Addendum #1
East Tennessee State University
Enrollment Consulting Services
RFP 6890

TO: All Proposers

FROM: Katherine Little Zink

RE: Request for Proposal #6890

               Enrollment Consulting Services

DATE: December 13, 2024

This Addendum #1, dated December 13, 2024, is issued as supplemental information and is hereby made part of the final RFP documents. Proposers shall acknowledge receipt of this addendum in their proposal response. The attachment provided is and shall remain a part of the Request for Proposal.

Institution's response to RFP #6890 Enrollment Consulting Services questions:

1. Can you provide the reason(s) for the release of the RFP?
   a. As stated in the RFP, the reason for this RFP is to secure a qualified vendor to provide direct marketing and enrollment consulting services to improve the effectiveness of ETSU recruitment efforts. Specifically, the goals of the University include:
      1. increasing the number of qualified prospects that express interest in attending ETSU;
      2. increasing the number of qualified applicants for admission;
      3. increasing the number of enrolling students;
      4. increase contact with parent/families throughout the enrollment funnel;
      5. increasing the level of academic preparation of entering students;
      6. increasing the diversity of the entering student population; and
      7. increasing the retention rate of students.
   This was further detailed in Attachment 6.4.

2. What is the approximate yearly budget allocated for this work? Is there an intended budget or price range for this scope of work?
   a. Part of the process of this Request for Proposal is to grade on the cost proposal of each submitted bid. ETSU has provided what services are being requested and will grade the cost proposals submitted by bidding vendors. The budget will be determined based on the winning bid factoring in the SOW.

3. Is ETSU currently working with a vendor for all or a portion of these services? If so, what vendor is handling this work? What has been most successful about that partnership? What (if anything) are you looking to change?
    a. Carnegie Dartlet; formally Fire Engine RED
    b. Working with our current partner has felt easy and their knowledge in the field has given us comfort with trusting their decisions.
    c. We want to ensure our team is doing as little work as possible. Specifically related to making edits and writing content for campaigns.

4. What is ETSU's current name buy quantity of high school students? Are you able to provide class level counts and the vendors managing this for ETSU?
    a. Approximately 95,000 senior, 90,000 junior/sophomore and 5,000 transfer
    b. College Board, Encoura, PTK

5. The goals ETSU articulates on page 3 relate to services that are not listed on the cost proposal schedule listed on page 44. Can we provide information and costs for services beyond the listed services on page 44 within the space for "ad hoc or incremental charges"?
    a. Yes

6. Can you tell us where you would like us to include the Score Summary Matrix? (Attachment 6.7) In the Technical Response? The Cost Proposal? Or should it be included in another area?
    a. You do not have to include the Score Summary Matrix. We provide that to give you an idea of the format we utilize for grading.

7. The conflict-of-interest policy hyperlink does not work – at the bottom of page 50 *Conflict of Interest Policy: https://www.etsu.edu/bf/procurement/purchasing/vendor_information.php. An Error of page not found appears - Can you offer a different hyperlink or does that form not need to be included? Or is it just for us to review?
    a. We apologize. The conflict-of-interest policy for ETSU can be found hyperlinked within our General Purchasing Policy found here: https://www.etsu.edu/policies/business-finance/general-purchasing.php. This is mainly for your review. There is no form to complete.

8. Are you willing to accept an electronic submission in lieu of hard copies? If not, will ETSU accept responses on a USB shipped to your location (no hard copy provided)?
    a. We requested both hard copies and USB flash drives be provided for the Technical Proposals, if at all possible, as seen in section 3.1 Proposal Form and Delivery.

9. Are you willing to accept an electronic signature in lieu of a wet ink signature on all forms?

a. The original must contain wet ink signatures.

10. Are you willing to accept an electronic signature on all forms of the electronic copies (flash drives) of our response, with wet signatures on the original and hard copy (printed) versions only?
    a. Wet signatures are only required on the original copy. All other copies and flash drives can either be copies of the original or electronic signatures.

11. Can ETSU please provide the decision timeline for this RFP?
    a. While we do not have a solid timeline in place yet, we will send updates on that throughout the process. We hope to announce the Intent to Award in February 2025 while securing the winning bidder with a contract start date of March 11, 2025.

12. We do not believe the performance bond requirement (Section 1.11, p. 6) is applicable to the nature of the services we are providing. Can you please confirm if the performance bond is an applicable requirement?
    a. Please see the updated RFP included. We have removed the Performance Bond for RFP 6890.

13. In the RFP it states in the overview that ETSU is seeking a partner to improve effectiveness of its "top of the funnel approach". However, later in the scope it mentions, "responding to the leads generated by direct marketing campaigns". Can you share more about what this would ideally look like? Where do you envision the handoff between the partner and ETSU in nurturing leads through the recruitment funnel?
    a. We are sorry; the most important thing is top of the funnel approach. We would love to hear ideas you have around yield campaigns or yield communication you could do, but also feel good about our in-house yield plans.

