



**COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT**

Contract No. UCPJMU6190

This contract entered into this 29th day of November 2021, by ADV Market Research and Consulting, 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 September 29, 2021 and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
 - (a) Negotiations Summary, dated November 16, 2021.

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

CONTRACTOR:

By: Grant De Roo
(Signature)

Grant De Roo
(Printed Name)

Title: Founder, Principal

PURCHASING AGENCY:

By: Jeremy Good
(Signature)

Jeremy Good
(Printed Name)

Title: Buyer Specialist

**RFP # JPG-1131, Admissions and Geodemographic Research and
Marketing Services
Negotiation Summary for ADV Market Research and Consulting**

11/16/21

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. Pricing shall be as detailed in the attached pricing schedule.
3. The Contractor shall negotiate with JMU individually 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.
4. Cost of incentives for survey participants will vary depending on the number of participants. ADV will only invoice JMU for the incentives that are distributed and will invoice at cost. Contractor has disclosed all potential fees. Additional charges will not be accepted.
5. There shall be no additional costs to the University for contractor travel to campus. Additionally, there shall be no additional costs for up to three (3) campus visits per project, additional meetings will be discussed between the Contractor and the University.
6. No work shall be undertaken by the Contractor until written approval from the University project manager.
7. Contractor agrees to the cooperative language in this contract.
8. 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	\$34,850
Developmental support of enrollment strategy and communications	\$59,550
Slate Optimization:	
Review of general Slate overview	\$21,925
Strategy and implementation of Slate improvements	\$21,950
List purchasing (per list of \$100,000 names)	\$28,400
Geodemographic Research and Communications:	
Competitive analysis consultation(s)	\$13,800
Geospatial and market opportunity research	\$19,775
Targeted ad campaigns (per campaign)	\$234,900
Additional geodemographic services as quoted	\$29,800
Total:	
	\$464,950

Notes:

1. Pricing differs from our original proposal due to the line items in the "Slate Optimization" section. In the original RFP, experience with CRM systems, and Slate in particular, were specified as statements of need for this project, but they were not elevated to the level of clear action items as stated in the table above. We have therefore provided quotes for each of the items listed in that section. All other pricing is identical to what we have provided to JMU previously.
2. The quote provided for "Additional geodemographic services as quoted" is for market research to assess awareness and perceptions of the JMU brand among target audiences (described in full in our proposal).



10.13.2021

Proposal for:

Admissions and Geodemographic Research and Marketing Services

Presented to:

James Madison University

Prepared by:

**Grant De Roo
Founder and Principal
ADV Market Research & Consulting**

Introduction

Thank you for the opportunity to present this proposal to James Madison University (JMU) for market research, enrollment planning, and marketing services.

In this proposal, we address how we will help JMU thrive in a difficult environment by creating a coordinated plan to achieve both enrollment and revenue goals. Our work is done from a strong background in enrollment issues—we live completely in the higher education space. To this end, our benefits for JMU include:

- **We Are an Enrollment-Minded, Research-First Higher Education Team.** ADV's team has both practitioner and consulting enrollment experience, greatly with public universities. Higher education is our focus and passion. We also know the value of data, so research leads every project we undertake—leveraging the information you already have and then creating a smart, customized approach to collect more. Data will shape all JMU enrollment-related recommendations. In our experience, many firms can obtain data; some can interpret it—but few can make it *relevant*. We do.
- **A Partnership Built for JMU:** Leading this effort is ADV. Our experience in marketplace assessment, market research for brand reputation, and complex communication planning and messaging is an ideal body of work that drives all projects. For JMU's benefit, ADV is partnering with two resources for specific tasks. Best Practice Solutions (BPS) is an agency exclusively focused on enrollment and financial aid solutions for universities. Intead, Inc. is a higher education-focused marketing firm with extensive university experience and a clear record of success in sophisticated and data-based marketing campaigns.
- **Experience on “Your Side of the Desk”:** Most members of our team have held campus admissions and financial aid positions, and all have worked extensively in higher education. We know the questions to ask, how to reach multiple goals for enrollment and revenue, and—critically—what it takes to implement a new strategy.
- **Extensive Experience in Your Markets:** Your audiences and immediate region demand the attention of someone who understands their distinct context, goals, priorities, and barriers. The ADV team is custom-built to address these very specific needs. Our approach for you is born from experience with college and universities in your region (although none under contract today) as well as other excellent public institutions who have wanted to “dominate” their markets (a goal per your RFP).
- **Non-Templated Approach:** You deserve a market research partner that adapts to your distinct requests, not one that operates from a template. Large enrollment firms apply their machinery to your situation – however, ADV treats each assignment as a nuanced opportunity to truly address the dynamics of your situation. Our work is tailored to your circumstances, resources, identities, and goals.

- **We Don't Work for Your Rivals – So We Have an Agnostic Point-of-View.** Large enrollment firms including those in your backyard work with several if not many of your competitors and dominate from Virginia and the Carolinas to D.C. and New York City. You deserve a partner capable of accomplishing everything you request without the concern of wondering whether they're offering the same guidance to your competition. ADV's customized, focused approach to this work will be one-of-a-kind for JMU and reflect your distinct goals and opportunities for growing and sustaining enrollment in the years ahead.

Thank you for the opportunity to show you how we can be the right partner for JMU in this important work. We look forward to discussing your needs and how we can further shape an appropriate plan to assist you.

Sincerely,



Grant De Roo
Founder and Principal

RFP Cover Sheet and Addenda Acknowledgments

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:

ADV Market Research & Consulting, LLC

450 Hwy 1 W, #184

Iowa City, IA 52246

By:



(Signature in Ink)

Name: Grant De Roo

(Please Print)

Date: September 29, 2021

Title: Founder, Principal

Web Address: Advmarketresearch.com

Phone: 603-686-1928

Email: gderoo@advmrc.com

Fax #: _____

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 GD #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

Project Plan for Meeting Your Statements of Needs

We have reviewed your stated goals for this project and bring a best practice consistency to execute all of this important work.

To show you how we have created a coordinated approach to accomplishing your goals *and* meet each of your statements of needs, we have described our plan below and included every need statement satisfied by each project step. While this means the need statements do not follow the order set forth in your RFP, we feel this is the best way to show you how our work plan for JMU achieves each of your goals. We identified each statement of need with its number and letter system from the RFP.

At a high level, our work plan for JMU includes the following steps:



Discovery provides needed context for all the work to come.

Research provides the critical data needed for effective enrollment and marketing planning as well as allow us to measure progress.

Enrollment Planning will clarify and define your enrollment goals for the future as well as the coordinated enrollment management tactics designed to achieve them.

Marketing Planning (and execution) will proceed hand-in-hand with Enrollment Planning to accomplish JMU's enrollment goals by engaging your target audiences and strategically guiding them through the enrollment process.

The following is a detailed description of each of these project steps and how they will meet JMU's needs for this project.

Discovery

Before taking interrelated but distinct paths of work, our team will take a centralized, holistic approach to starting the project so that we have a singular foundation.

Discovery is context informed by your current enrollment strategies, financial aid awarding plan, brand messaging, enrollment goals, and post-pandemic opportunities. We know your core markets have seen demographic and enrollment challenges in recent years and we know you have a mission to serve a distinct and diverse set of audiences.

But there is a great deal we do not yet know about your situation, resources, students, goals, and opportunities. We want to understand your perspectives on tuition and financial aid, what you hope to accomplish, and what expectations you have for JMU in the years ahead. Additionally, this first

step allows us to get to know one another. We want you to ask questions and feel comfortable with the process we map out for JMU.

To kick off the project, we will conduct a two-step Discovery process.

First, we will review relevant information that provides important background for this work as well as a vision for what is ahead. This will include:

- Existing research (prior to ours) that would inform who JMU competes with and any enrollment challenges or opportunities (particularly as they relate to tuition and financial aid)
- JMU reports regarding admissions trends (inquiries, applications, accepts, enrollments) and higher-level financial information such as EFC frequencies, trends in discount rate, etc.
- Past marketing campaign execution samples and results
- Examples of prospective student marketing materials (e.g., print, advertising) to get a sense of how JMU is positioned and, in particular, how matters relating to admissions process, programs, and tuition and net cost are framed for prospective students
- Available plans and stated goals for enrollment (total and for sub-populations)
- Promotional assets used to recruit students (print, digital) as well as a review of events on the JMU recruitment calendar

Second, we will engage directly with the JMU team to hear from you and have the opportunity to ask questions of one another that will guide the work ahead. We anticipate speaking with:

- President Alger
- Enrollment leadership
- Admissions team
- Financial aid team
- Academic leadership
- Student Life leadership
- Select current students
- Select faculty
- Additional staff as needed

Depending upon Virginia's campus rules with COVID and travel, we can do some or all of these interviews in-person. We will conduct meetings remotely as needed. (Note that all of ADV's team members are fully vaccinated.)

This foundational step will provide alignment on all project components and timelines, context for your current situation, and clarity on goals for the future. With Discovery completed, we will then move into the assessment and research phases of the project.

Geodemographic Research

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

3.b.i. Incorporate the existing geodemographic data that JMU uses to identify regions that possess students who might be interested in JMU.

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

We will collect secondary data for JMU's core and emerging markets to determine trends that could meaningfully impact JMU's enrollment and discuss their implications for the University's admissions strategy. We will answer questions such as:

- *How is the population changing in core recruitment markets today? What are the potential implications for JMU's enrollment throughout the next decade?*
- *Which school districts and high schools in JMU's core areas are projected to grow or decline in enrollment?*
 - *How do these coincide with JMU's feeder schools? What are the implications for recruitment strategy?*
- *What other U.S. markets should JMU consider as enrollment opportunities based on population growth, historical interest, alumni matriculation, and other compelling factors?*
- *How could/should JMU approach these markets in a targeted fashion that maximizes enrollment potential and stewards the University's travel recruitment resources?*
- *To what extent are JMU's chief competitors also recruiting from these markets?*

In analyzing **core markets**, we will naturally start with a detailed focus on Virginia from which 75% of JMU's new undergraduate students came in Fall 2020 (per IPEDS reporting). We will focus on your distinct markets within Virginia and provide a detailed analysis of population changes, recruitment implications, and emerging markets within the state that warrant JMU's further consideration.

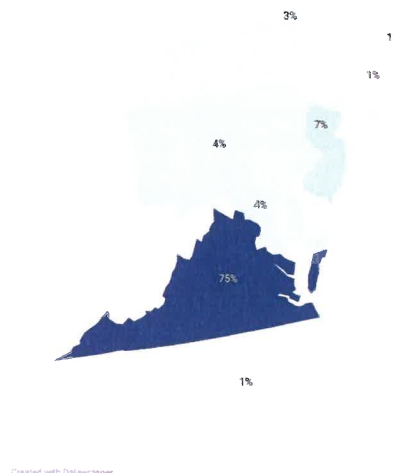
In addition to Virginia, we will focus on secondary core markets today, including:

New Jersey	Massachusetts
Maryland	Connecticut
Pennsylvania	North Carolina
New York	

Combined, these seven states accounted for 21% of newly enrolled JMU students in Fall 2020 and represent most of JMU's out-of-state students. This list of primary out-of-state markets can be revised or added to if there is interest in exploring other key geographies.

