July 30, 2021

ADDENDUM NO.: One

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# MPC-1098**
                 Dated: **July 13, 2021**
                 Commodity: Digital Advertising Services
                 RFP Closing On: **August 12, 2021 at 2:00pm**

Please note the clarifications and/or changes made on this proposal program:

1. Question: How often does JMU currently receive reports on digital marketing activities?
   Answer: If campaigns are done by our staff, we produce reports every 1-2 months. Our external vendors send reports halfway-through and at the conclusion of a campaign. We also have access to a live online dashboard. At minimum, we would like weekly reports and/or a live dashboard showing results from any campaigns.

2. Question: What channels are implemented in-house by JMU and would require consultation?
   Answer: All of the digital marketing for JMU's Graduate School is done in-house and primarily focuses on placements in Facebook, Instagram, Google and YouTube. We would seek consultation support for these campaigns and for other smaller campaigns that support student recruitment.

3. Question: It's stated that the contractor will work with multiple offices — how many client-side stakeholders are there expected to be?
   Answer: Across campus, approximately eight different offices set aside budget dollars for digital advertising. This includes Undergraduate Admissions, Graduate Admissions, Professional and Continuing Education, Study Abroad programs, Annual Giving, particular academic programs, our performing arts center, etc. We are seeking a vendor to provide these services and work directly with departments on campus, but the University Communications and Marketing Office needs to be aware of all campaigns and existing projects. We want to be in the loop to know that ad creative is on brand and to also know we are not bidding against ourselves.

4. Question: How many campaigns are currently active in the market?
   Answer: Our Graduate School ran about 60 campaigns last year on Google and Facebook (all in-house). On the undergraduate recruitment side, we run 8-10 each year with a vendor, and tend to expand each year. Professional and Continuing Education

runs approximately 10 campaigns. And roughly 5 other potential campaigns across campus.

5. Question: What CRM does James Madison currently utilize?
   Answer: Undergraduate Admissions currently uses Slate, Graduate Admissions uses CollegeNET Prospect, and Professional and Continuing Education uses SalesForce. The University is currently researching a move to an enterprise CRM to bring all offices together.

6. Question: Does the CRM need to integrate with the landing pages/microsites only? Or is the broader University web presence also in scope?
   Answer: Both are in scope. We do prefer to host ad landing pages on our CMS system (Cascade) and would prefer to have strong integration with our CRMs. Undergraduate Admissions just moved to Slate last month.

7. Question: Does the University have current brand guidelines/style-book as well as website design templates that the vendor will be able to utilize?
   Answer: Yes, our brand guide can be found at www.jmu.edu/identity. University Communications and Marketing is the contract admin for this contract and will need to be aware of all active/upcoming campaigns to confirm compliance with JMU's brand.

8. Question: With regard to capabilities, is branding in scope for this engagement?
   Answer: We welcome feedback regarding how the University presents itself in digital ads, but brand consultation or rebranding efforts would not necessarily be in scope for this engagement.

9. Question: With regard to capabilities, is photography/videography in scope for this engagement?
   Answer: Vendors may provide any available services offered and include pricing Section X Pricing Schedule.

10. Question: With regard to capabilities, is copywriting in scope for this engagement?
    Answer: Yes, that would be part of ad creative, if campaigns need help in that area.

11. Question: With regard to capabilities, are both creative services and media buying services in scope for this engagement?
    Answer: Yes

12. Question: How is digital campaign success currently reported?
    Answer: We will expect weekly reports or an active dashboard throughout a campaign. Final reports at the conclusion of a campaign are expected so we can learn from the results and make changes for the next campaign, if needed. We are ultimately interested in ROI factors such as applications, registrations, deposits, etc. We measure campaign effectiveness through clicks, inquiries, conversions, etc. If we are running campaigns for certain programs/regions and not in others, we will often compare the two to see how digital campaigns made an impact.

13. Question: What is the services budget for this engagement? Please break this down by program/college/department.
    Answer: JMU does not disclose budget information. The requested pricing schedule and completed scenarios will help the committee determine the best value for the University.

14. Question: What is the media budget for this engagement? Please break this down by program/college/department.
    Answer: JMU does not disclose budget information. The requested pricing schedule and completed scenarios will help the committee determine the best value for the University.

15. Question: Regarding the Statement of Needs and hypothetical scenarios requested in the Pricing Schedule, please clarify: do JMU's digital advertising and SEO needs encompass brand-based, program-specific, or both?
    Answer: Both

16. Question: If program-specific is included, please specify how many programs need to be supported and define by undergraduate, graduate, online, etc.
    Answer: We have never run program-specific campaigns because we typically focus on the overall JMU experience for undergraduates, but it's something we would be interested in pursuing in the future if the University invests more in digital advertising. We have 8 academic colleges (composed of more than 70 individual majors).

