Budget – The University is allocating $175,000 to digital marketing efforts for fiscal year 2024 (July 1, 2023 – June 30, 2024). This total is inclusive of all agency/reporting/professional service fees as well as paid media placement to be made on the University's behalf by future partner.   Efforts in the past have focused primarily on traditional student audiences and within the realm of paid digital efforts, but we are open to expanding our tactics to new higher education audiences and tactics at the recommendation of our partner.

- Can you please advise on the anticipated budget (including agency fee and expected media spend)? Further, can you please advise me on timelines for this engagement?

- What is the comprehensive annual budget for advertising/digital marketing? Please separate professional services from the media spend.

- Can you provide an idea of the paid media spend you've had in the market over the last couple of years? This will help us better price out our solution for media management (testing, analytics, reporting, and optimization).

- What is your marketing budget? (If this has not been determined, please tell us what the budget for the current year is.) What is your typical annual media spend?

- Do you have a preferred budget?

- We note that you require a suggested budget as part of our response. Can you confirm your previous year's spend on digital marketing activities?

- Have funds been secured for this scope of work?

- Can you advise on current and anticipated budget (media spend and services) for this scope of work?

- What is the budget for the digital marketing services described in this RFP?

- Is this budget inclusive of the anticipated ad spend?

- If a budget is not available, what has been spent on an annual basis for these services in past years?

- Should the budget include fees and expenses related to the development of video creative, e.g. filming and editing? Or will video and photography assets be provided?

- What is your annual digital marketing budget?

- Has USI established a budget or budget range for this project?

- Can you confirm your average working media budget for paid media?

- Can you confirm the % distribution of investment for paid media between:
    - brand awareness v lead generation?
    - graduate v undergraduate v non-credit students

RFP/Process - Please refer to original RFP and addendum, issued via email on May 25, 2023, which included a revised RFP Schedule to accommodate for the 2023 Memorial Day Holiday. Q&A will be sent to all agencies who indicated intent to bid on this project via an email addendum on May 30, 2023. This is an open RFP. All vendors who meet the proposal requirements will be considered.

- The RFP indicates Q&A will be distributed on 5/29 (Memorial Day). Is this the correct date? – Answers will be distributed in advance of the holiday.

- How will Q&A be shared? Is there a bid site or will responses be emailed to everyone who submitted an intent to bid?

- How many agencies was the RFP sent to?

- Please confirm that the "Deliverables" are in fact the scope of work for the winning agency and not part of the proposal content.

- Given the upcoming Memorial Day holiday and many people being out of office on May 29th, would USI consider releasing the answers to the RFP questions at an earlier date?

- Will any consideration be given to out-of-state agencies, or is

    there an evaluation bonus for in-state agencies?

- What is the desired timeline for this project?

Current Partner - The University does currently have a digital marketing partner. Recognizing the evolving digital landscape and the competitive nature of the higher education sector, we are proactively exploring opportunities to evaluate and potentially engage new partners. As part of our comprehensive approach, we are extending the opportunity to bid on this RFP to our incumbent agency while actively considering other prospective partners. This is an open RFP. All vendors who meet the proposal requirements will be considered.

- Does USI currently have a digital marketing partner? If so, is the university pleased with the existing relationship, services, and value? Please describe.

- What is the impetus for your agency search?

- If there is one, is the incumbent agency invited to participate?

- Where have you seen your existing marketing plans falling short?

- Why are you looking for a new advertising agency?

- Who is your incumbent agency, and will they be participating in the RFP response?

- How many agencies are invited to respond?
- Have you previously worked with an agency partner of digital marketing? If yes, are they participating in the RFP?
- What is your reasoning for issuing the RFP?
- Historically, what pain points have you had with agency partners?

Creative / Content Creation /Management - The University has a dedicated in-house creative team, who will provide the necessary creative assets for the upcoming academic year for our digital marketing initiatives. However, we do recognize the importance of staying current and standing out against our competitors in the ever-evolving landscape of digital marketing. As such, we rely on our partners to advise us on current trends and best practices, ensuring our campaigns remain relevant and effective. We wish to understand bidders' capabilities in the creative space for potential future needs.