For each market, we will collect and analyze the following data points to understand meaningful changes in the population and their potential consequences for JMU:

- Total projected high school graduates and trend throughout the next decade
 - Expected changes in the race/ethnicity of high school graduates in each state
- Forecasted number of high school graduates who will attend four-year colleges and regional universities
- Projected impact on JMU enrollments from each market
- County- and school-district-level analysis of changes in high school graduates to guide recruitment efforts toward areas experiencing or expecting growth
 - Include household income, parent education, historical interest in JMU (applications, enrollees), and alumni concentration to determine the quality of the recruitment opportunity for JMU in growing areas
 - Drill down to specific high schools within high-potential districts to further inform JMU's strategy



We will then turn our attention to **emerging markets** for the University – areas with sizable populations, past interest in JMU, and/or projected growth in high school graduates throughout the next decade. At the outset of the research, we will work with the JMU team to identify the emerging markets to focus on in this portion of the research. We have found it is helpful to provide the following to guide that discussion:

- Projected trends in high school graduates and number of students projected to four-year universities
- Prior interest in JMU (applications, matriculants)
- Number of high school students who attend out-of-state institutions

Once the list of emerging market states is defined, we will then collect and analyze in-market data for each state, including:

- County- and school-district-level analysis of high school enrollment and projected changes in enrollment
- Median income and parental education by school district to identify high-potential areas

- Percentage of students attending four-year universities and, when available, out-of-state institutions by high school
- Distribution of JMU alumni within each market – this is not only an indicator of potential awareness of the University, but also points to opportunities to engage local alumni in the recruitment process
- Number of students from the market attending JMU's top competitors as well as any competitors' local presence via regional representatives

ADV will collect the data from a variety of sources such as the American Community Survey, the Higher Education Demand Index, the Western Interstate Commission on Higher Education, the Economic Census of the United States, and a variety of state and local datasets for school enrollments and education data.

Deliverable: We will present all of the information for current and emerging markets in a detailed, yet readable, report with the information organized on a state-by-state basis. The analysis and discussion will emphasize areas of concern and opportunity as well as the implications for JMU's recruitment and marketing strategy.

As part of delivering the results, we anticipate an overarching discussion with the Enrollment Management leadership about the findings and their implications. We are also available to meet individually with territory managers on the Admissions staff to discuss the meaning of the data for their areas and address any questions they may have.

Survey Research and Message Positioning

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

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

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

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

2.f.vii. Translation of the university's brand for prospective students.

3.b.xi. Raise the recognition of the value of JMU's education experiences to increase matriculates.

3.b.xiv. Increase the JMU name recognition in current markets.

Per your response to our question in Q&A, we appreciate your desire to acquire, analyze, and use timely data to inform enrollment and marketing planning for the future. And while we recognize that survey data alone will not completely meet each of the needs listed above, this research process is critical in informing the work that will meet them. For instance, one of your stated needs is "raise the recognition of the value of JMU's education experiences." To accomplish this, we need to first understand: (a) current levels of awareness of JMU, (b) perceptions of your education in the market today, (c) how your current students and faculty define JMU's educational value; only after clarifying

these things through data can we create a successful marketing effort to improve perceptions of JMU. Furthermore, validating the effectiveness of those marketing efforts is only made possible by knowing where things stand today. For these and many other reasons, there is tremendous value in doing the research and messaging work described below.

Survey Research

We will collaborate with JMU in creating, fielding, and analyzing surveys aimed at soliciting response from JMU's external audiences and stakeholders. Informed by Discovery, we want to understand the critical, real-time insight into the hearts and minds of audiences about the University.

Research done right and then interpreted and leveraged properly will tie the findings of Discovery with the future of the JMU reputation and enrollment efforts and guide our plan. This work will help us better understand internal and external opinions of JMU, the role you do, can, and should play in the region, and, importantly, the value JMU can/should offer in the years to come.

This survey research offers several key benefits:

- This process will enable JMU to gather critically important institutional data *from a large number of participants* that will serve the University well for multiple endeavors and strategic decisions.
- This research will establish a more complete brand perception baseline against which future research can measure changes in opinions and perceptions over time.
- A sound survey lends more confidence to the findings than limited focus groups. The far more extensive data better represents the complete thoughts and feelings of your key stakeholders and the region you serve (so critical to JMU). Thus, there is more confidence in articulating and expressing the enrollment and marketing strategies to come.

We use a rigorous survey methodology to ensure the validity of results so that JMU has confidence in the findings and the brand direction moving forward. To ensure we are reaching the true target audience and doing so in a way that makes the findings representative, we will work with the JMU admissions team when compiling the sample and clarify several questions about the individuals we want to reach and the accuracy of their contact information.

We then take several measures to ensure we have a large enough response sample to feel confident in the findings. We strive for a margin of error of +/- 5%, which typically requires at least 500-600 responses. We use monetary incentives and reminders to generate as large of a response as practically and financially feasible.

In analysis, we are careful to let the data speak for itself and therefore allow valid findings to surface. We use statistical tests to confirm significance and review the data carefully to avoid calculation errors. In sum, we have a time-tested process for ensuring the validity of our survey process, the resulting data, and, critically, the decisions that stem from the findings.

In the research, we will incorporate both internal and external perspectives:

Internal Stakeholders

- Current JMU Students
- Faculty and Staff
- Alumni

External Target Audiences

- Prospective students
- Parents of prospective students
- High school counselors

We will design the survey based on the information learned to date, our prior experience conducting similar studies, and input from the JMU team. These surveys will be administered online via email with contact information provided by you. The surveys will likely focus on:

- **Internal Stakeholders**
 - Perceptions of JMU on brand attributes and key college characteristics
 - Words/phrases used to describe JMU
 - Strengths and specific points of distinction; opportunities for improvement
 - Likelihood to recommend JMU to others
 - Information students wish they had known when they were applying to college
 - Accuracy and authenticity of current messaging
 - Role of STEM programs
 - Role of JMU athletics in reputation (all perspectives inside and outside of athletics)
 - Top academic programs to communicate to prospective students
- **External Target Audiences**
 - Name of their top-choice institution and why it became their top choice [prospective students and parents]
 - Awareness and familiarity with JMU
 - Knowledge of academic programming options and opportunities at JMU
 - The importance of various qualities/characteristics when evaluating a college
 - Words/phrases used to describe their ideal college environment
 - Methods of collecting information about colleges
 - Likelihood to recommend JMU to others
 - Perceptions of JMU on various college qualities/characteristics
 - Strengths and weaknesses of JMU
 - Awareness of athletics and what they value about you
 - Descriptions of students who are a good fit for JMU
 - Changes in perceptions of JMU over time [for parents and counselors]

ADV will handle all survey logistics, such as programming, testing, administering, and sending reminders. We recommend a monetary incentive for external audiences to encourage their participation, which we will discuss with the JMU team prior to survey fieldwork. After data collection, our team will analyze responses to extract meaning from the data.

Deliverable: We will report on significant implications and recommendations to address regarding JMU's enrollment efforts, the University's brand, and your position in the

marketplace. We will report all findings and recommendations to the JMU team and leadership as needed for discussion about the data and implications. This research sets the direction for the enrollment and marketing strategies to come.

Message Alignment

We are sure that much of what JMU says, shows, and does in promotion is appropriate. Our research will confirm this.

However, applying best practices in 2021-22 and our experience with JMU-like institutions will undoubtedly provide excellent options to embellish the JMU message platform.

Working with your team established for this project, we will ensure your mission, vision, and values and our research can better define and distinguish your brand position moving ahead to best impact enrollment. This means clarifying the verbal vocabulary foundation the University uses to serve as the unifying story that connects all JMU constituents and stakeholder groups to a single compelling brand idea.

Our **Brand Platform** has the following three components:

- A **Brand Promise** is what JMU promises to deliver those who align with you. It is a statement that captures the benefit to *any* audience and clarifies what you ultimately deliver to your target audiences. It is a compass when developing key messages and communication materials.
- **Brand Pillars** are how JMU demonstrates what you deliver to stakeholders. The key words and phrases that provide rationale and supporting proof points bring added dimension to the Brand Promise. These guide your marketing staff and other communicators when developing and executing communication programs.
- **Brand Character** refers to how JMU acts. Every brand has a personality, a way of presenting itself to the world. It is a set of human characteristics (adjectives) that define the Institute's brand's voice, look, and actions in the world. We want to clarify those traits and determine how they will be expressed and reinforced.

After using research to establish the appropriate succinct and compelling verbal vocabulary of the Brand Platform, we will develop a **Message Matrix** which applies the Brand Pillars to a range of distinct JMU audiences to create sample copy moving ahead. This document serves as the guide to all verbiage of the JMU enrollment work ahead.

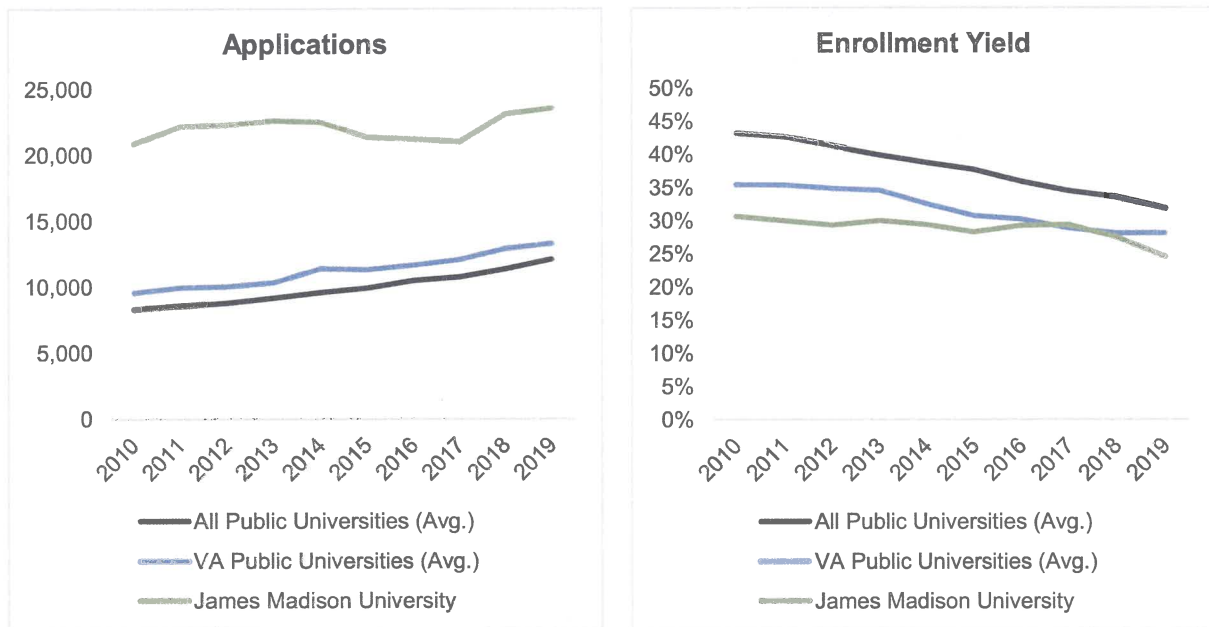
We will leverage this verbal identity and begin our work to express the JMU story in the holistic emotional, engaging enrollment campaign.