17. Question: Are current budget dollars funding the RFP, or is JMU looking at investing new dollars?
    Answer: We are currently allocating dollars toward digital advertising and are also looking at investing more going forward.

18. Question: With the aim of scoping a project that allows the review committee to provide consistent evaluation of all offers, please provide JMU's budget for the resulting contract.
    Answer: JMU does not disclose budget information. The requested pricing schedule and completed scenarios will help the committee determine the best value for the University.

19. Question: What staffing structure do you have for those currently focusing on the University's SEO?
    Answer: The University's Director of Digital Marketing focuses on the University's SEO and has another full-time staff member assisting in optimizing our website.

20. Question: Who owns the pages? Academics, Marketing, etc.?
    Answer: University Communications and Marketing "owns" the University's website and has specific brand guidelines for how pages should be designed and used. However, individual departments still have access to web managers outside of UCM who make content updates according to set guidelines. UCM serves as a consultant for departments across campus and should be aware of any web pages associated with a digital ad campaign.

21. Question: What CMS is the University using?
    Answer: Cascade CMS

22. Question: Does JMU have conversion tracking set up for Google Analytics?
    Answer: Yes

23. Question: What are your current microsites hosted on at this time?
    Answer: All of our microsites and landing pages are hosted on JMU's Cascade CMS.

24. Question: Are you looking for specific training of JMU staff (i.e., SEO training, writing training, etc.) on top of the consulting that comes as part of SEO delivery?
    Answer: We would be interested in training/consulting that relates to running effective digital ad campaigns. That could include writing ad copy, how to design an ad, how to effectively manage an ad budget, how to set up pixels, how to set up new campaigns, etc.

25. Question: The RFP scope lists 3 CRMS – is integration going to be with all three, or will one be the key CRM of use (source of truth)?
    Answer: It would be with all three for now. However, the University is looking into a potential enterprise system.

26. Question: Advertising Budget: Do you have any guidelines around how much you would like to spend on Branding initiatives versus Direct Response (lead generation) initiatives? Or would you like our team to make recommendations?
    Answer: We historically have focused on direct response with little attention to branding. We will accept recommendations.

27. Question: What does your current advertising media mix look like? (% of spend across search, social, display, ctv, etc?)
    Answer: For undergraduate and graduate recruitment ads, digital ads are almost entirely on social (Facebook, Instagram and YouTube). Professional and Continuing Ed is more focused on Google AdWords and Bing, but still use some social.

28. Question: Were there any recurring challenges within paid media advertising efforts during 2019, 2020, 2021?
    Answer: There were no recurring challenges.

29. Question: How is the monthly Advertising budget allocated between schools?
    Answer: There are three centralized advertising budgets across campus: undergraduate recruitment, graduate recruitment and professional and continuing education recruitment. We typically plan high-level campaigns from the top level and schools determine if they'd like to do any additional advertising, if they set aside money to do so.

30. Question: What is your cost-per-lead goal?
    Answer: We have not established one yet.

31. Question: Do CPL goals differ for each school?
    Answer: N/A

32. Question: What is your cost per student enrollment goal?
    Answer: We have not established one yet.

33. Question: Do CPS goals differ for each school?
    Answer: N/A

34. Question: Do we have visibility from click to enrollment?
    Answer: We are implementing Slate now and will hopefully gain a better picture of click to enrollment for undergraduate campaigns. Professional and Continuing Ed is still implementing the Salesforce platform and seeing some tracking. Our history has been to track where leads come from into our system and then we have to sync that data to our enrollments (Aceware and Peoplesoft data).

35. Question: What are your priority schools that need the most lift in leads/enrollments?
    Answer: For undergraduate programs, we have not historically focused on any particular schools or programs. At the graduate level, all programs are assessed each year based on application/admission data. Professional and Continuing Ed does want to focus efforts on increasing enrollments in some of our credential/credit programs as well as for some of our noncredit programming.

36. Question: What is your CRM system used to track leads and enrollments? Will we have access to a database per each school?
    Answer: Undergraduate uses Slate (brand new), Graduate uses CollegeNET, Professional and Continuing ED uses SalesForce. It is unlikely that vendors will have user access to CRMs, but we would have to analyze the possibilities there.

