University of Maine System
UMaineGOLD Marketing Consultant – RFP#2018-74
ADDENDUM #01

CLARIFICATION

1. The University received a large amount of written questions and is extending the submission deadline to June 13, 2018, 5:00 p.m. EST.

QUESTIONS

1. Whether companies from Outside USA can apply for this?   (like,from India or Canada)

   ANSWER: Please refer to RFP Section 1.3.2 Eligibility to Submit Responses

2. Whether we need to come over there for meetings?

   ANSWER: Please refer to RFP Appendix E – Rider A, Business and Performance Reviews

3. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

   ANSWER: Please refer to RFP Appendix E – Rider A, Business and Performance Reviews

4. Can we submit the proposals via email?

   ANSWER: Please refer to RFP Cover Page, Response Submission Information

5. In section 1.1.3 Purpose, it states, "The University seeks a partner to develop, implement, and asses marketing campaigns to help grow graduate online professional programs at UMaine." Is the University looking to start new programs, in addition to marketing existing ones? Or is the strategic plan to simply increase enrollments in current programs?

   ANSWER: Correct. We are looking to develop new programs in addition to marketing and increasing enrollment in our current programs.

6. Can the University share current enrollment funnel data (numbers of inquiries, applicants, admits and enrolled students) in recent years in order to allow our proposal to speak to specific ROI opportunities?

   ANSWER: Yes, these numbers are available.

7. In sections 1.1.4 Specifications / Scope of Work, bullet 1, it states "Audit current marketing and recruitment processes and resources...." Can the University share an overview of the current marketing approach that has been employed? Are there specific, defined enrollment targets for each respective program with the UMaine GOLD system? What is the desired rate of growth overall?

ANSWER: Yes, the University can share an overview of the current marketing approach. UMaine is looking to grow enrollments in graduate professional programs by 20% through the UMaineGOLD initiative.

8. The website is the core of the entire marketing stack and is the most important thread through the customer decision journey. What is the roadmap to enhance the website to support all upcoming marketing efforts? Will paid efforts drive to the main website, or individual landing pages (and thus part of this engagement as well)?

ANSWER: Paid efforts will drive to individual, program-specific landing pages under online.umaine.edu.

9. What is the target date for the first enrolled class of students? When do they hope to launch enrollment marketing efforts to recruit this first class?

ANSWER: Tiered launch. First batch of courses under the UMaineGOLD banner will be offered in spring 2019. Enrollment marketing efforts to launch fall 2018.

10. Who are UMaineGOLD's primary competitors?

ANSWER: Purdue Global, University of New England Online, Husson Online, SNHU, St Joseph's of Maine Online, ranked regional and national universities that provide online graduate professional degrees and certificates.

11. Would we have access to historical data on digital campaign performance of graduate programs' marketing, to help set realistic expectations on cost bids and other metrics?

ANSWER: Yes, this can be provided. Most of the digital campaigns we have done before would be relate to specific courses, inter-sessions (summer, winter) and brand awareness for UMaineOnline. Some of them would be related to graduate programs in this case. So short answer would be a yes, but a lot of them would not be related to graduate programs. Having said that, we do have Google Adwords running for two of our graduate programs. We have

also piloted several digital marketing campaigns for general brand awareness through regional and national sources.

12. Can you provide a budget range that is allocated to this engagement, and/or anticipated media spend?

     ANSWER: UMaineOnline current marketing budget for UMaineOnline excluding positions is $100,000. Some of these funds have been committed to specific marketing campaigns in FY19. Depending on specific recommendations in this RFP, additional funds may be made available.
     Specifically under the umbrella of UMaineGOLD, we have $100K/year funding for 2 years for marketing position(s). We are currently in search for one Digital Marketing coordinator level position @ $35K + benefits in year 1 and using the other half of the funding ($50K) to support building capacity for marketing and recruitment strategy under the scope of this RFP. We anticipate receiving an additional $15K for year 1 marketing specifically for the UMaineGOLD initiative.