Strategic Enrollment Plan and Execution

- 1.b. Identify and develop a 5-year comprehensive strategy to increase enrollment from underrepresented student populations and programs of study. (including goals set forth in 1.b.i through 1.b.vi.)**
- 1.c. Developing inquiries and leading the inquiries to applicants.**
- 1.d. Increasing the percent of admitted students who matriculate.**
- 1.e. Maintaining and strengthening university presence in existing markets.**
- 3.a. Allow JMU to dominate its primary markets relating to inquiries generated, applications received, and students enrolled.**

Nearly every member of our team has formerly led admissions and financial aid operations at colleges around the country. We therefore have firsthand experience with addressing the challenges of defining a target market, expanding regional recruiting, improving the campus visit experience, maintaining or increasing yield, and shaping a class through a data-informed strategy. We have also consulted with institutions around the nation on improving these very things and establishing a stronger data infrastructure that allows the enrollment management team to make more informed strategic decisions.

It is also important to consider the environmental context. For instance, as the charts below show, applications have risen across higher education, resulting in yield rates falling consistently throughout the past decade.



While JMU has not been immune to falling yield, the data show that your experience has been consistent with other public universities in the state. And, in contrast to some other institutions, many of which are letting market forces determine their enrollment fates, JMU has decided to take proactive steps to improve its enrollment outcomes amidst increasingly competitive market

conditions. We applaud JMU's desire to reposition the University in the higher education marketplace in ways that increase demand, and we are confident that we can help the University realize this goal in specific ways.

To that end, we will use the foundational information gathered in the Discovery phase and research to develop a five-year Strategic Enrollment Management (SEM) Plan and a related set of Customized Recruitment Strategies. In your RFP, JMU has identified a host of specific enrollment aims (e.g., increase male enrollment by 10%; racial and ethnic diversity from 24% to 30%; first-generation enrollment by 10%). To achieve these specific enrollment goals, JMU will need answers to a multitude of related questions, such as *What are JMU's targets for other recruitment dimensions (e.g., other academic programs; by student revenue level; by student profile)? Along what kind of timing can JMU realistically expect to see specific progress toward each goal (e.g., what are the year 1, year 2, year 3, etc. targets for each of the full plan goals)? And do we know if any of the goals are inconsistent with each another? And if so, which goals should be prioritized relative to any conflicts?*

The creation of an SEM Plan will serve as the vehicle for determining JMU's enrollment priorities and goals over the next few years in an integrated and comprehensive manner. More specifically, the SEM Plan will be organized around the following dimensions and related questions:

Recruitment Priorities

- Which student type dimensions does JMU want to prioritize in enrollment?
- What measures/indicators does JMU want to use to gauge success on those dimensions?
- What hierarchy does JMU want to establish across dimensions?

Enrollment and Revenue

- What revenue targets will help JMU achieve a sustainable operating budget?
- What are JMU's enrollment targets for 2023 and beyond?
- What operational changes will JMU prioritize to fulfill future enrollment goals?
- What resource investments will JMU prioritize to enhance JMU's reputation and resources?

Brand Elements & the Student Experience

- What are JMU's core brand elements? What does JMU want to be known for? (answered through market research and our discussions with JMU stakeholders)
- How do these elements tie to the JMU student experience currently?
- How can these elements serve as a guidepost for shaping aspects of the JMU student experience in the future?

To create the plan, we will work collaboratively with key JMU stakeholders to develop both the structure of the plan and the specific content. Our steps will include:

- Conducting in-depth interviews with relevant JMU stakeholders (e.g., cabinet members, admissions staff members, faculty, current students) on the SEM Plan topics
- Collecting and analyzing extant institutional and industry data that can provide a historical and benchmarking context for the SEM Plan (e.g., enrollment, financial aid, revenue, and academic profile from JMU and key competitors)
- Crating “what if” scenarios showing how changes in particular SEM Plan goals affect, or are projected to affect, other enrollment outcomes.

Hallmarks of the SEM Plan content will include a focus on:

- The full student lifecycle – from prospect to alumni;
- Student success at each stage of the student lifecycle;
- Cross-office coordination relative to SEM Plan priorities; and
- Use of data and analysis to guide enrollment strategy and decision making.

As we develop the SEM Plan, we will seek and respond to feedback from project sponsors to drafts in an iterative fashion. Once complete, the SEM Plan will provide several benefits to JMU. For example, the SEM Plan will serve as a guiding resource for University stakeholders about:

- Key indicators of enrollment health and related goals;
- JMU’s market position;
- Which types of students are best served by a JMU education;
- The expectations that enrolling students have for JMU; and
- What student success looks like at JMU.

In addition, the SEM Plan will give JMU a structured mechanism for being intentional about the University’s enrollment related priorities and for assessing progress toward goals and institutional health. The SEM Plan will also provide JMU the opportunity to establish a clear vision of the University’s hopes for future enrollment, which will help foster integrated efforts across JMU divisions and offices.

JMU will also benefit from a plan for Customized Recruitment Strategies that we will develop in support of achieving the SEM Plan goals. The SEM Plan will include enrollment goals and related key performance indicators across a variety of enrollment outcomes (e.g., headcount, net tuition revenue, discount rate, academic profile, yield rate) for the full entering class and for specific market segments (e.g., by sex, race and ethnicity, academic interest, in-state vs. out of state, student athlete vs. non-athlete). Through a combination of interview, audit, and “shopper” activities, we will identify where opportunities for improvement exist in recruitment strategies and make recommendations for how to do so. For this work, we will review the following recruitment domains among prospective first-year audiences:

- Visit and event programs, including daily visits and campus and virtual events;

- Email, print, and text communications;
- Admission counselor territory management (including high school visits, college fairs);
- Use of CRM (i.e., Slate) in prospective student engagement and information tracking;
- Admission office use of social media channels in student recruitment; and
- Admission student ambassador roles.

All of these observations, analyses, and recommendations will be delivered in a comprehensive report with an executive summary for cabinet-level leadership and supporting documentation throughout. We will also plan to meet with relevant campus stakeholders to present and discuss the recommendations and their implications for JMU's strategic enrollment management strategy.

Your Needs and The Enrollment Plan

To be clear, our enrollment planning work will address all of your requested audiences, goals, and activities. Per the RFP, we describe here in detail our approach to meeting the recruitment goals that you expect us to support.

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

Our team has worked with several colleges and universities as they have transitioned to higher Carnegie classifications, including how to leverage the institution's new category and assessing brand perceptions. In our experience, understanding brand awareness with the right audiences is important in this process as is the emphasis on research.

Two recent examples from our experience include two members of the University of Texas System, which underwent substantial changes to increase their research output and gain new classifications in the Carnegie system. One was the University of Texas at San Antonio, which moved to a higher research classification. We conducted extensive brand awareness and reputation research for UTSA throughout the state to gauge opinions of the University and specifically evaluate the impact of the University's research on shaping those opinions. The second institution was the University of Texas, Rio Grande Valley, which our team helped create through the coming together of two distinct universities (UT-Brownsville and UT-Pan American). Our team created the brand and identity of the new selective university and a new medical school.

We have also worked with some institutions in substantial transitions from being two-year institutions to four-year colleges (Dean College, Indian River State College, and Landmark College) as well as with colleges and universities that have broadened the scope of what they offer. For example, we worked with Hastings College as they transitioned from being focused on the arts and sciences to being focused on diverse fields (in their case, developing professional programs to meet market need). While each situation is distinct, this collective experience has taught us valuable lessons about capitalizing on the transition in marketing and, most importantly, focusing on the *benefits* of the transition rather than solely the reclassification itself.

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

As industry practitioners our team has extensive experience designing, implementing, and executing recruitment and marketing strategies within Slate. Our approaches favor utilizing Slate's robust set of tools for marketing automation and intelligence to allow clients to reap the benefits of executing recruitment initiatives in the same place they manage their data. In our experience, a commitment to developing and utilizing Slate as the primary tool for relationship management activities drives a self-reinforcing cycle where recruitment approaches increasingly benefit from the marketing intelligence derived by prior campaigns and initiatives. Where utilization of Slate is not feasible, our team has supported the implementation of integrations between Slate and a variety of third-party platforms to ensure that recruitment activity is consistently and comprehensively captured in the CRM.

Our experience supporting university marketing-focused websites and marketing automation platforms includes work with other services such as Banner, Ellucian, Campus Management, Jenzabar, Hubspot, Marketo, Pardot, Microsoft Dynamics, TargetX, Salesforce, Mailchimp, Constant Contact, Expression Engine, WordPress, SquareSpace, Drupal, and Joomla. Most institutions have a variety of technology tools/platforms supporting marketing activities and part of the challenge is ensuring lead tracking and data transfer is consistent from one tool to the next. Our team is experienced identifying technology pain points and implementing solutions that support greater efficiency, data insights, and overall improvement in the effectiveness of the underlying systems. All of this with our eyes focused clearly on delivering results.

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

This is who we are – our team is comprised of former enrollment officers at private and public universities, so ADV's team will offer exceptional advice on your current operation and efforts. Our practice is to offer guidance organically as a natural product of our partnership (i.e., we do not parcel out advice or nickel-and-dime for sharing expertise).

In addition to having “practiced” in university enrollment and marketing strategy, our team brings a great depth of experience in higher education consulting. The benefit of this experience is having witnessed how certain strategies and tactics have been deployed at other institutions and the opportunity to evaluate their success over time. The breadth of this experience guides our recommendations for JMU – equally in knowing what to do and what *not* to do.

This experience does not mean we have all the answers. On the contrary, we know we have much to learn about JMU and your current enrollment and marketing operations. But it does mean we approach this project with invaluable context that will inform how we proceed and guide our feedback and recommendations for you.

Marketing Communication Plan and Execution

- 1.c. Developing inquiries and leading the inquiries to applicants.*
- 1.e. Maintaining and strengthening university presence in existing markets.*
- 1.f. Expanding brand awareness to a national scale.*
- 1.g. Identifying advertising opportunities with a high return – including digital, print and out-of-home formats.*
- 3.b. With the impending high school graduate decline, JMU is looking for a partner with an innovative approach to enrollment marketing that will accomplish items 3.b.i through 3.b.xiv.*
- 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 JMU. How would your firm work to meet this goal?*

As with the Enrollment Plan, the ADV team will assess the current state of communication at JMU by building on the documentation and data we reviewed in Discovery and further analyzing current web traffic and campaign analytics.

We will then create—collaboratively with your team—a comprehensive marketing and communications plan to achieve your awareness and enrollment goals and execute on that plan in whatever appropriate capacity we can.

At this point, we do not know the extent of marketing execution assistance JMU needs from an outside partner (e.g., content, creative, digital, etc.). We will address this with the JMU team and complement your existing team resources, creative assets, and skillsets as best for your team.

Our approach to marketing planning and execution is guided by the following:

Strategic Planning and Results Forecasting

The comprehensive nature of the JMU marketing planning and the ambitious goals set forth demand marketing expertise far beyond basic marketing execution. The strategic thinking and the market and competitor analysis necessary to position JMU successfully require an agency with a deep understanding of academic branding, the competitive landscape, and expertise in the blending of digital marketing, public relations, and other forms of traditional, direct to consumer outreach.

The market research described earlier will inform the marketing strategy which will then drive the marketing and media plan. Our marketing and media plans will provide JMU with concrete results forecasts based on our past academic marketing experience, our market research, industry benchmarks, and other valuable indicators – all helpful in building internal stakeholder buy-in in advance of launching the digital campaigns we will develop together.

