

**Salem State University**

**Request for Traditional Undergraduate Enrollment Growth**

Request for Proposal # 2018-07

**SALEM STATE UNIVERSITY**

INVITATION TO BID

THIS IS NOT AN ORDER

1. The university is an agency of the Commonwealth of Massachusetts and is exempt from any State tax or Federal excise tax.
2. Unless otherwise stated, the unit price shall be the net price. Separate unit and total prices must be shown if applicable.
3. Unless otherwise stated, all quoted prices shall be FOB university address inside delivery.
4. Responses must be received on or before **Friday, March 30, 2018 by 3 pm to Evelyn Wilson.**
5. **Email submissions are preferred; send to [ewilson@salemstate.edu](mailto:ewilson@salemstate.edu).**
6. Salem State University reserves the right to waive informalities and to reject any and all bids; or to accept the bid deemed best for the Commonwealth.
7. For additional information: Bonnie Galinski, Assistant Vice President, Enrollment Management, Salem State University, 352 Lafayette Street Salem, MA 01970-5353  
Email: bgalinski@salemstate.edu Phone: 978.542.2532  
All questions should be in writing (email) and will be answered and sent out as addendum to the RFP.
8. Reference RFP 2018-07 Traditional Undergraduate Enrollment Growth

Reference: Salem State University School of <b>SPECIFICATIONS</b>	<b>UNIT PRICE</b>	<b>TOTAL PRICE</b>
<b>See Attached Specifications</b>		

**EQUAL OPPORTUNITY**

The contractor agrees not to discriminate against any employee or applicant for employment because of race, sex, color, religious creed, national origin, and/or ancestry. The contractor agrees to post in conspicuous places notices to be provided by the Massachusetts Commission Against Discrimination with respect to the Fair Employment Practice laws of the Commonwealth which are herein made of this contract reference.

VENDOR IDENTIFICATION

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COMPANY

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ADDRESS

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CITY            STATE            ZIP

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TELEPHONE

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AUTHORIZED SIGNATURE

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NAME                    TITLE

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FEDERAL EMPLOYER'S ID CODE 9DIGITS

**VENDOR IDENTIFICATION (must be completed)**

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

DBA: \_\_\_\_\_

Company's Federal ID Number: \_\_\_\_\_

Address: \_\_\_\_\_

Remit to Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Web address: \_\_\_\_\_

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

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

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

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

Main Contact: \_\_\_\_\_

Person responsible for response (if different):

\_\_\_\_\_

## **1. PURPOSE**

Salem State University is initiating this request for proposal (RFP) to solicit proposals from firms to provide enrollment growth optimization services for a traditional undergraduate student population and marketplace.

## **2. SCOPE OF WORK**

The university seeks a qualified vendor to identify and communicate with prospective students to generate interest in the university and increase completed application submissions in support of our enrollment objectives. To be clear, we are seeking new students who will enroll in our existing programs under our current policies and delivery models. We are looking for positive results for the fall of 2019.

Vendor must provide targeted recommendations, development of marketing materials and implementation of campaigns for efficient and effective enrollment strategies, operations, and practices. Vendor shall provide clear estimates of enrollment growth.

Vendor will recommend and implement strategies to increase awareness of Salem State to prospective students with a goal of increasing the quality and volume of applications. Vendor will use predictive and behavioral modeling tools for list buys. This model will consider behaviors related to generation z's purchasing behavior and marketing channel preferences. This data will be utilized to build a 360-degree view of historic students, develop affinity models and identify specific prospects for outreach.

Vendor must develop and implement strategic actions that make efficient and effective use of limited university resources. Vendor must build from established messaging and creative with a minimal discovery process. The vendor must have a proven marketing and enrollment track record of large scale student search and inquiry generation marketing campaigns. This proven track record must include the ability to demonstrate a significant and positive return on the university's investment, as-well-as the highest in the industry rates of student response. Vendor's proven track record should include and demonstrate successful campaigns for institutions similar to Salem State in size, profile, and student body.

The selected vendor will be able to provide a turnkey operation to include: strategic and creative development; ability to print and mail information; email deliverability and response tracking; routine monitoring and analysis services; and social and digital ad placements.

The university requires direct mail, email, digital media campaigns, geo-fencing and other modern outreach strategies, and mobile optimized web response personalized recruitment sites that optimize student engagement. Outbound marketing is a critical component and must be personalized and be effectively delivered to maximize interest and engagement. All components must be fully ADA compliant. The vendor must be able to demonstrate the effectiveness of the campaign and recommend strategies at the point of initial response through enrollment.