DIGITAL MARKETING STRATEGY AND EXECUTION:

13. Can you briefly describe what type of digital marketing campaign execution was done for 2016 and 2017? What was the media budget used at that time? What worked well and what did not?

     ANSWER: We have have not run any digital campaigns specific to any UMaineGOLD programs. We ran a 3 month, UMaineOnline brand awareness campaign in 2017 that led to increased web traffic. This campaign included search and site retargeting, keyword contextual and demo targeting.

14. Do you have examples of existing campaigns you like? Dislike?

     ANSWER: no

15. How have you measured campaign success or failure in previous work?

     ANSWER: Clicks, inquiries, and enrollment
16. What is the existing enrollment marketing strategy?

     ANSWER: Strategy varies by program and includes print, digital, and events.

17. What geographical areas do you currently target in your media buy campaigns? Will this expand or maintain constant?

    ANSWER: Targets vary by program. The majority of the marketing currently is in state and New England. We are looking to expand this for some programs.

18. What percentage or amount in the budget is expected to be direct spend for media campaigns?

    ANSWER: Specific percentages or allocations within the overall marketing budget are unassigned.

19. What current advertising platforms are in use?

    ANSWER: For UMaineGOLD programs, currently only social media (Facebook, Twitter, LinkedIn), website, emails, postcards, and events.

20. What schools or universities would you consider to be your top competition?

    ANSWER: See response to question 10

21. List 3 or 4 items (if possible) that are key differentiators from competitors as listed in question above.

    ANSWER:
    - UMaine is Maine's flagship public institution
    - World class faculty and research programs
    - UMaine's Signature and Emerging Programs
    - Location of campus

22. Has there been research or marketing audits done previously to understand the students journey or develop new programs?

    ANSWER: No

23. Can we have access to the previous research that has been conducted?

ANSWER: n/a

24. What social media channels are you currently using?

    ANSWER: Facebook, Twitter, LinkedIn

25. Do you have any benchmarks of performance for conversions from inquiry to application or enrollment?

    ANSWER: We expect a 3–5% application conversion rate from online inquiries. This is not something we currently track but with the implementation of Target X, we hope to utilize this platform for the purpose of tracking how many of our inquiries, apply and enroll, and the time it takes for this process to occur.

26. Can you briefly describe the mix of marketing activities/channels that have been utilized over the last two years, and allocate a percentage indicating the level of resources applied to each channel (example; print 10%, digital advertising 40%, events 15%...)

    ANSWER: 25% events (conferences, sporting events, alumni events, etc.), 15% radio and tv, 35% digital, 25% print

INFRASTRUCTURE AND TECHNOLOGY:

27. Briefly describe the various systems you have/you are using to support your marketing and enrollment efforts.

    ANSWER: Target X (Salesforce) CRM

28. What Student Information System(s) are you using?

    ANSWER: Mainestreet (Peoplesoft)

29. Which CRM platform(s) are you using?

    ANSWER: We use the Target X platform (Salesforce) for all CRM services.

30. Which Marketing automation platform(s) are you using?

    ANSWER: Vertical Response for email campaigns

31. Which application system(s) are you using?

ANSWER: We use the Target X platform (Salesforce) for applications and decision making.

32. What platform are you using for your web site(s)?

ANSWER: Wordpress

33. How are you managing/accessing web analytics?

ANSWER: Wordpress analytics, Google Analytics

34. Which system do you use for Live Chat?

ANSWER: My Live Chat

35. Which system do you use for text broadcasting?

ANSWER: Target X (Salesforce) supports text messaging. We utilize this service on the undergraduate side, but not for Graduate students

36. Which system do you use for voice broadcasting?

ANSWER: None. The University of Maine is not interested in Voice Broadcasting Services.

37. Which system do you use for reporting?

ANSWER: Target X (Salesforce)

38. Which system do you use for business intelligence?

ANSWER: EAB/Academic Performance Solutions

39. What other systems are you utilizing?

ANSWER: There are a number of supplemental systems aiding enrollment management Target X and Peoplesoft are the primary interfaces.