CRM/Technology Integration

Relying heavily on JMU's Slate implementation, the marketing plan will drive leads into the CRM with full nurturing and tracking capabilities. This kind of digital marketing automation and analytics will be key to achieving JMU's enrollment goals. Using technology to automate, track, and analyze campaigns and other marketing initiatives will offer insights into the marketing activities and spending with the strongest return on investment. Our analysis will drive improvements over time.

As referenced previously, our team is highly experienced in supporting marketing automation across a variety of CRM platforms. We recognize that part of this endeavor with JMU will be learning what you have already set up and accomplished within Slate as well as where we can assist in making this powerful tool as valuable for you as possible.

Collaboration and Flexibility

Our team approach to marketing planning and execution takes the following campaign elements and applies the staff expertise needed to optimize the relevant marketing tasks. Our collaborative approach integrates our team's skills with the JMU team to bring just those skill sets JMU needs to make the overall plan work. With our team as your partner, over the five-year time horizon referenced in the RFP, JMU will have the capacity to ramp up or down in any area of marketing execution based on campaign results.

Our Approach to Student Engagement: Content Marketing

The student decision-making process is heavily influenced by digital presence and the engagement that can be fostered when done well and authentically. At the same time, parents are an important factor in the students' decision, but parents engage with digital marketing far differently than their children do. Finally, student counselors also play a valuable role,¹ though in some markets they are more influential than others.

All these participants in the university decision process engage in social media scrolling and all can be influenced by well-placed video of current students and alumni, along with well-timed faculty or administrator comments. These marketing factors all point to the importance of understanding the marketing channels, messaging, and importantly, the messenger for any given outreach effort.

Our team deeply understands content marketing and has been placing authentic and valuable content in front of targeted audience segments for more than a decade. To do this well means understanding the student decision-making journey and anticipating the questions the audience will ask before they ask them. It means having the downloadable pdf, testimonial video, or other key piece of content appearing in front of the prospective student (or the influencer) as they are thinking, "I wonder what they do about...?"

The digital tools available, from ads to landing pages to nurturing emails and retargeting messages, all support a level of engagement that can be tailored to each student segment's primary and

¹ We have seen time and again in our survey research that high school guidance/college counselors are the most important influencers in (a) finding colleges to consider and (b) making a final enrollment choice.

secondary interests and concerns. But that is not enough. For this work to succeed, JMU's tools must provide lead scoring to help the recruitment team engage with the highest value leads on a personal level. This level of authentic engagement must be part of the mix as marketing automation on its own, no matter how customizable, cannot convert at the level JMU seeks. With strategic lead scoring, based on data analytics, the JMU recruitment/admission team can focus their attention to produce the highest value conversions. This is one of several areas where the marketing planning and strategic enrollment management planning efforts intersect.

Geographic and Cultural Considerations

For each audience segment, we evaluate the student journey to move our prospects from attraction to engagement to conversion as an enrolled student or an influencer. To engage audience segments well we consider:

- Disparities in employment and health status in target regions due to the pandemic and economy and how they will influence target audience behavior (desire for skills, willingness to travel, availability of online education, economic feasibility of paying for education).
- Economic growth opportunities by region that will drive academic program development based on employer needs. Given your RFP's recognition of geographic marketplace challenges, this will be particularly important.
- Success stories from local and regional industries as well as JMU faculty and alumni that can influence target audience perceptions of you. To stand out from growing competition, JMU needs to tell more compelling and relevant stories at every turn.
- Diversity and equity factors that have become top of mind and highly influential elements for families and counselors.

These marketplace facts have implications for how we position JMU's abilities to support your communities, best serve your students, and achieve your enrollment goals.



The Marketing Team You Want

Our marketing team is composed of strategists, writers, designers, digital campaign and project managers, data analysts, public relations specialists, and video and podcast producers. We all share a common quality in that we are all innately curious and spend time reading, viewing, evaluating to understand market trends and audience behaviors. This is a band of creative talent that respects each other, blends easily, shares constantly, and seeks partners with common values.

Measurement, Analytics, and Reporting

We offer JMU access to our in-house analytics team providing data collection, tracking, and analytic insights to help adjust JMU's marketing campaigns based on real-time results. Analytics, faithfully monitored, allow you to continuously improve your marketing results, set your budget allocations, and achieve your goals. This effort must include sound and consistent reporting and analysis.

Our team values consistent research and measurement in everything we do, so assessing ROI is part of every project we undertake. How we measure ROI depends on the nature of the project and the goals of the client. For JMU, enrollment and public perception will be the barometers of our success.

We will be employing Google Analytics and goal conversion data along with the reporting capabilities of Slate, Facebook Business Manager, Google Ad Manager, and other tools available within the marketing channels we will employ. We will monitor web traffic, ad and email engagement, conversion metrics from all channels, etc. In short, there are many stops along the road toward growing enrollment. At each point, we assess how well our plans are working and adjust as needed.

Our success in any public relations work will be measured by public opinion, which is truly only measurable through primary research (i.e., engaging the outside world to gauge their awareness and perceptions of the University). After an appropriate window of time, we will discuss a focused survey of target audiences with the JMU team that will determine how much the "needle has moved" in perceptions of JMU and specifically on which points JMU's reputation has changed, all based on benchmarks established in our research and analysis phase. These results will guide improvements in the public relations strategy and future marketing investment decisions.

Specifically for marketing campaign goals, we will provide data-based analysis of campaign metrics that will allow JMU to use brand awareness, student inquiry, application, and enrollment data to help assess the effectiveness of all marketing efforts. Based on the RFP requests, much of the campaign work will focus on awareness before shifting focus to enrollment conversions. We will establish relevant KPIs with the JMU team leadership and track accordingly. In any digital campaign work, regular adjustments will optimize digital ad spends.

Additional Execution Notes

Our team will work with JMU's on the execution of the Plan. We will not know the details of this execution plan until we learn more about the JMU team, your current promotional assets, existing

plans and advertising relationships, experience with past campaigns, etc. With that said, we offer these elements of our work. We can and will:

- Write and design engaging, branded content as needed incorporating recruitment messages that authentically represent JMU's benefits based on our research and knowledge of the University by our team.
- Create and/or oversee compelling media of all kinds (videos, podcasts, ads, animations, web copy, emails, print collateral, etc.) as needed to attract and convert students and influence the appropriate audiences supporting the students. Our team will both provide support to JMU's in-house team and original design services as needed and appropriate.
- Analyze and report on campaign results and our other work throughout the engagement. Our team will make ongoing adjustments as needed based on analytics, qualitative feedback, and environmental factors (i.e., outside forces that might dictate a change in approach)

Qualifications

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.

ADV and our partner resources have a long history of success in work exactly of the scope JMU seeks and related work with enrollment goals.

Company Backgrounds

ADV is a higher education-focused research and branding firm. We use data to help colleges and universities better serve their students, employees, and communities with a focus on addressing enrollment-, marketing-, and strategy-related challenges. Our clients include R1 research universities and high-end private university brands.

Grant De Roo, Founder and Principal of ADV, founded the company after leading the market research division of a national agency. His goal was to provide colleges and universities with a go-to partner for customized research and assessment that leads to real outcomes. As ADV's team has grown, so too has the breadth and quality of our services, which include brand development and messaging as well as enrollment planning.

Chuck Reed, ADV's Senior Client Counsel, brings to the company more than 30 years in higher education as both a practitioner in enrollment and marketing as well as agency experience as a writer and brand strategist. The other members of our team bring to this work their own set of valuable experiences and skills (detailed in the following pages).

Joining ADV in this work are two partners:

- **Best Practice Solutions (BPS)** is a strategic enrollment management firm with extensive experience leading enrollment management and financial aid operations at public and private institutions around the country.
- **Intead** is a Massachusetts-based education marketing agency with a strong background in campaign planning, executions, and measuring, and the proactive management of campaigns. Intead has many examples of campaigns with the sole goal of delivering the right messages to the right audiences at the right time.

Clients: Current and Recent

Team members assigned to JMU have worked with a wide range of colleges recently or are currently engaged in relevant work as JMU with a host of clients.

Current Clients:

Alabama A&M University
Albany State University (GA)
Assumption University (MA)
Central College (IA)
Earlham College (IN)
Fairmont State University (WV)
Fordham University
Grinnell College
Hamline University (MN)
Iowa State University
Landmark College (VT)
Massachusetts College of Pharmacy and
Health Sciences University
Minnesota State University, Mankato
Monmouth University
Montana Technological University
Mott Community College (MI)
Purdue Northwest University
Saint Anselm College
Sinclair Community College
Trine University (IN)
Truman State University
University College London
University of Houston-Downtown (TX)
University of Maryland-Baltimore County
University of Nebraska
University of Texas at San Antonio

Relevant Clients in the Past Five Years

American University of the Caribbean
Babson College (MA)
Dean College (MA)
Drexel University (PA)
East Carolina University (NC)
Elon University (NC)
European Institute University
Ferris State University (MI)
Indian River State College (FL)
Kentucky Community & Technical Colleges
Mercy College (NY)
Miami University (OH)
Murray State University (KY)
Northeastern University (MA)
Rutgers University (NJ)
Sentara College of Health Sciences (VA)
St. Mary's College of Maryland
SUNY Jefferson Community College (NY)
Technion Israel Institute of Technology
Texas A&M University-Central Texas
Unity College (ME)
University of Connecticut
University of Kentucky
University of Minnesota
University of Montana
University of New Orleans
University of North Carolina System
University of North Dakota
University of North Florida
University of Texas-Rio Grande Valley
Virginia Tech
Wake Forest University
Washington State University Tri-Cities
Western Oregon University

2. Describe your firm's ability/experience with each of the following items:

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

ADV's entire model of operation is built on being collaborative with the client's team and within our own team. With this comes feedback (candid and constructive), milestone agreements, and respecting client's resources and abilities (talents) and meeting them where they are.

Collaboration flows throughout every step of the work plan, from initial kick-off meetings and Discovery, to research design and enrollment planning, and to marketing execution and tracking. At every point along the way, we will work with the JMU team to co-create our plans and discuss our recommendations. This not only leads to a better work process, but it is also critical to the successful outcome of the work. Your team will ultimately need to own the plan to execute on it, so co-creation, buy-in, and collaboration are essential.

Finally, note that all of our references can speak to our collaborative approach.

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

All parties on our team helping JMU have measurable records of success in enrollment. For example, as the enrollment management leaders at Beloit College, team members Robert Mirabile and Bill Mortimer generated the following increases in first-year student recruitment (2015-2017 vs. 2012-2014): 91% increase in applications; 20% increase in enrollment; 23% increase in aggregate net tuition revenue. Indeed, the 2015 and 2016 first-year classes were the largest entering classes at Beloit since 1975. The efforts they led also enhanced the diversity of new student enrollment across multiple dimensions, including a 73% increase in enrollment among ALANA students and a 120% increase among international students.

We have also had success at mid-size institutions like Roosevelt University, an urban, private university in Illinois enrolling over 3,000 undergraduate, graduate, and professional students with over 95% of students receiving aid and an endowment exceeding \$120 million. Our team directed data analysis and predictive modeling to guide financial aid leveraging initiatives as well as provided interim leadership in both Admissions and Financial Aid offices. Under our leadership, enrollment annually exceeded goals, first-to-second year retention increased by 5% all while maintaining discount rate goals. These goals were met during a time of significant strain to the University, having their bond ratings recently downgraded. Our efforts led to a series of significant improvements in enrollment, financial performance, and an improved bond rating.

