with more than 100 consultants who have previously served on campuses.

## Trust in our Higher Ed Expertise

JMU's primary contact for the RFP process is Adam Connolly. After execution of a contract for the services outlined in the RFP, JMU's primary contact for delivery and renewal of services is Kim Myrick.



### **Adam Connolly – Vice President, Enrollment Management**

Adam Connolly has more than 15 years of experience in higher education, specifically enrollment management. He served as vice president of enrollment management and marketing at Coker University (SC) prior to transitioning to RNL. At Coker, Adam led an enrollment team that helped the university achieve record enrollment numbers three different times during his tenure. He currently serves as vice president for enrollment management at RNL. Adam's area of experience and interest lies specifically in enrollment pipeline foundation, financial aid leveraging, and comprehensive enrollment and retention best practices. Adam earned his BA in communication from The College of Mount Saint Vincent located in Riverdale, NY. He then earned his MEd in Higher Education Administration from Drexel University.



### ***Kim Myrick, PhD – Vice President & Consultant***



Kim Myrick joined RNL in 2012, bringing more than 20 years of enrollment experience including undergraduate, adult, graduate, online, and remote campuses. As an enrollment consultant, Kim assists RNL clients with enrollment marketing services including student search, inquiry marketing, and application generation. Developing strategies to fully integrate RNL services with campus operations is a key element to Kim’s work with campuses.

Kim has collaborated with more than 40 private and public institutions throughout the U.S. on enrollment marketing services. As a consulting team lead, Kim coordinates RNL engagement across consulting teams including Advanced FinAid Services and Strategic Enrollment Planning. Her work has helped institutions achieve enrollment goals including increased headcount, net tuition revenue, and growing key populations.

### **Collaborative consultation from higher ed experts**

JMU’s RNL team consists of experts in their field who have each collaborated with numerous campus partners. Many factors are taken into consideration when compiling a team, such as institution type, experience, availability, etc. The following team members lead the service areas that would support the JMU project. Final team assignments will be made at contract execution.

### ***Lew Sanborne, PhD – Senior Vice President***

Dr. Sanborne brings more than 30 years of experience in multiple higher education roles and responsibilities. After 18 years working on a university campus, he made the transition to full-time work with RNL. In his current role, he oversees RNL’s consulting and research services division. Lew has collaborated with more than 100 colleges and universities—two-year, four-year, public, and private—throughout the U.S., Canada, and Europe on strategic enrollment planning, student success, and quality service.



### ***Sarah Keating – Vice President***

Sarah Keating joined RNL full time in 2014, bringing more than 25 years of enrollment management experience. As vice president for the recruitment consulting division, Sarah provides leadership, oversight, and planning of all recruitment management related projects. These projects include annual recruitment planning, admissions staff development, CRM consulting, communication audits and architecture, board retreats, and organizational structure reviews. Sarah has partnered with more than 70 institutions throughout the U.S. on enrollment management and marketing. Her work has assisted clients in achieving enrollment goals through strategic planning, operational and processing changes, predictive modeling, communication planning, and direct marketing.





### ***Michael Ritter – Vice President, Client Success***

Dr. Michael Ritter joined RNL in 2016, bringing more than 15 years of experience in enrollment management, including oversight of traditional, graduate, and online recruiting, as well as financial aid and institutional marketing. Michael leads the team delivering direct marketing and engagement campaigns as well as predictive analytics to enable more strategic decision-making. In addition to his role at RNL, Michael is an adjunct faculty member in the Briner School of Business at Greenville University, teaching graduate-level courses in strategic marketing, research methods, and statistics.



### ***Derek Flynn – Vice President***

Derek Flynn joined RNL in 2006, bringing more than 25 years of on-campus and consulting experience in higher education. In his current role as vice president, he leads RNL's financial aid services consulting team. He specializes in admissions strategies and maximizing the impact of an institution's financial aid packages on enrollment. Derek has consulted with more than 40 colleges and universities around the country. He has presented at conferences around the country including the RNL National Conference.



### ***Robert Tallerico – Vice President, CRM Consulting***

Robert Tallerico joined RNL in 2021, bringing more than 15 years of experience in higher education enrollment management. Robert is a CRM expert who helps RNL partners optimize the effectiveness of their enrollment solutions, integrating RNL solutions such as multichannel outreach to maximize return on investment. Robert has served in senior leadership roles at top institutions helping organizations meet their enrollment goals through the use of actionable data.



### ***Robert Van Cleef, DBA – Assistant Vice President***

Rob brings more than 15 years of higher education experience in diverse areas of strategic planning, enrollment management, marketing strategy, and market research. He has collaborated with more than 40 public and private institutions to identify new market opportunities through the design and implementation of custom research studies, especially in the areas of price strategy and academic program demand.



### ***Jeff Easterling – Chief Data Scientist***

Jeff Easterling joined RNL in 2001 as a statistical analyst and has served the firm in several roles over the past nearly 20 years. As chief data scientist, Jeff develops new modeling solutions and enhances existing modeling products for 600+ college and university partners each year.



### ***Danielle Rauser – Sr. Director, Marketing & Enrollment***

Danielle Rauser's experience includes strategic planning and managing all aspects of the execution of marketing, recruitment, and retention for undergraduate, graduate, and online programs. Using her sales background, she also assists in defining new markets and branding strategies to drive online enrollment and serves as SEO Strategist. Prior to her time at RNL, Danielle has over 15 years of experience in higher education marketing and enrollment.





ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Offeror Name: Ruffalo Noel Levitz, LLC

Preparer Name: Rob Ackley, PHR, SHRM-CP

Date: 10/11/2021

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes  No

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes  No

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes  No

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes  No

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

**Instructions:** *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

**Small Business:** "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

**Woman-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

**Minority-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

**Micro Business** is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees AND no more than \$3 million in average annual revenue over the three-year period prior to their certification.

**All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSB at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).**

**RETURN OF THIS PAGE IS REQUIRED**

**ATTACHMENT B (CNT'D)**  
**Small, Women and Minority-owned Businesses (SWaM) Utilization Plan**

Procurement Name and Number: Admissions and Geodemographic Research and Marketing Services

Date Form Completed: 10/11/2021

RFP# JPG-1131

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses  
 for this Proposal and Subsequent Contract

Offeror / Proposer:

Ruffalo Noel Levitz, LLC  
 Firm

1025 Kirkwood Parkway SW, Cedar Rapids, IA 52404  
 Address

Rob Ackley, PHR, SHRM-CP - Exec VP, HR & Administration  
 Contact Person/No. 800.876.1117

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)
Fineline Graphics, Inc. 8081 Zionsville Rd Indianapolis, IN 46268	Richard Miller 317.872.4490	703453	Print Production and Mailing Services	Subcontractor contract amount	dependent upon final scope to be agreed upon between JMU and RNL.

*(Form shall be submitted with proposal and if awarded, again with submission of each request for payment)*

**RETURN OF THIS PAGE IS REQUIRED**



## Sales with VASCUPP Members

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In the last 12 months RNL has been awarded sales with the following VASCUPP member institutions.

VASCUPP Member	Sales Volume in Past 12 Months



## Section X. Cost

*The offeror shall provide pricing for all products and services included in proposal indicating one-time and on-going costs. The resulting contract will be cooperative and pricing shall be inclusive for the attached Zone Map, of which JMU falls within Zone 2.*

The following investment tables include project scope and pricing based on the information we have been provided for JMU to implement these services. These services require additional scoping conversations in order to determine final investment by JMU or any other VASCUPP institution that may be included in a cooperative agreement. Once scope is finalized, we can provide costs for each year of the contract.

<p><b>RNL Student Search and Engagement</b>  <i>Level Up Your Student Search and Engagement Marketing</i></p> <p><b>Year 1: \$430,000 - \$515,000</b></p>
<p><b>Supercharged Search Marketing</b>  For Search Lists to Generate High-Converting Leads  Email • Direct Mail • Digital Ads • Calling</p>
<p><b>Digitally Driven Community Engagement</b>  Full-Funnel Social Media App for Prospective Students  Lead Gen • Inquiry Cultivation • App Gen • Yield • Melt Prevention</p>
<p><b>Parent Engagement that Boosts Enrollment</b>  Full-Funnel Engagement Platform for Parents  Inquiry Cultivation • App Gen • Yield • Melt Prevention</p>
<p><b>Advanced Behavioral Analytics</b>  Historical, Behavioral, and Attitudinal Insights  Inquiry-to-App • Affordability Predictor • Inquiry-to-Enroll • Parent Engagement Trend Score  Student Engagement Trend Score • Admitted Student Yield Predictor Score</p>
<p><b>RNL Consulting Services</b>  Full-Year Strategy Build, Support, and Reporting  Strategy Playbook • Virtual Monthly Review • Campus Visits • RNL Smart View</p>
<p><b>RNL ForecastPlus Inquiry-to-Enrollment Model</b>  <b>Year 1: \$30,000 - \$40,000</b></p>

A logistic regression analysis from inquiry to enrollment identifying a student’s propensity to enroll at the university based on 1 year of historical Corban data



## RNL Enrollment Projection Modeling

*Forecast the Impact of Future Demographic Changes*

<b>First-Year Student Model Only:</b> \$4,300	<b>First-Year and Transfer Student Model:</b> \$7,500
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- Projections in JMU’s primary and secondary markets of the size of the new first-year students class by race and the university’s expected share from each county; and/or
- Projections for new transfer students by race based on size of the market for prospective transfer students in each county
- An Excel workbook with summary tables that show multi-year projections for new first-year students, new transfer students, and new adult students to include:
  - Baseline with no change in market share;
  - “Best-case” with increase in market share and likely trend in market size; and
  - “Worst-case” with loss in market share and likely trend in market size.
- Presentation of projections and consultation via webinar

## Strategic Enrollment Planning

*Develop a Five-Year Strategic Enrollment Plan*

**\$125,000 - \$140,000**

### Consulting, Reports, and Support

- A series of 2-day consultations comprised of a combination of travel, report generation, analysis, and telephone support
- Preparation, including organization for SEP and identification of key performance indicators, and data analysis of JMU-provided enrollment and market data
- Strategy development and prioritization of potential SEP initiatives
- Enrollment goal setting and plan finalization
- Advising on plan implementation and modification

## RNL Recruitment Consulting

*Create a Data-Driven Annual Recruitment Plan or Gain Custom Project-Based Support*

<b>Annual Recruitment Plan Development:</b> \$75,000 - \$100,000	<b>Custom Project-Based Consultations:</b> \$35,000 - \$75,000
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### Consulting, Reports, and Support

- A series of consultations, including a combination of travel, report generation, analysis, and telephone support
- Assistance with the development of an annual recruitment plan and/or custom project-based consultations
- Identification of custom enrollment strategies
- Staff training and development workshops
- Ongoing strategy development, action plan formation, and implementation assistance
- Assessment of strategy success and return on investment



## RNL Class Optimizer™

*Optimize Your Financial Aid Strategy to Meet Enrollment and Revenue Goals*

**Year 1: \$75,000 - \$80,000**

### RNL Advanced FinAid Solutions

- Historical research and competitor benchmarking
- Econometric modeling
- Retention analysis
- Revenue optimization and simulation
- Annual financial aid plan development
- Five-Year Enrollment and Net Revenue Projection Model™
- Enrollment Likelihood and FinAid Receptivity scoring
- RNL Smart View dashboards and reporting
- Program management and consulting
- Up to 2 campus visits

### RNL TrueCost Calculator

- Mobile-responsive calculator is customized to reflect:
  - Merit scholarship award amounts
  - JMU colors and logo
  - Four-year cost projections
  - Versions for targeted student groups
  - Cost includes 2 unique data sets (e.g., first-year and transfer students) and up to 5 subpopulations per data set (e.g., first-year, in-state, out-of-state, and athletics)
  - RNL provides selected, ongoing modifications at no additional cost
  - Track usage and gain insights with RNL Smart View dashboard reporting

## RNL Personalized Video Services

*Boost Conversion and Yield with Personalized Videos*

**Year 1: \$30,000 - \$45,000**

### RNL Personalized Videos for Recruitment

- Video script development
- Video production, including scoped content segments and content sequences
- Action Buttons to redirect to a separate URL based on student attributes
- Closed captioning (English)
- Video delivery for integrated RNL enrollment marketing programs
- Consulting hours to guide your video strategy
- Live dashboard of video engagement metrics

### RNL Personalized FinAid Video Powered by Allied Pixel

- Remote kick-off consultation on video template scope and content
- Insertion of institution's existing video footage into the video template
- Creation of JMU-branded, personalized financial aid videos up to 6 minutes in length. Video creation timeline is 10 weeks for admitted/current students.
- Unique video links for scoped awarded admitted students and awarded current students
- Delivery of the video links via 1 text message per student for up to 28 consecutive weeks
- Security page to validate student identity prior to viewing the personalized video



- Up to 3 next-step links redirecting students to separate URL based on student attributes (e.g., redirect to forms and sites for enrollment deposits, event registration, financial aid, class registration, career services, advisor appointments, etc.)
- Video closed captioning
- Up to 3 unique revision videos per student (if a student's financial aid offer changes during the term)
- Live dashboard with video engagement metrics

## Dynamic SEO Strategy and Content Development

*Boost Online Engagement with Compelling Content and Smart SEO*

**\$39,000 - \$80,000**

- Development of written search-engine-optimized content for targeted academic program and priority enrollment webpages identified by the client, to include:
  - Remote interviews to inform content research
  - Keyword research and creation of blueprints for each page, including primary and secondary keywords, meta title, and meta descriptions
  - Delivery of content for client review, including revisions of up to 2 drafts for each page
- Pre-launch and quarterly SEO performance reports for targeted webpages, to include assessment of:
  - Changes in search engine rankings
  - Changes in website traffic originating from search engines
  - Changes in enrollment-related user behaviors on each page
- 2 technical audits/crawls of the client web domain to identify issues impacting SEO performance:
  - Up to 5,000 pages per month
  - Report detailing specific site errors by error type and URL for client remediation
- 12 months of consultation in monthly remote sessions covering:
  - Updates on content development process and page revisions
  - Presentation of recommended prioritized site technical issues
  - Presentation of SEO performance reports
  - Recommended adjustments or enhancements to strategy for ongoing improvement
- 12-months tracking in RNL's agency account of BrightEdge, including:
  - Set up and tracking for scoped keywords and competitors
  - Development of keyword performance dashboards accessible to the client
  - Integration of Google Analytics data for client site into BrightEdge platform to enable reporting on impact of SEO work on website traffic

## RNL CRM Solutions

*Ensure that Your CRM is Aligned and Optimized with Your Enrollment Goals*

**\$30,000 - \$125,000**

Scope may include any one or combination of the following service components:

### RNL CRM Implementation

- Discovery call and development of a concrete implementation plan prior to kick-off
- RNL expertise and best practices for CRM implementation
- Pre-implementation documentation and preparation guides
- Hands-on implementation work and training in partner CRM by RNL consultant of the following:
  - Phase 1: System Architecture
  - Phase 2: Prospect Management
  - Phase 3: Slate Application and Related Features



- Phase 4: Application Review and Decision Release
- Data integrations support with RNL to maximize the effectiveness of other RNL solutions
- Four (4) weeks of post-project support

#### **RNL CRM Assessment and Optimization**

- Initial learning call to discuss institution use of JMU's existing CRM and existing challenges
- Targeted review of 3 functional areas (or full system) within Slate
- Comprehensive findings report with suggested remediation plan
- Post-audit call to review findings and determine next steps

#### **RNL CRM Consultation and Training**

- Initial remote discovery call to determine the priorities and scope of the project
- Access to RNL expertise and best practices
- Remote CRM consulting sessions to support the optimization of the Slate CRM instance
- Remote CRM training sessions to support JMU staff
- Working hours to be scoped, inclusive of:
  - Remote consultation calls
  - Remote trainings
  - Time in between remote consultations for hands-on building by RNL consultant
  - Communication with partner, emails, and the writing of follow-up reports
- Documentation of the work completed and any to-do items moving forward.