14. Are you looking for a partner to support engaging only high school seniors or are you open to campaigns that build affinity among high school sophomores and juniors, as well?
    a. We want to engage seniors, juniors, and sophomores.

15. What is ETSU's most critical goal for the next two years? What is the biggest challenge standing in the way of achieving that goal?
    a. We want to maintain or see slight growth of enrollment in our freshman class. We would love to maintain a high GPA of the freshman class and diversify the freshman class. Overall continue to do what we have been doing with some enhancements. We must increase transfer enrollment and would like to see that by 1-5% in the next few years. The biggest challenges are lack of students seeing the value of a college education, our location (in terms of diversifying the class), and low community college enrollment.

16. What are you looking for in your new vendor relationship, and why?
    a. Open and honest communication. We want a partner that feels like a part of our team. We also want to do less work with this partnership and not more. We want to feel like a customer that is being valued at all times. It is important to us that we feel special as a partner and as important as any other client and that our unique needs are being listened to.

17. What solutions have you tried already? What worked? What didn't and why?
    a. Student search has gone well for us. Broadly we have done a much better job saturating our region and making sure people know who we are. We could do a better job convincing people of our academic quality. We also could do a better job with transfer search. I would not say anything didn't work other than having limited access to transfer names.

18. When you think about your new partnership (outside the scoring of the rubric) on a day-to-day basis, what would delight you in terms of service?
    a. Open and honest communication. We want a partner that feels like a part of our team. We also want to do less work with this partnership and not more. We want to feel like a customer that is being valued at all times. It is important to us that we feel special as a partner and as important as any other client and that our unique needs are being listened to.

19. If you were to move to a new vendor, what do you expect to be different from your current vendor relationship? Are you looking for different outcomes?
    a. We just want our jobs to be easier not harder. We should have to do work, but when we provide information, edits or feedback, we want to not have to re-tell it each year. We are looking for the same outcomes.

20. If we were invited to present at campus, what are you looking for in the presentation content that would help you make the best-informed decision?
    a. As much transparency as possible and that you have done your research on who we are broadly.

21. How many names do your currently buy annually? What sources? What is the ROI for each source YoY? How many times a year do you typically buy?
    a. Approximately 95,000 senior, 90,000 junior/sophomore and 5,000 transfer (no international prospects but interested)
    b. College Board, Encoura, PTK
    c. Our yield rate has been around 30% for senior search and 35% for Junior/Sophomore search
    d. 2-3 times a year depending on available names and advice from our partner.

22. How are you currently obtaining parent information? What is your current process for parent engagement?
    a. Students can provide parent information during current search communication campaigns.

23. Do you identify suspects/pre-prospects in any way at the moment?
    a. We have a few outside partnerships like Niche.

24. How many programs / what kind / modality (online vs. in person)?
    a. We offer 170 academic programs – dual enrollment, bachelors, and we have one certificate program at the undergraduate level. 99% of our traditional programs are on-ground, but they could have an online course as a part of the program (but not fully online). This contract is right now focused on traditional on-ground students.
    b. We have no major plans to change any of our current offered programs right now. We hope to increase opportunities for adult students with online opportunities, but we are not there yet.

25. Are you currently doing any kind of digital marketing? If yes, In-House or Outsourced? If Outsourced, who are you working with? What type of digital marketing (SEO, SEM, Paid Advertising)? What has the ROI been for each?
    a. Yes
    b. In house and outsourced
    c. All of those some in house and some outsourced
    d. We have great click rates and conversions, but can't say we know for sure they yielded because of the digital marketing only.

26. What is your knowledge of artificial intelligence?
    a. We are not using it and know what it is, but have not looked at implementing it yet. Limited knowledge in how it can help with recruitment.

27. Are you currently using any predictive or forecasting in your current admissions process?
    a. Yes, most of that is run in consultation with our current search partner.

28. What patterns are seeing in your data and student's success at your school?
    a. There are so many patterns I do not know I'll completely answer this question: Less men than women; Inflated GPAs; Low diverse applicants; Continue needs to support underrepresented groups; Students needing individualized support.

29. What have currently seen in your recruitment process that has positively affected enrollment?
    a. A personalized approach to recruitment has changed the game for us.

30. Are you currently reviewing your data to make current decisions? If so, what is that process? What trends are you seeing in your data?
    a. Yes, we review lots of data (high school data, community college data, local data, number of apps, admits, and enrollments, academic portfolio of students, etc.
    b. We use these and other data to make decisions on how to recruit, where to travel, etc. Our search patterns have been very helpful in this process.