Among large universities, we have created new institutions (UT-Rio Grande Valley, more than 1,000 students over goal upon institutional launch), assisted with enrollment "reset" initiatives (reinventing the University of Kentucky), and set specific goals for special projects (more women at a STEM university, diversity ratios, new program launches, first generation student increases).

In these examples and more, we have been consistently influential with strategy and/or tactics. We have included several detailed project examples later in this proposal that demonstrate how we have helped other universities achieve their enrollment goals with measurable and tangible results.

2.c. Has a reputation of being innovators.

Sometimes innovation is launching a bold, confident “push the envelope” creative expression; other times innovation is subtle (list purchase initiatives, financial aid matrices). Our team for this project has done all of this and more in between *but only if it is appropriate to the client and their goals*. To that end, we also believe that doing the basics exceptionally well can be successful. Knowing when to innovate and when to shore up fundamentals is a skill honed through experience and careful analysis – we have done this for many universities before and would bring the same level of care and discernment to JMU.

Our clients value us for taking innovative approaches to solving their challenges. This may come in the form of brand expression, messaging, program development, research insights, or yield initiatives.

We also know that creating innovative ideas are only as helpful as our ability to counsel a client to implement them and have them accepted by the university community. This is why we work closely with your team not just in idea generation, but also in implementation and generating buy-in. As a testament to this, Kirsten Lainsbury, Vice President for Marketing and Communications at Earlham College, had this to say about our work (emphasis added):

“It was clear from the start of our branding work with ADV that they understand our value proposition. But more important, they understand our campus culture and our people. Their personal investment in the work, coupled with deep expertise in market research, has inspired confidence among our faculty and staff. Today, we consider Chuck and Grant to be a trusted extension of our in-house team, whether we need a zinger of a copy line or strategic counsel on program development.”

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

This may be one of our strongest areas to help JMU. With a team composed of former enrollment officers at private and public universities, ADV’s group will offer exceptional advice on your current operation and efforts that are both contracted to do and as a byproduct of our collaborative work style. Indeed, we have presented on related topics at national conferences (e.g., AACRAO Strategic Enrollment Management Conference, ACT Enrollment Management Summit). Our assessments of JMU’s recruitment practices and staffing structure will include:

- Relationship development through individual outreach

- High school visits and college fairs
- Regional receptions for prospective students and their parents
- Campus-based daily visits (including admission interviews, information sessions, and tours)
- Open house events (e.g., summer visit days, fall open house, admitted student open houses)
- Academic showcase events
- Prospective student-athlete visit days and events
- School and independent counselor visit events
- Virtual information sessions and student ambassador panels

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

Our team has extensive experience with Slate, both in our work in enrollment management and in consulting with universities using the platform. Grant De Roo, ADV Principal and Founder, was part of the Admissions team at Elon University during the University's transition to Slate and has firsthand experience working within the platform as a member of the recruitment team and as a manager tasked with running and evaluating Slate reports.

BPS founder and principal Bill Mortimer also has more than eight years of industry experience working directly with Slate institutions. Bill has managed daily operations, improvement, and implementation for all aspects of multiple Slate instances of varying age and complexity. Bill's experience with CRM generally, and with Slate in particular, has been recognized in the *Chronicle of Higher Education*. Similarly, BPS founder and principal Rob Mirabile has led a systems-based approach to enrollment management at several institutions that utilized Slate as their primary technological support. Rob is adept at navigating the integration of recruitment approaches with technical operationalization.

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

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

The answer to all of these is absolutely yes. Rather than go through each, however, we offer three notes:

1. Our **philosophy when understanding your current state and creating work plans** is to assess and validate all that you already do well and then build from there. Other firms believe their “system” is the end-all-and-be-all approach to enrollment strategy and marketing, and therefore try to shoehorn their clients into their system. Our belief is that what works for University A may not work for JMU, just as what works for JMU may not work for University B. We start by seeking to understand – we want to know your current strengths, opportunities, and resources along with your challenges and threats. We then build a plan from that foundation. This customized approach is fundamental to who we are as an organization, and it guides every project we undertake.
2. Parents are the most underappreciated audiences for a university making a brand position shift like JMU is proposing. That’s why a smart **parent communication track** must be holistically conceived, well-built, and respectfully managed. There are certain approaches we must bring to this audience that have worked elsewhere, and should work for JMU – again, building on what you already do and are successful with.
3. **Translation of the university’s brand for prospective students** is perhaps the most important line item here from our point-of-view. Consider that without authentic, inspiring content, the best tools and actions (list buys, platforms, communication flows, etc.) are activities without substance. You may be able to send content to anyone efficiently, but if JMU doesn’t appropriately capture the interest of the target audience, does that matter? Our experience suggests that brand is at the heart of this effort – and thus central to our work plan for you.

For your reference, we include a handful of the many potential examples we can provide. Each has relevance to JMU without being immediate competitors or strongly Virginia-influenced institutions.

University of North Florida (UNF) Jacksonville, FL

The University of North Florida is a regional public university of approximately 16,000 students. With a new VP for Enrollment Management at the helm, UNF was eager for data to guide their revised recruitment process.

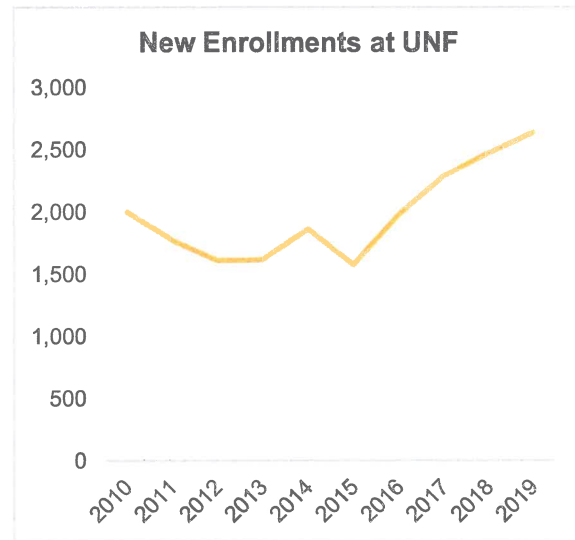
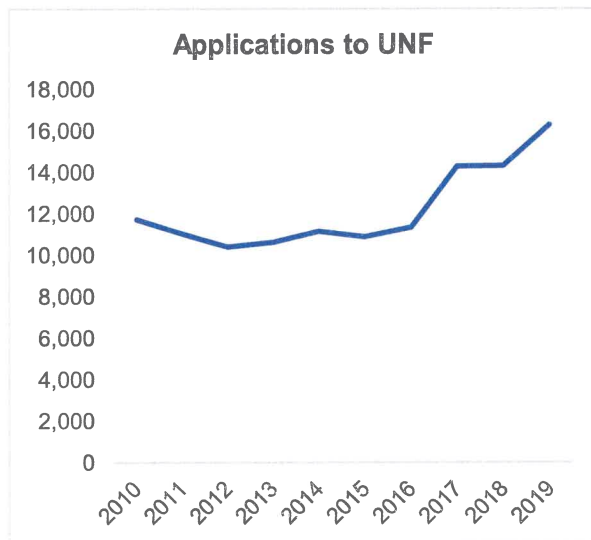


UNF sought research to inform and guide their short- and long-term recruitment marketing strategies aimed at bolstering applications and ultimately enrollment. The University sensed that it was not maximizing its recruitment potential among in-state students and sought opportunities to grow enrollment through untapped counties and high schools in the state.

We began by better understanding UNF’s target student. To do this, we spoke with members of the UNF community, including the admissions team, faculty, and current students. We also analyzed admissions funnel data to develop a better understanding of which factors were correlated with yield. We then compiled data for all counties in Florida and, based on the factors correlated with

yield at UNF, identified which counties offered strong recruitment potential. We then compared this list with the University's recruitment strategy and identified a number of markets the University was not engaging in the recruitment process as well as several areas where UNF admissions staff spent too much time relative to the region's recruitment potential.

***The Result:** Based on our work, the UNF admissions team made immediate changes to their recruitment strategy and used the data to determine not only where admissions counselors would spend time, but also where UNF would devote marketing resources. Shortly thereafter, summer applications increased by 4,000. When classes began the following year, UNF's new student enrollment was 20% higher than the previous year. Three years after the research findings were implemented (fall 2018), enrollment had increased 44% since the 2015 class. UNF was thrilled with the results of the work and has continued to follow a more data-oriented recruitment strategy.*



University of Nebraska Lincoln, NE

University of Nebraska-Lincoln (UNL) is the flagship research and land-grant university of Nebraska offering hundreds of academic programs serving the diverse needs of the state. We have worked with UNL on research initiatives, including a comprehensive study of the University's tuition strategy and its impact to enrollment conducted in 2019.



UNIVERSITY of NEBRASKA
LINCOLN

UNL sought pricing research to better understand its competitive position vis-à-vis other university brands and land-grants in the region. UNL had invested in marketing to enhance its perception

among prospective students both within Nebraska and in out-of-state markets. This research assessed the effectiveness of those efforts as well as guided a future-focused pricing strategy.

We conducted a large survey of UNL's prospective students and their parents. The findings clearly showed that UNL's efforts had paid dividends in improving perceptions of the University against competitors. The results also pointed to clear implications for how UNL could adjust its out-of-state pricing strategy to increase tuition revenue.

Relevant to JMU, we respected the significant work of UNL's team rather than try and "fix" things to our way. By building on their efforts, the project – one of nearly a dozen we've now done for UNL – was a success.

The Result: Our work influenced financial aid and recruitment work and has guided the University to measurable success in applications and matriculants. At the same time, this research demonstrated the positive effects of UNL's promotional campaigns that preceded the research. As a testament to the success of this research, UNL has continued to ask for our assistance in researching program opportunities, forming a strong partnership over the last several years.

University of North Carolina System Chapel Hill, NC

The University of North Carolina System governs the 16 public universities in North Carolina with the goals of fostering the development of a well-planned and coordinated system of higher education and improving the quality of education in the state. The System office sought assistance with a statewide issue that, if addressed, would enhance educational attainment and better serve the North Carolina community.