40. Please provide examples of email nurture communication and timing in between email deployment

    ANSWER: We have established initial communication that is sent to all inquiries that come through Target X (Salesforce) and our current plan is for the next communication to occur within 10 days from the initial, 30 days, with 3 month intervals until we meet the one year mark. Each communication will be dependent on the student's response or lack of response to previous communication. Research shows that many online students take up to 18 months to make a decision about whether or not to apply.

41. How many data sources are there for the leads (including purchased lists)?

    ANSWER: The University of Maine currently utilizes Organic, Email, Digital, Social, and Web-based lead sources, as well as traditional lead generation/advertising/and B-2-B.

42. How many different data layouts are there for lead sources?

    ANSWER: The University does not currently differentiate based on lead source, with the exception of incorporating dynamic content to CRM-supported communications based on source data and application stage.

43. How quickly could you provide file layouts and sample data?

    ANSWER: 72 hours

44. How many records are there (total, and by lead data source)?

    ANSWER: The University of Maine maintains a database of over 100,000 leads.

45. How old are the leads?

    ANSWER: 3 months to 5 years.

46. What kind of demographics are captured on the lead records?

    ANSWER: The purpose of this RFP is generating new leads, not cultivating current sources. Data captured depends on the lead source. At a minimum, name, program of interest, and

email. With more robust records, there are more than 20 variables captured.

47. Have any enrolled previously/are they lapsed students?

   ANSWER: The purpose of this RFP is generating new leads, not cultivating current sources. A few thousand of the leads (approx 9,000) are current students, recent students, or lapsed students.

48. What communications, by channel, have been taking place to each lead group?

   ANSWER: The University utilizes CRM-supported communications with prospects and inquiries periodically. Communications differentiate based on the inquiry type and application stage.

49. What are the conversion rates by program?

   ANSWER: 2 year yield rates, Online only:

	App N	Admit N	Conversion rate	Confirm N	Yield Rate
MBA	99	47	47%	45	96%
ED	70	37	53%	36	97%
MSIT	54	34	63%	34	100%
PSM	28	18	64%	16	89%
SPED	129	72	56%	66	92%

50. Over what time period are the conversions measured?

   ANSWER: We calculate conversions from the day an inquiry record is created to the day the prospect applis or enrolls. This can range from two years prior to application to zero hours prior to application. Approximately 35% of our external applicants (not current or prior

UMaine students) do not formally inquire prior to application. A further 30% of returning undergraduate or previous graduate applicants do not inquire prior to application.

51. What is the length of the average conversion cycle?

   ANSWER: From the day an inquiry record is created to the day they apply: 1.) Students who matriculate: 40.08 days, 2.) Students who are admitted but do not matriculate: 34.6 days, 3.) Students who are denied: 19.10 days, 4.) Students who withdraw their application: 26.21 days. UMaine GOLD guarantees an admission decision within two weeks of application. Staffing and Resources:

52. Please list current marketing and recruitment staff and responsibilities (full time or part time) and the percentage of hours allocated toward UMaineGOLD marketing efforts.

   ANSWER: Current marketing and recruitment staff include the following:
   - 1 FTE Marketing & Communications Coordinator (0.25 FTE UMaineGOLD marketing). Relevant responsibilities include: Content and creative development, oversight of compliance with brand standards, manages all marketing campaigns, assists with vendor sourcing and negotiations, liaison to campus Marketing & Communications office and external campus partners to develop and approve all marketing materials.
   - 1 FTE Coordinator of Digital Marketing & Analytics (1 FTE UMaineGOLD marketing). Relevant responsibilities include:
   - 1 FTE UMaineOnline Advisor (1 FTE UMaineGOLD marketing/recruitment). Relevant responsibilities include: Responds to program inquiries via phone, email, video chat, and/or one-on-one advising appointments within caseload, serves on marketing committee to develop marketing plan and review all marketing opportunities, helps potential students determine which program of study they would like to pursue based on professional and educational goals, guides new students through the UMaine Admission process, ensures that new students understand online learning and what is required to succeed in an online environment, serves as the primary point of contact for a caseload of students for all other university related questions, works in collaboration with the Graduate School to ensure that Target X CRM is running smoothly and providing the most up to date information to students, posts updates to social media in an effort to help boost enrollment in courses and programs as well as updates to website in collaboration with Marketing & Communications Coordinator, attends student recruitment and tabling events with the UMaineOnline Marketing team, as needed.