### 3. OVERVIEW OF SERVICES TO BE PROVIDED

The awarded vendor must provide the following services:

1. Based on established messaging and creative, establish a strategic direction for comprehensive campaigns. The campaign strategies must be fully integrated across all media and response platforms to include geo-targeting, web, mail, email, all advertisements, CTA's, and social media.
2. Develop compelling messages for the undergraduate student audience that can be adapted for use across multiple platforms.
3. Develop creative concepts for specific audiences.
4. Audience identification/targeting, list source and timing recommendation, and list order placement services.
5. Multi-channel marketing campaigns including lead generation, geo-targeting, personalized direct mail and corresponding landing pages, email, and other proven tactics.
6. Vendor shall create predictive/behavioral models to guide recruitment efforts based on the demographic markets the university currently reaches and aspires to help define target audience development, campaign messaging and media and effective CTA's.
7. Must be prepared to work directly with various list providers and acquire the list data immediately upon release of the new student information from each identified list source.
8. Provide the ability for prospective students to respond by mail or online.
9. Provide real time market analysis throughout each campaign to allow for progress tracking and ROI.
10. Provide a detailed response analysis to include list source, gender, ethnicity, geography, etc.
11. Deliver a real-time online reporting portal that provides on-demand analytics including metrics on response, audience and student information.
12. Manage digital and social media ad placement for the university's programs listed above as part of the comprehensive campaign.

Additional requirements:

1. Vendor's project team should include a professional analyst who will monitor results and make recommendations for improvements throughout the campaign as well as present to the campus community on updates and trainings.
2. Each project of the campaign will be defined with specific deadlines and expected outcomes.
3. Vendor to provide full online production and deployment of data tracking of each response channel's performance (broken down direct mail, email, QR code, etc....) as well as a measurement and metric dashboard.
4. Optimize communications for all mobile devices including mobile phones, tablets and laptops.
5. Vendor must maintain a consistent file format for data uploads and downloads. Describe the notification process to the university should the file format change during the contract period.
6. The vendor must have a proven program for data security including a secure file transfer protocol (SFTP) system. Please explain the firm's protocol.
7. The vendor must have a proven ability to communicate effectively with the university's CRM and SIS. Please explain the firm's protocol.
8. Vendor will manage process, data collection and campaigns in concert with the university up to the point of application. All assets, communication platforms developed must integrate with a Salesforce/Target X platform.
9. Salem State will retain the ownership of any and all materials developed and will receive the original files built on agreed upon applications/software as part of this agreement.
10. The vendor is required to have cyber insurance and the university must be named as an additional insured.



## 4. QUESTIONNAIRE FOR VENDORS

### Background Information

Describe past experience in the successful completion of similar services for higher education. Experience working with Massachusetts private or public colleges or universities is preferred. Vendors should provide evidence of the successful completion of at least three such projects. Please provide name, address and telephone numbers of contact person for such projects.

Identify specific person(s) who would be responsible for the proposed work and include a brief resume for each. Please list references for each person identified including name, address and phone number of an appropriate reference contact person.

### Scope of Work Questions

1. Describe your firm's ability and expertise in developing predictive models for continued growth in new student enrollment for undergraduate students. How do you develop and create such predictive modeling? How can predictive models be used to support a recruiting strategy? Give a specific example of your firm's successful use of predictive modeling to support a university's recruitment efforts.
2. Describe your approach to choosing which student prospect names to purchase. How would strategic selection of student names support Salem State's recruitment efforts?
3. Describe your ability to develop and maintain a comprehensive student recruitment database in support of Salem State's recruitment effort. What database features do you offer? What data points do you propose to include? How will Salem State be able to access the database? How quickly will student prospect information be entered into the database and made available to Salem State? Will the database include any reporting capabilities? If so, please describe. Provide a screen print or another example of your database system, including the user interface.
4. Describe your background and expertise in creating and deploying various student recruitment materials, including direct mail search pieces, email campaigns, telephone recruiting calls, and digital and mobile campaigns. Describe your approach in deciding what type of communication to deploy, how many to deploy, and upon whom to focus the recruitment communication effort. Provide examples, if available, of communication materials you have previously developed to support university recruitment efforts.

5. Describe your methodologies that encourage application submission.
6. Describe your success in working with influencers such as parents and specially targeted enrollment communities.
7. Describe your reporting capabilities, and the number and types of reports you propose to develop for Salem State. How will these reports support Salem State's student recruitment efforts? Provide samples of reports your firm has used to support university recruiting efforts.
8. What do you know about Salem State University? What do you know about our new student recruitment markets? Describe how you would get to know Salem State better in order to provide the most useful advice and analysis in support of the university's student recruitment effort. What would you need from Salem State to hit the ground running?
9. What are the current trends or issues impacting student search? How do prospective students prefer to interact with colleges and universities?
10. What do you consider to be the strengths of your company? What specific services regarding student search make your company unique? How do you measure success with your clients? How do you typically communicate with your clients?
11. Describe in detail any additional tools or services your firm could provide to Salem State, other than those services listed in this RFP, to support the university's strategic student recruitment effort.