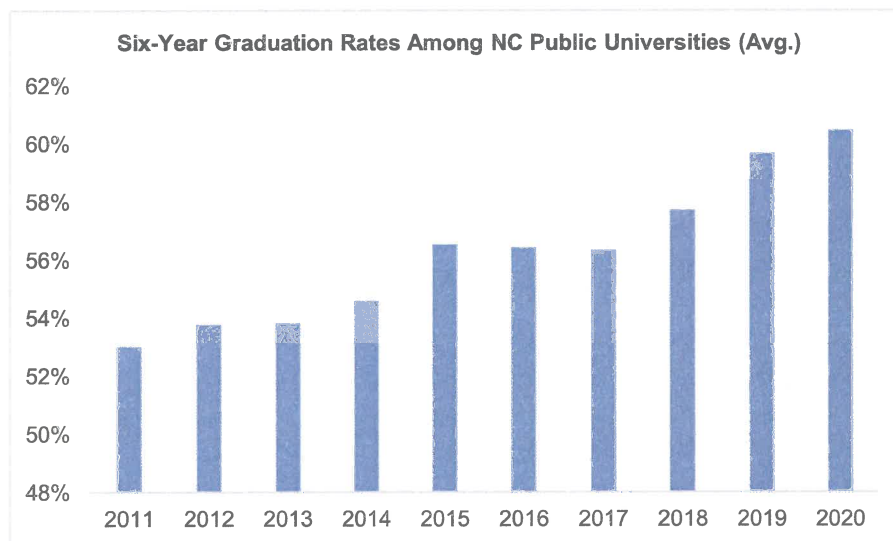


The System was concerned with the rising number of students withdrawing from public universities in North Carolina. Specifically, they wanted to address the segment of students who were withdrawing even after having earned at least 60 credits (Junior standing or higher). These students—dubbed “part-way home” (PWH) students—had earned college credits and possibly took on debt to do so but were not earning credentials that would help them in the job market. The System sought our help with determining why students were withdrawing and what could be done to encourage them to re-enroll.

We conducted qualitative and quantitative research to address this challenge. We began with focus groups with currently withdrawn students and those who had withdrawn and then decided to re-enroll. Focus groups provided an exploratory understanding of the issues facing these students, why they decided to withdraw, and why the re-enrolled students made the choice to return. We then conducted a survey of students who had withdrawn from all 16 public universities in the state to assess these factors at scale. We learned incredibly valuable information about the barriers that kept students from re-enrolling as well as some procedural challenges that impacted the withdrawal

process. We analyzed the survey data and presented it to representatives from the System office as well as each university at a statewide meeting.

***The Result:** Our research pointed to clear and actionable changes that universities could implement to either decrease the number of withdrawing students or provide a better pathway for re-enrollment. The findings also paved the way for a new marketing campaign that used the survey results about students' motivations and barriers to create tailored messaging that engaged the target audiences more effectively. Measurable results of our work confirm its value as re-enrollments and degree attainment among North Carolina universities have steadily climbed system-wide since our data-directed recommendations were implemented.*



Xavier University Cincinnati, OH

Xavier University knew the financial aid office was not using its student information system to full capacity. Xavier had staff with a user-level understanding of the system, but there had been knowledge loss on the technical side due to staff turnover. They sought a partner to evaluate Xavier's operations, and to plan and implement enhancements that would lead to better use of the system's automated capabilities. Xavier's goal was to enable staff to focus more on assisting students and less on performing time-consuming manual data entry.



Xavier engaged ADV team member Jeanne Locarnini to assist in a system-enhancement project. She used an assessment-focused approach, which determined the current state, concerns, and

goals, and then provided a path to reach those goals. When the project began, the SIS's automation abilities were not being maximized. Staff worked overtime to do data entry, impacting time available to interact with students.

Following the entire financial aid lifecycle, the work focused on automating document tracking solutions for students who were selected for verification, packaging financial aid awards, evaluating satisfactory academic progress, disbursing funds, reconciling student loans, and preparing the FISAP.

The Result: Our team's knowledge of financial aid process and SIS expertise created an efficiency that reduced overtime and led to better interaction with students. Speaking about the partnership, Xavier's director of financial aid said, "Our work...is about improving service in the way we deliver financial aid. They focus on applying solutions and not just making recommendations and leaving the implementation to the university. This is something that has been really beneficial for my staff and Xavier."

University of Texas-Rio Grande Valley South Texas (multiple campuses)



ADV senior counsel Chuck Reed led a team at his prior agency created the entirety of brand reputation for the nation's newest research institution, the University of Texas Rio Grande Valley (UTRGV). Predicting and then delivering an ambitious enrollment was the heart of the year-long effort and many of the projects we see for JMU were leveraged here.

The task was to "blend" two existing regional public universities, assets like a marine research facility and community-based facilities, and a new medical school into one very different singular institution. The "reputation" of the new university was to be created by Chuck and team – and one that was more selective

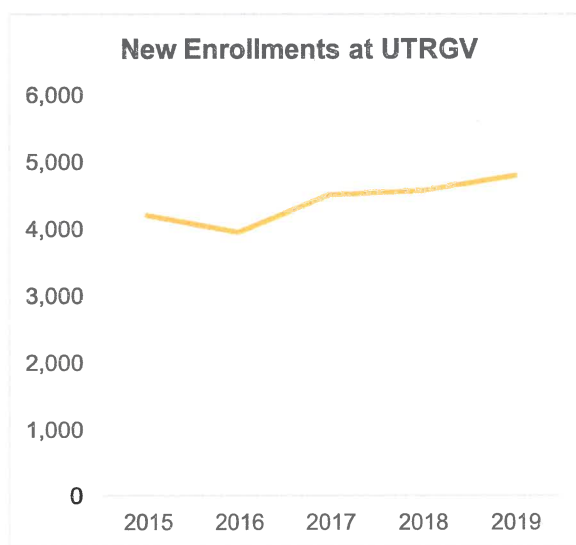
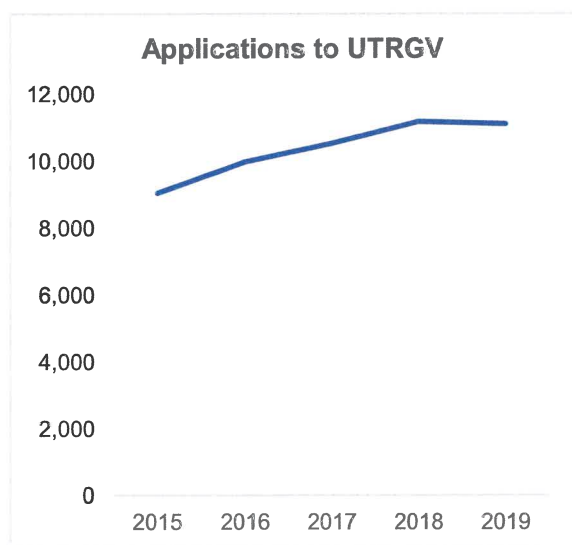
The enrollment goal? The new UT school would be one of the nation's largest HSIs in Year One but also would be significantly more selective in admission than the two former regional universities had been. So, a double challenge.

His team conducted comprehensive research of all potential internal and external audiences to determine expectations from the service area of the new university. The work determined all audience messaging in detail, a new graphic identity, and informed both an enrollment plan and an 18-month creative campaign reputation plan, and tactics including all design, development, and execution.

Important to JMU, Chuck's team had to reinvent the entire enrollment process and how UTRGV would recruit in the area, Texas, and the nation for all potential audiences. Communication, aid, and recruitment tracks were created for special audiences including first-generation and STEM students.

All of this led to the orchestration of a reputation campaign of complexity to support recruitment. The campaign mobilized internal and external resources to launch a new university with confidence and trust. Two years after institutional launch, Chuck did extensive further research to measure the impact of UTRGV and course correct as needed.

The Result: Our institutional We Will promotional campaign was successful. UTRGV's enrollment exceeded expectations, surpassing its first-year enrollment goals by more than 1,000 students including a larger-than-expected first year medical class. In the follow-up research, one of the University's best assets to success was the exemplary recruitment team and how it worked so well with so many different audiences – something we helped create.



Beloit College Beloit, WI

Private or public, times of transition are always a good opportunity for evaluating processes in a financial aid office.

When the director of financial aid at Beloit College in Wisconsin took a new position, leadership at the 1,350-student institution decided to examine that department's business operations.

Knowing the high importance of regulatory compliance to financial aid departments, it was critical to find a partner who had demonstrated expertise in this area. Our team fit that bill with more than 40 years of experience in financial aid and enrollment management. And from the beginning, the partnership was a clear success.

Our team's work with Beloit included removing manual processes, re-implementing financial aid operations software, and creating a policies and procedures manual. The team also evaluated the

Beloit College

College's federal compliance and adherence to regulations and then helped mitigate that risk through well-designed and executed controls, particularly through more effective use of the financial aid operations software. Finally, work with Beloit also focused on preparing the financial aid department for A-133 audits, and ensured that all staff received strong, customized training.

The Result: Beloit benefitted from having experts guiding the activities and anticipating the appropriate next steps to ensure a successful and low-stress response. Day-to-day operations are smoother, financial aid packages are accurate and sent on time, FAFSAs are filed correctly, and customer service feedback from current and prospective students and parents has been strongly positive.

As a testament to the quality and success of the work conducted for Beloit, the College's leadership had this to say about the partnership:

"It is not often you can create more efficiency, develop more accurate processes, write better policy and reduce risk—all in just three to four months."

"It was only weeks until it felt like we had been working with them for years. They listen to our needs and deliver processes and procedures that are tailored to our institution."

"They bring departments together as a team. They work professionally with the offices of Development, Alumni Relations, Student Affairs and Accounting (Bursar), and even other constituencies such as prospective students and board members, to effect change and improvement in all aspects of financial aid."

Sinclair College Dayton, OH



This large and complicated Ohio community college sought to attract specific target populations in select markets for a discrete set of academic programs. Ben, Patricia, and their team at Intead developed a campaign that addressed these audiences with custom messaging and a budget that was developed following an assessment of markets and realistic expectations and ROI.

Insights gleaned from the campaign analytics: Video ads were the top traffic ad units for both campaign age categories (18-24 and 25+); younger audiences were less engaged but proved less expensive to target. Mobile device usage dominated traffic with 95% of impressions and clicks while Facebook forms offered better and easier user experience than landing page forms.


These insights demonstrate how a well-tracked and analyzed campaign informs future marketing budgets and initiatives.

The Result: The campaign outperformed expectations by generating almost 5x the forecasted number of leads while adhering to the original budget. Ad creative played a strong role in the results of the campaign with specific ad imagery driving up performance – and the Intead team made content adjustments through the campaign by consistently monitoring user engagement.

Sample plan outline:


June 2020	July 2020	August 2020
Recruitment Strategy <ul style="list-style-type: none"> Initial tech, communication, and international enrollment assessment Target countries selection: South Africa and Colombia Persona ideation Target academic programs: 2-year CIS, 4-year Business, and a 4-year Engineering Campaign Strategy & Media Plan <ul style="list-style-type: none"> Sinclair differentiators Strategic positioning Campaign strategy Media plan + forecast 	Media Plan Execution <ul style="list-style-type: none"> Targeting: students and professionals interested in a “smart and affordable path to a U.S. education and the job market.” Facebook/Instagram setup for awareness & lead gen campaigns: 128 creative assets (images and videos) in English and Spanish 10 landing pages by program, including translation in Spanish Tracking and weekly leads sharing, and regular updates on campaign performance Email nurturing workflow <ul style="list-style-type: none"> 6 emails drafted to nurture international leads generated in this campaign. Webinar communications <ul style="list-style-type: none"> Email invitation, guidance on presentation, registration page, and social posts 	Final Execution <ul style="list-style-type: none"> <u>Intead</u> running campaign with remaining budget – focus on lead gen Sinclair nurturing leads with email workflow, and responding to prospects’ comments on Facebook and Instagram ads Final analytics report

Sample assets:



Sinclair Community College
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Hear from Assistant Prof. Paul Hansford how our 2-year degree in Computer Science and IT prepares you for a career in technology.



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Are You Ready For The Future You Want?