- 1 FTE UMaineGOLD Program Developer & Online Advisor (0.5 FTE UMaineGOLD marketing/recruitment). Relevant responsibilities include: Program development, project management for UMaineGOLD partnerships, scheduling UMaineGOLD meetings and events, communicating with UMaineGOLD partners, training program coordinators and coordinating their work, preparing content for UMaineGOLD outreach, training and support, student support services for online students, responds to program inquiries via phone, email, video chat, and/or one-on-one advising appointments within caseload, serves on marketing committee To develop marketing plan and review all marketing opportunities, helps potential students determine which program of study they would like to pursue based on professional and educational goals, guides new students through the UMaine Admission process, ensures that new students understand online learning and what is required to succeed in an online environment, and serves as the primary point of contact for a caseload of students for all other university related questions, attends student recruitment and tabling events with the UMaineOnline Marketing team, as needed.
- .5 FTE Assistant Director for Graduate Enrollment Services (.1 FTE UMaineGOLD marketing/recruitment). Relevant responsibilities include: Enrollment funnel oversight, predictive analytics, retention efforts.
- 1 FTE Graduate School Administrative Specialist (.025 FTE UMaine Gold CRM administration, troubleshooting and staff training)
- 0.5 FTE Graduate Assistant (0.125 FTE UMaineGOLD marketing). Relevant responsibilities include: social media (content marketing, Facebook, LinkedIn), UMaine GOLD (various areas of excellence), student support services (various areas including metrics), student data (enrollments retention, graduation) learning analytics, various research (survey engineering/other programs - e.g., opportunities, specialities within programs, regional and national programs, R&D).
- Our future plans include adding one additional FTE in UMaineGOLD marketing to assist with content development and social media, but this will depend on the outcome of vendor provided solutions as well as whether a vendor can assist with building internal capacity and assist with a smooth transition of duties to an additional staff member if deemed necessary after audit results.

53. Are you anticipating needing additional call center support for outreach efforts? If so, what level of support is expected or desired?

ANSWER: We do not anticipate needing additional call center support at this time. We currently do the majority of our communication through email with students.

54. When is the busiest time of year historically for applications and enrollments by program?

ANSWER: The busiest time historically has been between February through May. However, due to having rolling admission for many of our programs we have enrollment all year long.

55. What type of outreach efforts have you done in the past to help encourage applications?

ANSWER: We participate in tabling events, market through digital, email, and postal mail campaigns.

56. What is the current creative review process? Which roles are involved in the decision-making process?

ANSWER: Materials are most often created by DLL Marketing and Communications Coordinator and reviewed by academic department (Program Coordinator) and approved by UMaine Division of Marketing and Communications (Manager of Creative Services). If materials are created by faculty/academic department staff, they are approved by DLL Marketing and Communications Coordinator and Manager of Creative Services.

57. What regular meetings are expected for the marketing vendor to conduct or attend?

ANSWER: Please refer to RFP Section 1.1.4 Specifications / Scope of Work

PROGRAM INFORMATION AND GOALS:

58. Please list all current programs along with any additional new programs included in this initiative

ANSWER:
● Master of Business Administration
● PSM in Bioinformatics
● M.Ed. in Special Education
● M.Ed. in Instructional Technology
● M.Ed. in Elementary/Secondary Education - Curriculum, Assessment, and Instruction
● Graduate Certificate in Surveying Engineering Technology (New program)

59. Please describe the application and enrollment process. What is required to complete an application?

    ANSWER: The application is offered online through Target X (Salesforce) CRM. Students are required to provide transcripts, letters of recommendation, and for some programs graduate testing. Once applications are complete, the department and graduate school review and make a decision. Student is notified of the decision through the Target X (Salesforce) application portal and a follow up letter of congratulations from online advisors with information about next steps. Students are assisted with enrollment in their first semester by the department.