*\*All hours contracted by JMU must be used within 6 months of the beginning of the executed contract or the time will be forfeited without refund.*

#### **RNL Data Integration**

- Evaluation of current data needs related to RNL products
- Review of Slate fields and prompts to ensure accurate and consistent data storage
- Development of a plan based on current CRM configuration and JMU's needs to be implemented by the RNL consultant in the university's CRM
- Slate data import setup and mapping
  - RNL data source format configuration within Slate
  - SFTP account configuration and testing
- Slate data export configuration and automation
  - Building or refining existing export queries to meet RNL data requirements
  - Scheduling data export queries for automated RNL pickup
- Data validation testing for both incoming and outgoing data
- After initial integration, up to 5 hours of ongoing data integration support (to be used within 1 month)

#### **RNL Comm Flow Development**

- Development of Communication Plan Framework(s) for funnel stages, which may include inquiry, applicant, admit, deposit, and registration/enrollment
- Use of best practices in the development of key messages for target audiences
- Incorporation of current client key messages into communications flow with specific calls to action
- Delivery of completed Communication Plan framework, message templates, message content, and assets to JMU's CRM
- Complete build-out of communication flow in JMU's CRM
- Implementation of the RNL data integrations template
- Additional audiences/communications can be added for additional cost



***Specify any associated charge card processing fees, if applicable, to be billed to the university. Vendors shall provide their VISA registration number when indicating charge card processing fees. Any vendor requiring information on VISA registration may refer to <https://usa.visa.com/support/small-business/regulations-fees.html> and for questions <https://usa.visa.com/dam/VCOM/global/support-legal/documents/merchant-surcharging-qa-for-web.pdf>.***

RNL does not accept payment via credit card. Our preferred method of payment is ACH which does not incur a processing fee.



## RFP Exceptions

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Notwithstanding anything to the contrary in the RFP and any other documents incorporated into the RFP and/or referenced within the RFP, RNL's response to the RFP is an offer to provide services expressly conditioned upon utilizing the existing Master Services Agreement ("MSA") entered into by and between Ruffalo Noel Levitz and the University (attached). The MSA shall be supplemented with a Statement of Work ("SOW") which provides for the operative terms of pricing, payment schedule, and deliverables. RNL offers to provide services only according to the terms and conditions set forth in this response, or as mutually agreed upon through subsequent negotiation between the parties.

### Request for Proposal Form, Section VII. General Terms and Conditions, Section VIII. Special Terms and Conditions

RNL's signature on the form and/or submission of a proposal does not indicate its acceptance with all of the terms and conditions in this RFP, but its willingness to provide services expressly conditioned upon utilizing the existing MSA between the parties supplemented with a SOW, or as mutually agreed upon through subsequent negotiation between the parties.

### Section VI. B. Award to Multiple Offerors

Incorporation of the entire RFP, or RNL's complete proposal, is not appropriate, as the proposal may contain references, biographies, firm history, and locations; inclusion of such information may create ambiguity and describe prior or completed events, actions and timelines, and information irrelevant or unnecessary in a contract document.

### Section VIII. I. Cooperative Purchasing / Use of Agreement by Third Parties

The nature of RNL's services are dependent on the needs of each university and college it serves. Thus, it is not appropriate to offer the same services at the same prices to other institutions of higher education in Virginia, based on how RNL meets the needs of the University.



## MASTER SERVICES AGREEMENT

This Master Services Agreement ("Agreement") is entered into by and between Ruffalo Noel Levitz, LLC ("RNL") and James Madison University ("Client"), identified below, and sets forth the terms and conditions for RNL to provide Client with services as set forth herein. The parties agree as follows:

### 1. Client Information

A. Legal Entity Name:

James Madison University

B. Address, email address, and facsimile number, if any, for notice purposes:

800 South Main St Harrisonburg VA 22807

C. Type of Legal Entity (corporation, LLC, partnership, unit of government, etc.):

University

D. State of Legal Formation:

Virginia

E. Tax ID #:

[REDACTED]

### 2. Services, Reference Date and Costs

A. Client agrees to purchase, and RNL agrees to provide, the services (the "Services") set forth on one or more Statement of Work, Statement of Services or similar document describing work to be performed no matter how titled, which reference and are incorporated by the parties into this Agreement, or into which this Agreement may be incorporated, (individually a "SOW" and collectively the "SOWs") during the Term of Services set forth on such SOW.

B. This Agreement is dated October 1, 2019 for reference purposes (the "Reference Date" or "Date of this Agreement"). The term of delivery of any and all Services shall be set forth on one or more SOW.

C. The pricing, cost and payment terms are set forth on the SOW applicable to the Services.

### 3. Planning, Materials and Delivery of Services

A. Except to the extent otherwise expressly provided on a SOW, Client and RNL will work together to develop and finalize a plan for the delivery of the Services. Client shall fulfill the responsibilities and take the actions required of it as described on the Statements of Services, if any.

Client shall provide its data, materials, Client IP (defined below), telephone numbers and factual information necessary to perform the Services, including without limitation information regarding Client and Client's activities (collectively the "**Client Materials**") in order to implement a program for delivery of the Services. Client represents and warrants it has all consent and authority necessary to use, and to allow RNL to use, in connection with the delivery or provision of Services, all Client Materials, including without limitation all drawings, designs, fonts, trademarks, trade dress, service marks, telephone numbers and electronic mail addresses provided to RNL by Client. Client shall be solely responsible for securing the consent, right and authority to use, and for the accuracy of, all Client Materials contained in any materials or scripts, or otherwise used by RNL in the delivery of the Services, and represents and warrants that Client's Materials shall be accurate in all material respects and shall not omit any information reasonably necessary to make Client Materials not misleading. In the event RNL, or any of its officers, directors, managers, members, subsidiaries or employees, suffer any and all loss, damage, deficiency, claim, or liability arising out of, or resulting from, (a) any alleged or actual infringement by Client IP (defined below), or any portion thereof, on the intellectual property rights of another person, or (b) use of the Client Materials, it shall be deemed a breach of this Agreement by Client. Client acknowledges the likelihood that RNL may be harmed, or suffer damages, or both, as the result of a breach of this Agreement.

B. RNL shall fulfill the responsibilities, take the actions required of it and deliver the Services and materials as described on the SOW. RNL shall perform the Services to be provided in a professional and workman like manner substantially similar to that found in its industry or trade for substantially similar services provided by similar vendors under similar circumstances, subject to, and consistent with, the past practices of the parties, if any. Services will be provided at the RNL Office (defined below) and at other RNL locations, as well as on Client's premises when so described in one or more SOW, or as otherwise mutually agreed.

#### 4. Effective Date and Termination

This Agreement shall be effective on the Date of this Agreement; provided, however, that notwithstanding any other provision of this Agreement, if filing of this Agreement with a governmental authority is required by law in order for the Agreement to be effective with respect to any portion of the Services, then the Agreement shall be effective for such portion of the Services, and such portion of the services regulated or governed by such governmental authority will begin, only on the date the Agreement is so filed; provided further, however, that if a waiting period after the filing of this Agreement with a governmental authority is required by law in order for the Agreement to be effective for any portion of the Services, then the Agreement shall be effective for such portion, and such portion so regulated or governed by such governmental authority will begin, only on the first day after completion of such waiting period. The Agreement shall thereafter continue until terminated by law or in accordance with the terms of this Agreement.

This Agreement may be terminated at any time and for any reason, with or without cause, as follows:

- A. By Client providing sixty (60) days advance written notice to RNL; or
- B. By RNL providing one hundred eighty (180) days advance written notice to Client.

Termination of this Agreement shall not terminate any outstanding Statements of Work, and the terms of this agreement will continue to control any outstanding Statements of Work.

In the event a Statement of Work is terminated for any reason, Client shall compensate RNL for all costs for Services rendered up to the effective date of the termination, plus all applicable taxes, if any, according to the terms of this Agreement. Client shall not be obligated to purchase, or pay for, any

Services rendered beyond the effective date of the termination. In the event Client has paid and RNL has received any amount greater than the amount required for such full compensation to RNL then that excess amount shall be refunded by RNL to Client within the same period of time as established for Client's payment of RNL invoices.

5. Warranties, Limitation of Liability and Indemnification

A. EXCEPT AS EXPRESSLY STATED IN THIS AGREEMENT, RNL MAKES NO OTHER EXPRESS WARRANTIES OR GUARANTEES OF ANY TYPE OR NATURE, AND MAKES NO IMPLIED WARRANTIES OF ANY TYPE OR NATURE, AS TO THE QUALITY, MERCHANTABILITY, COMPLETENESS OR FITNESS FOR ANY PURPOSE OF ANY PRODUCT OR SERVICE. EXCEPT AS EXPRESSLY MANDATED BY ENFORCEABLE LAW, WHICH WOULD BE CONTRARY TO THE PARTIES' INTENTION AND DESIRES, RNL MAKES NO WARRANTIES, EXPRESS OR IMPLIED, REGARDING ANY FINANCIAL RESULTS OR OUTCOMES FROM OR RELATED TO ANY OF THE SERVICES PROVIDED PURSUANT TO THIS AGREEMENT.

B. In no event shall either party be liable for any special, consequential, exemplary, incidental or similarly designated damages arising out of or in connection with this Agreement. RNL's liability for any alleged or actual breach of, or claims arising from or related to, this Agreement, or Services to be rendered hereunder, shall be limited as follows to whichever is greater: (i) in the event any such liability or claim is covered by an insurance policy secured by RNL, then such liability or claim shall be limited to amount of coverage as determined by the issuer of such policy; and, (ii) in the event any such liability or claim is not covered by an insurance policy secured by RNL, then the liability and claims shall be limited to an amount equal to three times the amount of fees actually paid by Client to RNL for the services giving rise to such liability or claim; provided, however, that the foregoing clause (ii) is not intended, and shall not be deemed, to limit or restrict in any way any coverage or benefits provided under any applicable insurance policy secured by RNL. Client's liability for any alleged or actual breach of, or claims arising from or related to, this Agreement, other than and excluding claims for payment or reimbursement for or related to Services actually rendered hereunder, shall be limited as follows: (i) in the event any such liability or claim is covered by an insurance policy secured by Client, then such liability or claim shall be limited to amount of coverage as determined by the issuer of such policy; and, (ii) in the event any such liability or claim is not covered by an insurance policy secured by Client, then the liability and claims shall be limited to an amount equal to the amount of fees actually paid by Client to RNL for the services giving rise to such liability or claim, however, that the foregoing clause (ii) is not intended, and shall not be deemed, to limit or restrict in any way any coverage or benefits provided under any applicable insurance policy secured by Client. Except as expressly stated in a SOW RNL shall not be responsible for collection of any funds nor have or assume any custody or control over any Client funds. Notwithstanding the foregoing, in the event any funds are delivered to RNL in error, then such funds will be promptly forwarded to Client.

C. Subject to the limitations of this Agreement, RNL shall defend, indemnify, and hold Client and its employees, owners, officers and directors harmless from any and all loss, damage, deficiency, claim, or liability to the extent arising out of its actions, and any and all actions, suits, proceedings, demands, assessments, judgments, costs and expenses, including reasonable attorney fees, incident to the foregoing. Subject to the limitations of this Agreement, Client shall defend, indemnify, and hold RNL and its employees, owners, officers and directors harmless from any and all loss, damage, deficiency, claim, or liability to the extent arising out of its actions, and any and all actions, suits, proceedings, demands, assessments, judgments, costs and expenses, including reasonable attorney fees, incident to the foregoing.

6. Ownership of Materials and Intellectual Property

Unless otherwise expressly provided in a SOW, all patents, copyrights, trademarks, service marks, trade dress, software, processes, materials, inventions, designs, code and works of authorship, including derivatives therefrom or thereof, ("IP") now owned, or subsequently created or acquired, by RNL and all IP, other than and excluding the Client IP (defined below), resulting or arising from Services rendered under this Agreement, including in both cases all derivatives therefrom or thereof, (collectively the "RNL

IP”) shall be and remain the sole and exclusive property of RNL and this Agreement does not transfer any title to any RNL IP to Client. “**Client IP**” means any IP now owned by Client or subsequently created or acquired by Client in a manner unrelated to this Agreement. “**Services IP**” means any IP created by RNL in the performance of this Agreement for Client for the exclusive, non-commercial, non-profit use by Client for its own direct benefit in connection with this Agreement. RNL grants to Client a perpetual, royalty-free, non-exclusive, worldwide license to the Service IP, but not derivatives thereof, nor of any other RNL IP, for Client’s, and Client’s affiliate’s, limited, sole and exclusive, non-commercial, non-profit use of the Services IP for their own benefit (and not for the benefit of other non-affiliated third-parties). The parties acknowledge that RNL is willing to use the RNL IP for the benefit of Client, but does not by this Agreement, forfeit or lose any right, title or control to, over or in any RNL IP or derivatives thereof. Except for the limited license granted above, or as otherwise expressly stated and described on a SOW, RNL does not and will not provide its services or RNL IP on a “work for hire,” or “work made for hire,” basis, and Client acknowledges the same. Unless otherwise expressly provided in a SOW, each party agrees that it will not, directly or indirectly, reverse engineer, decompile, disassemble or otherwise attempt to derive source code or other trade secrets from any IP owned by the other. Client represents and warrants that it will not reproduce, disclose or use RNL IP for any purpose, or in any manner, other than as provided in this Agreement or authorized in writing in advance by RNL. RNL represents and warrants that it will not reproduce, disclose or use Client IP for any purpose, or in any manner, other than in the performance of this Agreement or as provided in this Agreement or as authorized in writing in advance by Client.

7. Related Services and Costs; Taxes

The fees, costs and expenses for the Services are described in this Agreement and on the SOW. Quotes and estimates will be provided upon request. Client will pay all applicable taxes, if any, on Services and costs, which RNL is required by law to collect, unless and until Client represents, warrants and provides written confirmation that Client is exempt from the collection of such taxes.

8. Invoicing, Inquiries and Payments

Unless otherwise directed in writing, invoices will be sent to the address specified in the applicable SOW. If not stated in the applicable SOW, then all payments on invoices are due net thirty (30) days from the date of the invoice, with late charges the lower of 1.5% per month or the highest rate allowable by law. All notices or inquiries regarding invoicing or this Agreement shall be sent addressed to (the “RNL Office”):

Ruffalo Noel Levitz  
Attention: CFO  
1025 Kirkwood Parkway SW  
Cedar Rapids, IA 52404-8629

All payments shall be sent addressed to:

Ruffalo Noel Levitz  
Attention: Controller  
P.O. Box 718  
Des Moines, IA 50303-0718

9. Confidentiality

Both parties acknowledge that in the negotiation and performance of this Agreement, confidential and proprietary information of each which is not generally known or available to the general public and has value to the owner of such information (“Confidential Information”) has been and will be made

available to the other. The parties agree to use reasonable efforts to maintain the confidentiality of Confidential Information, but in no event lesser than was used with like material of the receiving party. Both parties shall maintain in secret all Confidential Information received under this Agreement, shall not disclose the Confidential Information to any third party without prior written authorization from the disclosing party, and shall not use the Confidential Information except for the purpose for which it is disclosed under this Agreement. Each party shall limit dissemination of the Confidential Information received by it, except to those of its employees, agents and consultants whose duties justify the need for access to the Confidential Information provided that such individuals are subject to obligations of secrecy and limited use commensurate in scope with this Agreement. No other right or license to use the Confidential Information is granted under this Agreement. The foregoing obligations shall apply to verbal information as well as specific portions of the information that are disclosed in writing or other tangible form and marked to indicate the confidential nature thereof. The parties acknowledge that certain personal information and records may be protected by law, including without limitation, by the Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), Title XIII of the American Recovery and Reinvestment Act of 2009 ("ARRA") also known as the Health Information Technology for Economic Clinical Health Act ("HITECH"), the Family Educational Rights and Privacy Act of 1974 ("FERPA") and the Financial Services Modernization Act of 1999 also known as the Gramm-Leach-Bliley Act ("GLB," and collectively with HIPAA, ARRA, HITECH and FERPA referred to as the "Privacy Laws"), and that all such information is deemed "Confidential Information" regardless of whether it is designated as confidential in writing.