## **5. EVALUATION OF PROPOSALS**

All responses will be evaluated by the professional staff of enrollment management and marketing. Award of this contract shall be made to the bidder offering the best value response to the goals, specifications, and performance requirements outlined in the RFP. In addition to the price, the following will be considered (in no particular order):

- a. the material content and responsiveness of the bid
- b. the quality of the services offered
- c. experience in working with higher education clients
- d. experience in developing effective, results-driven campaigns
- e. proven track record in recruiting the adult learner market with strong ROI
- f. the general reputation of the firm
- g. quality of the references provided
- h. qualifications of the personnel assigned to work on the project
- i. demonstrated understanding of the respondent of conducting the work as required by the scope of services
- j. bidder's functionality, performance, flexibility, and ability to meet Salem State University needs and timetable.

## 6. SINGLE CONTRACTOR'S AWARD

This RFP will award a single contract to complete this project only and does not imply any further project awards from Salem State University.

## 7. INSTRUCTIONS FOR SUBMISSION OF RESPONSES

Bidders must acknowledge understanding and compliance with each section of this RFP. If the bidder's document conflicts with this RFP, the RFP's language takes priority.

This is a closed-bid submission. Bids will be opened and examined according to the time table set forth in section 8. Bidders will not have the opportunity to amend bids once they are submitted. If a bid is not complete, it will not be accepted. Further, if the contract is awarded and then discovered to be incomplete, that award will be rescinded.

Bids must be submitted BEFORE the posted deadline and will not be accepted after. Bids must be bound in some manner (three-ring, stapled, pressure-plate, etc.) and not submitted as loose pages, whether in an envelope or folder pocket. Electronic submissions, including faxed responses, will be accepted; however, the submission must either be electronic or hard copy (combination electronic and hard copy is not acceptable). Bidders will submit one (1) copy bid (electronic submissions **not** submitted through Comm-Pass will be in Microsoft Word or PDF format).

Any bid that does not specifically address the RFP will not be considered a valid bid-response.

## 8. TIMETABLE

Please note that this is an anticipated calendar and may be subject to change.

Release of RFP	Friday, March 16, 2018
Pre-bid conference call Registration, question submission process, and call details will be provided in posted addendum (see 11)	March 22, 2018 from 12 – 1:00pm EST
Response due date	<b>March 30, 2018 by 3 pm</b>
Selected firms invited to campus to introduce their services/review proposal (if necessary)	Week of April 16, 2018
RFP Anticipated Award	Anticipated week of May 7, 2018
Contract Offer	Anticipated week of May 14, 2018
Contract Signing	Anticipated week of May 21, 2018

## 9. COSTS FOR PROPOSAL PREPARATION

Any costs incurred by contractors in preparing or submitting a proposal shall be the contractor's sole responsibility.

## 10. DISQUALIFICATION OF PROPOSALS

Salem State University reserves the right to consider as acceptable only those proposals submitted in accordance with all requirements specified in this RFP and which demonstrate an understanding of the scope of the work. Any proposal offering any other set of terms and conditions contradictory to those included in this RFP shall be disqualified without further notice. A contractor shall be disqualified and the proposal automatically rejected for any one or more of the following reasons:

- The proposal shows any noncompliance with applicable law.
- The proposal is conditional, incomplete, or irregular in such a way as to make the proposal indefinite or ambiguous as to its meaning.
- The proposal has any provision reserving the right to accept or reject award, or to enter into a contract pursuant to an award, or provisions contrary to those required in the solicitation.
- The Contractor is debarred or suspended.
- The Contractor is in default of any prior contract or for misrepresentation.

## **11. ADDENDA TO THIS RFP**

Salem State may need to issue one or more addenda related to this RFP. Such addenda shall be posted at the Salem State University records site: <https://records.salemstate.edu/rfp>. It is the sole responsibility of prospective contractors and other interested parties to familiarize themselves with the web site and visit it regularly during the RFP process for updated information or addenda related to this RFP.

## **12. RIGHTS RESERVED**

Salem State reserves the right to award in part, to reject any and all proposals, in whole or in part, and to waive technical defects, irregularities and omissions if, in its judgment, the best interest of Salem State University will be served. Should the university determine that only one bidder is fully qualified, or that one bidder is more highly qualified than the others under consideration, a contract may be negotiated and awarded to that bidder.

