

September 14, 2020

Salem State University

Request for proposals

Stopped out student engagement

RFP # 2021-02 Re-engagement and re-enrollment strategy for **Stopped-out students**

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 **Thursday September 24, 2020 by 12:00 Noon to Reynaldo Ramos**
5. **Email submissions are preferred; send to rrosos@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.
All questions should be in writing via email to rrosos@salemstate.edu and will be answered and sent out as addendum to the RFP.
7. Reference RFP 2021-02 Re-engagement and re-enrollment strategy for Stopped-out students

Reference: Salem State University School of SPECIFICATIONS	UNIT PRICE	TOTAL PRICE
See Attached Specifications	Attached additional sheet, if needed	

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 hereinafter “the University” is initiating this request for proposal (RFP) to solicit proposals from firms to provide re-engagement and coaching services for students who have stopped out of Salem State University. Price for services shall be through a revenue share model.

2. SCOPE OF WORK

The university seeks a qualified vendor to provide bundled services which find and re-engage stopped-out students. The vendor shall provide personalized intensive one-on-one coaching to assist in their re-enrollment and continued coaching to persist and ultimately graduate.

Vendor will leverage the latest technology and data mining to tailor the messages and timing of messages to student and will also utilize data enrichment to update contact information of student names provided by the University. With data gathering develop a profile of stopped out student and utilize that to personalize all levels of a multi-channel communication plan.

Vendor will recommend and implement strategies to reach stopped out students. Through one on one coaching, the vendor will discern barriers to re-enrollment and share with University and will assist the students in best addressing those barriers within the University’s structure. When appropriate, the vendor will also recommend to the University changes and best practices to improve student experience and persistence. Critical to this will be well informed coach(s) who are committed to be trained from the University staff regarding University policies and practices.

Vendor will make use of predictive modeling tools and data to manage enrollment and maximize re-enrollment results. This model will consider behaviors related to lifestyle, psychographics, purchasing behavior, and marketing channel preferences. This data will be utilized to build a persona-based view of the University’s stopped out students and develop affinity models and identify and score specific stopped out 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. Vendor must demonstrate results in the re-engagement of stopped out students. This proven track record must include the ability to demonstrate a significant and positive return on the university’s human capital investment.

The university requires modern outreach strategies such as email, digital media, geo-fencing and other, and mobile optimized web response personalized recruitment 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 re-enrollment. Additional recommendations will be shared from the coaching interaction on challenges toward persistence and graduation.

3. OVERVIEW OF SERVICES TO BE PROVIDED

The awarded vendor must provide the following services:

1. Price for services shall be through a revenue share model. This will ensure the vendor has the shared interest in results while minimizing the University's initial financial investment. The share will be based on net (minus state funded waivers, discounts, etc.) tuition and mandatory fees (NOT room and board) of students who are re-enrolled as of census date. Allowance for refunds of revenue share paid based on students who fail to pay their student account in full prior to the end of the term.
2. Provide dedicated professional coaching to students to guide and assist in all aspects of return to school decision making.
3. Be able to identify, reach, engage, and nurture stopped out students throughout the student life cycle (contemplating, apply, matriculate, register, re-enroll, graduate).
4. Based on established and creative messaging, 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, email, CTA's, and social media.
5. Develop compelling messages based on data gathered during initial outreach and surveying. Use these personal based messages for each audience across multiple platforms.
6. Provide real time results analysis throughout each state of the outreach pipeline to allow for progress tracking and ROI.

Additional requirements:

1. Optimize communications for all mobile devices including mobile phones, tablets and laptops.
2. 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.

3. The vendor must have a proven program for data security including a secure file transfer protocol (SFTP) system. Please explain the firm's protocol.
4. The vendor must have a proven ability to communicate effectively with the university's CRM and SIS, and the ability to interface with third vendors to tag student support outreach to avoid duplication of messages. Please explain the firm's protocol.
5. All collateral must be demonstrated ADA compliant.
6. 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 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 persona based personalized targeted outreach to stopped out students. How do you develop and create such predictive modeling? How can predictive models be used to support a re-enrollment strategy? Give a specific example of your firm's successful use of predictive modeling to support a university's re-enrollment efforts.
2. Describe your approach for scoring which stopped out students to prioritize. How would strategic vetting and scaling of students influence Salem State's re-engagement efforts?
3. Describe your background and expertise in creating and deploying various student re-engagement outreach, including email, telephone coaching and/or survey calls. Describe your approach in deciding what type of communication to deploy, how many to deploy, and upon whom to focus the communication effort. Provide examples, if available, of communication materials you have previously developed to support university efforts in re-engaging the stopped-out students.