37. Question: What will be your "source of truth" for tracking leads (IE. Google Analytics, Publisher platforms, internal CRM, etc.)
    Answer: Google Analytics and our internal CRM.

38. Question: Are there specific target markets (location) we should focus on?
    Answer: This changes with each campaign, but yes, we would like to do geographic targets for certain campaigns.

39. Question: Paid Search - Are you currently running ads on both Google and Bing?
    Answer: Google; our paid search strategies are minimal.

40. Question: Paid Search - RFP mentions use of bid management tools - are you using a third-party tool such as Kenshoo, Marin, Search Ads360? Or can we recommend tools?
    Answer: You can recommend tools. We're not familiar with any of the tools mentioned.

41. Question: Paid Search - RFP mentions landing page recommendations/development - do you have a dev team internally that will implement recommendations or would you like the agency to handle this?
    Answer: We prefer to keep all landing pages within our CMS, so our team can create those and would welcome feedback. If there is a special circumstance where a landing page would need to be created outside of www.jmu.edu, we are open to recommendations from the agency.

42. Question: Do you use any CRO tools to implement website testing?
    Answer: We use Google Analytics to track web engagement, but have not talked specifically about CRO on our pages.

43. Question: Paid Social - You didn't mention anything about TikTok in regards to channels for ad placements. Is there a specific aversion to using TikTok in any capacity?
Answer: No. We are open to advertising on any social media platform.

44. Question: Do you have a brand agency and updated brand guidelines?
Answer: University Communications and Marketing manages the University's brand standards and all details can be found at www.jmu.edu/identity.

45. Question: For Advanced / Digital TV spot production, do you have predeveloped video, audio, photography, and production assets that the team will have access to create final assets for Advanced / Digital TV? Or would you like our team to include pricing for original video production Shoots.
Answer: We prefer to do video creative in-house or work with video vendors already on contract with the University.

46. Question: Will you need content/copywriting or will this be provided by your team?
Answer: The need for copywriting will vary by campaign.

47. Question: Is there an estimated total yearly future budget estimate you can provide? Or, can you provide your historical marketing investment?
Answer: JMU does not disclose budget information. The requested pricing schedule and completed scenarios will help the committee determine the best value for the University.

48. Question: Do you have an estimated collective media budget yearly? If yes, can you provide any information on both projected and historical trends?
Answer: JMU does not disclose budget information. The requested pricing schedule and completed scenarios will help the committee determine the best value for the University.

49. Question: In situations where JMU will develop the creative work and/or landing pages, can you provide examples of your typical creative work?
Answer: Please see Addendum Attachment One for samples of creative work, videos and landing pages.

50. Question: If you don't publish creative internally, could you share your agency partner?
Answer: We typically do this internally, but creative is within the scope of this RFP. We also have a number of designers on contract with the University as well.

51. Question: Is the zone map intended to be indicative of a geographic marketing boundary where your target audience resides? If yes, will you also be looking to reach targets outside of that zone within the state and/or nationally? For example, scenario 5 indicates that targets will vary geographically.
Answer: The zone map is unrelated to the digital advertising services sought. It is instead the location of other VASCUPP members who may utilize the cooperative contract that is awarded.

52. Question: Is the 20k in scenario 5 intended to cover all 10 degrees? Or is that a budget per degree? Additionally, is the intended campaign programmatic, with each degree having its own campaign? Or, is it intended to be general to all 10 of the graduate degree offerings?
Answer: 20k is for all 10 degrees (not 10k for each individual program). We envision each program to have general graduate school components along with degree-specific components, but are open to recommendations, given the size of the budget.

53. Question: You mention integration with Slate, SalesForce, or CollegeNET. Are all three operating currently in support of your operations? Will the use of these tools vary from engagement to engagement? Is there a need for three separate integrations to enable data flow and reporting? Or, is there just a need for one central integration?
Answer: Yes, all three are used, but each campaign will connect with only one of these CRMs. There is no need for central integration currently.

54. Question: What SIS is the campus using?
Answer: Slate, CollegeNET and SalesForce - depending on the audience.

55. Question: What metrics are most important for you to measure to indicate success in these efforts?
Answer: It depends on the campaign. For lead-gen, we're looking at clicks and engagements. For app-gen or event-based campaigns, we're looking at conversions.

56. Question: How far down the student journey do you track the success of your recruiting efforts? Does it stop at application or entry into programs? Or continue through to program completion?
Answer: We typically stop tracking after enrollment/deposit. We are measuring retention separately but have not tied retention to recruitment efforts.

