

104 Anderson Hall
Gorham, ME 04038

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www.maine.edu

REQUEST FOR PROPOSAL RFP # 47-15

MARKET RESEARCH SERVICES

University of Maine System

ADDENDUM #1

The University of Maine

This addendum responds to questions submitted by participants:

University of Maine
at Augusta

Q1) Can you provide counts for the following groups?

University of Maine
at Farmington

- a. Applicants (out-of-state vs. in-state and traditional vs. online vs. adult)
- b. Admissions (out-of-state vs. in-state and traditional vs. online vs. adult)
- c. Attendance (out-of-state vs. in-state and traditional vs. online vs. adult)
- d. Faculty by institution and department of discipline

University of Maine
at Fort Kent

A1) The successful bidder will be provided with all the detail of all four questions with the exception that we do not have specific details for on-line students. For the purposes of the bidding process, the University of Maine system is supplying the following table:

University of Maine
at Machias

University of Maine
at Presque Isle

Fall 2014 - Faculty and Summer/Fall Applications, Admissions, and Matriculations

	UM	UMA	UMF	UMFK	UMM	UMPI	USM	UMS Total
Faculty	836	243	169	77	58	92	580	2,055
Applied	12,630	3,663	1,765	896	517	761	5,400	25,632
In-State	4,897	3,318	1,189	724	353	578	3,572	14,631
Out-of-State	7,733	345	576	172	164	183	1,828	11,001
Admitted	10,332	2,260	1,375	685	446	628	4,409	20,135
In-State	4,172	2,103	934	571	329	493	2,966	11,568
Out-of-State	6,160	157	441	114	117	135	1,443	8,567
Matriculated	2,557	1,305	513	397	230	301	1,767	7,070
In-State	1,695	1,241	419	330	185	254	1,479	5,603
Out-of-State	862	64	94	67	45	47	288	1,467

Data Source: Faculty data comes from the faculty headcounts in the HR Headcount Report as of October 31, 2014. Admissions data provided by the Shared Data Processing Center as of September 21, 2014.

Notes: Faculty headcounts do not include staff or administrators who may have part-time teaching appointments. Applications include first-year and transfer students applying for admission in the summer for enrollment in the fall.

In addition, across UMS traditional-aged Undergraduate students make up 56% of UG students and adult-aged students the remaining 44%.

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Q2) How and where are you promoting/advertising UMS?

A2) The quick response is - not well, and not enough compared to our competition. The only system-level advertising over the last couple years was the Think-Maine campaign, which can be referenced at <http://think.maine.edu/>

As for marketing and promotion, each of our seven institutions has their own marketing staff and budgets. UMaine (Orono) has the largest and that can be accessed at <http://umaine.edu/marketingandcommunications/home/marketing/>

Other universities have smaller scale efforts, budgets and personnel.

All that said, this is not an RFP for marketing – it is to formulate the market research, competitor analyses, and emerging trends.

Q3) Do you have contact information (phone, email, both) for current students, applicants, faculty, and High School guidance staff?

A3) Yes, this can be pulled together and supplied to the successful bidder. Bidders should make specific note in their proposals of exact expectations of the UMS relative to contact information (see section 3.5 - paragraph 2 of the RFP).

Q4) Given the objectives and timeline, what is the total amount not to exceed for this project? What is the anticipated budget (or alternatively, budget range or not to exceed amount) for this comprehensive project? Is there a budget amount allocated for this research, if so, what is the amount? Has UMS allocated a particular budget amount for this initiative? Realizing that an exact figure may not be possible to release at this time, some type of a budget range would be appreciated.

A4) We have no specific budget or target for this work. We expect the bidders to propose to meet our outcomes and time frame, and expect you will tell us what that will cost. In addition, our criteria for selection are shared in the RFP, and cost is the fourth ranked, intending to indicate that we will judge proposals on a value-based methodology.

Q5) Section 1.0: Please define this target audience as specifically as possible, “the decision-makers of the college bound”.

A5) It is not yet clear enough to UMS leaders who makes (or influences) the decisions of where students go to college by market segment. We see answering this questions as part of the market research (i.e.: who is making/influencing the decision to be interested in, apply to, and matriculate to UMS or a competitor - is it primarily the student, or the parents, or the guidance counselors, or some combination).

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Q6) Will UMS provide a single de-duped contact list (prospective students and current students) for all institutions or will individual contact lists be provided by each institution individually? How will University College's contact lists be provided (or are all University College prospects/students already associated with one of the seven universities)?

A6) Each institution has a contact list of prospective and current students. These can be provided in Excel, Word or Access database to the successful bidder. In some cases we have prospective and current students that will show up on the lists of multiple campuses. Responses to RFP should specify exactly how the bidder expects this data to be rendered (see section 3.5 - paragraph 2 of the RFP).

University College prospects/students are associated with one of the seven universities.

There will be sensitivity to how the successful bidder reaches out to prospective students of the 2015 fall semester. UMS reserves the right to review and influence how prospective students will be sampled, and/or to direct the successful bidder to another source of this information.

Q7) Current UMS students will likely not be readily available during the fieldwork timeframe for the project based on finals and the closing out of the academic year. Does UMS (and/or the individual institutions) already possess information/survey data regarding why current students attend each of your universities?

