

Department of Procurement
University of Maryland, Baltimore County
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DATE: January 18, 2017

TO: All Prospective Bidders Cc: Procurement File

FROM: Mallela Ralliford

RE: UMBC Enrollment Management Consultant, Bid # BC-21048-R, ADDENDUM # 1

The following amends the above referenced RFP documents. Receipt of this addendum must be acknowledged by completing the enclosed "Acknowledgement of Receipt of Addenda" form and submitting it along with the Technical Proposal you return to the University.

The due date and time for the Proposals to be submitted to the University remains as **WEDNESDAY, JANUARY 25, 2017 by 4:00 p.m.**

A. The following questions have been submitted to the University for a response:

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

ANSWER: Due to the nature of this work, it is best that the firm has the flexibility to meet locally. Therefore, firm outside of the USA might find this a challenge.

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

ANSWER: Yes, meetings will be held locally.

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

ANSWER: Due to the nature of this work, it is best that the firm has the flexibility to meet locally. Therefore, firm outside of the USA might find this a challenge.

4. QUESTION: Can we submit the proposals via email?

ANSWER: Technical Proposals to be emailed to UMBC Box at:
Technic.k80lre9xa2148og0@u.box.com

Price Proposals to be emailed to UMBC Box at:
PricePr.zxl47ao6o7f120tv@u.box.com

5. QUESTION: What Customer Relationship Management (CRM) system are you using for undergraduate and graduate programs?

ANSWER: Undergraduate Admissions is not using a CRM at the moment. The Graduate School is piloting the Target X/Sales Force CRM, to launch at the end of January.

6. QUESTION: What is UMBC's current lead to application rate?

ANSWER: For new freshmen enrollment for the fall 2016 class, UMBC purchased a file from the College Board (specifying particular bands) and mailed to 88,000 SAT-takers We received 10,819 applications, admitted 6,150 students, and enrolled 1,544, for a ratio of 51:1 leads to applications and 7:1 applications to enrolled.

7. QUESTION: What is UMBC's current application to enrollment rate?

ANSWER: Please see response to Question 6.

8. QUESTION: Is UMBC currently working with other agency partners for marketing, recruitment, enrollment, and/or other related services? Please provide the names of these agencies and the services they're providing.

ANSWER: No.

9. QUESTION: Who developed the strategy and branding platform for UMBC's 50th anniversary campaign?

ANSWER: The strategy and branding were internally developed by the UMBC's Marketing & Creative Services teams.

10. QUESTION: What is the core messaging/positioning currently in place for engaging prospective undergraduate students? What aspects of the platform has worked/resonated with audiences and what has not? Has the messaging been tested with prospective students?

ANSWER: Our target among undergraduate new freshmen is women and students majoring in arts, humanities, or social sciences. Based on qualitative and quantitative research with those groups, we found that what most appeals to them about and defines UMBC is a sense of belonging/community and making a difference. We developed the House of Grit campaign to promote these aspects, where you can be a mix of many types of people but still find your place and succeed at UMBC, supported by faculty, staff and other students. Other aspects of our positioning that appeals to prospects and parents are our medium size, location near Baltimore and DC, a diverse student body, strong connection to community partners and employers who can provide internships and jobs, and a safe campus. Our challenge isn't so much what does or doesn't appeal as it is identifying UMBC in their minds with the aspects that they say they seek. We tested the most recent undergraduate campaign with brand new freshmen, which helped us to refine the creative.

11. QUESTION: What recent (within the past three years) qualitative and quantitative research data has been collected for/about UMBC's undergraduate student population (such as ASQ, NSSE, etc.)? When did UMBC last conduct quantitative research similar to what is described in 2.4.5.?

ANSWER: ASQ 2013, 2016; NSSE 2012, 2013. We last conducted research as described in 2.4.5 in 2013.

12. QUESTION: What is UMBC's primary UG recruitment footprint (counties or mile radius)?

ANSWER: Baltimore metro region (Baltimore city and county, Anne Arundel, Harford, Howard, Carroll counties) and Montgomery and Prince Georges counties. We have limited reach in Northern Va., Long Island, NJ, PA, NC, and Ohio.

13. QUESTION: Who are UMBC's top five competitors for undergraduate students?

ANSWER: UM College Park (by a large margin), Towson, Penn State, Univ. of Delaware, Salisbury

14. QUESTION: What CRM does UMBC currently use to manage its UG recruitment communications sequence?

ANSWER: UG Admissions does not use a CRM per se, but does use Emma for recruitment email communications.