The foregoing obligations shall not apply to any information which:

- A. Was known to the receiving party prior to receipt under this Agreement, as demonstrated by the receiving party's records; or
- B. Was publicly known or available prior to receipt under this Agreement, or later becomes publicly known or available through no fault of the receiving party; or
- C. Is disclosed to the receiving party by a third-party having the legal right to disclose the same; or
- D. It is disclosed to any third-party by the disclosing party without an obligation of confidentiality; or
- E. Is independently developed by an employee, consultant, or agent of the receiving party without access to the information as received under this Agreement; or
- F. The receiving party is obligated to produce as a result of a legal requirement, provided that the disclosing party has been given notice thereof and an opportunity to waive its rights or to seek a protective order or other appropriate remedy; it being the intention of the parties to comply with any applicable state "freedom of information," or similar, law or statute; and, such information shall not be deemed or considered to be Confidential Information.

Information described in clauses A through E above shall not be considered confidential, proprietary or "Confidential Information." Upon written request of a disclosing party, the receiving party shall return all Confidential Information disclosed in written or tangible form, and the receiving party shall destroy all their copies, excerpts or notes made by it which contain any portions of the information unless otherwise provided for by the parties, other than copies on back-up tapes stored off-site which shall be over-written by RNL in accordance with its disaster recovery and business continuity practices and procedures.

#### 10. Notices

All notices given pursuant to or in connection with this Agreement shall be in writing, and provided (A) for the Client to the address in Section 1, and (B) for RNL to the RNL Office in Section 8, in either case by (1) U.S. Postal Service, certified mail, return receipt requested, or its then equivalent, (2) courier or hand-delivery, (3) facsimile transmission with delivery confirmed, if a facsimile number has been provided, or (4) electronic mail with delivery receipt or acknowledgment. Notices shall be deemed

received and effective (a) as of the fifth (5th) day subsequent to deposit in a U.S. Postal Service mail depository, postage fully prepaid, if so deposited, or (b) on the date of confirmed or acknowledged delivery by any other method; whichever is earlier.

11. Independent Contractor Relationship

All persons employed by RNL in connection with the provision of Services shall be employees of RNL and not Client. In performing any and all of the Services to be provided under this Agreement, RNL shall at all times and for all purposes be and remain an independent contractor and in no case and under no circumstances shall RNL or any of its employees, including but not limited to those of its employees actually performing any of the Services, be considered or otherwise deemed to be employees or agents of Client for any purpose whatsoever. Accordingly, neither RNL nor any of its employees or agents shall have the authority to enter into any contract for or on behalf of the Client or otherwise bind the Client in any manner whatsoever.

12. Compliance with Laws

A. Both parties shall comply, at its own cost and expense, with the provisions of all state, federal and local laws, ordinances, regulations and orders pertaining to this Agreement and performance of this Agreement. For clarity, both parties agree to abide by all requirements of the Privacy Laws with respect to all records, information and data governed by such laws, and as applicable to such party. Both parties shall take all measures necessary to promptly remedy any violations, if any, of any such law, ordinance, rule, regulation or order. The parties will use all commercially reasonable efforts to assist each other, to the extent required, in the compliance with state, federal and local laws, ordinances, regulations and orders (the "Laws").

B. If either party (the "Complying Party") requires information from the other party (the "Supplying Party") in order to comply with any of the Laws; then the Supplying Party shall supply the required information promptly following a reasonable request in writing, including by electronic mail, but no later than twenty (20) calendar days after such request. If the Complying Party requires and requests information in writing, with a reasonably adequate description, from the Supplying Party, (the "Requested Information") and the Supplying Party does not provide the Requested Information within twenty (20) calendar days after such request, then (a) for purposes of this Agreement, the Complying Party shall not be deemed to be in breach of this Agreement as the result of any failure to comply with any Laws as a result of the Supplying Party's failure or refusal to provide any Requested Information; and, (b) any and all penalties, fines, interest, costs and expense incurred as a result of, or related to, the Supplying Party's failure or refusal to provide any Requested Information shall be a cost and price of the Services which shall be paid by the Supplying Party (or reimbursed by the Supplying Party if the Complying Party is required by law to make such payment).

C. To the extent any particular contractual provisions are required in order to comply with any particular provisions of any Laws, to the extent applicable to this Agreement, or the performance of this Agreement or the Services, then the parties will endeavor to set forth such provisions on either one or more of a SOW or Regulatory Attachment or similar provision, schedule, attachment, exhibit or addendum, executed by the parties and either attached to this Agreement and incorporated here by this reference or attached to or included in a SOW or otherwise incorporated into this Agreement.

13. Equal Employment Opportunity

In connection with the performance of the Services under this Agreement, RNL agrees that it will not discriminate against any employee or applicant for employment because of age, race, color, religion, sex, sexual orientation, national origin, disability, or because he or she is a disabled veteran or veteran of the Vietnam Era.

14. Covered Information Security

A. "Covered Information" shall mean any personally identifiable financial information that is not publicly available, including but not limited to, social security numbers, credit information and payment card information ("PCI") such as account and card numbers, verification numbers, and expiration dates, whether in paper, electronic or other form, that is obtained, handled, accessed or maintained by RNL on behalf of Client, or exchanged between Client and RNL, in the performance of this Agreement.

B. Each party shall maintain commercially reasonable safeguards, practices and procedures to protect Covered Information. Each party shall provide the other with information concerning safeguards, practices and procedures it has implemented and maintained to protect Covered Information as the other party may reasonably request.

C. If, and to the extent that, a party, or its employees, contractors and agents is processing, storing, caching and initiating or engaging in transmission of PCI on such party's network, or servers located on such party's network, then that party is responsible for maintaining compliance with the then current Payment Card Industry Data Security Standard ("PCIDSS"). RNL acknowledges that it is responsible for the security of all cardholder data it possesses or otherwise stores, processes or transmits on behalf of Client, and to the extent that RNL could impact the security of Client's cardholder data environment. To the extent any review or inspection of either parties' records or facilities is required for either party to comply with the requirements of this clause, then the parties agree that they will reasonably cooperate with each other in connection with any such review or inspection. The parties agree further that (i) unless expressly provided on an applicable SOW, neither party shall have any obligations or responsibility regarding or related to the other party's network, servers or equipment, or the management of any of them, and (ii) RNL does not provide payment card processing services and, unless expressly provided in an applicable SOW, RNL will not possess or otherwise store, process or transmit cardholder data on behalf of the Client and the Services do not involve the possession, or the storing, processing or transmitting, of cardholder data.

D. RNL may make information available to Client by granting Client, and individuals designated by Client, with password restricted access to a RNL SFTP server, and in the event any individual with such access ceases to be under the direction and control of Client then Client will notify RNL in writing of such event and RNL may require a modification in the password for such access.

E. The parties agree to implement the following network and data security practices in connection with this Agreement:

i. Each party will install and maintain commercially reasonable security devices, firewalls, controls or rules, that isolate, regulate and control the ability of all of such party's facilities, network, servers and equipment used in connection with the Services to access, utilize or connect to or through the Internet.

ii. Each party will install and maintain anti-virus software on such party's servers and workstations used in connection with the Services.

iii. Each party will either (1) require Strong Passwords (defined below) to log on to any computer or server used in connection with the Services, or (2) tightly restrict the physical and network access any computer or server used in connection with the Services to only certain selected and clearly defined networks, servers and services. "Strong Passwords" have at a minimum a mix of letters and either numbers or symbols.

iv. Neither party will store PCI in a database created and maintained exclusively through any RNL software.

F. In the event a party identifies a suspected or confirmed security breach involving any Covered Information which is in any way related or connected to the Services, then such party shall, to the maximum extent possible, take immediate action to limit the breach and shall immediately notify the other. To the extent a party identifies a cause or potential cause of a suspected or confirmed security breach involving any Covered Information which is in its reasonable control, then such party shall take action as soon as reasonably practical, to correct or remedy such cause.

G. In the event either party fails to meet the obligations of this Section 14, then the party failing to meet such obligations hereby releases and affirmatively waives all claims and rights it might otherwise have or assert against the other party to the extent such claims relate in any way to such failure.

15. Dispute Resolution, Governing Law & Jurisdiction

This Agreement shall be construed and interpreted in accordance with the laws of the state where a majority of the Services are provided. Both parties agree that if either party wishes to initiate litigation based on this Agreement, it must do so exclusively in the jurisdiction in which the other party is located and both parties hereby submit to such jurisdiction subject to the conditions and requirements of this paragraph. Prior to the instigation of any such action (other than an action for equitable relief), and as a condition to the voluntary submission to the jurisdiction of any state, a meeting shall be held at a mutually agreed upon neutral location, attended by individuals with decision-making authority regarding the dispute to attempt in good faith to negotiate a resolution of the dispute. If within forty-five (45) days after such meeting the parties have not succeeded in resolving the dispute, either party may proceed at law, or in equity, in a court of the jurisdiction described above.

16. Force Majeure

No party will be responsible to the other, and such shall not be grounds to terminate this Agreement, for disruptions in the delivery of the Services caused by acts of God or governmental authority (a "Force Majeure Event"); provided that RNL shall have a duty reasonably to mitigate, or cause to be mitigated, any such disruptions (or parts thereof). RNL's obligation to deliver or provide the Services covered by the Agreement shall be suspended (or reduced, as applicable) during the period, and to the extent, that use of the Services is disrupted by the Force Majeure Event, without such suspension or disruption of the Services constituting a material breach of its obligations under this Agreement.

17. Severability & Assignment

It is agreed and understood that should any of the provisions of this Agreement, other than and excluding Sections 2, 4, 5, 6, & 9, be determined by any court of competent jurisdiction to be invalid or void for any reason, then the parties consent that this Agreement shall be amended retroactive to the date of its execution to include all terms and conditions other than those found by the court to be invalid or void. It is agreed and understood that should any of the provisions of Sections 2, 4, 5, 6, & 9, be determined by any court of competent jurisdiction to be invalid or void for any reason, then either party may terminate this Agreement immediately by giving written notice to the other (including by electronic mail). Other than assignment to a corporate affiliate or successor by RNL, neither party may assign this Agreement without prior written consent of the other party, which shall not be unreasonably withheld.

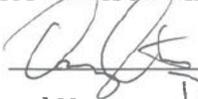
18. Entire Agreement

The supplemental terms of all attached Statements of Services, as well as any attachment, exhibit or addendum expressly incorporated herein or in a SOW, including without limitation any Regulatory Attachments, are made a part of this Agreement. This Agreement constitutes the entire agreement between the parties hereto and replaces all other agreements between the parties relating to the same subject matter, whether written or oral. No amendment, modification or addition to this Agreement shall be effective unless set forth in writing and executed by both parties. No non-conforming terms of Client's purchase order, request for proposal, bid request or other documentation shall control over the terms and conditions of this Agreement and all such documents are hereby amended and superseded.

Signed by the parties effective on the date or dates described in section 4 above.

**[SPACE INTENTIONALLY LEFT BLANK.  
SIGNATURES FOLLOW ON NEXT PAGE.]**

**James Madison University (2 separate signatories - REQUIRED):**

By:   
Printed Name: Doug Chester  
Title: Buyer Senior  
Date: 10/18/19

By:   
Printed Name: Leah Frank  
Title: Procurement Manager  
Date: 10/18/19

**Ruffalo Noel Levitz, LLC**

By:   
Printed Name: Mary Noel  
Title: Director of Revenue  
Date: 10/18/2019

By:   
Printed Name: Trisha Cornwell  
Title: Controller  
Date: 10/18/2019

**Please return signed contracts to [RNLContracts@RuffaloNL.com](mailto:RNLContracts@RuffaloNL.com)**

**COMMONWEALTH OF VIRGINIA AGENCY**  
**CONTRACT FORM ADDENDUM TO CONTRACTOR'S FORM**

**AGENCY NAME:** James Madison University

**CONTRACTOR NAME:** Ruffalo Noel Levitz, LLC

**DATE:** 10/18/19

The Commonwealth and the Contractor are this day entering into a contract and, for their mutual convenience, the parties are using the standard form agreement provided by the Contractor. This addendum, duly executed by the parties, is attached to and hereby made a part of the contract. In the event that the Vendor enters into terms of use agreements or other agreements of understanding with University employees and students (whether electronic, click-through, verbal, or in writing), the terms and conditions of this Agreement shall prevail.

The Contractor represents and warrants that it is a limited liability company authorized to do in Virginia the business provided for in this contract. (Check the appropriate box.)

Notwithstanding anything in the Contractor's form to which this Addendum is attached, the payments to be made by the Commonwealth for all goods, services and other deliverables under this contract shall not exceed Purchase Order Amounts; payments will be made only upon receipt of a proper invoice, detailing the goods/services provided and submitted to James Madison University. The total cumulative liability of the Commonwealth, its officers, employees and agents in connection with this contract or in connection with any goods, services, actions or omissions relating to the contract, shall not under any circumstance exceed payment of the above maximum purchase price plus liability for an additional amount equal to such maximum purchase price. In its performance under this contract, the Contractor acts and will act as an independent contractor, and not as an agent or employee of the Commonwealth.