Additionally, there is a possibility of one-time funding specifically allocated for video needs, which would further enhance our digital marketing efforts. Together, we aim to create compelling campaigns that effectively represent our university's distinct identity.

We are working within the creative assets of a current campaign and would like our digital materials to complement. We are not looking for a rebrand at this time.

- Is the vendor providing digital assets for the ads?

- Who will be responsible for the creative messaging?

- We note that the services may include creative development. Can you confirm whether this would include brand creation/development or asset creation based off your existing brand guidelines?

- You mentioned a potential need for organic content creation/management. In our experience, the cost for someone to create and manage (e.g. interact/respond) organic content tends to be too expensive against the return (most clients will do this internally as it's more cost-effective to have someone in-house, who's directly connected to the university to manage this). Is this what you're looking for?

- Do you have existing video and audio assets that are expected to be leveraged to develop creative or are net new production services needed?

- Are creative services needed/wanted?

- How do you envision the creation and approval process of the creative assets mentioned (organic social creative, videos, email marketing content, brand imagery & assets)? Is there an in-house team that is responsible for the creation and the digital agency deploys the assets? Or, are you looking for the agency to do all of the asset creation, including videos?

- Does USI have a current creative campaign that the selected agency leveraging to develop creative assets? (if needed)

- Has USI undergone any re-brand work recently? Are you planning on doing any significant brand work in the near future?

- Can you point to an example of your most recent prospective student communications? (e.g website, viewbook, social campaign, etc)

- You mentioned there is a potential for the winning agency to provide creative services. What are the factors that weigh on that opportunity? What are the chances of that happening?

- How extensive of a role do you anticipate creative production services will play?

- You're requesting a proposed timeline for the project. We understand that you have a campaign start date of August, with work beginning on July 1 and ending June 30, 2024. is it safe to assume that initial creative will be provided by USI, regardless of the potential of the selected agency to provide creative later down the line?

- Are you currently working with a brand strategy and/or creative partner?

- Can you clarify or expand on what you mean when it says 'managing a content strategy' - is the ask for your partner to manage owned channels and the content posting and measurement, or that that mean helping to create the creative asset suite?

Web/Content Development - USI uses Umbraco CMS built on ASP.NET Core. Vendors/Agency will not have editing access to the CMS. Partners may recommend suggested changes or edits concerning landing pages, SEO content, or other web pages for the USI team to implement. Agency partners may have access to USI's Google Analytics. USI's transition from Google Analytics to GA4 is complete and BigQuery with GA4 has been setup. The average number of monthly visitors to admissions, application and visit pages will be shared with the selected vendor. Slate is currently being implemented for enrollment and marketing efforts. USI uses dedicated landing pages for paid media and an example of that is: www.usi.edu/soar

- What is the average number of unique monthly visitors for admissions, application, and visit pages?

- What is your current Content Management System (CMS)?

- Will the agency be granted access to the university's CMS and Google Analytics?

- What access/collaboration would the agency partner have to your current website and/or landing page?

- What is the website built on? What level of permissions do you normally grant an agency partner to your website? Who would be making the recommended SEO / Content / Landing Page changes?

- How is USI's transition from Google Analytics to GA4 being handled? What is the status of this transition? Do you have an instance of Big Query set up for your data retention beyond 14 months?

- What other information about your marketing tech stack can you share at this time?

- What is your marketing automation tech stack?

- Does USI use dedicated landing pages for paid media? If so, can those URLs be shared?

Social/Inbound Marketing – The internal management of organic social media falls outside the scope of this project and will continue to be handled internally. However, we are open to multi-channel promotions and recommendations from our partner on ways to bolster our organic channels by aligning with paid efforts. We are committed to exploring all appropriate and compliant media platforms that strategically target and engage prospective students.