31. What has enrollment been like in the past 3 years?
    a. We have had 2 back-to-back record enrollment years for First Time Freshman. We have been down in transfer enrollment since Covid. Overall enrollment declined in the last 10 years, but has picked back up the last few years. We also had the highest graduation rate the last few years in the history of the institution.

32. How many admissions recruiters/counselors at ETSU are boots on the ground? How are they currently managing their territory? What are their KPI's they are measured against?
    a. 13
    b. They are responsible for all things in their territory (generating apps, admits, yield)…working the funnel, with call, texts, emails, etc.
    c. They are also responsible for building their travel schedule and consulting with supervisors on opportunities and challenges within their territory.

33. Who are your ideal students? (academics, location, etc.)
    a. We are here to serve the students of our region. We want students with a good academic record, but also can serve students who might need a little more support academically. We are supporting our region and beyond.

34. Who are typically your bread-and-butter students?
    Primary market: Asheville, Chattanooga, East TN, Knoxville, Morristown, Southwest VA, Tri-Cities, Upstate SC, Western NC
    Secondary market: Nashville, Southwest VA, Upstate SC, Western NC, Chattanooga
    Tertiary market: Atlanta, Nashville DMA, Southeast KY

35. Are there any new markets or initiatives ETSU is interested in? If so, what are they?
    a. Potentially more NC locations
    b. Potentially Northern VA

36. What does summer melt look like? Do you know why students are deciding to not enroll? How do you currently handle appeals? Is there a formal analysis?
    a. We have an intend to enroll campaign.
    b. We do survey students and it seem mostly related to costs.
    c. There is currently no appeals process in this context.

37. Are you currently using anything to prioritize admissions teams tasks and marketing resources (i.e. segmenting call lists, selective print/direct mail vs. bulk sending)? If so, what is that process?
    a. Yes, we use data to determine how to prioritize tasks and mailings.

38. Do you have currently a financial aid model? If so, was this model made in house or with a vendor?
    a. We have used a vendor to look at models. We have some work to do in this area.

39. Do you have multiple awarding models? (In-state, out of state, scholarship, etc.)
    a. Yes.

40. What is your discount rate?
    a. 18.5%

41. Do you currently offer academic and/or need scholarships?
    a. Yes, academic merit-based scholarships
    b. We have a promise plus program and other opportunities for need based aid through the general scholarship application.

42. How often are you analyzing your financial aid data?
    a. This varies.

43. Are you offering additional aid to those that may potentially melt? If so, what is that process?
    a. No.

44. How many inquiries, applicants, accepts, and enrolled students did the university receive in 2023 and 2024?
    a. 2023: 9900 apps, 6181 admits, 2141 enrolled (FTF), transfer: 2555 apps, 1459 admits, 926 enrolled
    b. 2024: 10, 051 apps, 8,665, 2138 enrolled (FTF), transfer 2,451 apps, 1,793 admits, 929 enrolled

45. Can you provide goals across the enrollment funnel for the Fall '25, Fall '26 and Fall 27? (Prospect, Inquiry, Applicant, Deposit, Enrollment)?
    a. As stated earlier, we want to maintain FTF enrollment and grow transfer enrollment.

46. Must Attachment 6.13 be completed and returned with the RFP response?
    a. No, we will be removing it entirely. Please see the attached updated RFP.

47. For the Technical Proposal and Evaluation Guide - Section C, can we do the same as with A&B and lists a proposal page number for the response, or do you want us to insert the answer into the table under the question?
    a. Answers can be separate with the given page number provided, just like sections A & B.

48. How many transfer inquiries do you anticipate having?
    a. $5,000-$10,000

49. What strategies is the ETSU team currently using or implementing to support the following objectives?
    a. *increasing the number of qualified prospects that express interest in attending ETSU;*
        i. search, personalized engagement which includes emails, phone calls, text, digital ads, and print campaigns
    b. *increasing the number of qualified applicants for admission;*
        i. search, personalized engagement which includes emails, phone calls, text, digital ads, and print campaigns, and application free months
    c. *increasing the number of enrolling students;*
        i. personalized engagement which includes emails, phone calls, text, digital ads, and print campaigns; events; yield campaigns
    d. *increase contact with parent/families throughout the enrollment funnel;*
        i. email communication and digital ads
    e. *increasing the level of academic preparation of entering students;*
        i. search name buys; events targeted at high achieving students
    f. *increasing the diversity of the entering student population*
        i. eager for opportunities to improve in this area

50. Do you currently have a contracted digital agency that implements enrollment focused digital campaigns?
    a. Yes.

51. Do you have interest in digital marketing tactics that are focused on particular academic program areas?
    a. Potentially

52. Can you expand on your interest in international student recruitment? Is this an area you are hoping to see a strategic enrollment plan included?
    a. We are open to learning more about opportunities and working together on how to potentially use a partner to help with international recruitment. What have you done and what has worked?

End of Addendum #1.