6 Reasons Why You Should Choose Sinclair



Established Pathway to a 4-Year Degree

We are a leading comprehensive college with over 200 degree and certificate programs, and transfer agreements with more than 100 U.S. universities nationwide.



Affordable

Sinclair offers an attractively low tuition and cost of living in heart of the U.S. – a benefit that can reduce your total cost of a 4-year degree by US\$80,000 and help you achieve your dream.



Individualized Attention

Our small class sizes ensure you experience the best of the U.S. educational system and reach your full potential. It also allows you to establish lifelong connections with your classmates, professors and our staff.



High-Quality, Career-Focused Curricula

Developed in partnership with local employers and experienced faculty, our programs will provide you with real-world career preparedness so you can take your education into the job market with confidence.



Diverse & Inclusive

Every year, Sinclair welcomes more than 1,250 international students from diverse countries onto its safe and inclusive campus in Dayton, Ohio. Because diversity makes us stronger.



Online Learning Expertise

Our faculty is well-trained and experienced in delivering online education using an award-winning platform that helps students learn and succeed.

Engineering and Engineering Technology University Transfer - ESUP.S.A.S

Looking for a smart and affordable path to a successful career in Engineering? This may be the option for you.

Engineering or Engineering Technology: what's the difference? Math. Classes within our Engineering program are calculus-based. The program emphasizes engineering theory and is focused on research, design and analysis. Engineering technology takes a more applied approach to its curricula, and focuses students on careers in fields like manufacturing, production, service, and sales.



Steve Wendel, Director of Engineering

Learn more



Cyril Baling, Counselor

"I'm majoring in Engineering and I plan to transfer to Ohio State University after I complete my 2-year program at Sinclair."

Top four-year transfer pathways

Want to pursue a bachelor's degree in the U.S., and save some money along the way? The credits earned at Sinclair in your first two years will transfer to four-year colleges and universities located nationwide.



All classes for Fall 2020 Semester will be online. Classes will return On-Campus in January 2021.

YOUR APPLICATION CHECKLIST

- ✓ Complete the [International Students application](#).
- ✓ Official high school transcripts
- ✓ Financial or Bank Statement that equals or exceeds one academic year of expenses: US\$17,800

Northeastern University Boston, MA



Northeastern University

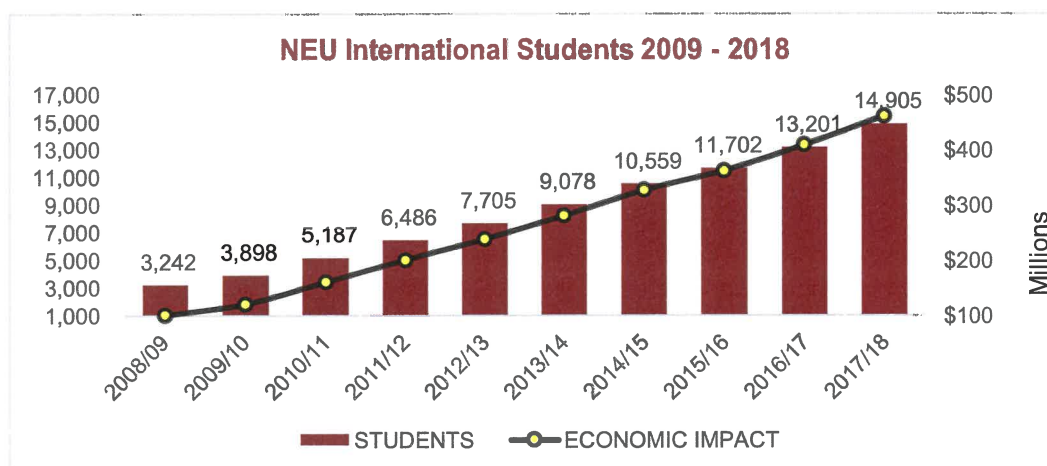
Northeastern University's famous co-op program was well known in parts of the U.S., but little known or understood by those in new recruitment markets or by international prospective students. This strong differentiator for the university was not being fully leveraged. Our JMU team's market research led to fully executing the undergraduate recruitment marketing strategy and later supporting the launch of graduate business programs.

Northeastern needed to understand how best to convey the value of the co-op program to prospective undergraduate students by region. We needed to develop compelling messaging and identify the strongest dissemination channels for our proposed recruitment marketing campaigns.

In developing these campaigns, we produced recruitment videos, designed digital ads, wrote and designed downloadable sell sheets, email nurturing campaigns, website content/landing pages, and student recruitment webinars. On the ground, our team managed in-country student-focused events to draw student attendees and follow up with them. We have also provided international recruiting agency communications to support agents' capacity to promote the institution and recruit best-fit students using relevant and current university information.

Over the course of a decade, the team has identified target markets and created compelling messaging to differentiate Northeastern University's many programs. From undergraduate degrees to graduate degrees and certificate programs, our work has helped Northeastern define opportunities and reach audiences. For example, our first project for Northeastern resulted in an increase in international student enrollment of nearly 40% over 2 years.

Northeastern has seen tremendous growth in international student enrollments and the institution stands in the top five universities in the country for total international students enrolled.



Intead cannot claim whole credit for the fantastic growth Northeastern has experienced in international enrollment, but we are proud to have played a part in both the strategic direction and the marketing execution over the years.

University of Maryland, Baltimore County Baltimore, MD

University of Maryland, Baltimore County hired Intead to undertake a multi-phased global enrollment marketing initiative. The project term covered 2018-2020.

We began with a large-scale market research study of global recruitment opportunities for the institution. Work involved:

- SWOT analysis of the institution's capacity to conduct marketing initiatives
- Competitor analysis of institutions often admitting and/or enrolling UMBC applicants
- Digital audit of UMBC enrollment data (inquiries, applications, enrollments, email analytics, social media analytics, Google analytics, and other student trend analyses)

This work resulted in clearly defined recommendations for:

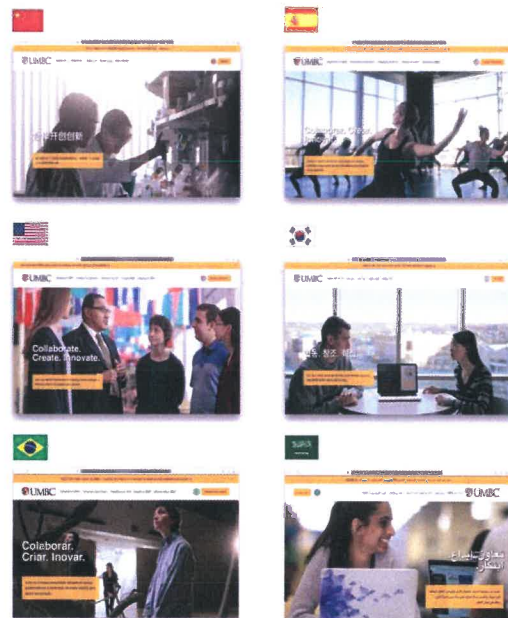
- Enrollment growth and sustainability
- Targeted travel in alignment with digital recruitment marketing campaigns
- A communications plan including marketing platforms, channels, and messaging

We built a conversion-focused recruitment microsite in six languages and optimized for global access (see www.globalstudent.umbc.edu). This work involved a user-experience evaluation incorporating student focus groups and interviews, website analysis, and comparison to key competitors.

To engage prospective students, we then created digital marketing assets (ads, videos, downloadable content offers, nurture emails) targeting specific regions. We launched, monitored, and optimized global digital marketing campaigns to the targeted regions to increase awareness and consideration of UMBC.

Results:

- 63% year-over-year increase in website traffic from targeted regions
- 30% year-over-year increase in website traffic from non-targeted regions
- Controlled media costs at 33% below forecast
- Exceeded lead capture forecasts by 488%
- Since 2018, UMBC has seen a 34% increase in enrollment from our target audience segments



Team

ADV has customized our team to individuals with the most appropriate talents and abilities to best work with you based on your stated needs. A strong fit is important to us, so assigning the best people to facilitate work with you depends on nuances like personality, interests, and, of course, a background of successfully addressing enrollment strategy.

Grant De Roo, Principal and Founder, ADV

Grant has worked in higher education as both a practitioner and consulting. Prior to founding ADV, Grant was the research director at a large national agency where he conducted market research for a variety of public colleges and universities. Before that, Grant managed the travel recruitment team at Elon University in North Carolina where he learned how to collect, analyze, and act on data in the recruitment and enrollment process.



He will serve as project head, lead all research, and work with JMU's teams as contact in all foundational aspects of our work together.

Grant's background in research includes extensive work with audience geodemography, recruitment audiences, pricing and brand value, academic programming, flagship- and land-grant university-specific competitive opportunities, and COVID-19 impact.

Grant's JMU-relevant enrollment work with public universities includes the 16-member University of North Carolina System, University of Montana, Iowa State University, University of Nebraska-Lincoln, University of Kentucky, University of North Florida, Miami University (OH), Murray State University (KY), University of Texas-San Antonio, and Washington State University. His relevant enrollment work with selective private institutions includes Bucknell University (PA), Elon University (NC), Rose-Hulman Institute of Technology (IN), and Wake Forest University.

Robert Mirabile, Ph.D., Principal & Founder, BPS

Rob brings more than two decades of experience to client engagements and a proven track record of increasing enrollment and revenue across market segments.

Prior to founding BPS, Rob served in a variety of admissions and financial aid leadership roles at diverse institutions throughout the country. Immediately prior to co-founding BPS, Rob served as Vice President for Enrollment Management at Assumption University where he was responsible for undergraduate and graduate admissions, financial aid, enrollment marketing, enrollment operations, and athletics.



Before leading Assumption's enrollment and financial aid offices, Rob was the Vice President for Enrollment at Beloit (WI) College where he led the creation of a multi-year strategic enrollment management plan built on input from faculty, staff, students, alumni, and board members that was endorsed by the college's governing bodies. Notably, Rob also led the team responsible for enrolling Beloit's largest first-year class since 1975.

Rob's experience extends to institutions such as Drexel University where, as Assistant Vice President for Enrollment Analytics, Rob founded one of the first university-based teams dedicated to optimizing enrollment strategy through data analysis and evidence-based decision-making, including the development of financial awarding plans for domestic first-year students, international students, transfer students, and graduate students.

Rob has presented on enrollment management and financial aid topics at numerous national conferences, including ACT, AACRAO, AMA, and the College Board. Rob holds master's and doctoral degrees in social psychology from Princeton University, a Bachelor of Arts in psychology from Bates College, and a certificate in enrollment management leadership from the University of Southern California.

Jeanne Locarnini, M.Ed., PMP, Principal & Founder, BPS

Jeanne has worked as a practitioner and consulting in the financial aid and enrollment management profession for over 20 years.

Prior to founding BPS, Jeanne was co-founder, President and CEO of Third Coast Higher Education, a national financial aid and enrollment management consulting firm. Jeanne has deep experience in financial aid management, project management, system implementation, compliance, business process review, training, and auditing support.



Jeanne is highly knowledgeable about student information systems, including Oracle PeopleSoft, Ellucian's Colleague and Banner and College Board PowerFAIDS. She is an expert at developing solutions to improve student service, processing efficiency, and compliance on federal and state financial aid regulations. Her imaginative and experienced approach has led to many successful engagements, including participation in over thirty Financial Aid Federal Program review responses and related process improvements.