15. QUESTION: Can you please provide figures for the most recent full UG recruitment cycle that includes prospects/suspects, inquiries, applicants, admits, and enrolled students. Please also share fall 2017 inquiries and applications to date as well as enrollment goals for fall 2017. Does UMBC conduct search (either on its own or using external services)?

Please see the responses to Questions 6 and 25. To date (1/15/17), we have had 9,159 freshmen applications and have admitted 4,650 students for fall 2017. We conduct search, buying lists from the College Board, and create and send materials on our own.

16. QUESTION: In addition to the formal agency requirements outlined in section 3.2, can you elaborate further on what qualitative attributes you seek in a partner for this comprehensive initiative? What are the keys to a successful partnership from your perspective?

ANSWER: We seek consultants who will truly work with us as partners—listening carefully, understanding our culture and context, sharing industry and other information, challenging us when needed. We also look for strategic thinkers who understand our strengths and challenges and the industry and audience opportunities, and will help us to work with those to position and leverage our strengths.

17. QUESTION: What is the anticipated/expected budget (or alternatively, the not-to-exceed amount) for this engagement (with and without the optional quantitative research)?

ANSWER: This information is for internal purposes. UMBC is requesting competitive pricing in order to finalize the numbers.

18. QUESTION: Stating that you encourage MBE businesses to respond, is there any preference/weight given to them over non-MBE businesses?

ANSWER: The State of Maryland does not have “preference” program for MBE, therefore, this is not applicable.

19. QUESTION: If proposals are to be submitted online (to the UMBC Box) where should the original paper copy be sent (if needed)? If a paper copy is needed, can it be received by UMBC after the submittal of the online versions?

ANSWER: Hard copies are to be sent within 24 hours of bid closing to:
Mallela Ralliford
University of Maryland Baltimore County
Department of Procurement
Administration Building, Room 732,
1000 Hilltop Circle
Baltimore, MD 21250

20. QUESTION: In lieu of submitting full resumes of each potential team member, would UMBC accept **more** abbreviated content that includes qualifications and roles/responsibilities for this project?

ANSWER: This is acceptable if the required information is included.

21. QUESTION: Has UMBC worked with an enrollment marketing consultant in the recent past? If yes, could you share the name of that consultant and if they are eligible to submit a proposal in response to this RFP?

ANSWER: We most recently worked with a marketing research firm in 2013, Melior Group.

22. QUESTION: If awarded a contract, we may decide to appoint someone as the “primary point of contact” who has many years’ experience in higher education marketing, but less than five years’ experience with our firm. Is this acceptable, or should the language in the RFP concerning experience be taken literally?

ANSWER: Experience elsewhere is acceptable.

23. QUESTION: From the way the RFP is structured, we’re a little unclear whether the 3 contract references are to be provided for the Key Personnel assigned or for the Firm in general. Could UMBC clarify where you would like us to provide the 3 contract references in our response?

ANSWER: Three (3) firm references **AS WELL AS** Three (3) key personnel references are required.

24. QUESTION: To help us understand the level of marketing impact needed to achieve your short-term vision, could UMBC share its Fall 2017 enrollment goals? Additionally, what is the percentage increase from last Fall's enrollment which we'd be shooting for?

ANSWER: Our enrollment goal for fall 2107 for new freshmen is 1,650, an increase of 6.9% from the previous year.

25. QUESTION: A component of the RFP is an Institutional Marketing and Communications plan that UMBC is working to develop. So that we don't propose to recreate any work that's already been done/is currently in progress, could you share a bit with us about the timing for this work and what steps may have already been taken?

ANSWER: This is a new project; we have developed many niche campaigns, but not none that is institution wide. Therefore, it requires a lot of process and buy-in, which we will manage. Fortunately, the campus just completed a multi-year strategic planning process, so we have consensus on institutional goals. In the course of this project, we look to the consulting firm for added capacity (e.g., developing a competitive analysis for both undergraduate and graduate enrollment; helping to develop a brand platform and messaging), but we do not expect the firm to manage the project. Regarding a timeline, at present we are completing a preliminary listening tour with key stakeholders. In February and March, we will compile and present data to senior leadership on our current position, and hold a retreat to discuss opportunities and strategies. In March we'll also do outreach and hold conversations on strategic vision-centered branding; spend April developing a brand platform and messaging; present those to leadership and key stakeholders in late April; develop the graphics treatment in May; test the creative in June; and refine it through the summer. (This is approximate but provides a sense of the steps and overall timing.)

