

**CONTRACT RENEWAL LETTER**

Date: April 24, 2017
Contract #: UCPJMU4647
Service: Admissions Geodemographic Research Service
Renewal Period: June 27, 2017 June 26, 2018
Renewal #: 1 of 4 One-Year
Issued By: James Madison University
Doug Chester, Buyer Senior Ph: 540-568-4272
Fx: (540) 568-7936
Contractor: College Marketing Technologies
Attn: Tim Dodge
426 South Milwaukee Ave.
Libertyville, IL 60048 Ph: (847) 362-8290
Contract Administrator: Michael Walsh, Admissions

Description of Renewal Notice:

In accordance with the renewal provision of the original contract all terms, conditions, and specifications of the original contract remain the same during the contract renewal period, along with any modifications that have been incorporated up until this point. The contract pricing will remain the same and is attached to this renewal.

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

Return one executed renewal notice to my attention within ten days.

College Marketing Technologies

By: Tim Dodge
Tim Dodge
Name (print)

Senior Vice President

Title

5/4/17
Date Signed

James Madison University

By: Doug Chester
Doug Chester, VCO
Name (print)

Buyer Senior

Title

4/24/17
Date Signed



Contract #: UCPJMU4647
Contractor: College Marketing Technologies
Renewal Period: 6/27/2017 - 6/26/2018
Commodity: Admissions Geodemographic Research Service

Pricing Schedule

1. **Profile” Analysis.** CMT will produce a profile of James Madison’s historic matriculants in geodemographic terms. Using PRIZMne a market segmentation system, CMT will identify James Madison’s “Profile” in terms of Clusters or neighborhood types that have specific demographic variables. CMT will first define James Madison’s historic areas of geographic draw and once our PRIZM profiling is done, we will rank geographic markets by your potential. Geographic market potential will first rank Virginia markets, but will then be expanded to identify high potential geographic markets (ZIP Codes and/or counties) in other nearby states which might include Maryland, Delaware, New Jersey, Pennsylvania, Connecticut, District of Columbia, Massachusetts, New Hampshire, New York, Rhode Island, North Carolina, Ohio, West Virginia, Florida and Georgia and then across the remainder of the US.
 - A. Analysis of James Madison’s historic draw by geography for inquiries, applicants, and matriculants
 1. Geographic penetration analyses – States, Counties and ZIP Codes, as appropriate
 2. Building historic unique James Madison Draw Areas (DA’s): Primary, Secondary and Tertiary. These are geographic areas that represent differing penetration rates into the available high school student age population for James Madison as well as different demographic profiles.
 3. Analysis of Inquiries, Applicants and Matriculants by Draw Area
 4. ZIP Codes and counties in James Madison’s Primary Draw Area (PDA)
 5. Counties and/or ZIP Codes in the Secondary Draw Area (SDA)
 6. Counties or Designated Marketing Areas (DMAs) in the Tertiary Draw Area (TDA).
 7. Ranking inquiries, applicants and matriculants, by distance from campus with penetration into the appropriate high school student age population.
 - B. Identification of Geodemographic Target Groups by Draw Area for Inquiries, Applicants and Matriculants in
 1. Primary Draw Area
 2. Secondary Draw Area
 3. Tertiary Draw Area
 4. Demographic profile of each customized James Madison Target Group
 - C. **(RFP III B 5)** Enrollment Funnel Yield Analysis (Student Population to Inquiry, Inquiry to Applicant, Applicant to Admit and Admit to Matriculant) by James Madison Target for each the:
 1. Primary Draw Area (PDA)
 2. Secondary Draw Area (SDA)
 3. Tertiary Draw Area (TDA)
 4. eXtra Draw Area (XDA)
 - D. Comparative yearly analysis (2014 to 2015 to 2016) from Inquiries to Applicants to Matriculants by Target Group, by Draw Area
 - E. **(RFP III B 4)** Quadrant Analysis Map and Report in the Primary Draw Area (Virginia) indicating ZIP Codes where James Madison should “Dominate” (High Potential, High Performance), “Invest” (High Potential, Low Performance), “Maintain” (Low Potential, High Performance) and “Trim” (Low Potential, Low Performance).