The Contractor's form contract is, with the exceptions noted herein, acceptable to the Commonwealth. Nonetheless, because certain standard clauses that may appear in the Contractor's form agreement cannot be accepted by the Commonwealth, and in consideration of the convenience of using that form, and this form, without the necessity of specifically negotiating a separate contract document, the parties hereto specifically agree that, notwithstanding any provisions appearing in the attached Contractor's form contract, none of the following paragraphs **1 through 18** shall have any effect or be enforceable against the Commonwealth:

1. **Requiring the Commonwealth to maintain any type of insurance either for the Commonwealth's benefit or for the contractor's benefit;**
2. **Renewing or extending the agreement beyond the initial term or automatically continuing the contract period from term to term;**
3. **Requiring or stating that the terms of the attached Contractor's form agreement shall prevail over the terms of this addendum in the event of conflict;**
4. **Requiring the Commonwealth to indemnify or to hold harmless the Contractor for any act or omission;**
5. **Imposing interest charges contrary to that specified by the Code of Virginia, §2.2-4347 through 2.2-4354, Prompt Payment;**
6. **Requiring the application of the law of any state other than Virginia in interpreting or enforcing the contract or requiring or permitting that any dispute under the contract be resolved in the courts of any state other than Virginia;**
7. **Requiring any total or partial compensation or payment for lost profit or liquidated damages by the Commonwealth if the contract is terminated before its ordinary period;**
8. **Requiring that the contract be "accepted" or endorsed by the home office or by any other officer subsequent to execution by an official of the Commonwealth before the contract is considered in effect;**
9. **Delaying the acceptance of this contract or its effective date beyond the date of execution;**

10. Limiting or adding to the time period within which claims can be made or actions can be brought;
11. ~~Limiting the liability of the Contractor for property damage or personal injury. The parties agree that this clause does not extend the Contractor's liability beyond its own acts or those of its agents/employees;~~
12. Permitting unilateral modification of this contract by the Contractor;
13. Binding the Commonwealth to any arbitration or to the decision of any arbitration board, commission, panel or other entity;
14. Obligating the Commonwealth to pay costs of collection or attorney's fees;
15. Granting the Contractor a security interest in property of the Commonwealth;
16. Bestowing any right or incurring any obligation that is beyond the duly granted authority of the undersigned agency representative to bestow or incur on behalf of the Commonwealth.
17. Requiring the "confidentiality" of the agreement, in whole or part, without (i) invoking the protection of Section 2.2-4342F of the Code of Virginia in writing prior to signing the agreement (ii) identifying the data or other materials to be protected, and (iii) stating the reasons why protection is necessary.
18. Requiring the Commonwealth to reimburse for travel and living expenses in excess of the agency policy located at <https://www.jmu.edu/financemanual/procedures/4215mie.shtml>

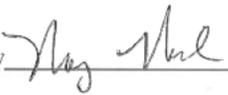
This contract may be renewed annually by mutual agreement of the parties after the expiration of the initial term under the terms and conditions of the original contract except as noted herein. If the parties elect to exercise the option to renew the contract for an additional renewal period, the contract price(s) for the succeeding renewal period shall not exceed the contract price(s) of the previous contract term increased/decreased by no more than the percentage increase/decrease of the "Other Services" category of the CPI-W of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

This Agency contract consisting of this Agency addendum and the attached Contractor's form contract constitute the entire agreement between the parties and may not be waived or modified except by written agreement between the parties.

This contract has been reviewed by staff of the agency. Its substantive terms are appropriate to the needs of the agency and sufficient funds have been allocated for its performance by the agency. This contract is subject to appropriations by the Virginia General Assembly.

IN WITNESS WHEREOF, the parties have caused this contract to be duly executed, intending thereby to be legally bound.

AGENCY by   
 Title Buyer Senior  
 Printed Name Doug Chester

CONTRACTOR by   
 Title Director of Revenue  
 Printed Name Mary Noel



ENROLLMENT



STUDENT SUCCESS



FUNDRAISING

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## MASTER SERVICES AGREEMENT

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This Master Services Agreement ("Agreement") is entered into by and between Ruffalo Noel Levitz, LLC ("RNL") and James Madison University ("Client"), identified below, and sets forth the terms and conditions for RNL to provide Client with services as set forth herein. The parties agree as follows:

### 1. Client Information

A. Legal Entity Name:

James Madison University

B. Address, email address, and facsimile number, if any, for notice purposes:

800 S. Main St, Harrisonburg VA 22807

C. Type of Legal Entity (corporation, LLC, partnership, unit of government, etc.):

University

D. State of Legal Formation:

Virginia

E. Tax ID #:

[REDACTED]

### 2. Services, Reference Date and Costs

A. Client agrees to purchase, and RNL agrees to provide, the services (the "Services") set forth on one or more Statement of Work, Statement of Services or similar document describing work to be performed no matter how titled, which reference and are incorporated by the parties into this Agreement, or into which this Agreement may be incorporated, (individually a "SOW" and collectively the "SOWs") during the Term of Services set forth on such SOW.

B. This Agreement is dated November 18, 2021 for reference purposes (the "Reference Date" or "Date of this Agreement"). The term of delivery of any and all Services shall be set forth on one or more SOW.

C. The pricing, cost and payment terms are set forth on the SOW applicable to the Services.

### 3. Planning, Materials and Delivery of Services

A. Except to the extent otherwise expressly provided on a SOW, Client and RNL will work together to develop and finalize a plan for the delivery of the Services. Client shall fulfill the responsibilities and take the actions required of it as described on the Statements of Services, if any.

Client shall provide its data, materials, Client IP (defined below), telephone numbers and factual information necessary to perform the Services, including without limitation information regarding Client and Client's activities (collectively the "Client Materials") in order to implement a program for delivery of the Services. Client represents and warrants it has all consent and authority necessary to use, and to allow RNL to use, in connection with the delivery or provision of Services, all Client Materials, including without limitation all drawings, designs, fonts, trademarks, trade dress, service marks, telephone numbers and electronic mail addresses provided to RNL by Client. Client shall be solely responsible for securing the consent, right and authority to use, and for the accuracy of, all Client Materials contained in any materials or scripts, or otherwise used by RNL in the delivery of the Services, and represents and warrants that Client's Materials shall be accurate in all material respects and shall not omit any information reasonably necessary to make Client Materials not misleading. In the event RNL, or any of its officers, directors, managers, members, subsidiaries or employees, suffer any and all loss, damage, deficiency, claim, or liability arising out of, or resulting from, (a) any alleged or actual infringement by Client IP (defined below), or any portion thereof, on the intellectual property rights of another person, or (b) use of the Client Materials, it shall be deemed a breach of this Agreement by Client. Client acknowledges the likelihood that RNL may be harmed, or suffer damages, or both, as the result of a breach of this Agreement.

B. RNL shall fulfill the responsibilities, take the actions required of it and deliver the Services and materials as described on the SOW. RNL shall perform the Services to be provided in a professional and workman like manner substantially similar to that found in its industry or trade for substantially similar services provided by similar vendors under similar circumstances, subject to, and consistent with, the past practices of the parties, if any. Services will be provided at the RNL Office (defined below) and at other RNL locations, as well as on Client's premises when so described in one or more SOW, or as otherwise mutually agreed.

#### 4. Effective Date and Termination

This Agreement shall be effective on the Date of this Agreement; provided, however, that notwithstanding any other provision of this Agreement, if filing of this Agreement with a governmental authority is required by law in order for the Agreement to be effective with respect to any portion of the Services, then the Agreement shall be effective for such portion of the Services, and such portion of the services regulated or governed by such governmental authority will begin, only on the date the Agreement is so filed; provided further, however, that if a waiting period after the filing of this Agreement with a governmental authority is required by law in order for the Agreement to be effective for any portion of the Services, then the Agreement shall be effective for such portion, and such portion so regulated or governed by such governmental authority will begin, only on the first day after completion of such waiting period. The Agreement shall thereafter continue until terminated by law or in accordance with the terms of this Agreement.

This Agreement may be terminated at any time and for any reason, with or without cause, as follows:

- A. By Client providing sixty (60) days advance written notice to RNL; or
- B. By RNL providing one hundred eighty (180) days advance written notice to Client.

Termination of this Agreement shall not terminate any outstanding Statements of Work, and the terms of this agreement will continue to control any outstanding Statements of Work.

In the event a Statement of Work is terminated for any reason, Client shall compensate RNL for all costs for Services rendered up to the effective date of the termination, plus all applicable taxes, if any, according to the terms of this Agreement. Client shall not be obligated to purchase, or pay for, any

Services rendered beyond the effective date of the termination. In the event Client has paid and RNL has received any amount greater than the amount required for such full compensation to RNL then that excess amount shall be refunded by RNL to Client within the same period of time as established for Client's payment of RNL invoices.

5. Warranties, Limitation of Liability and Indemnification

A. EXCEPT AS EXPRESSLY STATED IN THIS AGREEMENT, RNL MAKES NO OTHER EXPRESS WARRANTIES OR GUARANTEES OF ANY TYPE OR NATURE, AND MAKES NO IMPLIED WARRANTIES OF ANY TYPE OR NATURE, AS TO THE QUALITY, MERCHANTABILITY, COMPLETENESS OR FITNESS FOR ANY PURPOSE OF ANY PRODUCT OR SERVICE. EXCEPT AS EXPRESSLY MANDATED BY ENFORCEABLE LAW, WHICH WOULD BE CONTRARY TO THE PARTIES' INTENTION AND DESIRES, RNL MAKES NO WARRANTIES, EXPRESS OR IMPLIED, REGARDING ANY FINANCIAL RESULTS OR OUTCOMES FROM OR RELATED TO ANY OF THE SERVICES PROVIDED PURSUANT TO THIS AGREEMENT.

B. In no event shall either party be liable for any special, consequential, exemplary, incidental or similarly designated damages arising out of or in connection with this Agreement. RNL's liability for any alleged or actual breach of, or claims arising from or related to, this Agreement, or Services to be rendered hereunder, shall be limited as follows to whichever is greater: (i) in the event any such liability or claim is covered by an insurance policy secured by RNL, then such liability or claim shall be limited to amount of coverage as determined by the issuer of such policy; and, (ii) in the event any such liability or claim is not covered by an insurance policy secured by RNL, then the liability and claims shall be limited to an amount equal to three times the amount of fees actually paid by Client to RNL for the services giving rise to such liability or claim; provided, however, that the foregoing clause (ii) is not intended, and shall not be deemed, to limit or restrict in any way any coverage or benefits provided under any applicable insurance policy secured by RNL. Client's liability for any alleged or actual breach of, or claims arising from or related to, this Agreement, other than and excluding claims for payment or reimbursement for or related to Services actually rendered hereunder, shall be limited as follows: (i) in the event any such liability or claim is covered by an insurance policy secured by Client, then such liability or claim shall be limited to amount of coverage as determined by the issuer of such policy; and, (ii) in the event any such liability or claim is not covered by an insurance policy secured by Client, then the liability and claims shall be limited to an amount equal to the amount of fees actually paid by Client to RNL for the services giving rise to such liability or claim, however, that the foregoing clause (ii) is not intended, and shall not be deemed, to limit or restrict in any way any coverage or benefits provided under any applicable insurance policy secured by Client. Except as expressly stated in a SOW RNL shall not be responsible for collection of any funds nor have or assume any custody or control over any Client funds. Notwithstanding the foregoing, in the event any funds are delivered to RNL in error, then such funds will be promptly forwarded to Client.

C. Subject to the limitations of this Agreement, RNL shall defend, indemnify, and hold Client and its employees, owners, officers and directors harmless from any and all loss, damage, deficiency, claim, or liability to the extent arising out of its actions, and any and all actions, suits, proceedings, demands, assessments, judgments, costs and expenses, including reasonable attorney fees, incident to the foregoing. Subject to the limitations of this Agreement, Client shall defend, indemnify, and hold RNL and its employees, owners, officers and directors harmless from any and all loss, damage, deficiency, claim, or liability to the extent arising out of its actions, and any and all actions, suits, proceedings, demands, assessments, judgments, costs and expenses, including reasonable attorney fees, incident to the foregoing.

6. Ownership of Materials and Intellectual Property

Unless otherwise expressly provided in a SOW, all patents, copyrights, trademarks, service marks, trade dress, software, processes, materials, inventions, designs, code and works of authorship, including derivatives therefrom or thereof, ("IP") now owned, or subsequently created or acquired, by RNL and all IP, other than and excluding the Client IP (defined below), resulting or arising from Services rendered under this Agreement, including in both cases all derivatives therefrom or thereof, (collectively the "RNL

IP”) shall be and remain the sole and exclusive property of RNL and this Agreement does not transfer any title to any RNL IP to Client. “Client IP” means any IP now owned by Client or subsequently created or acquired by Client in a manner unrelated to this Agreement. “Services IP” means any IP created by RNL in the performance of this Agreement for Client for the exclusive, non-commercial, non-profit use by Client for its own direct benefit in connection with this Agreement. RNL grants to Client a perpetual, royalty-free, non-exclusive, worldwide license to the Service IP, but not derivatives thereof, nor of any other RNL IP, for Client’s, and Client’s affiliate’s, limited, sole and exclusive, non-commercial, non-profit use of the Services IP for their own benefit (and not for the benefit of other non-affiliated third-parties). The parties acknowledge that RNL is willing to use the RNL IP for the benefit of Client, but does not by this Agreement, forfeit or lose any right, title or control to, over or in any RNL IP or derivatives thereof. Except for the limited license granted above, or as otherwise expressly stated and described on a SOW, RNL does not and will not provide its services or RNL IP on a “work for hire,” or “work made for hire,” basis, and Client acknowledges the same. Unless otherwise expressly provided in a SOW, each party agrees that it will not, directly or indirectly, reverse engineer, decompile, disassemble or otherwise attempt to derive source code or other trade secrets from any IP owned by the other. Client represents and warrants that it will not reproduce, disclose or use RNL IP for any purpose, or in any manner, other than as provided in this Agreement or authorized in writing in advance by RNL. RNL represents and warrants that it will not reproduce, disclose or use Client IP for any purpose, or in any manner, other than in the performance of this Agreement or as provided in this Agreement or as authorized in writing in advance by Client.

7. Related Services and Costs: Taxes

The fees, costs and expenses for the Services are described in this Agreement and on the SOW. Quotes and estimates will be provided upon request. Client will pay all applicable taxes, if any, on Services and costs, which RNL is required by law to collect, unless and until Client represents, warrants and provides written confirmation that Client is exempt from the collection of such taxes.

8. Invoicing, Inquiries and Payments

Unless otherwise directed in writing, invoices will be sent to the address specified in the applicable SOW. If not stated in the applicable SOW, then all payments on invoices are due net thirty (30) days from the date of the invoice, with late charges the lower of 1.5% per month or the highest rate allowable by law. All notices or inquiries regarding invoicing or this Agreement shall be sent addressed to (the “RNL Office”):

Ruffalo Noel Levitz  
Attention: CFO  
1025 Kirkwood Parkway SW  
Cedar Rapids, IA 52404-8629

All payments shall be sent addressed to:

Ruffalo Noel Levitz  
Attention: Controller  
P.O. Box 718  
Des Moines, IA 50303-0718

9. Confidentiality

Both parties acknowledge that in the negotiation and performance of this Agreement, confidential and proprietary information of each which is not generally known or available to the general public and has value to the owner of such information (“Confidential Information”) has been and will be made

available to the other. The parties agree to use reasonable efforts to maintain the confidentiality of Confidential Information, but in no event lesser than was used with like material of the receiving party. Both parties shall maintain in secret all Confidential Information received under this Agreement, shall not disclose the Confidential Information to any third party without prior written authorization from the disclosing party, and shall not use the Confidential Information except for the purpose for which it is disclosed under this Agreement. Each party shall limit dissemination of the Confidential Information received by it, except to those of its employees, agents and consultants whose duties justify the need for access to the Confidential Information provided that such individuals are subject to obligations of secrecy and limited use commensurate in scope with this Agreement. No other right or license to use the Confidential Information is granted under this Agreement. The foregoing obligations shall apply to verbal information as well as specific portions of the information that are disclosed in writing or other tangible form and marked to indicate the confidential nature thereof. The parties acknowledge that certain personal information and records may be protected by law, including without limitation, by the Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), Title XIII of the American Recovery and Reinvestment Act of 2009 ("ARRA") also known as the Health Information Technology for Economic Clinical Health Act ("HITECH"), the Family Educational Rights and Privacy Act of 1974 ("FERPA") and the Financial Services Modernization Act of 1999 also known as the Gramm-Leach-Bliley Act ("GLB," and collectively with HIPAA, ARRA, HITECH and FERPA referred to as the "Privacy Laws"), and that all such information is deemed "Confidential Information" regardless of whether it is designated as confidential in writing.