57. Question: What LMS do your programs typically use?
Answer: The University uses Canvas.

58. Question: In reference to Section IV. Statement of Needs: Item H, is the University stating that no invoicing is to be done prior to project completion? Can a vendor break invoices into percentages to be paid at project initiation, mid-point, and completion (typically 30%-30%-40% respectively - not inclusive of media spend, which is typically billed upfront). Is this invoicing approach acceptable?
Answer: Vendors seeking further clarification can include questions or their invoicing model in response. Agreement can be reached through negotiation and clarification.

59. Question: Should pricing scenarios assume that the budgets provided are meant to cover both media spend as well as agency fees? Or are the dollar amounts listed solely the media spend, assuming agency fees over and over above those budget figures?
Answer: Pricing includes media spend and agency fees.

60. Question: Please clarify JMU's expectations for pricing. Does JMU envision vendors providing an itemized agency services breakdown for a sample Scope of Work that could potentially encompass the digital advertising needs of any single academic unit and division, as well as custom pricing in response to the five pricing scenarios?
Answer: Yes, please provide a cost of services breakdown as well as a breakdown of what each of the scenarios would cost.

61. Question: Since we would require more information to accurately price out a Scope of Work, are blended hourly rates for potential service areas (e.g. creative production, market research, campaign planning and strategy, campaign management and execution, etc.) acceptable?
Answer: Yes, please provide hourly rates for each service.

62. Question: Are we correct in understanding that this project will resemble an Agency of Record style of engagement vs. a contract for a single Scope of Work, where the chosen vendor will be "on-call" to support on a broad range of digital advertising project needs for any of JMU's academic units, division and departments as an extension of JMU's central marketing team?
Answer: Yes, this would make the selected agency "on-call" during the length of the contract to serve units across campus to assist with any digital advertising contracts. An extension of the central marketing team is an accurate description.

63. Question: Does JMU envision this project to include the development of CRM nurturing strategies, email workflows, and lower funnel campaigns to convert leads into enrolled students?
Answer: No, this is focused on digital advertising campaigns.

64. Question: Is video production envisioned to be part of this project?
Answer: Vendors may provide any available services offered and include pricing Section X Pricing Schedule.

65. Question: Will JMU (or any of the individual units or divisions) require the chosen vendor to develop an overarching campaign creative concept to guide creative development of all digital campaign assets?
Answer: All campaigns will need to be on-brand according to University standards, but there likely won't be a need for any overarching strategies that apply to every campaign across campus. The internal marketing team manages the University's brand strategy, so this contract is focused on management of digital ads as a channel within that plan.

66. Question: Are bidders obligated to subcontract any portion of the services to a SWAM business, or can bidders choose to self-perform all of the services requested in the RFP.
Answer: Bidders can choose to self-perform all services requested in the RFP.

67. Question: What strengths are important to you from your selected agency partner?
Answer: Expertise; proof of experience with digital advertising campaigns in higher education. Data-Driven; commitment to communicating campaign performance and making suggestions for improving campaigns. Communication; able to effectively communicate with partners across campus. Price; ability to manage large and small campaigns at a price that is reasonable.

68. Question: Are you currently able to track leads from brand awareness all the way through graduation? If not, can you please provide insights into how far you are able to currently track conversions?
Answer: No, we track leads through enrollment. If the University adopts an enterprise CRM, we would track leads through graduation.

69. Question: How has the post-2020 economy and ever-changing education landscape impacted your enrollment numbers? With schools closing and accrediting bodies losing accreditation, has this increased the overall brand credibility or student leads?
Answer: Our enrollment numbers are strong. We are planning for the impact of a shrinking pool of prospective students in the near future. Our brand falls between a regional University and a state flagship. With a focus on undergraduate education, we expect strong credibility going forward.

70. Question: Does any of the work have to be performed on site, or is remote acceptable?
Answer: Remote is acceptable. Given the nature of this work, no meetings are required to occur on campus.

71. Question: Is the contractor expected to determine the targeted ROI goals for JMU's individual marketing plans?
Answer: Yes, that would be a part of the planning process for any campaign.

72. Question: Regarding the creation of landing pages, microsites, or forms connected to a digital ad: What platforms and systems do you have in place to build these pages, microsites and forms?
Answer: We prefer to host landing pages and microsites on our own website/Cascade CMS platform.

73. Question: Regarding the creation of landing pages, microsites, or forms, can you confirm the scope of this task - is it JMU's expectation that the selected partner through design/technical development services will be implementing landing pages, microsites or forms - or just providing strategy for the use of such tools?
Answer: There are cases in which a landing page needs to be created by the agency so that option should be available, if needed. However, we prefer to keep landing pages and microsites under www.jmu.edu (Cascade CMS).