4. Describe your reporting capabilities, and the number and types of reports you propose share with Salem State. How will these reports support Salem State's efforts? Provide samples of reports your firm has used to support university re-engagement efforts.
5. What do you know about Salem State University? 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 re-engagement with stopped out student efforts. What would you need from Salem State to hit the ground running?
6. What are the current trends or issues impacting student persistence and graduation? What have you discerned about stopped out student's preferences regarding communication with colleges and universities?
7. What do you consider to be the strengths of your company? What specific services regarding student re-engagement make your company unique? How do you measure success with your clients? How do you typically communicate with your clients?
8. 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 stopped out student re-enrollment effort.

5. EVALUATION OF PROPOSALS

All responses will be evaluated by the professional staff of enrollment management, advising and marketing, and Purchasing. 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 timetable 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 thereafter. Bids submissions must be electronic via email to Reynaldo Ramos, Senior Director for Purchasing and Vendor Relations to rramos@salemstate.edu
 Bid document 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	Monday, September 14, 2020
Vendor Questions due	September 17, 2020 by 12:00 Noon
Answers to Vendors Questions due	Monday September 21, 2020
Proposals due date	Thursday September 24, 2020 by 12:00 Noon
Selected firms invited to virtual team to introduce their services/review proposal <i>(if necessary)</i>	October 19 and October 20, 2020
RFP Anticipated Award	Anticipated October 23, 2020
Contract Offer	Anticipated week of November 2, 2020
Contract Signing	Anticipated week of November 9, 2020

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 Commbuys.com. It is the sole responsibility of prospective contractors and other interested parties to familiarize themselves with the 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 shall use this RFP and the successful proposal as a basis for the final contract. The awarded vendor will be required to sign a Commonwealth of Massachusetts Standard Contract and Terms and Conditions (Attachment)

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.

The initial evaluation period will occur six months into the agreement. The selected firm's work will then be evaluated every three months thereafter. Contract term will be for one year, with one-year renewable options. The University will consider other proposed contract terms.

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 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

Price for services shall be through a revenue share model. This will ensure the vendor has the shared interest in results while minimizing the University’s initial financial investment. The share will be based on net (minus state funded waivers, discounts, etc.) tuition and mandatory fees (NOT room and board) of students who are re-enrolled as of census date. Allowance for refunds of revenue share paid based on students who fail to pay their student account in full prior to the end of the term

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. **Public Records:**

All responses and information submitted in response to this RFR are subject to the Massachusetts Public Records Law, M.G.L., c. 66, s. 10, and to c. 4, s. 7, ss. 26. Any statements in submitted responses that are inconsistent with these statutes shall be disregarded

18. **Equal Opportunity and Affirmative Action:**

Salem State University is an affirmative action/equal opportunity employer and does not discriminate on the basis of race, color, national origin, sex, disability, religion, age, veteran status, genetic information, gender identity and expression, or sexual orientation in its programs and activities as required by Title IX of the Educational Amendments of 1972, the Americans with Disabilities Act of 1990, Section 504 of the Rehabilitation Act of 1973, Title VII of the Civil Rights Act of 1964, and other applicable statutes and university policies. The university prohibits sexual harassment, including sexual violence. Inquiries or complaints concerning discrimination, harassment, retaliation or sexual violence shall be referred to the university's Affirmative Action and/or Title IX Coordinator, the Massachusetts Commission Against Discrimination, the Equal Employment Opportunities Commission or the United States Department of Education's Office for Civil Rights

19. **COMMBUYS Market Center:**

COMMBUYS is the official source of information for this Bid and is publicly accessible at no charge at www.commbuys.com. Information contained in this document and in COMMBUYS, including file attachments, and information contained in the related Bid Questions and Answers (Q&A), are all components of the Bid, as referenced in COMMBUYS, and are incorporated into the Bid and any resulting contract.

Bidders are solely responsible for obtaining all information distributed for this Bid via COMMBUYS. Bid Q&A supports Bidder submission of written questions associated with a Bid and publication of official answers

20. **Bidder Communication:**

Bidders are prohibited from communicating directly with any employee of the university regarding this solicitation except as specified above. Bidders may contact the contact person for this RFR in the event this RFR is incomplete or the bidder is having trouble obtaining any required attachments electronically through COMMBUYS