1. Are there any forbidden platforms, i.e. TikTok? – **not at this time.**

2. Who currently manages your social media and will they continue managing the channels with the selected agency's guidance?

3. Can you provide a bit more context about your interest in having your agency partner creating and managing <u>organic</u> social media campaigns? Are you looking for your agency partner to do community management, responding to comments and driving engagement? What is the depth and breadth of the organic social scope of work? How many social platforms? Goals and KPIs for this work

4. Please share the social media platforms you use and expect to use for this RFP campaign plan.

5. Of you inbound marketing tactics, can you advise what has worked well? What hasn't? What are your biggest challenges?

6. What are USI's expectations in terms of inbound marketing? Does the university want to manage inbound marketing, or do you wish for the vendor to be responsible for it?

Enrollment/Goals - The University has recently appointed a new Vice President for Strategic Enrollment Management in response to the evolving and competitive higher education landscape. This decision stems from the recognition of the necessity to adapt and thrive in this dynamic environment. Furthermore, in our commitment to enhancing our enrollment efforts, we are implementing Slate CRM and Common App in Fall 2023.

The University is already engaged with an external partner for Enrollment Search Campaigns. We will look to our partner to continue to set realistic and attainable enrollment goals, and will share all requested data with our selected agency.

- What are the enrollment goals for new students for fall 2024?

- What are your specific recruitment/enrollment goals for the 2023/2024 school year?

- Can you describe the working relationship between the admissions department and marketing & communications? What data sharing practices exist? Do you have a shared source of truth when it comes to enrollment? If so, what is that source of truth? How confident are you in the data you're sharing and this source of truth? How actionable is this data?

- What are the goals for inquiries and applications in the next recruitment cycle for each program (undergraduate, graduate, non-credit)?

- Approximately how many inquiries and applicants would you like to see attributed to digital advertising efforts?

- Has the university successfully implemented (c)onversion tracking for applications and/or form submissions in the past?

- You asked for the agency to Increase the quality and quantity of inbound inquiries - will you provide the current number of monthly inquiries and of those, how many are junk leads?

- Once prospective students engage with USI (request info, visit or apply), what is your nurturing process?

- What is your application to commit ratio?

- Can you share your KPIs or enrollment goals for the incoming class of Fall 2024 for UG, graduate, and non-credit students?

- You asked for the agency to help Increase visit registration by prospective students - is there a percentage of increase you would like to see and will you provide the current number of visit registrations you are receiving

- What would success look like in one year? Three years?

- What KPIs do you measure to determine whether the marketing strategy is successful

Slate/CRM – The University is implementing a single-instance CRM, Slate, across undergraduate and graduate records. We look to continually optimize this tool post-implementation.

- Can you confirm if your CRM and CMS are integrated? Do you use CRM form fills for tracking on landing pages, or something else?

- What CRM and CMS platforms do you currently use?

- What CRM does admissions use?

- What 3rd party platforms would digital media need to integrate with? (example: Slate)

- Are you currently able to track marketing attribution from your paid campaigns through enrollment and/or lifelong learning opportunities?

- What data, if any, will be available to the agency for use in digital ads targeting? E.g. CRM lists including email addresses and mailing addresses

Foundation – We are interested in learning about your capabilities in this area for future consideration. However, given current budget and needs, this is out of scope for this RFP.

- To what degree are you looking for marketing services for foundation?

- Should we include a campaign plan for foundation giving?

- What are your undergraduate, graduate, campus visit and foundation (giving) goals?

Audience – Our primary audience is traditional undergraduate students. Our focus has been on brand awareness. The University is already engaged with an external partner for Enrollment Search Campaigns. See RFP for additional details. Additionally, we are strongly considering the ever-growing adult learner population as well as programmatic marketing opportunities.

- Please provide more context around the target audience of current college students (Deliverables #3). Is this intended for a campaign centered around transferring to the University of Southern Indiana?