The foregoing obligations shall not apply to any information which:

A. Was known to the receiving party prior to receipt under this Agreement, as demonstrated by the receiving party's records; or

B. Was publicly known or available prior to receipt under this Agreement, or later becomes publicly known or available through no fault of the receiving party; or

C. Is disclosed to the receiving party by a third-party having the legal right to disclose the same; or

D. It is disclosed to any third-party by the disclosing party without an obligation of confidentiality; or

E. Is independently developed by an employee, consultant, or agent of the receiving party without access to the information as received under this Agreement; or

F. The receiving party is obligated to produce as a result of a legal requirement, provided that the disclosing party has been given notice thereof and an opportunity to waive its rights or to seek a protective order or other appropriate remedy; it being the intention of the parties to comply with any applicable state "freedom of information," or similar, law or statute; and, such information shall not be deemed or considered to be Confidential Information.

Information described in clauses A through E above shall not be considered confidential, proprietary or "Confidential Information." Upon written request of a disclosing party, the receiving party shall return all Confidential Information disclosed in written or tangible form, and the receiving party shall destroy all their copies, excerpts or notes made by it which contain any portions of the information unless otherwise provided for by the parties, other than copies on back-up tapes stored off-site which shall be over-written by RNL in accordance with its disaster recovery and business continuity practices and procedures.

#### 10. Notices

All notices given pursuant to or in connection with this Agreement shall be in writing, and provided (A) for the Client to the address in Section 1, and (B) for RNL to the RNL Office in Section 8, in either case by (1) U.S. Postal Service, certified mail, return receipt requested, or its then equivalent, (2) courier or hand-delivery, (3) facsimile transmission with delivery confirmed, if a facsimile number has been provided, or (4) electronic mail with delivery receipt or acknowledgment. Notices shall be deemed

received and effective (a) as of the fifth (5th) day subsequent to deposit in a U.S. Postal Service mail depository, postage fully prepaid, if so deposited, or (b) on the date of confirmed or acknowledged delivery by any other method; whichever is earlier.

11. Independent Contractor Relationship

All persons employed by RNL in connection with the provision of Services shall be employees of RNL and not Client. In performing any and all of the Services to be provided under this Agreement, RNL shall at all times and for all purposes be and remain an independent contractor and in no case and under no circumstances shall RNL or any of its employees, including but not limited to those of its employees actually performing any of the Services, be considered or otherwise deemed to be employees or agents of Client for any purpose whatsoever. Accordingly, neither RNL nor any of its employees or agents shall have the authority to enter into any contract for or on behalf of the Client or otherwise bind the Client in any manner whatsoever.

12. Compliance with Laws

A. Both parties shall comply, at its own cost and expense, with the provisions of all state, federal and local laws, ordinances, regulations and orders pertaining to this Agreement and performance of this Agreement. For clarity, both parties agree to abide by all requirements of the Privacy Laws with respect to all records, information and data governed by such laws, and as applicable to such party. Both parties shall take all measures necessary to promptly remedy any violations, if any, of any such law, ordinance, rule, regulation or order. The parties will use all commercially reasonable efforts to assist each other, to the extent required, in the compliance with state, federal and local laws, ordinances, regulations and orders (the "Laws").

B. If either party (the "Complying Party") requires information from the other party (the "Supplying Party") in order to comply with any of the Laws; then the Supplying Party shall supply the required information promptly following a reasonable request in writing, including by electronic mail, but no later than twenty (20) calendar days after such request. If the Complying Party requires and requests information in writing, with a reasonably adequate description, from the Supplying Party, (the "Requested Information") and the Supplying Party does not provide the Requested Information within twenty (20) calendar days after such request, then (a) for purposes of this Agreement, the Complying Party shall not be deemed to be in breach of this Agreement as the result of any failure to comply with any Laws as a result of the Supplying Party's failure or refusal to provide any Requested Information; and, (b) any and all penalties, fines, interest, costs and expense incurred as a result of, or related to, the Supplying Party's failure or refusal to provide any Requested Information shall be a cost and price of the Services which shall be paid by the Supplying Party (or reimbursed by the Supplying Party if the Complying Party is required by law to make such payment).

C. To the extent any particular contractual provisions are required in order to comply with any particular provisions of any Laws, to the extent applicable to this Agreement, or the performance of this Agreement or the Services, then the parties will endeavor to set forth such provisions on either one or more of a SOW or Regulatory Attachment or similar provision, schedule, attachment, exhibit or addendum, executed by the parties and either attached to this Agreement and incorporated here by this reference or attached to or included in a SOW or otherwise incorporated into this Agreement.

13. Equal Employment Opportunity

In connection with the performance of the Services under this Agreement, RNL agrees that it will not discriminate against any employee or applicant for employment because of age, race, color, religion, sex, sexual orientation, national origin, disability, or because he or she is a disabled veteran or veteran of the Vietnam Era.

14. Covered Information Security

A. "Covered Information" shall mean any personally identifiable financial information that is not publicly available, including but not limited to, social security numbers, credit information and payment card information ("PCI") such as account and card numbers, verification numbers, and expiration dates, whether in paper, electronic or other form, that is obtained, handled, accessed or maintained by RNL on behalf of Client, or exchanged between Client and RNL, in the performance of this Agreement.

B. Each party shall maintain commercially reasonable safeguards, practices and procedures to protect Covered Information. Each party shall provide the other with information concerning safeguards, practices and procedures it has implemented and maintained to protect Covered Information as the other party may reasonably request.

C. If, and to the extent that, a party, or its employees, contractors and agents is processing, storing, caching and initiating or engaging in transmission of PCI on such party's network, or servers located on such party's network, then that party is responsible for maintaining compliance with the then current Payment Card Industry Data Security Standard ("PCIDSS"). RNL acknowledges that it is responsible for the security of all cardholder data it possesses or otherwise stores, processes or transmits on behalf of Client, and to the extent that RNL could impact the security of Client's cardholder data environment. To the extent any review or inspection of either parties' records or facilities is required for either party to comply with the requirements of this clause, then the parties agree that they will reasonably cooperate with each other in connection with any such review or inspection. The parties agree further that (i) unless expressly provided on an applicable SOW, neither party shall have any obligations or responsibility regarding or related to the other party's network, servers or equipment, or the management of any of them, and (ii) RNL does not provide payment card processing services and, unless expressly provided in an applicable SOW, RNL will not possess or otherwise store, process or transmit cardholder data on behalf of the Client and the Services do not involve the possession, or the storing, processing or transmitting, of cardholder data.

D. RNL may make information available to Client by granting Client, and individuals designated by Client, with password restricted access to a RNL SFTP server, and in the event any individual with such access ceases to be under the direction and control of Client then Client will notify RNL in writing of such event and RNL may require a modification in the password for such access.

E. The parties agree to implement the following network and data security practices in connection with this Agreement:

i. Each party will install and maintain commercially reasonable security devices, firewalls, controls or rules, that isolate, regulate and control the ability of all of such party's facilities, network, servers and equipment used in connection with the Services to access, utilize or connect to or through the Internet.

ii. Each party will install and maintain anti-virus software on such party's servers and workstations used in connection with the Services.

iii. Each party will either (1) require Strong Passwords (defined below) to log on to any computer or server used in connection with the Services, or (2) tightly restrict the physical and network access any computer or server used in connection with the Services to only certain selected and clearly defined networks, servers and services. "Strong Passwords" have at a minimum a mix of letters and either numbers or symbols.

iv. Neither party will store PCI in a database created and maintained exclusively through any RNL software.

F. In the event a party identifies a suspected or confirmed security breach involving any Covered Information which is in any way related or connected to the Services, then such party shall, to the maximum extent possible, take immediate action to limit the breach and shall immediately notify the other. To the extent a party identifies a cause or potential cause of a suspected or confirmed security breach involving any Covered Information which is in its reasonable control, then such party shall take action as soon as reasonably practical, to correct or remedy such cause.

G. In the event either party fails to meet the obligations of this Section 14, then the party failing to meet such obligations hereby releases and affirmatively waives all claims and rights it might otherwise have or assert against the other party to the extent such claims relate in any way to such failure.

15. Dispute Resolution, Governing Law & Jurisdiction

This Agreement shall be construed and interpreted in accordance with the laws of the state where a majority of the Services are provided. Both parties agree that if either party wishes to initiate litigation based on this Agreement, it must do so exclusively in the jurisdiction in which the other party is located and both parties hereby submit to such jurisdiction subject to the conditions and requirements of this paragraph. Prior to the instigation of any such action (other than an action for equitable relief), and as a condition to the voluntary submission to the jurisdiction of any state, a meeting shall be held at a mutually agreed upon neutral location, attended by individuals with decision-making authority regarding the dispute to attempt in good faith to negotiate a resolution of the dispute. If within forty-five (45) days after such meeting the parties have not succeeded in resolving the dispute, either party may proceed at law, or in equity, in a court of the jurisdiction described above.

16. Force Majeure

No party will be responsible to the other, and such shall not be grounds to terminate this Agreement, for disruptions in the delivery of the Services caused by acts of God or governmental authority (a "Force Majeure Event"); provided that RNL shall have a duty reasonably to mitigate, or cause to be mitigated, any such disruptions (or parts thereof). RNL's obligation to deliver or provide the Services covered by the Agreement shall be suspended (or reduced, as applicable) during the period, and to the extent, that use of the Services is disrupted by the Force Majeure Event, without such suspension or disruption of the Services constituting a material breach of its obligations under this Agreement.

17. Severability & Assignment

It is agreed and understood that should any of the provisions of this Agreement, other than and excluding Sections 2, 4, 5, 6, & 9, be determined by any court of competent jurisdiction to be invalid or void for any reason, then the parties consent that this Agreement shall be amended retroactive to the date of its execution to include all terms and conditions other than those found by the court to be invalid or void. It is agreed and understood that should any of the provisions of Sections 2, 4, 5, 6, & 9, be determined by any court of competent jurisdiction to be invalid or void for any reason, then either party may terminate this Agreement immediately by giving written notice to the other (including by electronic mail). Other than assignment to a corporate affiliate or successor by RNL, neither party may assign this Agreement without prior written consent of the other party, which shall not be unreasonably withheld.

18. Entire Agreement

The supplemental terms of all attached Statements of Services, as well as any attachment, exhibit or addendum expressly incorporated herein or in a SOW, including without limitation any Regulatory Attachments, are made a part of this Agreement. This Agreement constitutes the entire agreement between the parties hereto and replaces all other agreements between the parties relating to the same subject matter, whether written or oral. No amendment, modification or addition to this Agreement shall be effective unless set forth in writing and executed by both parties. No non-conforming terms of Client's purchase order, request for proposal, bid request or other documentation shall control over the terms and conditions of this Agreement and all such documents are hereby amended and superseded.

Signed by the parties effective on the date or dates described in section 4 above.

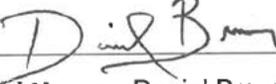
**[SPACE INTENTIONALLY LEFT BLANK.  
SIGNATURES FOLLOW ON NEXT PAGE.]**

**James Madison University (2 separate signatories - REQUIRED):**

By:   
Printed Name: Jeremy Good  
Title: Buyer Specialist  
Date: 11/29/2021

By:   
Printed Name: Stephen D. Howard  
Title: Procurement Manager  
Date: 11/29/2021

**Ruffalo Noel Levitz, LLC**

By:   
Printed Name: Daniel Brown  
Title: Controller  
Date: 11/19/2021

By:   
Printed Name: Patricia Shepherd  
Title: Director of Revenue  
Date: 11/19/2021

**Please return signed contracts to [RNLContracts@RuffaloNL.com](mailto:RNLContracts@RuffaloNL.com)**

The attached Commonwealth of Virginia Agency Contract Form Addendum to Contractor's Form is included as part of this agreement and in case of conflict the COV Agency Contract Form Addendum to Contractor's Form governs.

**COMMONWEALTH OF VIRGINIA AGENCY  
CONTRACT FORM ADDENDUM TO CONTRACTOR'S FORM**

AGENCY NAME: James Madison University

CONTRACTOR NAME: Ruffalo Noel Levitz, LLC

DATE: 10/18/19

The Commonwealth and the Contractor are this day entering into a contract and, for their mutual convenience, the parties are using the standard form agreement provided by the Contractor. This addendum, duly executed by the parties, is attached to and hereby made a part of the contract. In the event that the Vendor enters into terms of use agreements or other agreements of understanding with University employees and students (whether electronic, click-through, verbal, or in writing), the terms and conditions of this Agreement shall prevail.

The Contractor represents and warrants that it is a limited liability company authorized to do in Virginia the business provided for in this contract. (Check the appropriate box.)

Notwithstanding anything in the Contractor's form to which this Addendum is attached, the payments to be made by the Commonwealth for all goods, services and other deliverables under this contract shall not exceed Purchase Order Amounts; payments will be made only upon receipt of a proper invoice, detailing the goods/services provided and submitted to James Madison University. The total cumulative liability of the Commonwealth, its officers, employees and agents in connection with this contract or in connection with any goods, services, actions or omissions relating to the contract, shall not under any circumstance exceed payment of the above maximum purchase price plus liability for an additional amount equal to such maximum purchase price. In its performance under this contract, the Contractor acts and will act as an independent contractor, and not as an agent or employee of the Commonwealth.

The Contractor's form contract is, with the exceptions noted herein, acceptable to the Commonwealth. Nonetheless, because certain standard clauses that may appear in the Contractor's form agreement cannot be accepted by the Commonwealth, and in consideration of the convenience of using that form, and this form, without the necessity of specifically negotiating a separate contract document, the parties hereto specifically agree that, notwithstanding any provisions appearing in the attached Contractor's form contract, none of the following paragraphs 1 through 18 shall have any effect or be enforceable against the Commonwealth:

1. Requiring the Commonwealth to maintain any type of insurance either for the Commonwealth's benefit or for the contractor's benefit;
2. Renewing or extending the agreement beyond the initial term or automatically continuing the contract period from term to term;
3. Requiring or stating that the terms of the attached Contractor's form agreement shall prevail over the terms of this addendum in the event of conflict;
4. Requiring the Commonwealth to indemnify or to hold harmless the Contractor for any act or omission;
5. Imposing interest charges contrary to that specified by the Code of Virginia, §2.2-4347 through 2.2-4354, Prompt Payment;
6. Requiring the application of the law of any state other than Virginia in interpreting or enforcing the contract or requiring or permitting that any dispute under the contract be resolved in the courts of any state other than Virginia;
7. Requiring any total or partial compensation or payment for lost profit or liquidated damages by the Commonwealth if the contract is terminated before its ordinary period;
8. Requiring that the contract be "accepted" or endorsed by the home office or by any other officer subsequent to execution by an official of the Commonwealth before the contract is considered in effect;
9. Delaying the acceptance of this contract or its effective date beyond the date of execution;

10. Limiting or adding to the time period within which claims can be made or actions can be brought;
11. ~~Limiting the liability of the Contractor for property damage or personal injury. The parties agree that this clause does not extend the Contractor's liability beyond its own acts or those of its agents/employees;~~
12. Permitting unilateral modification of this contract by the Contractor;
13. Binding the Commonwealth to any arbitration or to the decision of any arbitration board, commission, panel or other entity;
14. Obligating the Commonwealth to pay costs of collection or attorney's fees;
15. Granting the Contractor a security interest in property of the Commonwealth;
16. Bestowing any right or incurring any obligation that is beyond the duly granted authority of the undersigned agency representative to bestow or incur on behalf of the Commonwealth.
17. Requiring the "confidentiality" of the agreement, in whole or part, without (i) invoking the protection of Section 2.2-4342F of the Code of Virginia in writing prior to signing the agreement (ii) identifying the data or other materials to be protected, and (iii) stating the reasons why protection is necessary.
18. Requiring the Commonwealth to reimburse for travel and living expenses in excess of the agency policy located at <https://www.jmu.edu/financemanual/procedures/4215mic.shtml>

This contract may be renewed annually by mutual agreement of the parties after the expiration of the initial term under the terms and conditions of the original contract except as noted herein. If the parties elect to exercise the option to renew the contract for an additional renewal period, the contract price(s) for the succeeding renewal period shall not exceed the contract price(s) of the previous contract term increased/decreased by no more than the percentage increase/decrease of the "Other Services" category of the CPI-W of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

This Agency contract consisting of this Agency addendum and the attached Contractor's form contract constitute the entire agreement between the parties and may not be waived or modified except by written agreement between the parties.