## **13. FINAL CONTRACT**

Salem State University intends to use this RFP and the successful proposal as a basis for the final contract. The winning vendor will be required to sign a Commonwealth of Massachusetts standard contract. Sample is available at: <https://www.mass.gov/files/documents/2017/11/24/dor-ust-forms-standard-contract.pdf>

## **14. INSPECTION OF PROPOSALS**

Proposals may be available for public inspection upon notice of award and shall be available for public inspection after the contract is signed by all parties.

## **15. CONTRACT INVALIDATION**

If any provision of this contract is found to be invalid, such invalidation will not be construed to invalidate the entire contract.

## **16. RFP TERMS AND CONDITIONS**

The terms and conditions of Salem State University (sections A to G), specified below, should be reviewed carefully to ensure full responsiveness to the RFP. The anticipated contract will be, in form and substance, consistent with applicable policy and regulations of Salem State University and the Commonwealth of Massachusetts statutes and regulations regarding the creation and execution of such contract. The failure of any respondent to receive or examine any contract, document, form,

addenda or to visit the sites and acquaint itself with conditions there-existing, will not relieve it of any obligation with respect to its proposal or any executed contract. The submission of a proposal shall be conclusive evidence and understanding of the Salem State University's intent to incorporate such terms and conditions into the contract.

#### A. PURCHASE TERMS

Where a term or condition contained in this RFP differs from a term or condition set forth in the state contract, the terms or conditions of the state contract shall prevail.

#### B. ADDITIONAL TERMS AND CONDITIONS

No additional terms and conditions included with the proposal response shall be evaluated or considered and all such additional terms and conditions shall have no force and effect and are inapplicable to this proposal.

1. The initial evaluation period will occur six months into the agreement. The selected firm's work will then be evaluated every three months thereafter.
2. Customer Payment and Privacy Protection Conditions—responses should certify compliance and/or company policies and procedures regarding the following.
  - (a) PCI-DSS Compliance—presently in effect, any merchant processing, storing, and transmitting customer credit card information must show evidence of being PCI compliant. Please submit a Certification of Compliance with your submission.
  - (b) PA-DSS Compliance —effective July 1, 2010, any payment application sold, distributed or licensed to a third party must be PA-DSS compliant. Please identify your firm's plans for compliance in your submission.
  - (c) "Red Flag Rules" —effective November 1, 2009, any third-party vendor of the university that handles, stores or transmits personal identifying information must comply with federal trade Commission' s Red Flag Rules. Please identify your company's Red Flag Administrator and policies related to this regulation.

Please note: any submission that does not address these conditions will be deemed to be incomplete and subject to disqualification from consideration.

#### C. PRICING

Quoted pricing shall remain firm for the entire term of the contract.

#### D. EXCUSABLE NON-PERFORMANCE

The vendor will use its best effort to provide satisfactory and uninterrupted service as described in the RFP. The vendor will not be responsible or in default for any failure of service arising from an act of God, civil riot, war, restrictions imposed by governmental authorities, or other causes determined by Salem State University to be beyond the vendor's control.

#### E. CONTRACT TERMINATION

If the contractor persistently disregards the laws, ordinances, rules, regulations or orders of any authority having jurisdiction, or otherwise is in substantial violation of a provision of the contract documents, or the university deems the services provided to be unsatisfactory, then the university may, without prejudice to any right or remedy and after given the carrier thirty (30) days written notice, terminate the employment of the carrier.

The university shall be obligated only for those services rendered and accepted prior to the date of Notice of Termination.

#### F. CONTRACT RENEWAL

The contract may be renewed upon the same terms and conditions, provided that the parties agree on pricing terms. The vendor shall no later than thirty (30) days before the expiration of the contract provide written notice of its intent not to renew the contract or of any changes to pricing in may require.

#### G. EMPLOYEES

All workers performing services shall be employees of contractor and shall not, under any circumstances, be considered employees of Salem State University. Contractor shall provide, and be responsible for, all required services and benefits with respect to its employees, including but not limited to worker's compensation and unemployment insurance.

### **17. EQUAL EMPLOYMENT OPPORTUNITIES REQUIREMENTS**

In entering into any contract resulting from this RFP the contractor agrees not to discriminate against any employee or applicant for employment because of race, sex, color, religious creed, national origin, and/or ancestry. The contractor agrees to post in conspicuous places notices to be provided by the Massachusetts Commission Against Discrimination with respect to the Fair Employment Practice laws of the Commonwealth which are herein made of this contract reference.