60. How do you measure success by your programs?

    ANSWER: We measure the success of our programs by a variety of factors - enrollment, retention, graduation.

61. What is the goal growth rate by program and by term expectations? What are historical enrollments by term by program?

    ANSWER: The yearly goal growth rate by the selected programs is by 10%.

62. Do you have access to an undergraduate Alumni database? What type of messaging is sent to Alumni to promote UMaineGOLD program offerings? Please provide a sample.

    ANSWER: Access to undergraduate database is available. No specific messaging currently exists.

63. Please provide any historical metrics by program if available (example: Fall 1 2017 MBA - 200 inquiries, 55 applications started, 40 applications completed, 30 enrolled)

    ANSWER: Overall (online and live) historic enrollments for target programs include the following. Funnel figures are not currently available.

64. What is the FY18-19 marketing budget for both services and direct marketing spend?

    ANSWER: Response to this question is included with response to Q#82.

	2013	**2014**	**2015**	**2016**	**2017**
Master of Business Administration:	41	37	45	61	67
PSM in Bioinformatics	0	3	1	1	1
M.Ed. in Special Education	48	38	42	75	75
M.Ed. in Instructional Technology	23	19	15	15	28
M.Ed. in Elementary/Secondary Education - Curriculum, Assessment, and Instruction	25	35	43	41	45
Graduate Certificate in Surveying Engineering Technology (New program)	0	0	0	0	0

65. What is the breakdown by source for enrolled students by program (example: 25% Alumni, 20% Referral, 15% adwords, etc)

    ANSWER:
    MBA: 87% Online referral (inquiry form) / 5% app is first contact/ 8% Other
    MSIT: 100% Online referral
    PSM 86% Online referral (inquiry form) / 11% app is first contact/ 5% Other
    SPED 78% Online referral (inquiry form) / 14% app is first contact/ 8% Other
    MED 77% Online referral (inquiry form) / 8% app is first contact/18% Other

66. When does the FY18-FY19 UMaineGOLD fiscal year begin? How much, if any, of the marketing funds been allocated for the upcoming fiscal year?

    ANSWER: The University of Maine System fiscal year runs from July 1–June 30. Funds are available immediately (prior to end of FY18, as well as into FY19). Please see response to Q#82 to further details regarding budget.

STAFFING AND RESOURCES:

67. Please list current marketing and recruitment staff and responsibilities (full time or part time) and the percentage of hours allocated toward UMaineGOLD marketing efforts.

    ANSWER: This question has been answered in response to Q#52.

68. Are you anticipating needing additional call center support for outreach efforts? If so, what level of support is expected or desired?

    ANSWER: Not at this time.

69. When is the busiest time of year historically for applications and enrollments by program

    ANSWER: The busiest time historically has been between February through May. However, due to having rolling admission for many of our programs we have enrollment all year long.

70. What type of outreach efforts have you done in the past to help encourage applications?

    ANSWER: We participate in tabling events, market through digital, email, and postal mail campaigns.

71. What is the current creative review process? Which roles are involved in the decision-making process?

    ANSWER: See answer to question #56.

72. What regular meetings are expected for the marketing vendor to conduct or attend?

    ANSWER: Marketing consultant are expected to provide weekly updates in meetings with UMaineGOLD marketing staff.

PROGRAM INFORMATION AND GOALS:

73. Please list all current programs along with any additional new programs included in this initiative

    ANSWER:
    - Master of Business Administration

- PSM in Bioinformatics
- M.Ed. in Special Education
- M.Ed. in Instructional Technology
- M.Ed. in Elementary/Secondary Education - Curriculum, Assessment, and Instruction
- Graduate Certificate in Surveying Engineering Technology (New program)

74. Please describe the application and enrollment process. What is required to complete an application?

ANSWER: The application is offered online through Target X (Salesforce) CRM. Students are required to provide transcripts, letters of recommendation, and for some programs graduate testing. Once applications are complete, the department and graduate school review and make a decision. Student is notified of the decision through the Target X (Salesforce) application portal and a follow up letter of congratulations from online advisors with information about next steps. Students are assisted with enrollment in their first semester by the department

75. How do you measure success by your programs?

ANSWER: We measure the success of our programs by a variety of factors - enrollment, retention, graduation.

