



07 March 2023

Addendum 1 for BID 23-22 – Enrollment Management Support Services

This addendum provides answers to questions submitted by prospective bidders. The University's answers are shown in **RED**.



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Buyer, Procurement and Contract Services

1. Could you share your current funnel numbers and conversion rates over the last two to three enrollment cycles? i.e. number of qualified prospects/inquiries, number of applicants, number of admits?
2022
Inquiries/Prospects – 109636
Applicants – 15293
Admits – 8409
Enrolled – 1567

2021
Inquiries/Prospects – 33197
Applicants – 15025
Admits – 8535
Enrolled – 1559
2. What criteria do you have in mind regarding “level of academic preparation” for entering students? **This would refer to the GPA and/or SAT/ACT scores. In other words, USM seeks increasingly academically prepared students. We hope to attract more academically prepared students by way of selecting students who are college going and have taken a curriculum in high school which prepares them for the rigors of university studies.**
3. What are you currently doing for brand awareness via social media? **Admissions has a presence on Facebook for example, but relative to other units on campus have not engaged as much as we should in this area. We are exploring options for future investment including possibly hiring staff to manage social media for admissions exclusively.**

4. Can you share what you are already doing for search to identify qualified high school sophomores, juniors and seniors? **This includes name buys, CRM, post cards, limited social media, advertising and fulfillment campaigns (e.g., looking for ways to engage with students via inquiry card completion or online completion that then prompts additional mail outs to students, texting, calling campaigns, and very soon we plan to integrate same day video campaigns).**
5. Do you currently have a team that is responsible for designing/creating marketing deliverables? **Yes, we have an in-house Admissions marketing team along with support from the University marketing team.**
6. Can you share what kind of analytical reports you are using today? **HelioCampus, Tableau, CRM data, and data provided by our current EM Support Services provider (deliverables, progress towards deliverable, data on marketing efforts, projections based upon the funnel performance, and any regional or national trends you are seeing).**
7. How do you generate your analytical reports? **Generated automatically via daily refreshes or manually with CRM data**
8. What is the average Net Tuition Revenue per student? **Not fully developed**
9. When you say consulting, can you explain what kind of services you were hoping for? Do you have a number of hours/week in mind? **Consulting would typically comprise an every other week 30 min consult regarding progress on deliverables and any analytical data you wish to share.**
10. It looks like you are using Slate as your CRM. Would you like for these campaigns to run out of your Slate instance or are you open to them running out of a separate system that has integration with the CRM? **We would prefer that they come out of Slate**
11. What other technology/tools are you already using for your enrollment marketing? **Slate Texting, Thankview, BeeFree, SignalVine texting, Limited Social Media posts, and resources within Slate**
12. Have you worked with an outside vendor in the development of this RFP? If so, who? **Yes, EAB**
13. Do you have a budget allocated for the services requested? If so, please share how much or a range. **Budget will not be disclosed at this time.**
14. Are you open to a bid that would just include consulting services for the further scoping and development of robust campaigns? **We would consider this, but would like to see how you will be able to help generate marketing campaigns pre-applicant.**
15. Would you be open to an electronic submission of the RFP? **As an alternative to traditional sealed bids in envelopes, the University of Southern Mississippi is capable of receiving electronic bid responses. While this option is available, it is not required and we ask that all potential respondents keep in mind that with any electronic system there could be delays or glitches with the submission process; therefore the University highly encourages traditional sealed bids which are either mailed or submitted in person. Should a vendor choose to submit their response**

electronically, please follow the instructions below using the following website: https://www.ms.gov/dfa/contract_bid_search/Home/Sell. On this site you will find helpful links to procurement opportunities, as well as a link to supplier registration. If not already registered in this system, potential bidders will first need to click on 'Supplier Registration' and follow the steps outlined (a one-time process). Once registered, they can return to the original website and click on 'Procurement Opportunities' where they can either search by keyword for the bid they desire to respond to or leave the search box blank and click 'Search' for a listing of all current bids and proposals for the various State of Mississippi offices. Instructions in how to respond to an RFX in M.A.G.I.C. the following link is provided <http://uperform.magic.ms.gov/gm/folder-1.11.9125?mode=EU&primaryCSH=RFX%2Cresponses>. If you experience any problems with submitting your response through M.A.G.I.C. Please email the M.A.G.I.C. IT Helpdesk at mash@dfa.ms.gov. Please note, emailed bids will not be accepted and will cause your bid to be rejected as a result of early disclosure.

