

ADDENDUM (1) ONE

March 30, 2016

To all Bidders on the Project Titled:

Bid Number CL16-EP-0066

**Graduate Admissions Assessment and Marketing Consulting Services
University of Massachusetts – Lowell**

UNIVERSITY OF MASSACHUSETTS – Lowell

Purchasing Department
Wannalancit Business Center
600 Suffolk Street, Suite 415
Lowell, MA 01854

Reference Request for Proposal Documents dated March 21, 2016.

The attention of bidders submitting proposals for the above subject project is called to the following addendum to the specifications and drawings. The items set forth herein, whether of omission, addition, substitution, or clarifications are all to be included in and form part of the proposal submitted.

THE NUMBER OF THIS ADDENDUM (1) MUST BE ACKNOWLEDGED IN THE PROPOSAL OFFER OF THE BID.

Clarification:

The Bid Due Date has been changed from Monday, April 4, 2016 @ 11:00 AM to Wednesday, April 6, 2016 @ 11:00 AM

Questions and Responses:

1. Page 2, Preparation of Bids "May be e-mailed to Purchasing@uml.edu or one (1) original and one (1) copy of the proposal may be submitted in a sealed envelope to:" - Please confirm that emailing the bid is sufficient and printed copies are only required if the bidder cannot email a copy.

Yes, email is sufficient.

2. Are out-of-state agencies allowed to submit proposals? If yes, are local agencies given preference?

Yes, out-of-state agencies are welcome to submit proposals. Local agencies are not given preferential treatment.

3. Page 6, Deliverables: "Are the appropriate metrics being captured, shared and used to inform decisions?" What admissions and marketing metrics are currently being captured by the University?

At the graduate level, the only metrics currently being tracked with consistency are inquiries, applications begun, applications completed, admissions, and yield.

4. Page 6, Deliverables: "Is our staffing appropriate for our goals, vision and needs?" Is it possible to receive an organizational staffing structure chart or summary of roles at this time in the RFP process?

Establishing this full picture is part of the work envisioned in the RFP. Generally speaking, the graduate admissions function is widely dispersed. Marketing for graduate admissions (1 dedicated staff, multiple supporting) is housed in University Relations. Graduate Admissions (7 dedicated staff) is in academic affairs. A cadre of about 50 graduate coordinators oversee the graduate function at the academic program level, but their exact duties are not articulated with great clarity. Ancillary services (e.g. veteran's affairs) are staffed in a way that serves undergraduate and graduate populations.

5. Page 6, Deliverables: "What must be done to enhance our ability to track prospective students through the admissions funnel..." What back-end system(s) does the University currently have in place to track prospective students throughout the admissions process?

We are in the process of implementing TargetX. This is our first CRM. Cognos and Summit are used, but Cognos is being phased out. We also use internal reporting that is produced from Institutional Research office.

6. Page 6, Deliverables: "Marketing and recruitment activities" Would the University be able to provide a brief description of current marketing and recruitment activities?

Until recently, marketing of graduate programs primarily focused on publicizing bi-annual open houses. We have recently shifted by hiring a full-time staff member to look after graduate admissions marketing and will soon begin advertising, selectively, programs where we have room to grow and a product we believe the marketplace wants. We are also implementing TargetX to introduce a much more robust email messaging stream to inquiries (currently there is no CRM in place, so we do little email messaging). Collateral was previously created only at department request and lacked consistency. All programs now receive consistent one-sheets and website attention as a starting place.

Recruitment activities involve two open houses per year and a minimal presence at fairs and events. Most of graduate admissions staff time appears to be spent processing paperwork and responding to student and grad coordinator issues (including academic performance issues once a student is enrolled).

7. Does the University currently work with a marketing consulting agency? If yes, would you be able to disclose the agency's name and if they are participating in this RFP process?

No.

8. Can you provide us with further detail on who will be in charge of making key decisions and approving work?

This study is being commissioned by the university's office of marketing which will oversee the vendor relationship and approve work.

9. Does the University have a yearly marketing budget in place? Are there any general budget guidelines that we should follow for the scope of this project? Could we be provided with a ballpark budget range, or a maximum amount the budget cannot exceed?