F. **(RFP III B 4)** Market Potential Maps and Reports for the Secondary Draw Area, Tertiary Draw Area and eXDtra Draw Area ranking James Madison's Geographic Market Potential by Draw Area

1. Secondary Draw Area: ZIP Codes and/or Counties
2. Tertiary Draw Area: Counties or Designated Marketing Areas
3. eXtra Draw Area:

G. **(RFP III B 3)** James Madison's key demographic targets will be correlated to:

1. 212 Media Imperatives, (46 Print, 119 TV and 47 Radio)
2. 76 Demographics
3. 146 Lifestyle Indicators and Descriptors
4. 91 Electronics Usage Variables

In the report 8 ½" x 11" colored maps and overlays will be provided. However, most of these will also be produced for your ease of use in a 24" x 36" size.

COST: \$21,950

2. **(RFP III A 4)** CMT will build a "profile" of James Madison University's matriculants by Gender. If you are trying to more effectively recruit male students, it is important to better understand this population in comparison to your female student cohort so that you can build a different, more effective targeting scheme for your male prospects, inquiries and applicants. Once completed, one strategy that may prove effective is to add a group of the highest potential non-responding Student Search prospects directly to your JMU Inquiry List for a limited period of time allowing them to receive additional communications from the University and offering additional opportunities to respond.

COST: \$995

3. **(RFP III A 5 & III B 6)** CMT will build a profile of James Madison University's matriculants by multi-cultural status or ethnic background. If you believe that the geographic or demographic profile of students is different by ethnicity or if you are trying to more effectively recruit more qualified students from minority populations, it is important to better understand these populations so that you can build a different, more effective targeting scheme for each. On the JMU input data file, each applicant and matriculant address record, where available, should be coded with the appropriate JMU ethnicity code

COST: \$995

4. **(RFP III A 7 & III B 6)** CMT will build a unique PRIZM Profile of James Madison's historic STEM (Science, Technology, Engineering and Math) students. CMT can analyze the geodemographic "Profile" of three years of James Madison University's STEM students. This subset analysis will allow James Madison to hone its admissions targeting scheme further by identifying the most likely matriculants by those academic disciplines. JMU's STEM students may have a geodemographic PRIZM "profile" that is markedly different than your other enrolling students. It will be necessary to code each of the applicant and matriculant records on the files sent for analysis with either a code showing major or academic interest or else a specific STEM designation.

COST: \$995

5. **(RFP III B 5)** Student Search Yield Analysis. CMT will examine three years of James Madison's inquiries received as a result of a response to a Student Search communication and will chart JMU's inquiry, applicant and matriculant conversion by each of the 66 PRIZM Clusters as well as by James Madison target group, by JMU Draw Area (Primary, Secondary, Tertiary and eXtra). We will analyze the inquiry to matriculant conversion, by each of the 66 Clusters and by each JMU customized target in the



Primary, Secondary, Tertiary and eXtra Draw Areas. This analysis will identify from which Clusters and targets James Madison is purchasing names and producing inquiries as well as applicants and matriculants and conversely which Clusters and targets are producing only inquiries/applicants with NO corresponding matriculants. Student Search must be identifiable as the first source of admissions contact.

COST: \$1,250

6. **(RFP III) Transfers vs. Freshmen.** CMT will construct all our analyses above using the freshman student population as a base. However, because James Madison University enrolls a large number of new transfer students annually and wishes to more effectively target that cohort going forward, it is important to additionally profile this historic transfer student population. To achieve this, JMU will need to separately provide CMT a file of transfer student applicant address records with matriculants flagged for 2014, 2015 and 2016.

COST: \$995

(RFP III B 1, 4, 5, 6) Once the initial analyses have been performed, you will have a tool that allows you to more effectively purchase names from College Board's Student Search and other sources including ACT-PLAN, NRCCUA and/or CBSS. James Madison will also be able to direct admissions travels into the highest potential geographic markets (ZIP Codes) in Virginia as well as out of state markets (counties and/or ZIP Codes) in New England, Maryland, District of Columbia, Pennsylvania, New York, Delaware, New Jersey, West Virginia, North Carolina, Georgia, Florida and other more distant out-of-state geographic markets (Texas and California). The services below are then often provided on an annual basis.