A7) Some institutions have a limited amount which can be shared with the successful bidder. It is not enough to base decisions on or we would not have included it in the RFP request. UMS believes that a sufficient sample can be aggregated from this group, provided that the successful bidder is prepared to engage immediately. There is also a significant segment of the student population that can be reached after finals.

For the purposes of this RFP, the responses should be written comprehensively enough that they do not depend on existing information/data.

Q8) Can the University of Maine System (UMS) provide contact information for 2013, 2014 and 2015 graduating high school seniors, specifically emails (number of emails), telephone number (number of contacts with telephone numbers) and or physical mailing addresses (number of contacts with telephone numbers)? This information will be necessary for primary research.

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A8) It is an expectation that any qualified respondents will have the necessary experience and contacts to generate the representative sample of not only traditional aged students, but other primary student groups as well. UMS will not be providing it.

Q9) Does the market research pertain to only undergraduates or graduate students as well? If graduate students, can the UMS provide contact information such as email, telephone or physical mailing addresses of 2013, 2014 and 2015 college upperclassmen?

A9) For this round we were primarily concerned with undergraduates.

Q10) Can a firm provide a "Fixed Bid by Project" only without itemized pricing or hourly rates for individual staff assigned to the project (e.g., Analyst/Consultant, Senior Consultant, etc.)?

A10) Yes, provided that the scope is clear in terms of process, outcomes and deliverables. Fixed bids should also address proposed methodology for scope revisions.

Q11) Are you interested only in diagnostics or in prescriptive recommendations as well?

A11) For this RFP we are interested in diagnostics only. That does not preclude future work (or RFP) on the prescriptive side.

Q12) What will the data be used for? What are the ultimate outcomes?

A12) The data will be used by the leadership of the institutions to better understand the markets, what influences decision-making at each decision point of the process (interest to matriculation), and what makes decision makers choose UMS or our competitors (all by major market segment).

Q13) Are you "fixed" (set) on your market segments?

A13) No, we want to understand the natural groupings of "like" decision makers. We only used these categories in the RFP to illustrate a point, not to lead the categorization of the market research.

Q14) We doubt there is enough time to do an adequate job in the timeframe allowed. Would you consider modifying the time or scope?

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A14) This is the RFP we have gone out with. In our opening paragraph we included the following quote: *We believe this would include the following, but are open to the consultants experience to guide us to a better set of outcomes.* Please respond with your best proposal to get us to the outcomes mentioned in the RFP and in this addendum. If this means a phased project, then bid as such. It is imperative that you include what deliverables UMS can be assured of receiving by June 30th (or your bid will be seen as non-responsive).

Q15) Is the UM System the unit of analysis?

A15) No, the seven institutions are the units of analysis. We expect a summary for the system, but that should be an aggregate of the seven units.

Q16) Does UMS have a current communications agency of record? If so, can you cite the name of the agency/firm, the extent of the relationship and what work has been produced by this firm within the past 1-2 years?

A16) We are not sure how this question applies to the RFP. Most communications from UMS and the campuses are handled by internal communication, marketing and public relations employees.

Q17) When was the last time UMS completed a research study of this nature? Did you engage an external partner for this purpose? Please specify.

A17) 2009-present. Noel-Levitz was engaged to do enrollment work for all campuses within the system in approximately 2009, and they continued into last year with a few of the campuses. Several campuses have done their own surveys and sampling work – see answer to Q#7.

Q18) What extent of existing institutional and/or third party research will be made available upon project award?

A18) See answers to Q#1 and Q#7. A limited amount will be made available to the successful bidder, however for the purposes of this RFP the responses should be formulated with a methodology that does NOT depend on existing information/data. UMS can provide limited IR capacity for this engagement. Again, the bidder should specifically call out any expectations for assistance as per section 3.5 - paragraph 2 of the RFP.

Q19) Will UMS be providing the sample data (email files, etc.) for the survey or will this be upon the vendor to purchase and utilize?

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A19) UMS will be providing the data specified in the answers to Q#1, Q#3 and Q#6. UMS will NOT be providing the data referenced in Q#8. Any other data necessary to the RFP response MUST be specifically called out in the response, as per section 3.5- paragraph 2 of the RFP

Q20) How large of a sample is UMS looking to have for the purposes of this data research?

A20) We expect the successful bidder to tell us that in their response to RFP. There clearly is a trade-off between time/cost and levels of sample accuracy. Respondents should specify target sample sizes and/or standard statistical parameters. Preference will be given in the first three categories of the RFP selection criteria to those that can demonstrate the understanding and experience to determine and balance these trade-offs to the outcomes specified.

Q21) Are you looking to sample all of the counties in the state of Maine or those within a certain geographical distance to UMS?

A21) The seven institutions and centers of UMS are geographically distributed and serve the entire State of Maine. All counties will be sampled if the sampling plan/distribution is accurately formulated.


Q22) From the scope it looks as though UMS is looking to gain insight from the following groups; current students, accepted but not attended students, non-applying students, and interested prospective students. Are there any other audience groups that you would also look to gather data from (i.e. alumni, parents, guidance counselors, etc.)?

A22) UMS leadership is looking to understand why students and their decision-influencers (parents, guidance counselors, funders) select the institutions they do – with priority to those that do not come to UMS and then to those that do. In order of priority, we believe this looks like the following:

- accepted but not attended students, parents, decision-influencers
- interested prospective students, parents, decision-influencers
- non-applying students
- current students

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April 3, 2015

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