76. Do you have access to an undergraduate Alumni database? What type of messaging is sent to Alumni to promote UMaineGOLD program offerings? Please provide a sample.

ANSWER:
Access to undergraduate database is available. No specific messaging currently exists.

77. What is the goal growth rate by program and by term expectations? What are historical enrollments by term by program?

ANSWER: UMaine is looking to grow enrollments in graduate professional programs by 20% through the UMaineGOLD initiative.

	FA2013	FA2014	FA2015	FA2016	FA2017
Master of Business Administration:	41	37	45	61	67
PSM in Bioinformatics	0	3	1	1	1
M.Ed. in Special Education	48	38	42	75	75
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M.Ed. in Elementary/Secondary Education - Curriculum, Assessment, and Instruction	25	35	43	41	45
Graduate Certificate in Surveying Engineering Technology (New program)	0	0	0	0	0

78. Please provide any historical metrics by program if available (example: Fall 1 2017 MBA - 200 inquiries, 55 applications started, 40 applications completed, 30 enrolled)

ANSWER: Overall (online and live) historic enrollments for target programs include the following. Funnel figures are not currently available.

	2013	**2014**	**2015**	**2016**	**2017**
Master of Business Administration:	41	37	45	61	67
PSM in Bioinformatics	0	3	1	1	1
M.Ed. in Special Education	48	38	42	75	75
M.Ed. in Instructional Technology	23	19	15	15	28
M.Ed. in Elementary/Secondary Education - Curriculum, Assessment, and Instruction	25	35	43	41	45
Graduate Certificate in Surveying Engineering Technology (New program)	0	0	0	0	0

79. Please list any communication (phone or email) done with applicants during the application cycle. What is your application start to application completed rate?

ANSWER: Applicants receive approximately 7-15 automated emails throughout the funnel, as well as supplemental personalized communications to answer specific questions. These communications are facilitated through the CRM. Nearly all communications are in the form of email. Application completion rate is approximately 67% overall.

80. What is the breakdown by source for enrolled students by program (example: 25% Alumni, 20% Referral, 15% adwords, etc)

    ANSWER:
    MBA: 87% Online referral (inquiry form) / 5% app is first contact/ 8% Other
    MSIT: 100% Online referral
    PSM 86% Online referral (inquiry form) / 11% app is first contact/ 5% Other
    SPED 78% Online referral (inquiry form) / 14% app is first contact/ 8% Other
    MED 77% Online referral (inquiry form) / 8% app is first contact/18% Other

81. What is the FY18-19 marketing budget for both services and direct marketing spend?

    ANSWER: UMaineOnline Current marketing budget for UMaineOnline excluding positions is $100,000. Some of these funds have been committed to specific marketing campaigns in FY19. Depending on specific recommendations in this RFP, additional funds may be made available.

    Specifically under the umbrella of UMaineGOLD, we have $100K/year funding for 2 years for marketing position(s). We are currently in search for one Digital Marketing coordinator level position @ $35K + benefits in year 1 and using the other half of the funding ($50K) to support building capacity for marketing and recruitment strategy under the scope of this RFP.

    We anticipate receiving an additional $15K for year 1 marketing specifically for the UMaineGOLD initiative. Other dollars would need to come through matching funds from the Graduate School, which has a total marketing budget (including staff) of $75K.

82. When does the FY18-FY19 UMaineGOLD fiscal year begin? How much, if any, of the marketing funds been allocated for the upcoming fiscal year?

    ANSWER: The fiscal year for the University of Maine System is July 1–June 30. Funds are available immediately for this initiative. Please see answer to question 82 for more clarification regarding budget.