- Please clarify the audience named "working professionals." Shall we assume this includes all non-traditional adult students who are seeking additional training, skills or degrees at any educational level (certificate, course, or full degree?)

- From your RFP we can see that your target audience is focussed on undergraduate prospects however, your goals state that you want to increase the number of inquiries for undergraduate, postgraduate, and non-credit students. Can you confirm whether you intend to allocate media campaign budget for postgraduate and non-credit student audiences as well?

- Thank you for providing detail on previous instate market areas, please can you confirm whether you wish to also allocate budget and focus to out of state and/or international student prospects?

- Can you provide student population percentages by market areas?

- Is there any marketing priority placed on specific target audiences, programs, or areas of study?

- Can you confirm whether you wish to run program specific campaigns or whether media campaigns should focus on USI's brand as a whole?

- What is the demographic, psychographic, geographic mix of your current students? Where do you see the most success with enrollment marketing efforts from a student profiling perspective?

- Describe the ideal prospective student. Where do they reside, what are their aspirations, what are they hoping to accomplish, why did they choose USI over other schools? How does this vary by program?

- In additional to the target audience information you provided, do you have existing personas, journey maps, and additional audience data we will be able to leverage to support developing a comprehensive marketing plan?

- - You mention high school age undergrad students as the primary target audience. Are there any other audiences (ie: parents of high school graduates) that you've experimented with or see as a secondary audience?

- Are the DMA's listed in the RFP examples of preferred geographies USI focuses on, or is there flexibility in reviewing and testing regions?

- Is brand advertising or lead conversion advertising higher than the other? Should the campaign focus on the top or the bottom of the funnel or both?

- You have a goal of attracting more high-quality applicants- can you define what 'quality' means to you? Is it test scores, a specific GPA average, or something else

Research – The University has performed various types of research over the last several years, and current campaigns and brand strategy have been shaped by various methodology. The full complement of data will be shared with the winning agency.

- What other research has USI conducted or purchased in the last three years to inform a brand message strategy or consumer audience habits? Examples could include focus groups, individual interviews, web surveys, vendor reports, brand studies, internal student surveys, alumni surveys or donor surveys.

- Would you be open to conducting primary research to help answer your question number 3 about expertise and insight into target audiences?

- Have you completed any recent market share or brand awareness and perception studies that you could share as part of this RFP response?

Paid/Earned Media – The University has implemented a diverse range of tactics in the past and will rely on our agency partner to recommend the optimal blend of tactics for our future campaigns.

- Which channels or marketing strategies that you've previously deployed were deemed successful, and which did not perform to expectations? Any data or performance dashboards you can share regarding the campaigns (either initial launch or recurring campaigns)?

- Who currently plans, places, and manages your paid media efforts?

- Are there any media tactics that you would not consider as part of future media plans?

- Do you currently have any earned media strategies in place? If so, can you please provide insight into those plans (e.g. PR, conferences, speaking engagements, how the podcast fits into this, etc.)?

- Can you share what marketing strategies and media channels have worked well for you in the past? What hasn't worked well? Are their media channels that you are particularly interested in?

Marketing General – The University is excited about the opportunity to engage in robust conversations with the awarded agency, and will provide comprehensive information on our

past experiences and successes. We value open collaboration and believe that sharing relevant insights will facilitate a fruitful partnership in developing effective digital marketing strategies. We look forward to these conversations and the opportunity to leverage our collective expertise for successful outcomes.

- What is the date of the last communication audit? Have any findings from the audit been implemented? Any not yet implemented?

- Could you please list your direct and indirect competitors?

- Who do you consider to be your strongest competitors?

- What are the top things you are looking for in a digital marketing partner?

- Do you have any current partnerships with corporations or organizations that are feeders for graduate prospective students? If so, please provide them and a brief description of your relationship and/or the structure of your agreement.

- Can you confirm the 'strong CTAs' that USI has most recently used to track against?

- What are USI's largest hurdles in communicating the brand message to prospective students?