16. Given the tight turnaround time between when questions are due and the submission, we'd like to respectfully request a two week extension on the due date. **At this time no extension will be given. Should this change, a second addendum will be issued and all interested parties made aware.**
17. Will you accept digital signatures on the RFP response where signatories are requested or is physical ink required? **While physical signatures are preferred, digital signatures will be accepted.**
18. What is your decision-making process for this RFP response selection and who is involved in the decision-making process? **Executive Vice Provost – Academic Affairs, Sr. Associate Vice President for Enrollment Management, Executive Director – Admissions, other administrators, and the selection committee for this RFP**
19. When would you like to start the project, given Award Contract will be made by April 21, 2023? **Effective July 1 for implementation in the Fall (Mid-august or earlier)**
20. Please confirm this project is focused only on incoming, traditional undergraduates. **Yes, traditional undergraduate students.**
21. How many names are you buying annually? **Approx. 80-90K**
 - a. Prospects by grade level? **60-70K Sr's, 20K Jr's**
22. Please break down by grade level **N/A**
 - a. Inquiries by grade level? **N/A**
23. Please break down by grade level **N/A**
 - a. What sources? **ACT, College Board, CBSS, NRCCUA**
24. What are your specific enrollment goals this academic year? **On the Undergraduate Admissions side, we would like to see our new FR #'s increase approx. 3-5%**
 - a. How are they trending this year? **Mixed. Applications are down, admits are up. Conversion down-funnel will be critical this year. Last year conversion was exceptionally low, but we have significantly ramped up communications efforts this year to increase the yield.**

- b. Build funnel, shape funnel, both? **At this point we are in the building stage, but would certainly like to move to shaping in the near future if we are able to capture more student interest.**
 - c. What is your current application goal? **Likely will not meet application goals because of down year.**
 - d. What is your current Enrollment Goal? **3-5% increase in first time students.**
 - i. Volume?
 - ii. NTR? **Not fully developed**
 - e. Event registrations and show-up rates? **We do a very effective job at “rolling out” the red carpet to prospective students and have a great deal of interest from prospective students to attend, yet our “show rate” at nearly all events (except Honors Events) hover at approximately 50%. This needs to improve.**
25. What are your specific enrollment goals for the next academic year? **Much more personalization, more outreach to HS SO and JR populations, build out primary and secondary territory markets, and more data analytics.**
- a. Build funnel, shape funnel, both? **Build funnel**
 - b. What is your application goal? **2-3% increase**
 - c. What is your Enrollment Goal? **2-3% increase**
 - i. Volume?
 - ii. NTR?
 - d. Event registrations and show-up rates? **This needs to improve significantly.**
26. Did you hit your goal the last academic year? **No**
- a. What was your total number of applications versus your goal? **Applications down last year**
 - b. What was your total number of enrollments versus your goal? **We ended up from previous year, but off of goals.**
 - c. What was your total NTR versus your NTR goals? **Have not assessed this**
27. Please provide your top recruitment markets:
- a. Primary **Mississippi statewide, Alabama, Louisiana**
 - b. Secondary **Tennessee, Florida, Texas**
 - c. Tertiary
 - d. Any new markets of interest? **Texas is an emerging market and we plan to engage (school counselors, alumni, marketing collateral) in that state much more diligently starting for Fall 2024 and beyond.**
28. Do you feel you have a good pulse on your top market and competitors? **Yes, we feel very comfortable on where we are situated in the market at this point.**
- a. How often are you running an analysis to stay on top of trends and what the competitors are launching and communicating mid-cycle to potential students? **Our vendors typically share this type of information with us.**
29. How important is it to you to be able to forecast future enrollment, applications, NTR, and retention for first time freshmen (FTF)? **Absolutely critical**
- a. Are you doing this successfully today? **Yes, on all except NTR**

30. Who are the stakeholders for making the decision for this RFP? **Executive Vice Provost – Academic Affairs, Sr. Associate Vice President for Enrollment Management, Executive Director – Admissions, other administrators, and the selection committee for this RFP**
31. Does your current enrollment strategy include both campuses? **We have strategies in place, but will soon be embarking on a new Strategic Enrollment Management planning process to revamp current processes and procedures.**
32. Are you handling enrollment marketing solutions in-house or outsourcing it? **Vendor pre applicant stage. In-house post applicant.**
- a. If outsourcing - which vendor are you currently working with?
 - b. What's working well? **More exposure about the university to external audiences.**
 - c. What would you like to be seen done better? **Better collaboration and communication between vendor and USM, more attention to our fulfillment activities, higher quality marketing collateral.**
33. How effective is your institution with email inbox deliverability (spam vs inbox)? **We feel that we have this well under control.**
34. Do you feel you are effectively showcasing your key offerings to potential students? (i.e. Academics, Location, campus, Athletics, Student Experience). **We have been working diligently in ramping up “macro” marketing in the areas you note. Additionally, we have increased our marketing efforts surrounding “micro” marketing (by college or department) as well.**
35. How are you managing the complexity of integrating digital into your enrollment plan and overall campaigning? **Not currently, but are considering this.**
36. Given the fact that marketing technology has grown 5200X in the last 7 years, what have you changed?
- a. How do you build communication for improved user experience? **We could use some assistance here. We have created plenty RFI's, but translating the technology into a seamless experience for prospective students could be improved.**
 - b. How is social media incorporated into your enrollment marketing plan? **This has not been developed well at this point. However, we are considering adding a social media specialist in Undergraduate Admissions. Currently we have a very robust On-line Learning unit and they are collaborating closely to Undergrad Admissions to ramp up our current capacities.**
 - c. What are you doing about the fact that Gmail puts all cold emails in spam? **Have not discussed.**
 - d. Do you have an influencer strategy? **No**
37. How many companies are you working with for enrollment marketing? **One**
- a. Are they all aligned with your goals? **To some extent yes**
 - b. Which one of them take responsibility goals? **The one company for building our prospect inquiry pool**