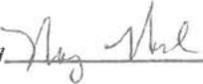
This contract has been reviewed by staff of the agency. Its substantive terms are appropriate to the needs of the agency and sufficient funds have been allocated for its performance by the agency. This contract is subject to appropriations by the Virginia General Assembly.

IN WITNESS WHEREOF, the parties have caused this contract to be duly executed, intending thereby to be legally bound.

AGENCY by 

Title Buyer Senior

Printed Name Doug Chester

CONTRACTOR by 

Title Director of Revenue

Printed Name Mary Noel

April 2017

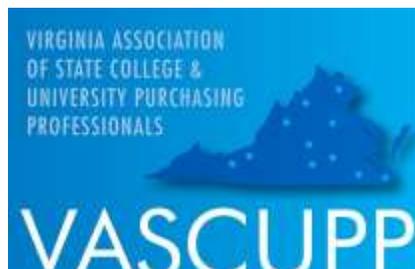


# Request for Proposal

## **RFP# JPG-1131**

**Admissions and Geodemographic Research and  
Marketing Services**

**September 15, 2021**



**REQUEST FOR PROPOSAL**  
**RFP# JPG-1131**

**Issue Date:** September 15, 2021  
**Title:** Admissions and Geodemographic Research and Marketing Services  
**Issuing Agency:** Commonwealth of Virginia  
James Madison University  
Procurement Services MSC 5720  
752 Ott Street, Wine Price Building  
First Floor, Suite 1023  
Harrisonburg, VA 22807

**Period of Contract: From Date of Award Through One Year (Renewable)**

**Sealed Proposals Will Be Received Until 2:00 PM on October 13, 2021 for Furnishing The Services Described Herein.**

*SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.*

All Inquiries for Information and Clarification Should Be Directed To: Jeremy Good, Buyer Specialist, Procurement Services, [goodjp@jmu.edu](mailto:goodjp@jmu.edu); 540-568-3131; (Fax) 540-568-7935 not later than five business days before the proposal closing date.

**NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.**

In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm: \_\_\_\_\_  
By: \_\_\_\_\_  
(Signature in Ink)

\_\_\_\_\_  
Name: \_\_\_\_\_  
(Please Print)

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

Web Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_ Fax #: \_\_\_\_\_

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 \_\_\_\_\_ #2 \_\_\_\_\_ #3 \_\_\_\_\_ #4 \_\_\_\_\_ #5 \_\_\_\_\_ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

YES;  NO; *IF YES* ⇒ ⇒  SMALL;  WOMAN;  MINORITY ***IF MINORITY:***  AA;  HA;  AsA;  NW;  Micro

**Note: This public body does not discriminate against faith-based organizations in accordance with the Code of Virginia, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.**

# ***REQUEST FOR PROPOSAL***

***RFP # JPG-1311***

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## I. PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit sealed proposals from qualified sources to enter into a contract to provide Admissions Geodemographic Research and Marketing Services for James Madison University (JMU), an agency of the Commonwealth of Virginia. Initial contract shall be for one (1) year with an option to renew for four (4) additional one-year periods.

## II. BACKGROUND

### About James Madison University

Founded in 1908, James Madison University (JMU) is a comprehensive public university located in Virginia's Shenandoah Valley. JMU is a community of higher learning that reaches beyond the pursuit of instruction, developing well-rounded citizens who make a real difference in the world. We are continually building a culture marked by strong relationships, engagement, teaching excellence, ethical reasoning, discovery, and a commitment to the liberal arts and sciences. Students often describe their experience as one where we "hold the door open" for each other. We see this as both literal – reflecting a warm and welcoming community – and figurative, where we open opportunities for our students by fostering the cultivation of ideas in and beyond the classroom. We offer the benefits and resources of large scale and mass while providing close relationships between students and faculty – the benefits of big with a small feel.

At JMU, that's what Being the Change is all about. JMU graduates are far more than merely educated. Members of a fellowship of doers, they know how to make things happen. They've honed their ability to think critically. They've learned the importance of a strong work ethic and have become committed to and skilled at collaborating with others. Equal parts intellect and action help mold JMU graduates. Crafting the knowledge. Walking the walk. Seizing the day. Being the Change.

In June 2020, JMU adopted a new strategic plan that positions the University to respond to the ever-changing needs of our local, regional, and global communities. JMU's strategic plan has four guiding priorities:

1. Being the Change at Work and in the World
2. Embracing Diversity, Equity, and Inclusion
3. Attracting the Students of Tomorrow
4. Recovery and Learning from COVID-19 and Beyond

In 2022, JMU will be reclassified as an R2 high research university, effectively making the institution a national university. This is due to growth in JMU's graduate and doctoral programs. While this reclassification will not change the essential offering of JMU, it will have an impact on external university rankings (such as U.S. News and World Report). The university has performed well in regional rankings thus far, but as we move to a national status, we anticipate typically ranked accolades to drop.

JMU has an enrollment of approximately 22,000 students and 4,000 faculty and staff with more than 600 departments that support seven academic divisions. The University offers over 120 majors, minors, and concentrations. Further information about the university can be found at the following website: [www.jmu.edu](http://www.jmu.edu).

## About JMU Admissions

Undergraduate Admissions to JMU is selective. The Class of 2025 was selected from 22,040 applicants. The top schools with which JMU competes for applicants include large public research institutions and mid-size private liberal arts institutions. Of the 18,461 students admitted to JMU for the Class of 2025, approximately 4,800 enrolled for fall 2021; 79% in-state, and 21% are out-of-state. Approximately 41% of first-year students are male and 24% are students of color. Half the applicants admitted to JMU have an SAT score between 1180 and 1340 or an ACT score of 25 and 30.

JMU's retention and graduation rates are above the national average; 90% retention rate and 6-year graduation rate of 82%. After graduation, 98% of 2020 JMU graduates were employed in graduate school or involved in other career endeavors within six months of graduation. Recently, JMU has experienced shifts in the type of student who applies (in and out-of-state), a 10% decline in applications primarily from out-of-state applicants, and a slight decline in the academic profile of the student who enrolls. JMU's recruitment model leverages strategies based on past performance, academic profile, historical travel patterns, and final enrollment yield. JMU is experiencing downward trends in the yield from admitted applicants. JMU's ability to reach the type of prospective students who would enroll if admitted has declined. Out of state, JMU has seen a decline in yield from regions that typically provide students. This trend will continue unless efforts are made to expand JMU's brand awareness, identify new and emerging markets, and develop a robust targeted marketing plan. We historically work with a modest marketing budget and staffing resources.

JMU has continued to refine recruitment strategies to attract inquiries, applications, and enrollees in primary market areas. A personal approach to the individual inquiry/applicant has been a priority, yet due to increased competition and the increasing financial need of our applicant pool, our efforts have been inhibited. In June 2021, Undergraduate Admissions made the switch to use Slate as the primary CRM, expanding communication options and data management beyond our previous capabilities.

JMU seeks to work with a marketing firm whose background and mission is to work with universities on market analysis, marketing strategies, and enrollment efforts; a firm that supports the full admissions life cycle of student recruitment.

### **III. SMALL, WOMAN-OWNED AND MINORITY PARTICIPATION**

It is the policy of the Commonwealth of Virginia to contribute to the establishment, preservation, and strengthening of small businesses and businesses owned by women and minorities, and to encourage their participation in State procurement activities. The Commonwealth encourages contractors to provide for the participation of small businesses and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other contractual opportunities. Attachment B contains information on reporting spend data with subcontractors.

### **IV. STATEMENT OF NEEDS**

1. The Office of Admissions at JMU is seeking admissions geodemographic research and marketing services to identify new and emerging markets, develop marketing strategies to attract students in existing and new markets, and increase overall student yield. Respond to each area below in detail and describe your firm's background in these general categories.

- a. Geodemographic and market analysis of new and existing markets to identify new pipelines of students in and out of state.
  - b. Identify and develop a 5-year comprehensive strategy to increase enrollment from underrepresented student populations and programs of study.
    - i. Increase male enrollment by 10%.
    - ii. Increase racial and ethnic diversity enrollment from 24% to 30%.
    - iii. Increase first-generation enrollment by 10%.
    - iv. Increase the percentage of Science, Technology, Engineering, and Mathematics (STEM) applicants by 10%.
    - v. Increase the number out-of-state applications in existing and emerging markets.
    - vi. Stabilize and improve out-of-state enrollment with an enrollment goal of 30% out-of-state representation.
  - c. Developing inquiries and leading the inquiries to applicants.
  - d. Increasing the percent of admitted students who matriculate.
  - e. Maintaining and strengthening university presence in existing markets.
  - f. Expanding brand awareness to a national scale.
  - g. Identifying advertising opportunities with a high return - including digital, print and out-of-home formats.
  - h. Working with colleges that are moving to a higher Carnegie reclassification.
  - i. Building successful strategies for CRM implementation (preferably in Slate). Describe other CRM technologies for which you support integration.
  - j. Scanning existing marketing practices, communication methods and team organization to offer feedback on how to improve.
2. Describe your firm's ability/experience with each of the following items. JMU is looking for a partner that:
- a. Has a strong reputation of being collaborative.
  - b. Has an established track record of helping clients achieve enrollment goals.
  - c. Has a reputation of being innovators.
  - d. Can audit existing practices and work with JMU staff to improve the organization of our recruitment teams.
  - e. Has experience with CRM Slate and marketing integration with Slate.

- f. Can incorporate and improve upon the parts of JMU's recruitment efforts that have been successful, including:
  - i. Use of geodemographic data
  - ii. Purchasing of names
  - iii. The JMYOU platform
  - iv. Taking in-state/out-of-state inquiries to the applicant stage
  - v. Regional advertising strategies
  - vi. Budget allocation for recruitment, advertising and marketing
  - vii. Translation of the university's brand for prospective students
  - viii. Digital advertising strategies
  - ix. Student and parent communication methods/strategies
3. Describe in detail your firm's approach to meeting the recruitment goals of JMU that the requested marketing company is expected to support.
  - a. Allow JMU to dominate its primary markets relating to inquiries generated, applications received, and students enrolled.
  - b. With the impending high school graduate decline, JMU is looking for a partner with an innovative approach to enrollment marketing that will:
    - i. Incorporate the existing geodemographic data that JMU uses to identify regions that possess students who might be interested in JMU.
    - ii. Provide messaging and instant replies tailored to the student's specific interests.
    - iii. Incorporate internally generated names from university outreach in admissions recruitment efforts.
    - iv. Develop organized marketing initiatives that work collectively to attract and maintain the interest of potential students from 7-12<sup>th</sup> grade.
    - v. Help JMU increase its market share in key in-state and out-of-state regions.
    - vi. Help raise JMU's name recognition and the value of the JMU educational experience.
    - vii. Develop and implement a comprehensive plan to market the value of a JMU degree in new and existing market areas.
    - viii. Increase the yield of admits to enrolled, to enable JMU to meet annual enrollment targets.

- ix. Develop organized marketing initiatives that work collectively to close the deal and move admits to enrollees.
  - x. Help JMU increase yield in key in-state and out of state regions.
  - xi. Raise the recognition of the value of JMU's educational experiences to increase matriculates.
  - xii. Identify where JMU should increase and decrease recruitment efforts in order to maximize impact on enrollment.
  - xiii. Incorporate the various academic and co-curricular parts of JMU into the yield effort.
  - xiv. Increase the JMU name recognition in current markets.
4. In addition, to off-set the impact of the high school graduation cliff that has already hit parts of the United States and by 2026 will impact 48 states directly and 50 directly and indirectly, JMU seeks to contract with a marketing firm that can assist in developing a long-term, comprehensive marketing and communications plan in order to continue to meet enrollment goals, specifically:
- a. JMU's primary out-of-state regions will be impacted heavily. JMU needs a marketing plan to identify innovative, economically feasible and sustainable recruitment methods in new regions. Describe in detail how your firm would work to meet this goal.
  - b. JMU's primary in-state and out-of-state regions will see an influx of new competitors as they try to increase the yield from these same regions. JMU must be ready to defend these regions and increase the portion of students who seriously consider our University. Describe in detail how your firm would work to meet this goal.

## V. PROPOSAL PREPARATION AND SUBMISSION

### A. GENERAL INSTRUCTIONS

**To ensure timely and adequate consideration of your proposal, offerors are to limit all contact, whether verbal or written, pertaining to this RFP to the James Madison University Procurement Office for the duration of this Proposal process. Failure to do so may jeopardize further consideration of Offeror's proposal.**

1. RFP Response: In order to be considered for selection, the **Offeror shall submit a complete response to this RFP**; and shall submit to the issuing Purchasing Agency:
  - a. **One (1) original and seven (7) copies** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with 3.f. below.
  - b. **One (1) electronic copy in WORD format or searchable PDF (CD or flash drive)** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with 3.f. below.
  - c. Should the proposal contain **proprietary information**, provide **one (1) redacted hard copy** of the proposal and all attachments with **proprietary portions removed or**

**blacked out.** This copy should be clearly marked “*Redacted Copy*” on the front cover. The classification of an entire proposal document, line item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. JMU shall not be responsible for the Contractor’s failure to exclude proprietary information from this redacted copy.

No other distribution of the proposal shall be made by the Offeror.

2. The version of the solicitation issued by JMU Procurement Services, as amended by an addenda, is the mandatory controlling version of the document. Any modification of, or additions to, the solicitation by the Offeror shall not modify the official version of the solicitation issued by JMU Procurement services unless accepted in writing by the University. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, JMU reserves the right to decide, on a case-by-case basis in its sole discretion, whether to reject such a proposal. If the modification or additions are not identified until after the award of the contract, the controlling version of the solicitation document shall still be the official state form issued by Procurement Services.
3. Proposal Preparation
  - a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in the purchasing agency requiring prompt submissions of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by the purchasing agency. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.
  - b. Proposals shall be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
  - c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and sub letter should be repeated at the top of the next page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at the appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.
  - d. As used in this RFP, the terms “must”, “shall”, “should” and “may” identify the criticality of requirements. “Must” and “shall” identify requirements whose absence will have a major negative impact on the suitability of the proposed solution. Items labeled as “should” or “may” are highly desirable, although their absence will not have a large impact and would be useful, but are not necessary. Depending on the overall response to the RFP, some individual “must” and “shall” items may not be fully satisfied, but it is the intent to satisfy most, if not all, “must” and “shall” requirements.

The inability of an offeror to satisfy a “must” or “shall” requirement does not automatically remove that offeror from consideration; however, it may seriously affect the overall rating of the offeror’ proposal.

- e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.
  - f. Ownership of all data, materials and documentation originated and prepared for the State pursuant to the RFP shall belong exclusively to the State and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by the offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the offeror must invoke the protection of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data is submitted. The written notice must specifically identify the data or materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret materials submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and will result in rejection and return of the proposal.
4. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to James Madison University. This provides an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact-finding and explanation session only and does not include negotiation. James Madison University will schedule the time and location of these presentations. Oral presentations are an option of the University and may or may not be conducted. Therefore, proposals should be complete.