7. **(RFP III B 1, 4, 5, 6) Target Coding or Prioritizing James Madison's Inquiry List and/or Student Search and NRCCUA lists.** Upon completion of James Madison's "Profile" analysis, CMT can annually examine JMU's current pool of inquiries to identify the likelihood for each student to enroll. CMT will assign a James Madison Draw Area, James Madison Target and Historic Inquiry to Matriculant Conversion Rate to each student inquiry address record indicating the likelihood to enroll.

James Madison's historic conversion from Inquiry to Matriculant, Applicant to Matriculant and Admit to Matriculant will range by James Madison target and by geography (Primary Draw Area, Secondary Draw Area, Tertiary Draw Area and eXtra Draw)

You can adjust your direct mail, e-mail communications, telephone campaigns and admissions travel accordingly. Invest the greatest amount of admissions time, effort and expense in the recruitment of those students most likely to enroll. You can also use this target coding to segment your inquiry list to provide target specific messages to address specific needs and concerns of students, by demographic target.

It is impossible to effectively market your inquiry list by sending the same direct mail and publications to each prospective student and expecting that they will be equally effective.

With CMT's analysis, James Madison will be able to purchase College Board's Student Search and names from ACT-PLAN, NRCCUA and CBSS with greater intelligence by selecting those highest potential geographic markets. Then you can eliminate your initial mailing to those no-potential and lowest potential students. Finally, you can also use this coding to identify those best "matched" non-respondents that are worthy of a follow-up mailing/communication.

**COST: \$2,950 Plus \$46 for each
1,000 Names Coded**

8. **(RFP III B 1, 6, C 1, 3, 4) Estimated Household Incomes.** CMT can append each James Madison Inquiry List record with not only a likelihood to enroll but also an Estimated Household Income that is



collected and assigned at the individual household level. The EHI is household income that is reported for a specific address record. Normally, it is all taxable and non-taxable income that is attributable to that address. Household incomes are assigned using the following ranges:

| | | | | | | | | | | |
|---|---|------------|---|-----------|----------|---|----------|---|----------|----------|
| L | = | \$250,000+ | F | = | \$75,000 | - | \$99,999 | | | |
| K | = | \$200,000 | - | \$249,999 | E | = | \$50,000 | - | \$74,999 | |
| J | = | \$175,000 | - | \$199,999 | D | = | \$35,000 | - | \$49,999 | |
| I | = | \$150,000 | - | \$174,999 | C | = | \$25,000 | - | \$34,999 | |
| H | = | \$125,000 | - | \$149,999 | B | = | \$15,000 | - | \$24,999 | |
| G | = | \$100,000 | - | \$124,999 | A | = | \$ | 0 | - | \$14,999 |

**COST: \$42 per 1,000 with a \$1,800
Minimum**

The geodemographic analysis and predictive model are built using files from James Madison with addresses of inquiries, applicants, admits and matriculants from each of the last three years: 2014, 2015 and 2016. Append to each address record the year of high school graduation or entrance year. Additionally, flag each Applicant/Admit/Matriculant record with a gender code in order to perform the Gender analysis. Append each Applicant, Admit and Matriculant address record with James Madison's multi-cultural background/ethnicity code and supply CMT with a key to let us know the description for each code. For the Student Search Yield Analysis, CMT will require JMU to flag each inquiry list record that had a first source admissions contact that was an initial response to a Student Search communication. Finally, for the STEM student analysis, each JMU Applicant, Admit, Matriculant record that is identified as a STEM student by academic interest or intended major, must be coded.

For the Transfer student analysis, CMT will require a separate file of Transfer student applicants for each of the last three years with a flag for those transfers that subsequently matriculated.

Notes from Negotiation Summary

1. The pricing for a Profile Analysis shall include one of the included Subset Analyses in the proposal (#2, #3, #4, or #6) as part of the base Profile Analysis (#1) for no additional cost. The choice of which subset would happen at the time of the request.
2. As an agency of the Commonwealth of Virginia, James Madison University makes payment(s) in accordance with the Code of Virginia, §2.2-4347 through 2.2-4354, Prompt Payment.
3. Contractor's billing for travel related expenses must be in accordance with the U.S. General Services Administration (GSA) rates for lodging, meals, and incidentals expenses at the time of travel. They can be referenced at <http://www.jmu.edu/financemanual/procedures/4215.shtml>