74. Question: Regarding integration with a CRM (such as Slate, Salesforce or CollegeNET) to track prospect clicks and import new prospect data: Could we get a full list of integration points, and related applications we would be working with? Is it JMU's expectation that the selected vendor will be completing any technical development work associated with implementation of any integrations between tools and platforms?
Answer: Until we have an enterprise CRM, any integration points would be fairly manual and managed by JMU. SalesForce and Slate, however, are more flexible than CollegeNET, so we would be open to recommendations for how to better track leads and prospects that are also included in digital marketing campaigns.

75. Question: Regarding a sample reporting/metrics dashboard for a digital campaign and monthly reports. Deliverables produced from engagements with other clients are typically considered proprietary by our clients, may we present the dashboard format we delivered with sample/redacted data?
    Answer: Yes, sample data will be accepted.

76. Question: Are there particular degrees, educational programs or academic areas you're looking to prioritize in JMU's paid advertising efforts?
    Answer: Please see response to Question 35.

77. Question: Can you please provide any and all information allowed with regard to the current or previous budget for the first year of this project?
    Answer: JMU does not disclose budget information. The requested pricing schedule and completed scenarios will help the committee determine the best value for the University.

78. Question: If JMU awards this contract to multiple vendors, how will future work be divided among awardees? Will task orders be competed among contract holders or will JMU assign the work out?
    Answer: Multiple awards contracts do not guarantee work. Departments can choose to work with any of the awarded vendors. The department can also choose to compete the work among any of the awarded vendors.

79. Question: Scenarios 3 and 5 ask for our "approach" in addition to pricing, and scenario 4 asks for us to provide "two or three strategy options". Will it be acceptable to provide, procedurally, how we would approach the scenarios or is the expectation that we are providing an actual sample strategy? It would be impossible for us to provide an actual strategy without having more information (i.e. target audience data, business goals, budget, etc) so I would like to make sure that isn't what's expected here.
    Answer: Yes, please describe how you would approach the scenarios. We understand there are missing factors that would help complete a full strategy.

Signify receipt of this addendum by initialing *"Addendum #1_____"* on the signature page of your proposal.

Sincerely,

Mikayla Comer
Buyer Specialist
Phone: (540-568-4071)

July 30, 2021

ADDENDUM NO.: Attachment One

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# MPC-1098**
                           Dated: **July 13, 2021**
                           Commodity: Digital Advertising Services
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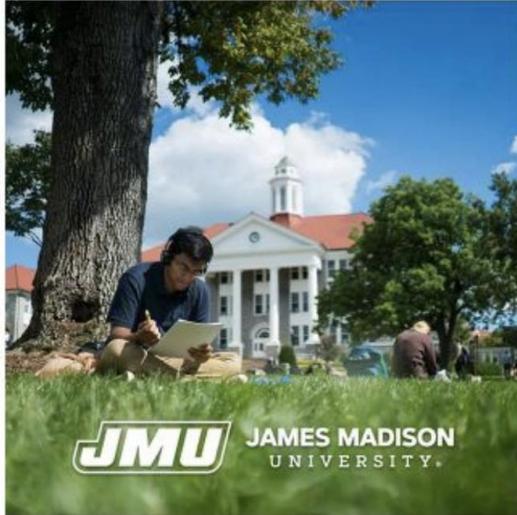Samples of creative work and landing pages below:

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15 Second Videos

1. Trimmed streamer video #1
   https://www.dropbox.com/s/mxguli3mv7yymbj/15%20Second%20Streamer1%20Final.mp4?dl=0

2. Trimmed streamer video #2
   https://www.dropbox.com/s/6dnt474fxq8uaud/15%20Second%20Streamer2%20Final.mp4?dl=0

3. #1 most recommended
   https://www.dropbox.com/s/7rl8iojwml5jsx6/15%20Sec%20-%20Most%20Recommended%20-%20Final.mp4?dl=0

30 Second Videos

1. Being the Change
   https://www.dropbox.com/s/gaed29ev9n4mpjm/2019%20Brand%20Statement%2030_4.mov?dl=0

2. Trimmed streamer video
   https://www.dropbox.com/s/1xhey6lwkiqh7or/30%20Second%20Streamer%20Final.mp4?dl=0

3. Trimmed CHOICES video
   https://www.dropbox.com/s/dtglguhm7fdsp2a/Choices%2030%20Second%20Ad2.mp4?dl=0