## B. SPECIFIC PROPOSAL INSTRUCTIONS

Proposals should be as thorough and detailed as possible so that James Madison University may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following items as a complete proposal:

1. Return RFP cover sheet and all addenda acknowledgements, if any, signed and filled out as required.
2. Plan and methodology for providing the goods/services as described in Section IV. Statement of Needs of this Request for Proposal.
3. A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work.
4. Offeror Data Sheet, included as *Attachment A* to this RFP.
5. Small Business Subcontracting Plan, included as *Attachment B* to this RFP. Offeror shall provide a Small Business Subcontracting plan which summarizes the planned utilization of Department of Small Business and Supplier Diversity (SBSD)-certified small businesses which include businesses owned by women and minorities, when they have received

Department of Small Business and Supplier Diversity (SBSD) small business certification, under the contract to be awarded as a result of this solicitation. This is a requirement for all prime contracts in excess of \$100,000 unless no subcontracting opportunities exist.

6. Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: [www.VASCUPP.org](http://www.VASCUPP.org).
7. Proposed Cost. See Section X. Pricing Schedule of this Request for Proposal.

## **VI. EVALUATION AND AWARD CRITERIA**

### **A. EVALUATION CRITERIA**

Proposals shall be evaluated by James Madison University using the following criteria:

1. Quality of products/services offered and suitability for intended purposes
  2. Qualifications and experience of Offeror in providing the goods/services
  3. Specific plans or methodology to be used to perform the services
  4. Participation of Small, Women-Owned, & Minority (SWaM) Businesses
  5. Cost
- B. **AWARD TO MULTIPLE OFFERORS**: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The Commonwealth reserves the right to make multiple awards as a result of this solicitation. The Commonwealth may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous. Should the Commonwealth determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the contractor's proposal as negotiated.

## **VII. GENERAL TERMS AND CONDITIONS**

- A. **PURCHASING MANUAL**: This solicitation is subject to the provisions of the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and Their Vendors and any revisions thereto, which are hereby incorporated into this contract in their entirety. A copy of the manual is available for review at the purchasing office. In addition, the manual may be accessed electronically at <http://www.jmu.edu/procurement> or a copy can be obtained by calling Procurement Services at (540) 568-3145.

- B. APPLICABLE LAWS AND COURTS: This solicitation and any resulting contract shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The Contractor shall comply with applicable federal, state and local laws and regulations.
- C. ANTI-DISCRIMINATION: By submitting their proposals, offerors certify to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and §10 of the Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 (available for review at <http://www.jmu.edu/procurement>). If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender, sexual orientation, gender identity, or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*§6 of the Rules Governing Procurement*).

In every contract over \$10,000 the provisions in 1. and 2. below apply:

1. During the performance of this contract, the contractor agrees as follows:
    - a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
    - b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
    - c. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting these requirements.
  2. The contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.
- D. ETHICS IN PUBLIC CONTRACTING: By submitting their proposals, offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other offeror, supplier, manufacturer or subcontractor in connection with their proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.
- E. IMMIGRATION REFORM AND CONTROL ACT OF 1986: By entering into a written contract with the Commonwealth of Virginia, the Contractor certifies that the Contractor does

not, and shall not during the performance of the contract for goods and services in the Commonwealth, knowingly employ an unauthorized alien as defined in the federal Immigration Reform and Control Act of 1986.

- F. DEBARMENT STATUS: By submitting their proposals, offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.
- G. ANTITRUST: By entering into a contract, the contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.
- H. MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS RFPs: Failure to submit a proposal on the official state form provided for that purpose may be a cause for rejection of the proposal. Modification of or additions to the General Terms and Conditions of the solicitation may be cause for rejection of the proposal; however, the Commonwealth reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.
- I. CLARIFICATION OF TERMS: If any prospective offeror has questions about the specifications or other solicitation documents, the prospective offeror should contact the buyer whose name appears on the face of the solicitation no later than five working days before the due date. Any revisions to the solicitation will be made only by addendum issued by the buyer.
- J. PAYMENT:
  - 1. To Prime Contractor:
    - a. Invoices for items ordered, delivered and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the state contract number and/or purchase order number; social security number (for individual contractors) or the federal employer identification number (for proprietorships, partnerships, and corporations).
    - b. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than 30 days, however.
    - c. All goods or services provided under this contract or purchase order, that are to be paid for with public funds, shall be billed by the contractor at the contract price, regardless of which public agency is being billed.
    - d. The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or the date of offset when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.

e. Unreasonable Charges. Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. Upon determining that invoiced charges are not reasonable, the Commonwealth shall promptly notify the contractor, in writing, as to those charges which it considers unreasonable and the basis for the determination. A contractor may not institute legal action unless a settlement cannot be reached within thirty (30) days of notification. The provisions of this section do not relieve an agency of its prompt payment obligations with respect to those charges which are not in dispute (*Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 § 53; available for review at <http://www.jmu.edu/procurement>*).

2. To Subcontractors:

a. A contractor awarded a contract under this solicitation is hereby obligated:

(1) To pay the subcontractor(s) within seven (7) days of the contractor's receipt of payment from the Commonwealth for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or

(2) To notify the agency and the subcontractors, in writing, of the contractor's intention to withhold payment and the reason.

b. The contractor is obligated to pay the subcontractor(s) interest at the rate of one percent per month (unless otherwise provided under the terms of the contract) on all amounts owed by the contractor that remain unpaid seven (7) days following receipt of payment from the Commonwealth, except for amounts withheld as stated in (2) above. The date of mailing of any payment by U. S. Mail is deemed to be payment to the addressee. These provisions apply to each sub-tier contractor performing under the primary contract. A contractor's obligation to pay an interest charge to a subcontractor may not be construed to be an obligation of the Commonwealth.

3. Each prime contractor who wins an award in which provision of a SWAM procurement plan is a condition to the award, shall deliver to the contracting agency or institution, on or before request for final payment, evidence and certification of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the SWAM procurement plan. Final payment under the contract in question may be withheld until such certification is delivered and, if necessary, confirmed by the agency or institution, or other appropriate penalties may be assessed in lieu of withholding such payment.

4. The Commonwealth of Virginia encourages contractors and subcontractors to accept electronic and credit card payments.

K. PRECEDENCE OF TERMS: Paragraphs A through J of these General Terms and Conditions and the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors, shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.

- L. QUALIFICATIONS OF OFFERORS: The Commonwealth may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the services/furnish the goods and the offeror shall furnish to the Commonwealth all such information and data for this purpose as may be requested. The Commonwealth reserves the right to inspect offeror's physical facilities prior to award to satisfy questions regarding the offeror's capabilities. The Commonwealth further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such offeror fails to satisfy the Commonwealth that such offeror is properly qualified to carry out the obligations of the contract and to provide the services and/or furnish the goods contemplated therein.
- M. TESTING AND INSPECTION: The Commonwealth reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.
- N. ASSIGNMENT OF CONTRACT: A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.
- O. CHANGES TO THE CONTRACT: Changes can be made to the contract in any of the following ways:
1. The parties may agree in writing to modify the scope of the contract. An increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.
  2. The Purchasing Agency may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt. The contractor shall be compensated for any additional costs incurred as the result of such order and shall give the Purchasing Agency a credit for any savings. Said compensation shall be determined by one of the following methods:
    - a. By mutual agreement between the parties in writing; or
    - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the Purchasing Agency's right to audit the contractor's records and/or to determine the correct number of units independently; or
    - c. By ordering the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the Purchasing Agency with all vouchers and records of expenses incurred and savings realized. The Purchasing Agency shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the Purchasing Agency within thirty (30) days from the date of receipt of the written order from the Purchasing Agency. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this contract or, if there is none, in accordance with the disputes provisions of the

Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the Purchasing Agency or with the performance of the contract generally.

- P. DEFAULT: In case of failure to deliver goods or services in accordance with the contract terms and conditions, the Commonwealth, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Commonwealth may have.
- Q. INSURANCE: By signing and submitting a proposal under this solicitation, the offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract is awarded. For construction contracts, if any subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with § 25 of the Rules Governing Procurement – Chapter 2, Exhibit J, Attachment 1, and 65.2-800 et. Seq. of the Code of Virginia (available for review at <http://www.jmu.edu/procurement>) The offeror further certifies that the contractor and any subcontractors will maintain these insurance coverage during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED FOR MOST CONTRACTS:

1. Workers' Compensation: Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirement under the Code of Virginia during the course of the contract shall be in noncompliance with the contract.
  2. Employer's Liability: \$100,000
  3. Commercial General Liability: \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia must be named as an additional insured and so endorsed on the policy.
  4. Automobile Liability: \$1,000,000 combined single limit. *(Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third-party owner of such motor vehicle.)*
- R. ANNOUNCEMENT OF AWARD: Upon the award or the announcement of the decision to award a contract over \$100,000, as a result of this solicitation, the purchasing agency will publicly post such notice on the DGS/DPS eVA web site ([www.eva.virginia.gov](http://www.eva.virginia.gov)) for a minimum of 10 days.
- S. DRUG-FREE WORKPLACE: During the performance of this contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a

controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purposes of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

T. NONDISCRIMINATION OF CONTRACTORS: An offeror, or contractor shall not be discriminated against in the solicitation or award of this contract because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, faith-based organizational status, any other basis prohibited by state law relating to discrimination in employment or because the offeror employs ex-offenders unless the state agency, department or institution has made a written determination that employing ex-offenders on the specific contract is not in its best interest. If the award of this contract is made to a faith-based organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.

U. eVA BUSINESS TO GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS: The eVA Internet electronic procurement solution, website portal [www.eVA.virginia.gov](http://www.eVA.virginia.gov), streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet eprocurement solution by completing the free eVA Vendor Registration. All offerors must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the proposal being rejected. Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

1. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:
  - a. Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$500 per order.
  - b. Businesses that are not Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$1,500 per order.
2. For orders issued prior to July 1, 2014 the vendor transaction fees can be found at [www.eVA.virginia.gov](http://www.eVA.virginia.gov).

3. The specified vendor transaction fee will be invoiced by the Commonwealth of Virginia Department of General Services approximately 60 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.
- V. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the Commonwealth of Virginia shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
- W. PRICING CURRENCY: Unless stated otherwise in the solicitation, offerors shall state offered prices in U.S. dollars.
- X. E-VERIFY REQUIREMENT OF ANY CONTRACTOR: Any employer with more than an average of 50 employees for the previous 12 months entering into a contract in excess of \$50,000 with James Madison University to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to any awarded contract.
- Y. CIVILITY IN STATE WORKPLACES: The contractor shall take all reasonable steps to ensure that no individual, while performing work on behalf of the contractor or any subcontractor in connection with this agreement (each, a "Contract Worker"), shall engage in 1) harassment (including sexual harassment), bullying, cyber-bullying, or threatening or violent conduct, or 2) discriminatory behavior on the basis of race, sex, color, national origin, religious belief, sexual orientation, gender identity or expression, age, political affiliation, veteran status, or disability.

The contractor shall provide each Contract Worker with a copy of this Section and will require Contract Workers to participate in training on civility in the State workplace. Upon request, the contractor shall provide documentation that each Contract Worker has received such training.

For purposes of this Section, "State workplace" includes any location, permanent or temporary, where a Commonwealth employee performs any work-related duty or is representing his or her agency, as well as surrounding perimeters, parking lots, outside meeting locations, and means of travel to and from these locations. Communications are deemed to occur in a State workplace if the Contract Worker reasonably should know that the phone number, email, or other method of communication is associated with a State workplace or is associated with a person who is a State employee.

The Commonwealth of Virginia may require, at its sole discretion, the removal and replacement of any Contract Worker who the Commonwealth reasonably believes to have violated this Section.

This Section creates obligations solely on the part of the contractor. Employees or other third parties may benefit incidentally from this Section and from training materials or other communications distributed on this topic, but the Parties to this agreement intend this Section to be enforceable solely by the Commonwealth and not by employees or other third parties.

## **VIII. SPECIAL TERMS AND CONDITIONS**

- A. AUDIT: The Contractor hereby agrees to retain all books, records, systems, and other documents relative to this contract for five (5) years after final payment, or until audited by the

Commonwealth of Virginia, whichever is sooner. The Commonwealth of Virginia, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.

- B. CANCELLATION OF CONTRACT: James Madison University reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
- C. IDENTIFICATION OF PROPOSAL ENVELOPE: The signed proposal should be returned in a separate envelope or package, sealed and identified as follows:

From: \_\_\_\_\_

Name of Offeror	Due Date	Time
Street or Box No.	RFP #	
City, State, Zip Code	RFP Title	

\_\_\_\_\_  
Name of Purchasing Officer:

The envelope should be addressed as directed on the title page of the solicitation.

The Offeror takes the risk that if the envelope is not marked as described above, it may be inadvertently opened and the information compromised, which may cause the proposal to be disqualified. Proposals may be hand-delivered to the designated location in the office issuing the solicitation. No other correspondence or other proposals should be placed in the envelope.

- D. LATE PROPOSALS: To be considered for selection, proposals must be received by the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically non responsive and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intra university mail system. It is the sole responsibility of the Offeror to ensure that its proposal reaches the issuing office by the designated date and hour.
- E. UNDERSTANDING OF REQUIREMENTS: It is the responsibility of each offeror to inquire about and clarify any requirements of this solicitation that is not understood. The University will not be bound by oral explanations as to the meaning of specifications or language contained in this solicitation. Therefore, all inquiries deemed to be substantive in nature must be in writing and submitted to the responsible buyer in the Procurement Services Office. Offerors must ensure that written inquiries reach the buyer at least five (5) days prior to the time set for receipt of offerors proposals. A copy of all queries and the respective response will be provided in the form of an addendum to all offerors who have indicated an interest in responding to this solicitation. Your signature on your Offer certifies that you fully understand all facets of this solicitation. These questions may be sent by Fax to 540/568-7935.
- F. RENEWAL OF CONTRACT: This contract may be renewed by the Commonwealth for a period of four (4) successive one year periods under the terms and conditions of the original

contract except as stated in 1. and 2. below. Price increases may be negotiated only at the time of renewal. Written notice of the Commonwealth's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.

1. If the Commonwealth elects to exercise the option to renew the contract for an additional one-year period, the contract price(s) for the additional one year shall not exceed the contract price(s) of the original contract increased/decreased by no more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
2. If during any subsequent renewal periods, the Commonwealth elects to exercise the option to renew the contract, the contract price(s) for the subsequent renewal period shall not exceed the contract price(s) of the previous renewal period increased/decreased by more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

G. SUBMISSION OF INVOICES: All invoices shall be submitted within sixty days of contract term expiration for the initial contract period as well as for each subsequent contract renewal period. Any invoices submitted after the sixty day period will not be processed for payment.

H. OPERATING VEHICLES ON JAMES MADISON UNIVERSITY CAMPUS: Operating vehicles on sidewalks, plazas, and areas heavily used by pedestrians is prohibited. In the unlikely event a driver should find it necessary to drive on James Madison University sidewalks, plazas, and areas heavily used by pedestrians, the driver must yield to pedestrians. For a complete list of parking regulations, please go to [www.jmu.edu/parking](http://www.jmu.edu/parking); or to acquire a service representative parking permit, contact Parking Services at 540.568.3300. The safety of our students, faculty and staff is of paramount importance to us. Accordingly, violators may be charged.

I. COOPERATIVE PURCHASING / USE OF AGREEMENT BY THIRD PARTIES: It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body, (to include government/state agencies, political subdivisions, etc.), cooperative purchasing organizations, public or private health or educational institutions or any University related foundation and affiliated corporations may access any resulting contract if authorized by the Contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this contract or execution of a separate agreement is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of this contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The Contractor will notify the University in writing of any such entities accessing this contract. The Contractor will provide semi-annual usage reports for all entities accessing the contract. The University shall not be held liable for any costs or damages incurred by any other

participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that the University is not responsible for the acts or omissions of any entity and will not be considered in default of the contract no matter the circumstances.