- c. Are you happy with your print vendor or are you looking to include this in your search initiative? **Yes... internally post applicant. The pre-admit stage would see the vendor awarded this contract printing collateral.**
38. How much print are you sending out by HS grade level annually? **Very little high school FR and SO... Marginal at the JR level and robust at the SR level. We need to do much more marketing at the JR level, however.**
39. What is your overall budget towards print mailers by HS grade level annually? **We do not track this way currently.**
40. What is your overall budget towards your enrollment marketing campaign (building HS interest, building quality apps, increasing deposits, and reducing melt)? **Not tracked individually, but rather holistically as part of our overall budget.**
41. What is your total digital budget - if separate from your enrollment marketing campaign? **Not tracked separately.**
- a. Do you break out your digital budget by grade level? **No**
42. Please briefly describe how "search" been handled in the past by Southern Miss. **First internally, then with a vendor we current have, and we plan to work collaboratively with the new vendor to do some search in house and other parts of the search (marketing) outsourced.**
43. Does Southern Miss currently have an enrollment management support partner? If so, is the university pleased with the existing relationship, services, and value? Please describe. **Yes, we are currently working with a support partner. We are looking for the new relationship to include a vendor who is engaged and collaborative with us especially on critical marketing and conversion discussions around strategy and goals.**
44. Will the enrollment management support services focus on undergraduate enrollment efforts solely or will graduate recruitment efforts also be included in the relationship? **This effort will focus specifically on the undergraduate recruitment efforts.**
45. What CRM platform does Southern Miss use? **Slate**
46. Will the winning agency work within the CRM and will need to work outside the institutions CRM? **Work within our Slate platform**
47. What is the current dual enrollment/early college credit enrollment? **While we engage in dual, the enrollment for us is relatively small and not a huge focus for us at this time. We are however, working to build out early/middle college efforts with local community colleges related to partnerships, support, scholarships, and seamless entry.**
48. What are the theories of what needs improvement to increase applicants? **We need to have a robust message at the top of the funnel for seniors as well as engaged marketing efforts down funnel which market the institution at a macro market level as well as academic departments at the "micro" marketing level. We also need to significantly ramp up marketing to HS SO and JR's. This engagement will focus on high school Jr's, Sr's, and top end of the funnel.**
49. What are the theories of what needs improvement to increase matriculation from applicants? **Better communication at the suspect, prospect, inquiry level and much more awareness among HS SO's and JR's. The admissions office will work to engage in conversion down funnel at the**

applicant and admit stage (essentially taking over for marketing and conversion once the vendor generates interest at the higher level of the funnel).

50. What are your current yields from prospects to inquiry, inquiry to applicant and applicant to matriculation? What are the anticipated goals for these groups? **Those raw numbers are presented above. Ultimately our admit to enroll conversion has been in the high teens for some time and we need to see significant improvement in that metric and that starts at the top of the funnel.**
51. What are witnessed shortcomings of the students who are not academically prepared for college? **We have had challenges with test optional students as retention rates with that population is lower than those students who send scores. However, we are working diligently to provide support for these populations.**
52. Has the college undergone a brand renewal within the last three years?
53. We understand that USM is looking for enrolment management support services. Kindly confirm whether vendor is expected to provide a CRM for enrolment process which will be used by USM's Admissions/Enrolment team (for example: Counsellors, Directors of Admissions etc.) or, USM wants to outsource end-to-end enrolment support services to the vendor. Kindly elaborate. **We currently work with another provider for CRM, but manage all of the work with the CRM internally.**
54. Kindly mention some key pain areas/challenges currently being faced by USM Admissions/Enrollment team across the campuses? **Marketing efforts to high school So's and JR's, conversion at all levels of the funnel, brand awareness for our Gulf Coast campus (this RFP does not include the coastal operations)**
55. We understand that USM is using Elucian Banner as its SIS. Kindly mention what are other 3rd party systems, if any, which are part of USM's IT ecosystem. Is USM expecting Integration with Elucian Banner? **We currently use PeopleSoft not Banner**
56. What are the data fields to be passed between the two systems, integration methodology, integration environment, Direction of integration (Bi-Directional or Uni-Directional), and Use-Cases (Applicable for all 3rd Party Integration software.) **N/A**
57. Number of enrollments per year. **First time students 1,500-1,600 each Fall and a few hundred in Spring**
58. Does USM has dedicated marketing team or is it expecting the vendor to establish the marketing content as well? Need elaboration regarding direct marketing services? **We do have a marketing team, but this vendor engagement will assist us specifically at the top end of the funnel (suspect, inquiry, prospect stage) to help on fulfillment and marketing.**
59. Does USM has dedicated IT support team? **Yes**
60. How many users are expected to use the CRM system? **N/A**