26. QUESTION: To help us more clearly understand the level of consulting and support which UMBC expects within each "task" included in the RFP, could UMBC share a ballpark budget for each? If not, perhaps a total budget for the RFP as a whole?

ANSWER: See response to Question 17.

27. QUESTION: We understand the RFP is asking vendors to provide a fixed cost for each "task" included in the RFP. However, when the scope of work is consulting – as opposed to creation of a "deliverable" – it's difficult for vendors to provide a fixed cost. Alternatively, would providing our firm's hourly rates by resource – as opposed to fixed costs by task – be acceptable?

ANSWER: Yes, see the revised Price Proposal Form.

28. QUESTION: If hourly rates by resource are not acceptable, could UMBC provide any further elaboration to describe your expectations and “vision” for each of the tasks so that we might better understand the scope and firm resources that will be needed to achieve them?

ANSWER: See the revised Price Proposal Form.

29. QUESTION: Is UMBC primarily interested in conducting research to test the appeal of particular messages, or is UMBC interested in using research to understand how particular strategic directions the University might take will affect application and enrollment decisions?

ANSWER: The former, as part of the work for the institutional marketing/communications plan. (Note that the enrollment research referenced in 2.4.5 is a separate project and would help us to better understand students’ and parents’ college selection processes; their media consumption habits and preferences; and perceptions of UMBC.)

30. QUESTION: Are there particular strategic directions under consideration that would affect the student experience that the University would like to test with the prospective student market?

ANSWER: To date, there are not. However, it is possible that some may arise in the course of the marketing/communications plan development.

31. QUESTION: Does the University have any particular goals related to institutional profile, enrollment, or net tuition revenue it wishes to explore as part of this effort, such as increasing its stature nationally, expanding enrollment, or increasing cost of attendance?

ANSWER: As part of the marketing/communications plan, we do have goals to increase our national profile, particularly as a research university, and to expand enrollment. The recently completed university strategic plan can be found [here](#).

32. QUESTION: Are there particular student populations that the University is most interested in understanding, for example, high-achieving students, under-represented students, students from particular geographic regions outside the Baltimore-DC metro area, students interested in particular majors, etc.

ANSWER: We are particularly interested in increasing the number of female UG students (the student body is 60% male); students interested arts, humanities or social sciences, and out-of-state students (most whom we attract come from the mid-Atlantic region).

33. QUESTION: Does the University have any particular concerns about how it is perceived by the market? What is the University most interested in understanding in terms of market perceptions?

ANSWER: We focus a good deal on countering the perception that we are a “STEM school,” when the fact is that our arts, humanities, and social sciences programs are equal to STEM in caliber. We also find that perception lags reality with regard to our vibrant campus life (despite the absence of a football team), and to the fact that we are very much a residential campus. On the national level, we would like to be recognized for outstanding research in the way that we are for teaching.

34. QUESTION: Would the University be willing to provide enrollment funnel data (# of inquirers, applicants, admitted students, and matriculants) for the past enrollment cycle to help the proposing firm develop a budget for the research component of the project?

ANSWER: Please see response to Questions 6.

35. QUESTION: Has the University conducted any positioning research in the recent past, and would it be willing to share with the proposing firm?

ANSWER: Yes, we conduct research every few years with target audiences and would be happy to share it.

36. QUESTION: Would it be possible to have a conversation with the Assistant Vice President for Marketing & Creative Services so that we can better understand the proposed project’s context and goals?

ANSWER: The Procurement Office is the sole point of contact. Short-listed firms will be invited to have further conversations with members of the Marketing and Creative Services team.

Enclosures: Acknowledgement of Receipt of Addenda Form
Price Proposal Form

END OF ADDENDUM #1, DATED 1/18/17
This addendum was posted on eBid Board On 1/18/17.
(Original with enclosures were not mailed)

BID NO.: BC-21048-R

BID DUE DATE: WEDNESDAY, JANUARY 25, 2017 BY 4:00 P.M.

BID FOR: UMBC ENROLLMENT MANAGEMENT CONSULTANT

NAME OF PROPOSER _____

ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA

The undersigned, hereby acknowledges the receipt of the following addenda:

Addendum No. 1 dated 01/18/17

Addendum No. dated

Addendum No. dated

Addendum No. dated

As stated in this Addendum, this form is to be returned with your Technical Proposal.