In addition to her consulting roles, Jeanne has served in leadership positions at several universities including as Vice Provost for Financial Aid at Roosevelt University in Chicago. Jeanne received a Bachelor of Arts in History and her Master of Education with a Higher Education Administration Concentration from Loyola University Chicago. She has completed the Project Management Professional Certification and is currently attending the Master of Business Administration program at the University of Illinois Urbana-Champaign.

Chuck Reed, Senior Client Counsel, ADV

Chuck will serve as communications and messaging strategist, and writer, for this project. He has extensive experience with research, enrollment, and brand development with regional public universities.

His specialty of working with JMU-like institutions nationally gives him relevant experience with your varied audiences. He has worked with all possible solutions to inform enrollment and brand campaigns, and drive customized, targeted messaging to the right audiences.



Also relevant to JMU, Chuck served as director of admissions at a public college and later private university marketing before holding a senior leadership role at a national higher education consulting firm until he joined ADV.

Chuck's own JMU-relevant institution enrollment and messaging experience includes more than a dozen flagship high-end public universities including University of Kentucky, Rutgers University, University of Mississippi, University of Nebraska-Lincoln, Iowa State University, Georgia Institute of Technology, University of North Dakota, University of Texas-San Antonio, and University of Arizona. Clients from Virginia and influenced by Virginia's markets have also included the University of Mary Washington (his team helped rename the institution as well), Bridgewater College, and East Carolina University. Past private clients of note include Villanova University, LaSalle University, and Creighton University.

Bill Mortimer, Principal & Founder, BPS

Bill is an enrollment management leader with recent posts as Assistant Vice President for Enrollment Management at Assumption University and Director of Enrollment at Beloit College. In these roles, Bill built data and analytics teams focused on predictive modeling, reporting, and financial aid leveraging, led admissions departments, oversaw complex enrollment operations, and developed full cycle marketing strategies ranging from search to yield.



Bill's expertise in CRM implementation and management has been recognized in the *Chronicle of Higher Education* and he has presented on a variety of enrollment management topics at conferences including NACAC, ACT, HighEdWeb, and Slate Summit.

Prior to his most recent appointments, Bill worked in admissions at Marlboro College where serving a student body of fewer than 400 students instilled in him the importance of working collaboratively and broadly with faculty and staff across institutions. He is passionate about the potential for higher education to serve as an engine for social good and economic growth. Bill received his Bachelor of Arts in sociology, with honors, from Bates College.

Ben Waxman, Marketing Campaign Strategy

Ben is the CEO of our partner firm, Intead, and will lead the campaign planning and execution in tactically approaching your target markets.

Ben and his team have helped colleges achieve ambitious marketing goals since the early 1990s. He and his team ensure the resulting campaign for JMU will employ the most relevant mix of marketing tools from digital campaigns, mobile apps, and digital/interactive media to print collateral and traditional PR.

Ben has led marketing recruitment initiatives for public and private universities across the country. A few examples include Fordham University (NY), Northeastern University (MA), California State University-Fresno, Case Western Reserve University (OH), Indiana State University, and University of Wisconsin-Milwaukee.



Patricia Tozzi, Account Management

Patricia's expertise in branding and communications planning has contributed greatly to the implementation of competitive recruiting tactics for academic clients. As Chief Strategy Officer of Intead, her work leads to successful brand positioning and approach and results in higher conversion rates for targeted promotions.

Patricia's experience spans creating brand strategies and marketing and communications plans as well as managing the execution. She has expertise in content and collateral production (digital and print) while ensuring that brand messages, standards, and communications are understood and implemented consistently and effectively.

She holds a bachelor's degree in Marketing & Advertising from ESPM in Brazil, and the Credential of Readiness (CORE) from Harvard Business School Online.



Chris Caputo, Director of Digital Campaigns

Chris is an online marketing professional with strong experience in Internet strategy, search engine marketing both paid search and SEO, online advertising, social media optimization, information architecture, email marketing and usability. He strengthens his skills through continual practice and study of marketing disciplines.



Chris' specialties include SEO, SEM (paid search), eCommerce, online marketing, social media marketing, branding, direct marketing, internet marketing, marketing communications, event marketing.

Chris brings a wealth of experience to the team. His approach to digital campaigns in higher education will benefit JMU and this enrollment-first effort. Chris relies on his experience and extensive research to develop a program that will be customized to your needs and goals.

Attachment A: Offeror Data Sheet

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 2 Months 7
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
The University of Texas at San Antonio	2018 - Present	One UTSA Circle San Antonio, TX 78249	Brett Calvert Sr. Executive Director of Marketing 210.458.6160
Montana Technological University	2019 – Present	1300 W Park St. Butte, MT 59701	Amanda Badovinac Executive Director, Marketing & Communications 406.496.4828
Earlham College	2019 – Present	801 National Rd. W Richmond, IN 47374	Kristen Lainsbury Vice President, Marketing & Communications 765.983.1651
Drexel University	2017 – 2019	3141 Chestnut St. Philadelphia, PA 19104	Joan McDonald Former Senior Vice President of Enrollment Management 267.767.8796
University of Maryland, Baltimore County	2018 – Present	1000 Hilltop Circle Baltimore, MD 21250	Miriam Tillman Asst. VP, Marketing & Creative Services 330.861.3283

4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

ADV Market Research & Consulting, LLC (450 Hwy 1 W, #184, Iowa City, IA 52246)

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: _____

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

Offeror Name: ADV Market Research & Consulting, LLC **Preparer Name:** Grant De Roo

Date: 9/29/2021

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

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 X

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 X

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 X 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).

ATTACHMENT B (CNT'D)

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

Procurement Name and Number: Admissions and Geodemographic Research and Marketing Services (RFP# JPG-1131)
 Date Form Completed: 9/29/2021

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

Offeror / Proposer:
ADV Market Research & Consulting, LLC
Firm

450 Hwy W, #184, Iowa City, IA 52246
Address

Grant De Roo 603-686-1928
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)

Sales with VASCUPP Members

ADV has not conducted any work for the following VASCUPP institutions in the past 12 months:

- College of William and Mary
- George Mason University
- James Madison University
- Longwood University
- Old Dominion University
- Radford University
- University of Mary Washington
- University of Virginia
- University of Virginia-Wise
- Virginia Commonwealth University
- Virginia Military Institute
- Virginia Tech

Proposed Costs

Project Phase	Phase Detail	Cost
Discovery	<p>Review existing research, marketing materials, institutional plans, etc. to gather context for interviews and the subsequent project phases.</p> <p>Hold Discovery meetings with the JMU team and leadership to understand current enrollment strategies, current promotion/messaging strategies, pricing and financial aid policies, perspectives on potential improvements, clarify project needs, review timelines, and discuss data specifics and transfer processes.</p> <p>Competitor analysis of top-level messaging and available data on enrollment trends.</p>	\$22,800
Geodemographic Research	<p>In-depth analysis of JMU's current recruitment markets to inform changes in high school graduates and the quality of the enrollment opportunity for the University.</p> <p>Identify recruitment opportunities within existing markets as well as in new or emerging markets.</p> <p>Use results of the analysis to inform enrollment and marketing plans.</p>	\$19,700
Survey Research and Message Positioning	<p>Survey stakeholder (current students, faculty and staff, alumni) and external audiences (prospective students of all types, parents of first-year prospects, and regional guidance counselors).</p> <p>Conceive and field survey instruments, analyze data. Provide detailed recommendations for all facets of our work.</p> <p>Validate/refine foundational messaging for JMU's promotional assets in all communication representing the University.</p>	\$29,800
Strategic Enrollment Plan and Execution	<p>Expand on Discovery's review of strategies and plans regarding recruitment; review of all internal processes regarding the recruitment of students. Conduct additional interviews as needed.</p> <p>Create comprehensive strategic enrollment management plan that addresses all relevant aspects of the admissions process and provides JMU guidance in growing total enrollment as well as for specific target sub-populations.</p> <p>Help execute the plan as needed.</p>	\$82,600

Marketing Communications Plan	<p>Expand on Discovery's review of strategies and plans regarding brand communication for JMU with a thorough analytics review, further understanding of current digital campaigns, analysis of web content, and additional interviews as needed.</p> <p>Create a measurable promotion plan that supports the enrollment goals effectively in strategy and tactics.</p>	\$24,900
Marketing Campaign Execution	<p>Create written content and creative assets for marketing campaign to increase awareness and consideration among prospective students.</p> <p>Write and design branded content as needed incorporating recruitment messages to represent JMU's benefits.</p> <p>Create and/or oversee compelling media of all kinds (videos, podcasts, ads, animations, web copy, emails, print collateral, etc.) as needed to attract and convert students and influence the appropriate audiences supporting the students. Our team will both provide support to JMU's in-house team and original design services as needed and appropriate.</p> <p>Analyze and report on campaign results; make ongoing adjustments based on analytics, qualitative feedback, and environmental factors (i.e., outside forces that might dictate a change in approach).</p>	<i>TBD based on JMU's needs, existing creative, campaign budget, and staff time/abilities.</i>
	Total Project Fees:	\$179,800

Note that the fees quotes above represent what is known and can be accurately estimated at this point. Fees for the last project component listed above, Marketing Campaign Execution, are variable and subject to how we can be most helpful to JMU, which we will learn throughout the project. The scope of executing the marketing campaign for JMU depends on your existing resources (e.g., creative assets), your team's time and capabilities, and your overall budget for the campaign. We will work with JMU to estimate work as early in the project as possible. For reference, our experience has been that initiating, launching, and maintaining a campaign of the size and goals JMU is seeking may cost between \$15,000 and \$22,500 per month, depending on ad spend, creative needs, budget, and the campaign's target audiences. We have also included hourly rates for the various project functions that may be required in this project phase:

- Traditional marketing (\$175/hr.)
- Digital marketing (\$175/hr.)
- Creative direction (\$220/hr.)
- Digital design and development services (\$200/hr.)
- Advertising: planning, design, development, production, and evaluation (\$200/hr.)
- Media buying, placement, and monitoring (\$175/hr.)
- Graphic design (\$155/hr.)

Timeline for All Phases

Month	1	2	3	4	5	6-12
Discovery						
Geodemographic Research						
Field Research and Message Positioning						
Strategic Enrollment Plan						
Marketing Communication Plan						
Campaign Execution, Monitoring, Evaluation, and Adjusting (as needed)						



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; 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.

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 7-12th 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’s 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.
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) 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, 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.

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; 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 SBSD-certified small businesses. This shall not exclude SBSD-certified women-owned and minority-owned businesses when they have received SBSD 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 SBSD 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. **OWNERSHIP 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.

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: _____

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

<u>Zone 1</u> George Mason University (Fairfax)	<u>Zone 2</u> James Madison University (Harrisonburg)	<u>Zone 3</u> University of Virginia (Charlottesville)
<u>Zone 4</u> University of Mary Washington (Fredericksburg)	<u>Zone 5</u> College of William and Mary (Williamsburg) Old Dominion University (Norfolk)	<u>Zone 6</u> Virginia Commonwealth University (Richmond)
<u>Zone 7</u> Longwood University (Farmville)	<u>Zone 8</u> Virginia Military Institute (Lexington) Virginia Tech (Blacksburg) Radford University (Radford)	<u>Zone 9</u> University of Virginia - Wise (Wise)

ADDENDUM NO.: One

To ALL OFFERORS:

REFERENCE:	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)