Use of this contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.

J. SMALL BUSINESS SUBCONTRACTING AND EVIDENCE OF COMPLIANCE:

1. It is the goal of the Commonwealth that 42% of its purchases are made from small businesses. This includes discretionary spending in prime contracts and subcontracts. All potential offerors are required to submit a Small Business Subcontracting Plan. Unless the offeror is registered as a Department of Small Business and Supplier Diversity (SBSD)-certified small business and where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such subcontracting opportunities to SBSBD-certified small businesses. This shall not exclude SBSBD-certified women-owned and minority-owned businesses when they have received SBSBD small business certification. No offeror or subcontractor shall be considered a Small Business, a Women-Owned Business or a Minority-Owned Business unless certified as such by the Department of Small Business and Supplier Diversity (SBSD) by the due date for receipt of proposals. If small business subcontractors are used, the prime contractor agrees to report the use of small business subcontractors by providing the purchasing office at a minimum the following information: name of small business with the SBSBD certification number or FEIN, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product/service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.**
2. Each prime contractor who wins an award in which provision of a small business subcontracting plan is a condition of the award, shall deliver to the contracting agency or institution with every request for payment, evidence of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the small business subcontracting plan. **This information shall be submitted to: JMU Office of Procurement Services, SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.** When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm with the Department of Small Business and Supplier Diversity (SBSD) certification number or FEIN number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product or service provided. Payment(s) may be withheld until compliance with the plan is received and confirmed by the agency or institution. The agency or institution reserves the right to pursue other appropriate remedies to include, but not be limited to, termination for default.
3. Each prime contractor who wins an award valued over \$200,000 shall deliver to the contracting agency or institution with every request for payment, information on use of subcontractors that are not Department of Small Business and Supplier Diversity (SBSD)-certified small businesses. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm, phone number, FEIN number, total dollar amount subcontracted, and type of product or service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.**

- K. AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH: A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the Code of Virginia or as otherwise required by law. Any business entity described above that enters into a contract with a public body shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract. A public body may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this section.
- L. PUBLIC POSTING OF COOPERATIVE CONTRACTS: James Madison University maintains a web-based contracts database with a public gateway access. Any resulting cooperative contract/s to this solicitation will be posted to the publicly accessible website. Contents identified as proprietary information will not be made public.
- M. CRIMINAL BACKGROUND CHECKS OF PERSONNEL ASSIGNED BY CONTRACTOR TO PERFORM WORK ON JMU PROPERTY: The Contractor shall obtain criminal background checks on all of their contracted employees who will be assigned to perform services on James Madison University property. The results of the background checks will be directed solely to the Contractor. The Contractor bears responsibility for confirming to the University contract administrator that the background checks have been completed prior to work being performed by their employees or subcontractors. The Contractor shall only assign to work on the University campus those individuals whom it deems qualified and permissible based on the results of completed background checks. Notwithstanding any other provision herein, and to ensure the safety of students, faculty, staff and facilities, James Madison University reserves the right to approve or disapprove any contract employee that will work on JMU property. Disapproval by the University will solely apply to JMU property and should have no bearing on the Contractor's employment of an individual outside of James Madison University.
- N. INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the contractor/any services of any kind or nature furnished by the contractor, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered.
- O. ADDITIONAL GOODS AND SERVICES: The University may acquire other goods or services that the supplier provides than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms, and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services that are newly introduced during the term of this Agreement. Such additional goods and services will be provided to the University at favored nations pricing, terms, and conditions.
- P. ADVERTISING: In the event a contract is awarded for supplies, equipment, or services resulting from this proposal, no indication of such sales or services to James Madison University will be used in product literature or advertising without the express written consent

of the University. The contractor shall not state in any of its advertising or product literature that James Madison University has purchased or uses any of its products or services, and the contractor shall not include James Madison University in any client list in advertising and promotional materials without the express written consent of the University.

- Q. **OWENERSHIP OF DATA:** Ownership of all data, material, and documentation originated and prepared for James Madison University pursuant to the RFP shall belong exclusively to James Madison University.
- R. **PRIME CONTRACTOR RESPONSIBILITIES:** The contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime contractor. The contractor agrees that he is fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees.
- S. **SUBCONTRACTS:** No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.

## **IX. METHOD OF PAYMENT**

The contractor will be paid based on invoices submitted in accordance with the solicitation and any negotiations. James Madison University recognizes the importance of expediting the payment process for our vendors and suppliers; we request that our vendors and suppliers enroll in our bank's Comprehensive Payable options: either the Virtual Payables Virtual Card or the PayMode-X electronic deposit (ACH) to your bank account so that future payments are made electronically. Contractors signed up for the Virtual Payables process will receive the benefit of being paid Net 15. Additional information is available online at:

<http://www.jmu.edu/financeoffice/accounting-operations-disbursements/cash-investments/vendor-payment-methods.shtml>

## **X. PRICING SCHEDULE**

The offeror shall provide pricing for all products and services included in proposal indicating one-time and on-going costs. The resulting contract will be cooperative and pricing shall be inclusive for the attached Zone Map, of which JMU falls within Zone 2.

Specify any associated charge card processing fees, if applicable, to be billed to the university.

Vendors shall provide their VISA registration number when indicating charge card processing fees. Any vendor requiring information on VISA registration may refer to <https://usa.visa.com/support/small-business/regulations-fees.html> and for questions <https://usa.visa.com/dam/VCOM/global/support-legal/documents/merchant-surcharging-qa-for-web.pdf> .

## **XI. ATTACHMENTS**

Attachment A: Offeror Data Sheet

Attachment B: Small, Women, and Minority-owned Business (SWaM) Utilization Plan

Attachment C: Standard Contract Sample

Attachment D: Zone Map

ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

1. **QUALIFICATIONS OF OFFEROR:** Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.
2. **YEARS IN BUSINESS:** Indicate the length of time you have been in business providing these types of goods and services.

Years \_\_\_\_\_ Months \_\_\_\_\_

3. **REFERENCES:** Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #
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4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

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5. **RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA:** Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the [CODE OF VIRGINIA](#), SECTION 2.2-3100 – 3131?

YES  NO

IF YES, EXPLAIN: \_\_\_\_\_

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ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Offeror Name: \_\_\_\_\_ Preparer Name: \_\_\_\_\_

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

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes\_\_\_\_\_ No\_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date:\_\_\_\_\_

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes\_\_\_\_\_ No\_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date:\_\_\_\_\_

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes\_\_\_\_\_ No\_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date:\_\_\_\_\_

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes\_\_\_\_\_ No\_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

**Instructions:** *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

**Small Business:** "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

**Woman-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

**Minority-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

**Micro Business** is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees **AND** no more than \$3 million in average annual revenue over the three-year period prior to their certification.

**All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).**

***RETURN OF THIS PAGE IS REQUIRED***

**ATTACHMENT B (CNT'D)**  
**Small, Women and Minority-owned Businesses (SWaM) Utilization Plan**

Procurement Name and Number: \_\_\_\_\_

Date Form Completed: \_\_\_\_\_

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses  
for this Proposal and Subsequent Contract

Offeror / Proposer:

\_\_\_\_\_ Firm

\_\_\_\_\_ Address

\_\_\_\_\_ Contact Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)

*(Form shall be submitted with proposal and if awarded, again with submission of each request for payment)*

***RETURN OF THIS PAGE IS REQUIRED***

ATTACHMENT C



COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No. \_\_\_\_\_

This contract entered into this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_, by \_\_\_\_\_ hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From \_\_\_\_\_ through \_\_\_\_\_

The contract documents shall consist of:

- (1) This signed form;
(2) The following portions of the Request for Proposals dated \_\_\_\_\_:
(a) The Statement of Needs,
(b) The General Terms and Conditions,
(c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
(d) List each addendum that may be issued
(3) The Contractor's Proposal dated \_\_\_\_\_ and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
(a) Negotiations summary dated \_\_\_\_\_.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:

PURCHASING AGENCY:

By: \_\_\_\_\_ (Signature)

By: \_\_\_\_\_ (Signature)

\_\_\_\_\_  
(Printed Name)

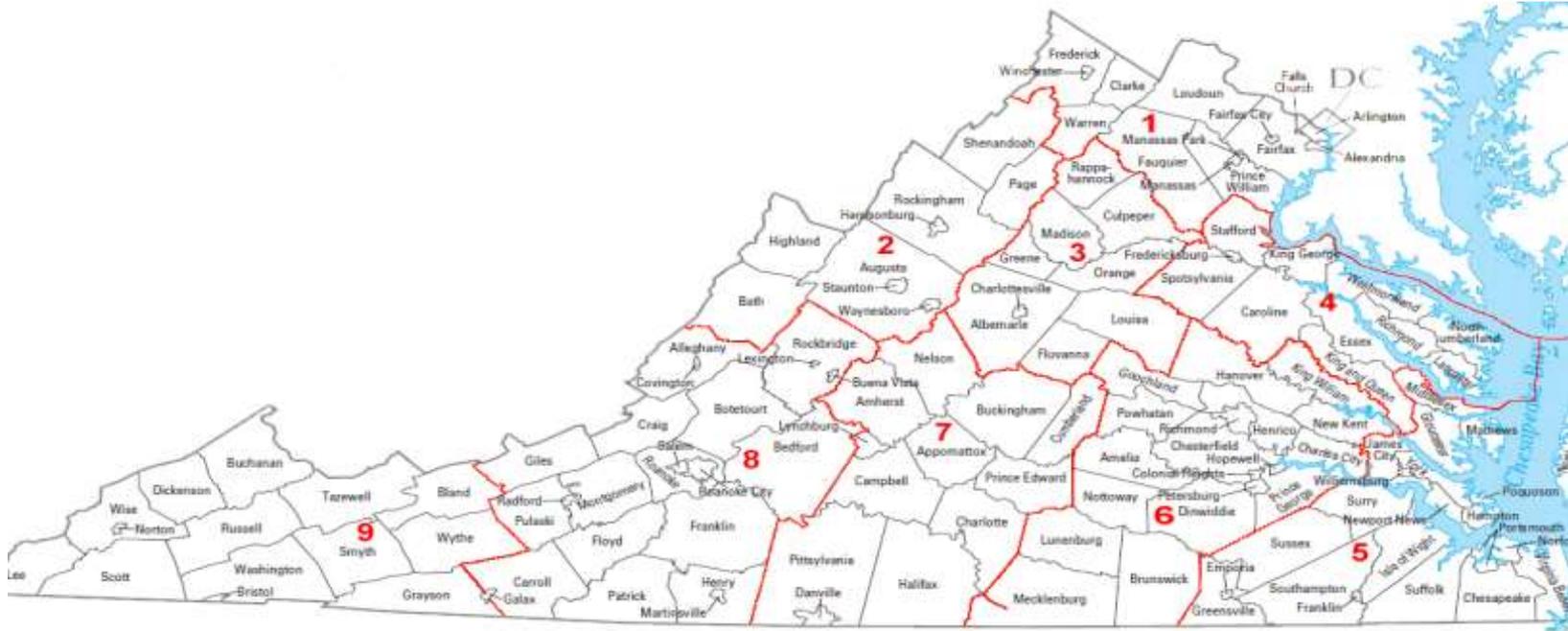
\_\_\_\_\_  
(Printed Name)

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

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

# ATTACHMENT D

## Zone Map



### Virginia Association of State College & University Purchasing Professionals (VASCUPP)

#### List of member institutions by zones

<b><u>Zone 1</u></b> George Mason University (Fairfax)	<b><u>Zone 2</u></b> James Madison University (Harrisonburg)	<b><u>Zone 3</u></b> University of Virginia (Charlottesville)
<b><u>Zone 4</u></b> University of Mary Washington (Fredericksburg)	<b><u>Zone 5</u></b> College of William and Mary (Williamsburg) Old Dominion University (Norfolk)	<b><u>Zone 6</u></b> Virginia Commonwealth University (Richmond)
<b><u>Zone 7</u></b> Longwood University (Farmville)	<b><u>Zone 8</u></b> Virginia Military Institute (Lexington) Virginia Tech (Blacksburg) Radford University (Radford)	<b><u>Zone 9</u></b> University of Virginia - Wise (Wise)

## ADDENDUM NO.: One

### To ALL OFFERORS:

<b>REFERENCE:</b>	Request for Proposal No.:	RFP# JPG-1131
	Dated:	September 15, 2021
	Commodity:	Admissions and Geodemographic Research and Marketing Services
	RFP Closing On:	October 13, 2021

Please note the clarifications and/or changes made on this proposal program:

- Question:** What is the intended first enrollment period for execution of the requested strategy?  
**Answer:** Fall 2023
- Question:** How many student records (College Board, Encoura, etc.) does JMU intend to purchase, and which graduation years?  
**Answer:** JMU purchases between 75-100k search names annually. In 2021, JMU purchased graduation years 2022, 2023, & 2024.
- Question:** Regarding page 3 (Sec IV, 1.b): *“Identify and develop a 5-year comprehensive strategy to increase enrollment from underrepresented student populations and programs of study.”* Is JMU looking to optimize their academic program portfolio mix by looking at the health of current offerings and opportunity associated with new programs? Or are you simply looking to better understand how to enroll students interested in specific areas of study?  
**Answer:** JMU is looking to enroll students interested in specific areas of study to strengthen/increase participation in existing programs that are stagnant or declining enrollment.
- Question:** Is there a desired annual budget we should be aware of?  
**Answer:** The university does not disclosure budget information for a project.
- Question:** Are current budget dollars funding this RFP, or is JMU looking to invest new budget dollars?  
**Answer:** New budget dollars.
- Question:** Since the size and quality of enrollment audiences is the goal of this work, we assume financial aid needs to be part of the scope but there is little mention of cost/aid in the RFP. Can you elaborate on what you expect the firm to do and not do with JMU’s financial aid processes and systems?  
**Answer:** The scope of this project does not include financial aid or scholarship strategy.
- Question:** Why is JMU interested in this initiative at this time?  
**Answer:** In 2022, JMU will be reclassified as an R2 high research university which is moves the university from regional to the national list. The goal of admissions is to be prepared to identify new markets in and out of state as JMU moves to a national university. This project is about expanding JMU’s brand awareness in and out of state.
- Question:** Who are the last outside firms to conduct audience research, do enrollment planning, and execute brand initiatives, and when did they last work with JMU?  
**Answer:** That information is not available.
- Question:** The research requested does not include primary research with your audiences (e.g., surveys of prospective students), which would benefit all enrollment- and marketing-related parts of the project. Would you consider an approach that includes survey research?  
**Answer:** Yes
- Question:** Is the digital campaign meant to focus only on undergraduate populations, or should it extend to grad/online? If not, it may compete.

**Answer:** The focus is on undergraduate admissions only. We do not offer online degree programs and the graduate school is a separate entity with a very different audience.

11. **Question:** In the RFP, the university wishes to engage 7-12 grade prospects. What sort of outreach does the university currently engage in with 7-9 grade students?

**Answer:** JMU has a Middle School Leadership Academy, a summer program. The program has been on hold since 2019 due to the pandemic.

12. **Question:** How extensive are the university's electronic and print fulfillment communications?

**Answer:** The current digital and print communications are adequate for the high school senior prospects that have expressed interest in JMU, reside in known regions, or purchased names. There is an opportunity to expand digital and print communication strategies for high school underclassmen.

Signify receipt of this addendum by initialing "*Addendum # 1*" on the signature page of your proposal.

Sincerely,

Jeremy Good

Buyer Specialist

Phone: (540-568-3131)