Signature

Printed Name

Title

Date

END OF FORM

PROPOSAL NO. RFP #BC-21048-R
PRICE PROPOSAL DUE: WEDNESDAY, JANUARY 25, 2017, by 4:00 p.m. EST
PRICE PROPOSAL FOR: UMBC ENROLLMENT MARKETING CONSULTANT

NAME OF PROPOSER: _____

FID NUMBER: _____

PRICE PROPOSAL FORM

DATE: _____

Ms. Mallela Ralliford
Procurement Office
University of Maryland, Baltimore County
Room #732, Administration Building
1000 Hilltop Circle
Baltimore, MD 21250

Dear Ms. Ralliford:

The undersigned, hereby submits a Price Proposal to provide all labor, material, equipment, and supervision for the Enrollment Marketing Consultant Contract for the UMBC as set forth in RFP #BC-21048-R, dated 01/10/17 and Addenda as follows:

Addendum No. 1 dated 01/18/17

Addendum No. dated

Addendum No. dated

Having received clarification on all matters upon which any doubt arose, the undersigned proposes to perform the services as described in the solicitation documents. By signing and submitting this response, undersigned hereby agrees to all the terms and conditions of the RFP documents.

We will perform the on call work as described in the RFP documents inclusive of technical specifications and issued addenda for the guaranteed unit pricing defined on the following pages.

We understand that the University reserves the right to make the award of for all items, or any parts, thereof, to one or more proposers as set forth in detail under the information furnished in the specified documents. We understand it is the University's intent to make a single award.

We understand that the University is requesting pricing per this Price Proposal Form. We further understand that this Price Proposal includes all costs associated with the provision of the scope of work per the RFP documents.

PROPOSAL NO: RFP # BC-21048-R
 PRICE PROPOSAL DUE DATE: WEDNESDAY, JANUARY 25, 2017 BY 4 P.M. EST
 PRICE PROPOSAL FOR: ENROLLMENT MARKETING CONSULTANT

NAME OF PROPOSER: _____

ALL BLANKS ARE TO BE COMPLETED. THERE ARE TO BE NO ALTERATIONS, ADDITIONS, OR DELETIONS MADE ON THE PRICE FORM:

TASKS	Key Personnel(s)	Hourly Rate	Estimated # of Hours	PRICE
<p>Marketing content support to meet fall 2017 enrollment goals (yield strategies and execution support) Based on the firm’s recommendations, execution of messaging and other implementation may be requested. UMBC’s Creative Services group will provide graphic design and execution of print and digital campaign materials. As part of the process, the firm will review current Undergraduate Admissions efforts, particularly social media, focusing on yield during spring for fall 2017 enrollment, and recommend strategies and opportunities based on best practices.</p>				
<p>Strategic audit and recommendations The firm will evaluate UMBC’s recruitment communications plan, channels by audience, creative messaging, and use of social media (with user experience in mind), and provide recommendations for short- and long-term improvements for the next cycle (fall 2018).</p>				
<p>Institutional branding support As UMBC leads the development of the institutional marketing/communications plan, we will turn to the firm for assistance and capacity in institutional positioning research, branding platform, and messaging.</p>				
<p>Marketing organization and roles The firm will evaluate and make recommendations to optimize roles and responsibilities in UMBC’s marketing functions, and identify required resources.</p>				
<p>TOTAL (Required Services)</p>				

PROPOSAL NO: RFP # BC-21048-R
 PRICE PROPOSAL DUE DATE: WEDNESDAY, JANUARY 25, 2017 BY 4 P.M. EST
 PRICE PROPOSAL FOR: ENROLLMENT MARKETING CONSULTANT

NAME OF PROPOSER: _____

TASKS	Key Personnel(s)	Hourly Rate	Estimated # of Hours	PRICE
(Optional) Quantitative research Develop and field quantitative survey of prospective undergraduates and parents of prospective undergraduates in the Baltimore and DC metro areas to understand their college selection drivers and process, preferred channels of information in that process, and perception of UMBC and its competitors.				

We further confirm that the key personnel named within our Technical Proposal will be assigned to UMBC for the duration of this contract. We understand that no changes in these assignments will be allowed without written authorization from the University via contract amendment prior to such changes being made.

We understand that if we are the successful Firm we will be required to provide the university with proof of meeting all insurance requirements as set forth in the RFP documents, and if necessary, will purchase, at our expense, all necessary riders to comply. Such insurance policies inclusive of all riders will remain in force for the contract and warranty periods.

As well, we agree to all terms and conditions as set forth in the RFP documents, including those of the documents issued to solicit Technical Proposals, all addenda since that issuance, our Technical Proposal submitted in response to the original solicitation, and our Price Proposal are a part of any resulting contract.

Signature

Date

Print Name

Phone Number

Proposing Firm's Name

Street Address

City, State, Zip Code

END OF FORM