Yes. We do not wish to exceed \$50,000 for this engagement. Competitive pricing on bids (value for price paid, not necessarily absolute price) will be a major factor in awarding the bid. Budgets that are based on detailed estimates (I.e. with a clear picture breaking down expenses against deliverables) will be viewed more favorably than lump sum estimates.

10. Does the University have an in-house marketing team? If so, what is the size of this team and how will they be involved in this project?

Yes. The absolute size of the marketing department is about 20 FTE, but a smaller subset of 3-5 individuals work with regularity on admissions marketing projects. There is one FTE dedicated primarily to graduate admissions marketing. Our involvement in the project will be to provide information, access and perspective as needed by the vendor to successfully fulfill this assignment.

11. Briefly, how would you characterize the aspirations of a University of Massachusetts Lowell graduate student?

At the master's level: To earn a marketable advanced degree in the least inconvenient fashion possible, at the lowest price possible, to get the best job possible.

12. What colleges does the University consider to be its closest competitors?

At the master's level, our competition varies by program. Our competition could include any of our sister UMass campuses; regional publics such as Salem State, Bridgewater State, University of New Hampshire or URI; large privates such as Northeastern, BU and BC; niche privates such as Suffolk, Bentley and Emerson; and large online providers such as Southern New Hampshire U. It is a crowded marketplace.

13. Has the University audited its admissions and marketing functions in the past? If yes, when was the most recent audit and what were the main outcomes?

Scannel and Kurz conducted an audit of both graduate and undergraduate admissions in 2005. The goal was to review at large admissions and financial aid processes.

14. Related to this RFP - What is the University finding most challenging in terms of its graduate admissions process?

We have reached a point where we must choose whether the systems/personnel we have in place can scale up or must be replaced or altered. This is especially difficult because our grad admissions function is, in essence, split across many offices and silos of authority. In order to improve the whole, it is not sufficient to improve just one or two parts. It is time for a comprehensive review taking all factors into account. This RFP represents a recognition that “what got us here won’t get us there.” Our ambitions to grow are considerable, but resources must be deployed wisely and we wish to be as informed about how to grow intelligently and in a way that most benefits students.

15. What makes the University want to address these challenges now?

Continued growth in master’s level enrollments is vital to our revenue projections, but we were beginning to see softness in our numbers. Further, leadership changes over the past year have created a window of opportunity to adopt a fresh approach. There is a sense of urgency and openness to change that we must take advantage of.

16. Would you please elaborate on UML’s goal to establish criteria to evaluate the viability of current and proposed master’s degree programs? Are you seeking only recommendations on how to evaluate program viability going forward? Or are you looking for the inclusion of market research to assess viability and effectiveness of UML’s current and potential program offerings?

Mostly for new programs going forward. Academic program areas are asked to address market viability. We wish to ensure they are using appropriate and data-based criteria to establish demand. Market research on a programmatic basis is not in the scope of this RFP but would be an interesting future direction to pursue.

17. Would the University consider closing or reducing some of its program? To what extent would UML take to start new programs?

Openness to closing a program depends on the program in question. Some are considered more untouchable than others, but all have champions and vested interests. We have grown our master’s enrollment largely by starting new programs, and that process continues at a rapid pace. There is some concern that we are subdividing our master’s population into too-small specialties in some cases.

18. What tools are currently in use to track and analyze UML’s graduate enrollment

We are introducing TargetX. Cognos and Summit are used, but we are phasing out Cognos.

19. What is the anticipated budget to be allocated to this project?

We do not wish to exceed \$50,000 for this engagement, but our outlook always is to prefer the lowest cost bid that delivers the end product we need in terms of value to the university.

20. Are you able to share the names and title of members of the selection committee

The committee has not been finalized. It will involve members of the UMass Lowell marketing department and representatives from academic affairs.

21. What kind of qualitative data does UML collect regarding students' decision to attend/not attend?

None

All other of the portions of the RFP Documents remain **unchanged.**

--End of Addendum No. 1--